




# Wellness as a Key Factor for the Sustainable Development of Tourism in Serbia

Ljiljana Kontić<sup>1</sup>   
Milos Todosijevic<sup>2</sup>  
Jovan Kontić<sup>3</sup>

Received: August 3, 2022  
Revised: March 7, 2023  
Accepted: June 22, 2023

## Keywords:

Wellness tourism;  
Sustainable development;  
Strategy;  
Serbia



Creative Commons Non Commercial CC BY-NC: This article is distributed under the terms of the Creative Commons Attribution-Non-Commercial 4.0 License (<https://creativecommons.org/licenses/by-nc/4.0/>) which permits non-commercial use, reproduction and distribution of the work without further permission.

**Abstract:** *This study focused on the main potentials and challenges in domain of the wellness tourism in Serbia. Over the last decade, the wellness industry has transformed into a multi-billion business that focused on the interest of managers and the academic community. A review of past studies conducted worldwide has been presented, too. Serbia is a case in point. Due to the various natural resources, the Republic of Serbia has a strong foundation for faster development of sustainable wellness tourism. The results of the analysis showed the key components of the wellness tourism offer system in Serbia along with the proposals for new wellness experiences. The main recommendations for managers and policy-makers are presented, too.*

## 1. INTRODUCTION

Wellness is about making healthy lifestyle choices and maintaining one's well-being both physically and mentally. In recent years, more people around the world have begun to recognize the importance of wellness – a trend that has seen the value of the industry increase year-on-year. The health and wellness market size worldwide was estimated at over 4.4 trillion U.S. dollars in 2019, a figure which is set to increase to over six trillion U.S. dollars by 2025 (Global Wellness Institute, 2021).

The latest research trend in tourism shows the importance of wellness, abstract forms of value, quality of life, sustainable business practices, and the feeling of wellness. The vast majority of studies have been conducted in developed countries (Agrodimou, 2019; Andreu et al., 2021; Dini & Pencarelli, 2021; Phuthong et al., 2022). A few studies focused on developing countries (Djuradjevic, 2017; Kontić et al., 2020; Lakicevic et al., 2021; Smith & Puczkó, 2013). This study fills the research gap in the literature on wellness tourism in the specific context of Serbia as one of the Western Balkan countries.

Well-preserved nature is one of the fundamental and competitive advantages of tourism development in Serbia, while the diversity of natural resources becomes an additional reason for the development of wellness tourism as an important means of sustainable tourism development. Due to a large number of attractive natural and anthropogenic tourism resources, the Republic of Serbia has a strong foundation for faster development of wellness tourism, and thus for more comprehensive economic development as a whole.

<sup>1</sup> Faculty of Business and Law, University MB, Belgrade, Serbia

<sup>2</sup> Ph.D. student, Kosovska Mitrovica

<sup>3</sup> MSc Economics, Novi Sad

The main objective of this paper is to emphasize the main potentials and challenges in domain of the wellness tourism in Serbia. This study aimed to answer the following research questions:

- 1) What opportunities and competitive advantages does the tourist destination of Serbia have in the field of wellness tourism?
- 2) What are the challenges in developing a post-pandemic model for wellness in the context of sustainable tourism?

This paper is structured as follows. The first part is devoted to the theoretical background of wellness tourism in sustainable destination paradigm and wellness and medical tourism-market transformation. In the second part, wellness and sustainable tourism development are presented, considering the size of the global market and the main challenges, the strategy of sustainable tourism in Serbia, the competitiveness index and domestic barriers. The third part outlines the research methodology, followed by results and discussion. The final part gives the contributions to theory and practice, including the main recommendations, limitations and directions for future research.

## 2. THEORETICAL BACKGROUND

It is important to emphasize some prepositions about wellness tourism. Then, the relevant facts about sustainable tourism will be presented along with key factors of sustainable tourism in developing countries.

### 2.1. Wellness Tourism in Sustainable Destination Paradigm

Wellness is a state of optimal living directed towards making the most of an individual's potential. In a modern sense of the word, wellness is a combination of mind, body and spirit. Optimal wellness allows us to achieve our goals and find meaning and purpose in life. Wellness combines seven dimensions of life into a quality lifestyle. Most authors agree that wellness is a multi-componential concept in which the body, mind and spirit are the key components (Bodecker & Cohen, 2010; Hyde-Smith, 2012).

Wellness tourism can be defined as “travel associated with the pursuit of maintaining or enhancing one's well-being. With so much non-wellness embedded in today's travel, wellness tourism brings the promise of combating those negative qualities and turning travel into an opportunity to maintain and improve our holistic health” (Global Wellness Institute, 2021).

The principal components of wellness are (Hyde-Smith, 2012; Sidorova, 2019): physical wellness, intellectual wellness, social wellness, spiritual wellness, emotional wellness and environmental wellness. The newest results showed a “need for balance and positive body-mind connection, mindfulness, positivity and happiness, the growing importance of social ties as a basis for feeling happy, as well as self-improvement and life optimization, emerged as fundamental reasons for wellness consumption and adopting a wellness lifestyle” (Grénman, 2019, p. 471). Some of the basic wellness philosophy principles are: movement; mental activity; relaxation and harmony; beauty and body care; balanced diet (Ustyenko, 2020).

An extensive literature review on wellness showed the following major themes (Stará & Peterson, 2017):

- Wellness as a state of being,

- Wellness as a dynamic process of personal growth and adopting behaviors in multiple dimensions that improve functioning,
- Wellness is conceptualized as an approach to “whole-person” care within the medical context,
- The wellness approach also champions the use of multidisciplinary care teams that create safe, non-judgmental environments,
- The concept of wellness is not modern in its meaning, but mostly in its terminology and operationalization in the Western (U.S. and European) context.

## 2.2. Wellness and Medical Tourism - Market Transformations

In Central and Eastern European countries, due to former government funding, wellness is associated with physical and medical treatments in mineral and thermal waters (Smith & Puczkó, 2013). Wellness tourism is often conflated with medical tourism. The main causes of this confusion are an incomplete understanding of these markets as well as the inconsistent usage of terminologies by destinations, government organizations and promotion agencies. Wellness Tourism refers to the act of traveling to enhance physical, mental, and spiritual health (Chen et al., 2008). Medical Tourism entails the concept of traveling for medical purposes, such as receiving medical treatment or undergoing surgery (Smith & Puczkó, 2013). The main differences between wellness tourism and medical tourism are presented in Table 1.

**Table 1.** The differences between wellness and medical tourism

Reactive	Proactive
Medical tourism	Wellness tourism
Travel to receive treatment for a - or improve health and/or to seek enhancement.	Travel to maintain, diagnosed disease, ailment, or condition, manage, and well-being.
Motivated by the desire for lower cost of care, higher quality care, better access to care, and/or care not available at home.	Motivated by the desire for healthy living, disease prevention, stress reduction, management of poor lifestyle habits, and/or authentic experiences.
Activities are reactive to illness, medically necessary, invasive, and/or overseen by a doctor.	Activities are proactive, voluntary, non-invasive, and non-medical.

Source: Global Wellness Institute, 2018

Although it has many elements in common with health tourism, wellness tourism focuses more on the pleasure or sensations that travelers can feel at a destination during their stay, adding added value to tourist products (Petroman, 2021). It is important to emphasize the similarity and differences between well-being and wellness (Grénman & Räikkönen, 2015). Well-being is connected with the standard of living and education, but also with freedom, peace and nature. In contrast, wellness reflects self-responsibility and proactivity with hedonistic consumption of concrete products and services.

There are two types of wellness travelers: primary and secondary wellness travelers (Global Wellness Institute, 2018). For primary wellness travelers, the main motivation for destination choice is wellness. Secondary wellness travelers seek to maintain wellness during a private or business trip.

Some authors argued that wellness tourists searched for novelty, escapism, and relaxation, along with personal growth and development (Kim et al., 2017). One study about attitudes toward the concept of wellness within the millennium generation showed that the key factors were fitness, yoga, sauna, and pampering spa treatments (Agrodimou, 2019). In the travel decision process, this generation

preferred a destination and a low price of accommodation. The results of the study showed that value, quality, experience, satisfaction, and revisit have a positive effect on the formation of wellness tourists' loyalty (Lakicevic et al., 2021). The important factors in wellness tourism research were relaxation, wellness infrastructure and natural resources (Damijanic, 2021). A similar methodology has been used in different research contexts, but the results were the same (Tüzünkan, 2017).

### 3. WELLNESS AND SUSTAINABLE TOURISM DEVELOPMENT

At the begging of the 21<sup>st</sup>, four critical issues existed in sustainable tourism studies (Liu, 2003). First, the concept of sustainability was clearly defined. Second, practical policies have not been developed. Third, the lack of a holistic approach to sustainable tourism, from various points of view (i.e. economic, social, technological, ecological). Forth, it was necessary to adopt an interdisciplinary approach to studies of sustainable tourism.

Sustainable tourism is defined by UN World Tourism Organization (UNWTO, 2013) as “tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.”

The results of situational analysis have revealed that tourism may be a source of economic growth and development from three main points of view (UNWTO, 2013, p. 133). First, international tourism is a traded service, therefore it is important to national balances. Second, tourism is one of the most labor-intensive sectors, from one side. On the other side, the development of tourism can initiate employment, particularly for females and youth. Third, the development of sustainable tourism creates jobs, not only in tourism but in other sectors of the national economy. It is particularly important for developing countries where tourism development creates a demand for specific agriculture products as well as other products from construction, industry, or handicrafts. In some cases, such a demand can initiate the recovery of lost activities and skills.

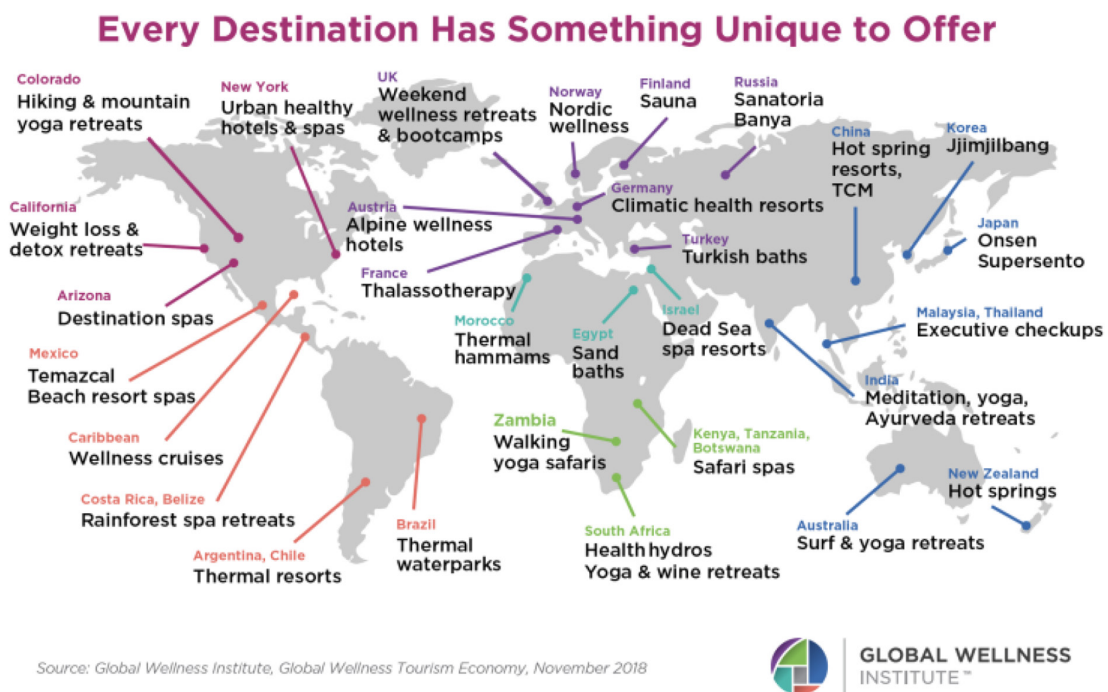
#### 3.1. Global market size and main challenges

It is important to note that every destination has something unique to offer which is linked to culture, natural resources, food, etc. (see Figure 1). There are various categories of services in wellness hotels such as spirit & mind, vital cuisine, beauty and cosmetics, relaxation, and comfort (Milicevic & Jovanovic, 2015).

The important fact is that wellness tourism bring more benefits to national economy. According to Global Wellness Institute (2021), the expenditures may include:

- International wellness tourism expenditures: All receipts earned by a country from inbound wellness tourists visiting from abroad, with an overnight stay.
- Domestic wellness tourism expenditures: All expenditures in a country made by wellness tourists traveling within their own country, with an overnight stay.

Due to the COVID-19 pandemic, in 2020, the global expenditure on wellness tourism decreased by roughly 39.5% (Global Wellness Institute, 2021). Overall, North America was the region recording the highest spending in this market worldwide. However, wellness tourism expenditure in North America dropped from over 277 billion U.S. dollars in 2019 to around 170 billion U.S. dollars in 2020 (Statista, 2022). The market size of the wellness industry worldwide in 2020, by segment (in billion U.S. dollars) is presented in Table 2.



**Figure 1.** Worldwide unique offers  
Source: Global Wellness Institute, 2018

**Table 2.** The market size of the wellness industry worldwide in 2020.

Segment	Market size (in billion U.S. dollars)
Personal care & beauty	955
Healthy eating	946
Physical activity	738
Wellness tourism	436
Traditional medicine	413
Public health	375
Wellness real estate	275
Mental wellness	131
Spas	68
Workplace wellness	49
Springs	39

Source: Statista, 2022

The main structural components of the wellness industry are the following (Ustyomenko, 2020):

1. Establishments and areas of recreational and health-improving direction: specialized medical and preventive treatment facilities; thermal complexes; equipped beaches; facilities and areas for physical culture and sports; tracking areas; pump rooms of mineral waters; wellness clubs; SPA complexes, centers and areas.
2. Companies providing accommodation services: hotels, motels, campsites, boarding houses; sanatoriums, preventoriums; tourist bases, rest homes, shelters and others.
3. Food companies: restaurants, canteens; cafes, bars; fast food companies.
4. Companies providing transport services: car companies; railway departments; river and sea transport companies.
5. Travel companies for the development and selling of wellness products: travel companies for the development of wellness products; travel companies for the sale of wellness products.
6. Leisure companies: culture and recreation parks; special interest clubs; entertainment establishments.

The wellness industry is heavily dominated by women—from entrepreneurs to practitioners to consumers—and therein lies an opportunity (Pundit, 2020). The authors pointed to critical challenges in the wellness industry (Singh & Jain, 2020):

1. The global mindset,
2. The lack of skilled manpower in the wellness industry,
3. The lack of standardization in terms of methods and materials that are used the most in the wellness industry.
4. The presence of certain unscrupulous elements and certain practices that are used are unethical and this leads to a bad image of the global wellness industry.
5. The kind of secrecy that shrouds wellness centers.

### 3.2. Sustainable Tourism Strategy in Serbia

The strategic choice and implementation of the development strategy depend on European and national strategies for sustainable tourism. The existing policies and initiatives concerning sustainable tourism in Serbia are the following:

- Serbian Law on Tourism;
- Tourism Development Strategy of the Republic of Serbia 2006-2015;
- National Sustainable Development Strategy of Serbia;
- Master plan for Sustainable Development of Rural Tourism in Serbia;
- National Strategy of Sustainable Use of Natural Resources and Goods, and
- Regional policies Sustainable Development Strategy for Sumadija and Pomoravlje 2011-2021.

The results of the study revealed the transformation process in health tourism, from only spas for healing illness to wellness (Gligorijevic & Novovic, 2014). To do this, it is necessary to enrich tourism offers, i.e. Davos, Switzerland expanded its offer with prevention programs, rehabilitation, wellness, etc.

For example, in order to improve wellness tourism, the special hospital Merkur was established as a dominant facility in Vrnjci Spa. Also, the key problems have been identified as followed (Djurovic, 2011): infrastructure is in bad condition; water supply in Vrnjacka banja Municipality is very problematic; waste management, and problems during the privatization process, etc. The Vrnjci Spa has great potential for the development of various forms of tourism such as health tourism, wellness, congress, cultural tourism, picnic and sports tourism (Pecic, 2012).

In the previous study, the primary data have been collected about the attitudes of tourists regarding the quality of the existing tourist offers of Vrnjci Spa and opportunities for improvement (Podovac & Jovanovic-Toncev, 2015). Based on the average values of individual elements of tourist offers, which have been evaluated by selected tourists, it can be concluded that tourists visiting Vrnjci Spa are satisfied by the existing tourist offer. 97.4% of respondents said they would visit Vrnjci Spa again. Although this spa is one of the most visited destinations in Serbia, some problems may have a negative effect on future development. The small number of foreign tourists caused the low influx of foreign exchange, on one side. On the other, the results showed that the main factors for this have been the following: the unrecognizable brand of Vrnjci Spa in the international market, lack of international promotion, lack of investments, unskilled employees, etc. (Podovac & Jovanovic-Toncev, 2015). Further development of this spa as a competitive tourism destination depends on managers' abilities to create innovative products. Based on

these results, the great potential and holistic approach would bring many tourists to Vrnjci Spa (Podovac & Jovanovic-Toncev, 2015).

In one empirical research, aimed to determine key elements of the tourism product, the following 14 elements were calculated (Milicevic & Djordjevic, 2020): 1. Natural beauty, 2. Hospitality, 3. Health related offer, 4. Cultural-entertainment offer, 5. Accommodation, 6. Spa and wellness offer, 7. Clean facilities, 8. Diversity and quality offer, 9. Sports offer, 10. Activities for children, 11. Prices, 12. Transportation, 13. Local information, and 14. Other elements. Also, there is a statistically important difference between domestic and foreign tourists' ratings of key elements of the tourism product of Vrnjci Spa (Milicevic & Djordjevic, 2020). Foreign tourists gave higher scores to the aforementioned elements of Vrnjci Spa than domestic tourists. It is worth noting that a small number of foreign tourists participated in the study.

In 2015, the USAID through a project supported the municipalities such as Kraljevo, Cacak, Vrnjacka Spa, Raska, and Gornji Milanovac to integrate their tourism products (VBM, 2005). In this region, there are two famous tourist destinations Kopaonik and Vrnjci Spa. The results showed that local authorities in Vrnjci Spa, in the domain of health tourism, should improve service quality and marketing activities. Also, the development of the following products has been suggested:

- Destination Spa with the main task of providing clients with an improvement in their quality of life, and health condition through fitness, education programs and accommodations. Also, the spa menu should be a specific offer;
- Medical Spa with the main role to provide complete health and wellness services (i.e. conventional, special treatments and therapies). In the next ten years, the fastest growth will be in holistic medical treatments and therapies;
- Mineral Springs Spa as a typical European spa/wellness center;
- Resort/hotel Spa which includes large investments.

The results of identification of wellness tourists' motives in Serbia showed that the recreation and relaxation involving various services of massage, hydrotherapy, aromatherapy and the like are essential services in wellness centers, along with Mental therapy, Enhancement of quality of life, and Effortless activity (Blesic et al., 2019). The results of the study showed that value, quality, experience, satisfaction, and revisit have positive effects on the formation of wellness tourists' loyalty (Lakicevic et al., 2021).

The development trend of spa tourism at wellness model is slowly being used in some spas in Serbia, primarily in their specialized hospitals (i.e. Merkur -Vrnjacka Banja), but also in hotels and other types of accommodation and facilities (e.g. the transformation of the hotel Izvor in Bukovicka Banja in the first wellness hotel in Serbia). In May 2005 specialized hospital Merkur - in Vrnjacka Banja opened the first spa wellness center in Serbia called Fons Romanus - located in the building of thermo-mineral bath, with many services that are available for wellness tourists. Merkur is a positive example of the separation of medical and wellness services (Djuradjevic, 2017). Hotel Izvor is a wellness hotel complex, opened in November 2010, situated in Arandjelovac, Bukovicka Banja. Today, some forms of wellness offers can also be found in other spas in Serbia, such as Atomska Banja in Gornja Trepca, Sokobanja, Vrdnik, Banja Junakovic, Prolom Banja, Niska Banja, Kanjiza (Vicentijevic, 2016).

To promote sustainable tourism in Serbia, especially wellness tourism, the authors proposed the following projects and activities connected to the National Strategy of Sustainable Development:

identification of tourism, creating a database of these resources, renewing tourism capacities and building new ones, marking key tourism objects and destinations, and develop urban plans to take advantage of tourism potential (Kontic et al., 2020).

### 3.3. Competitiveness Index and Domestic Barriers

In 2013, the World Tourism Organization (UNWTO) with the financial support of the European Commission (EC) Directorate-General Development and Cooperation, within the framework of the project “Enhancing capacities for Sustainable Tourism for Development in Developing Countries” prepared The Sustainable Tourism for Development study (UNWTO, 2013). This study pointed to 12 aims of sustainable tourism as followed (UNWTO, 2013, p. 18): 1. Economic viability, 2. Local prosperity, 3. Employment quality, 4. Social equity, 5. Visitors fulfillment, 6. Local control, 7. Community wellbeing, 8. Cultural richness, 9. Physical integrity, 10. Biological diversity, 11. Resource efficiency, and 12. Environmental purity.

The aforementioned goals can be connected to five pillars in this manner: Tourism policy and governance includes all 12 aims; Economic performance, investment and competitiveness includes Economic viability, Local prosperity, and Visitors fulfillment; Employment, decent work and human capital = Employment Quality; Poverty reduction and social inclusion embodies Local Prosperity, Social Equity, Local Control and Community Wellbeing, and Sustainability of the natural and cultural environment includes aims from 8 to 12.

At the same time, the ETIS system was introduced and validated by European Commission to cover the fundamental aspects of sustainability monitoring of a destination through 43 essential core indicators (European Commission, 2016). The ETIS indicators allow for comparison and benchmarking between tourism destinations over time (Vukadin et al., 2020). The ETIS methodology uses both quantitative and qualitative methods. A destination profile is a form that can be used by relevant stakeholders for the overview of the specific destination. The basic elements of this form are (European Commission, 2021): name of destination; country name; destination boundary; destination category; description of location; distance from capital city; overview of main types of tourism, and the most popular activities; overview of Top five most popular tourist attractions (including environmental and cultural attractions); approximate size of the destination (in km<sup>2</sup>) and principle physical characteristics (rivers, hills, bays etc.); dominant habitats; level of biodiversity (the range of different plant and animal species); average sunshine hours, rainfall (precipitation) and seasonal temperatures; *transport link* (i.e. distance from nearest local and international airport, in km); Details on any air carriers and/or cruise lines bringing visitors to the destination; Public transport facilities to your destination; Additional private arrangements for transporting visitors to the destination; *information about population*, such as number of permanent residents, population density, Summer/winter ratio of residents to tourists; Percentage of population employed in tourism related jobs; Average length of stay; *tourism amenities*: Approximate number of hotels (by star rating), and rooms in the destination; Other types of accommodation available (and approximate numbers); Approximate number of restaurants; *current strategies and policies*: The destination has an organization dedicated to its overall management; The destination has a current sustainable tourism strategy/action plan with an agreed monitoring and evaluation process; The destination has a current sustainable communication strategy or plan; The destination has a current policy or plan to protect cultural heritage; The destination has a current climate change adaptation strategy or plan; The destination has a current biodiversity management and monitoring plan; The destination has policies in place



that require tourism enterprises to minimize light and noise pollution; Percentage of the destination (area in km<sup>2</sup>) that is recognized as a protected area; Details on any air carriers and/or cruise lines bringing visitors to the destination; Public transport facilities to your destination.

The World Economic Forum published biennially the Travel & Tourism Competitiveness Report in which the Travel & Tourism Competitiveness Index (TTCI) has been calculated for 140 economies and measured “the set of factors and policies that enable the sustainable development of the Travel & Tourism (T&T) sector, which in turn, contributes to the development and competitiveness of a country.” (Calderwood & Soshkin, 2019, p.15).

Transition to sustainable tourism in developing countries could be enabled through the following activities (Marjanovic et al., 2020):

- Better use of natural resources,
- Focus on local socio-cultural heritage,
- Include relevant stakeholders in the creation and implementation of sustainable tourism development strategy,
- Achieve the highest level of tourists satisfaction.

Some authors classify the indicators of sustainable tourism development in the following categories such as economic indicators, tourist satisfaction with the quality of the offer and services provided, and the attractiveness, uniqueness of the offer, the state of the environment and the socio-cultural characteristics of the destination, social indicators, cultural indicators (i.e. the degree of preservation of the cultural heritage of the local community), and environmental indicators (Jovicic & Ilic, 2010, p. 280).

The results of the study in Croatia showed that only a few tourism destinations were included in sustainable development (Melkic et al., 2020). To date, few studies have positioned wellness tourism as a tool for addressing the challenges of achieving sustainability in tourist destinations i.e. relative lack of integrative knowledge about wellness in the tourist sector (Andreu et al., 2021). Other studies indicated strategies and considerations to improve the competitiveness of wellness destinations in Thailand, as well as key factors of wellness tourism: destination environment, travel and policy, infrastructure and capacity, manufactured and cultural resources, strategy and structure, novelty potential, and cooperative and proactive marketing (Phuthong et al., 2022).

Serbia has a tradition of more than 160 years in tourism. Strategic choice and implementation of the selected strategy depend on the vision and mission for the development of sustainable tourism in Serbia. The results for Serbia are presented in Table 3.

Serbia is the only country in the Balkans and Eastern Europe that improved its T&T competitiveness since the last edition of the report. Serbia (95th to 83rd) was the most advanced in the region of Europe and Eurasia in general thanks to its significant improvements to its enabling environment (62nd to 56th), T&T policy, and enabling conditions (112th to 91st) and air (86th to 76th) and ground (94th to 85th) infrastructure.

Conditions for T&T investment have also become more favorable, with a broad improvement in areas related to the business environment (112th to 74th) and human resource and labor markets (82nd to 58th). Despite all improvements, a lot more needs to be done for Serbia to become truly competitive in the domain of tourism, such as the following (Calderwood & Soshkin, 2019):

- To improve tourism service infrastructure, especially online branding strategy;
- To reduce travel barriers, and
- To improve safety and security.

**Table 3.** Travel & Tourism Competitiveness Index for Serbia

Index	Score
<b>ENABLING ENVIRONMENT</b>	
Business Environment	4.4
Safety & Security	5.5
Health & Hygiene	6.3
Human Resources & Labor Market	4.7
ICT Readiness	5.1
<b>T&amp;T POLICY &amp; ENABLING CONDITIONS</b>	
Prioritization of T&T	3.9
Int'l. Openness	3.2
Price Competitiveness	5.5
Environ. Sustainability	4.5
<b>INFRASTRUCTURE</b>	
Air Transport Infrastructure	2.6
Ground & Port Infrastructure	3.0
Tourist Service Infrastructure	3.9
<b>NATURAL &amp; CULTURAL RESOURCES</b>	
Natural Resources	2.1
Cultural Res. & Business Travel	1.7

Source: Calderwood & Soshkin, 2019, p. 53.

#### 4. RESEARCH METHODOLOGY

Researchers have employed mixed research methods, utilizing both quantitative and qualitative data collection strategies. The main aim of mixed methods is to increase study validity. First, the meta-data of tourist arrivals and overnight stays, per selected resorts in Serbia have been analyzed. The aim of meta-data-analysis is “to create a systematically developed, integrated body of knowledge about a specific phenomenon” (Paterson et al., 2001).

Second, the components of the wellness tourism offer system in Serbia will be presented. The conceptual part i.e. main components and description is adopted from Dini and Pencarelli's (2021) theoretical paper. Data for wellness tourism offered in Serbia were collected from various publications and websites (Gastronomy Serbia, 2022; National Tourist Organization of Serbia, 2015; Spa-Serbia, 2022). All these data have been used for the proposals for new wellness experiences in Serbia.

#### 5. RESULTS

From 2015 to 2019, the tourism sector in Serbia has evidenced exponential growth with a peak of 10,1 million overnight stays in 2019 (Statistical Office of the Republic of Serbia, 2022b). The latest data about the tourist arrivals and overnight stays (domestic/foreign), per selected resorts in Serbia is presented in Table 4.

Tourist resorts are divided into spa resorts, mountain resorts, and urban resorts. Compared to 2021, all tourist resorts evidenced growth in the number of tourists' overnight stays (Statistical Office of the Republic of Serbia, 2022b). The most frequently visited in the first five months of

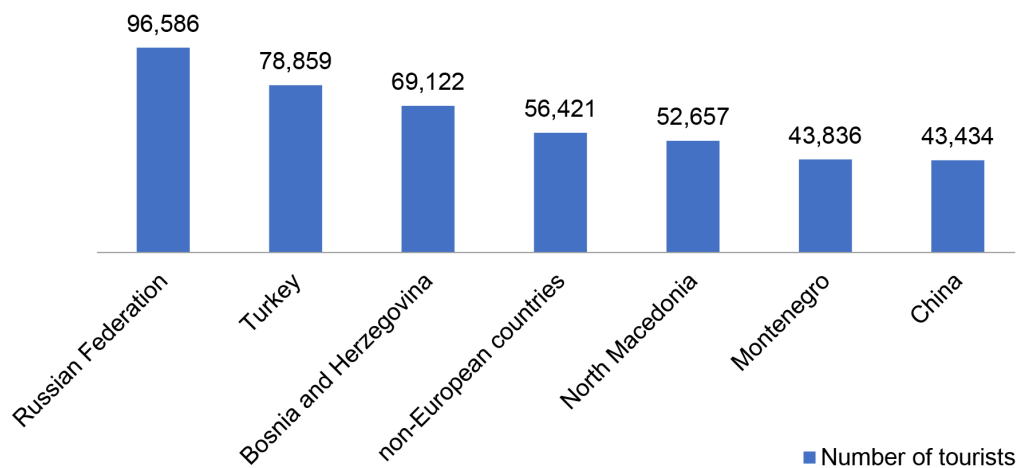
2022 were urban resorts with over 60% of total overnight stays. Almost half of these overnight stays were evidenced in Belgrade, followed by Novi Sad. The vast majority of tourists were foreign tourists (84% in Belgrade; 75% in Novi Sad). Tourists in spa resorts were mainly domestic and frequently visited Vrnjci Spa and Sokobanja. A similar situation was in mountain resorts, where domestic tourists mostly visited Kopaonik and Zlatibor. The countries of origin for foreign tourists are presented in Figure 2.

The results of the analysis of the components of the wellness tourism offer system in Serbia are presented in Table 5.

**Table 4.** The tourist arrivals and overnight stays, by resorts in Serbia (I-V 2022)

	Arrivals		Overnight stays	
	Domestic	Foreign	Domestic	Foreign
<b>Republic of Serbia - total</b>	<b>2,022,867</b>	<b>157,825</b>	<b>590,210</b>	<b>430,701</b>
<b>Spas - total</b>	<b>47,200</b>	<b>8,380</b>	<b>190,648</b>	<b>30,715</b>
Vrnjci spa	15,518	2,149	52,418	6,924
Sokobanja	10,438	421	47,320	1,317
Bukovicka	1,430	458	2,961	1,110
Koviljaca	1,768	537	10,180	5,588
Gornja Trepca	869	109	6,963	1,169
Vranjska	186	15	1,681	121
Kanjiza	516	335	3,299	814
Novopazarska	126	106	147	128
Vrdnik	4,965	1,353	11,509	3,598
Rusanda	224	14	1,480	108
Palic	3,165	2,071	7,498	5,489
Selters	203	16	1,997	93
Lukovska	1,883	262	12,065	1,285
Gamzigradska	29	12	127	19
Ribarska	725	57	3,801	294
Sijarinska	825	26	5,595	167
Vrujci	901	68	4,625	439
Niska	476	89	2,365	248
<b>Mountain resorts - total</b>	<b>54,715</b>	<b>9,705</b>	<b>177,873</b>	<b>22,801</b>
Zlatibor	9,569	3,683	29,139	8,393
Kopaonik	7,156	753	22,290	2,184
<b>Urban resorts - total</b>	<b>108,111</b>	<b>141,030</b>	<b>246,103</b>	<b>380,520</b>
Belgrade	19,575	87,768	46,527	244,246
Novi Sad	11,615	14,596	19,622	38,682
Nis	8,820	5,761	15,320	11,265
Krusevac	1,546	666	5,557	3,191
Sombor	971	885	1,726	1,798
Kragujevac	3,737	1,678	7,133	5,328
Subotica	9,077	8,930	17,343	21,615
Vrsac	1,219	624	2,442	1,603
Cacak	3,412	1,842	12,550	4,539
Pirot	1,276	664	2,563	1,604
Kladovo	5,562	741	10,015	1,531
Kursumlija	2,025	266	12,731	1,289
Becej	164	185	596	542

Source: Statistical Office of the Republic of Serbia, 2022a



**Figure 2.** Foreign tourists from countries of tourists origin

Source: Statistical Office of the Republic of Serbia, 2022b

Due to the numerous attractive natural and anthropogenic tourism resources, the Republic of Serbia has a strong foundation for faster development of sustainable wellness tourism. Bearing in mind that after the COVID-19 pandemic, it is necessary to create new wellness experiences for tourists (Andreu et al., 2021). The complementary offer of wellness activities should be based on the resources that the destination i.e. Serbia has, which are related to the natural resources, and cultural and spiritual heritage.

**Table 5.** The key components of wellness tourism offered in Serbia

Main components	Description	Offer
Hot springs	This offer is tied to hot springs establishments that provide access to hot springs and wellness services.	1,000 geothermal and mineral waters
Spas	This offer is tied to spa centers that offer options for the care and enhancement of a person’s physical and mental health, catering to his/her desire to “be well.”	Vrnjci spa; Sokobanja; Koviljaca; Prolom; Lukovska; Bukovicka; Selters; Ribarska; Vrdnik; Kanjiza (Spa-Serbia, 2022).
Care of body and mind	This can be a stand-alone offer by hotels or centers specializing in esthetic treatments and massage, or by gyms (services outside the purview of hot springs and spa facilities).	Fons Romanus in Vrnjci spa – wellness center offers 24 types of massage, the King’s Bath, the Queen’s Bath, the Eastern Bath, underwater massage, saunas, Jacuzzi with warm water, anti-stress and relaxation programmes; Choco-mint therapy; Algae therapy;
Natural environment	This offer, proposed by territories, is tied to all aspects of nature and the environment that can be enjoyed for personal wellbeing.	Goc Mountain; The Western Morava River; Mountains: Ozren, Rtanj, Devica and Bukovik; The river Drina; Devil’s Town; Bukulja and Vencac mountains; Ovcara-Kablar gorge; The natural phenomenon of the blooming of the Tisa River; Stopica Cave;
Spirituality	This offer aims to aid tourists in their search for spirituality through mystical and religious experiences or via other meditative paths.	Monasteries of Studenica, Zica, Gradac, Sopocani and George’s Pillars; St. Lazarus’ Temple; The Church of St. George, a mausoleum of Karadjordjevic Dynasty in Oplenac; Vujan monastery; 20 monasteries of Fruska gora also known as Serbian Athos;

Culture	This offer refers to cultural and artistic heritage in both tangible and intangible forms.	The remains of fortresses Ras, Maglic, Brvenik and Koznik; Trsic, the birthplace of Vuk Stefanovic Karadzic, the reformer of the Serbian language and the person who created Serbian Cyrillic alphabet; Archeological site Plocnik dating back to 7000 years BC; The building of “Staro zdanje” built by two Serbian royal dynasties; Kameni most (Stone Bridge) - the largest single-arch bridge in the Balkans;
Gastronomy	This offer is proposed by enterprises and territories, with specific reference to the realm of food and beverages.	Traditional Serbian dishes: ajvar, Serbian salad, sarma, gibanica, podvarak, cvarci, muckalica, rostilj, vanilice, rakija. Serbia is a true foodie’s paradise ( <a href="#">Gastronomy Serbia, 2022</a> ).
Sports	This offer includes indoor and outdoor sports activities designed for the active participation of the tourist.	Swimming pools in spas; Podina aqua park in Sokobanja; Sports courts (futsal, basketball, volleyball, tennis courts) in Lukovska spa; Hiking through breathtakingly beautiful valleys in Ribarska spa; Hiking, mountaineering, horse-riding, mountain-biking, paragliding at mountain Zlatibor
Events	This offer includes specific events and significant activities that engage and entertain tourists.	Carnival and film and music festivals (of traditional, popular, classical and electronic music); Events such as “The Flute-players’ Festival” in Prislonica; Novi Sad 2022;

Source: Adapted from [Dini & Pencarelli, 2021](#)

## 6. DISCUSSION

The competitiveness of a destination depends on the following elements: destination environment, Wellness Tourism Travel and Policy, Wellness Tourism Infrastructure and Capacity, Wellness Tourism Man-Made and Cultural Resources, Wellness Tourism Strategy and Structure, Wellness Tourism Innovation Potential, Wellness Tourism Collaborative and Proactive Marketing ([Phuthong et al., 2022](#)). Complementary wellness offer requires collaborative work between the local administration, tourist agents, and local experts. The proposals for new wellness experiences in Serbia are presented in Table 6.

**Table 6.** The proposals for new wellness experiences in Serbia

<b>Proposal 1. Eight days tour</b>		
<b>Timeline</b>	<b>Place</b>	<b>Content</b>
1 night	Belgrade	St.Sava Template, Kalemegdan fortress, Josip Broz Tito Mausoleum, Residence of Princess Ljubica
2 nights	Zlatibor	Stopica cave, ethno village of Sirogojno, Gostilje waterfall, anti-stress and relaxation programmes
2 nights	Nova Varos	Uvac
2 nights	Nis	Skull towel, Sokobanja spa
1 night	Smederevo	Smederevo Fortress, St. George Temple
<b>Proposal 2. Seven days tour</b>		
3 nights	Novi Sad	Vinery Sremski Karlovci, The Clock Tower, Fruska Gora monasteries, Vrdnik spa
2 nights	Zajecar	National Museum, Felix Romuliana, Resavska Cave
1 night	Belgrade	Nikola Tesla Museum, Ada Ciganlija, Skadarlija
<b>Proposal 3. Vrnjci spa</b>		
5 nights	Vrnjci spa	Merkur hotel, Japanese garden, Bridge of Love, Vinery visit, Zica monastery

Source: Authors’ elaboration

Over the last decade, the wellness industry has transformed into a multi-billion business that focused on the interest of managers and the academic community. This study contributes to

the literature about tourism and sustainable development by investigating wellness tourism in a specific environment i.e. Serbia.

The COVID-19 pandemic caused the transformation of wellness sectors, as well. The key factors of the new approach to wellness tourism are the following (Chhabra, 2020):

- Stakeholders,
- Strategies aimed to support different stakeholders in preparing future tourists,
- Synergy between the tourism and non-tourism stakeholders,
- Wellness outputs,
- Preparedness for future travel, and
- Future tourists.

### 6.1. Theoretical Implications

The new approach to wellness tourism is open and reliant on ethical/equitable and preventive/healing mechanisms (see Figure 3). Digital platforms provide crucial tools to facilitate interconnections and interactivity between local, national and global communities.

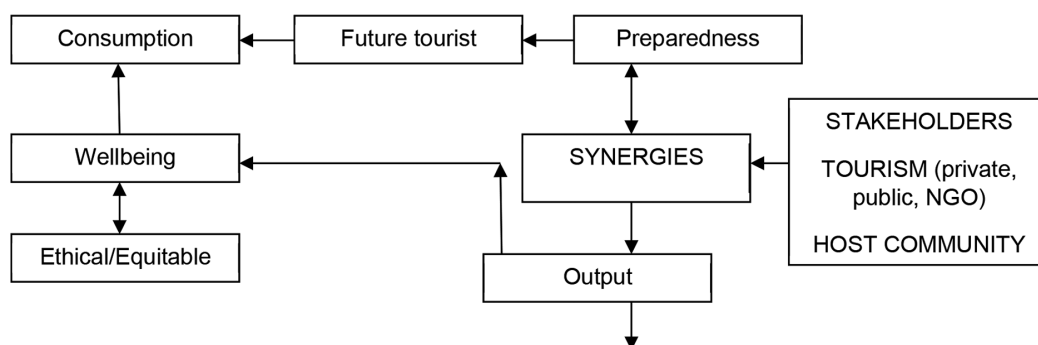


Figure 3. A new approach to wellness tourism

Source: Adapted from Chhabra, 2020

Finally, this study can be a concept for a detailed analysis of the current state of wellness facilities in Serbia.

### 6.2. Managerial Implications

The study's results indicated the element of novelty by putting the wellness industry in a specific Serbian environment. Wellness industry stakeholders and key players in tourism are advised to develop tailor-made offerings. Also, a diverse array of activities in their offerings could help to improve the image of Serbia in the tourism market.

Based on the study's findings, tourism stakeholders are advised to invest in digital marketing strategies, to improve the organic reach, and direct potential customers to companies' websites.

### 5.3. Implications for Policy-Makers

Major projects in sustainable tourism should be implemented by government investment and supervision. Investments in the restoration of cultural and historical monuments, recreational and entertainment objects for children and adults, and marking the key tourism spots should be

made. The vital segment for sustainable tourism development is education. Primarily, for the marketing sector in the domain of sustainability, the creation of a national brand, and a better position for Serbia in the competitive tourist market.

## 7. CONCLUSION

This study focused on the Serbian wellness market, and the findings have limited generalizability to other Western Balkan countries. There were some difficulties in data collection based on the fact that the wellness sector has not been recognized as a special part of the tourism industry. Due to time constraints, the study has been based on secondary data.

Future studies could expand the scope of the study across Western Balkans countries. This region has similar ethnic and cultural values, but fine differences can help wellness stakeholders and marketing specialists to customize offers by region.

Also, it is interesting to investigate the tourists' profiles of wellness tourism in terms of the travel decision process, behavior and expectations. These factors will help to tailor the specific needs and preferences of various wellness tourists.

Finally, the future study would address the following research questions:

- 1) What are the key data associated with the wellness industry? Data about the number of spas and wellness hotels, the average number of employees, and the average revenue;
- 2) What significance do issues of sustainability play for the Serbian wellness industry? The important issues will be corporate identity, network, contribution to the economy, and the relationship between the Serbian wellness industry and rural tourism stakeholders.

## References

- Agrodimou, A. (2019). Wellness tourism: through the lens of millennials' attitude: An exploratory qualitative study.
- Andreu, M. G. N. L., Font-Barnet, A., & Roca, M. E. (2021). Wellness tourism—new challenges and opportunities for tourism in Salou. *Sustainability*, 13(15), 8246. <https://doi.org/10.3390/su13158246>
- Blesic, I., Tepavcevic, J., Stanic, M., Dragin, A., & Ivkov, M. (2019). Impact of innovations on service orientation of employees in the hotel management. *Marketing*, 50(1), 13-23. <https://doi.org/10.5937/markt1901013b>
- Bodecker, G., & Cohen, M. (Eds.). (2010). *Understanding the global spa industry*. Routledge.
- Calderwood, L. U., & Soshkin, M. (2019, September). *The travel and tourism competitiveness report 2019*. World Economic Forum.
- Chen, J. S., Prebensen, N., & Huan, T. C. (2008). Determining the Motivation of Wellness Travelers. *Anatolia, An International Journal of Tourism and Hospitality Research*, 19 (1), 103-115. <https://doi.org/10.1080/13032917.2008.9687056>
- Chhabra, D. (2020). Transformational wellness tourism system model in the pandemic era. *International Journal of Health Management and Tourism*, 5(2), 76-101. <https://doi.org/10.31201/ijhmt.788628>
- Damijanovic, A. T. (2021). Travel motivations as criteria in the wellness tourism market segmentation process. *Academica Turistica-Tourism and Innovation Journal*, 13(2). 201-213. <https://doi.org/10.26493/2335-4194.13.201-213>

- Dini, M., & Pencarelli, T. (2021). Wellness tourism and the components of its offer system: a holistic perspective. *Tourism Review*, 77(2), 394-412. <https://doi.org/10.1108/tr-08-2020-0373>
- Djuradjevic, M. (2017). Characteristics of wellness tourism users in “Mercur” Specialised Hospital. *Hotel and Tourism Management*, 5 (1), 75-84.
- Djurovic, N. (2011). *Medical tourism as development factors of Vrnjci spa*. In Serbian: Zdravstveni turizam kao faktor razvoja Vrnjacke banje. Master thesis. Belgrade: University of Singidunum.
- European Commission. (2016). ETIS, [https://single-market-economy.ec.europa.eu/sectors/tourism/offer/sustainable/indicators\\_en](https://single-market-economy.ec.europa.eu/sectors/tourism/offer/sustainable/indicators_en)
- European Commission. (2021). ETIS - New destination profile, <https://ec.europa.eu/docsroom/documents/15849>
- Gastronomy Serbia. (2022). <https://www.serbia.travel/en/experience-serbia/hrana-i-pice>
- Gligorijevic, Z., & Novovic, M. (2014). Zdravstveno-rekreativni turizam u procesu razvoja banjskih i planinskih turistickih mesta. *Ekonomске teme*, 52 (4): 509-522.
- Global Wellness Institute. (2018). <https://globalwellnessinstitute.org/>
- Global Wellness Institute. (2021). *Global Wellness Institute, The Global Wellness Economy: Looking Beyond COVID, December 2021*.
- Grénman, M. (2019). In quest of the optimal self. Wellness consumption and lifestyle—A superficial marketing fad or a powerful means for transforming and branding oneself.
- Grénman, M., & Rääkkönen, J. (2015). Well-being and wellness tourism—Same, same but different? Conceptual discussions and empirical evidence. *Matkailututkimus*, 11(1), 7-25.
- Hyde-Smith, M. J. (2012). *The wellness spa: construct definition and performance evaluation* [Doctoral dissertation, Auckland University of Technology].
- Jovicic, D., & Ilic, T. (2010). Primena indikatora održivog turizma. *Glasnik srpskog Geografskog društva*, 1 (1), 277-305.
- Kim, E., Chiang, L., & Tang, L. (2017). Investigating wellness tourists’ motivation, engagement, and loyalty: in search of the missing link. *Journal of Travel & Tourism Marketing*, 34(7), 867-879. <https://doi.org/10.1080/10548408.2016.1261756>
- Kontic, Lj., Vidicki, Dj., & Lazovic, S. T. (2020). Sustainable Development Strategy of Ecological and Health Tourism: The Case of Novi Sad. *Ekonomija razdvajanja Zagreb*, 02.-03. prosinca 2019., 309-322.
- Lakicevic, M., Pantovic, D., & Fedajev, A. (2021). Investigating Factors of Customer Loyalty Formation for Wellness Spa. *Management: Journal of Sustainable Business and Management Solutions in Emerging Economies*. <https://doi.org/10.7595/management.fon.2021.0031>
- Liu, Z. (2003). Sustainable Tourism Development: A Critique, *Journal of Sustainable Tourism*, 11 (6), 459-475, <https://doi.org/10.1080/09669580308667216>
- Marjanovic, V., Djordjevic, D., & Mladenovic, I. (2020). THE IMPORTANCE OF INNOVATIONS FOR THE SUSTAINABLE DEVELOPMENT OF TOURISM. *INSCOSES 2020*, 22.
- Melkic, S., Markovic Vukadin, I., & Roknic, L. (2020). Održivi turizam-samozavaravanje, ideja ili realnost? *Communication Management Review*, 5(01), 48-83.
- Milicevic, S., & Djordjevic, N. (2020). Possibilities for improving the tourism offer of Vrnjacka banja, SERBIA. *INSCOSES 2020*, 30.
- Milicevic, S., & Jovanovic, D. (2015, October). Wellness tourism—competitive basis of European health tourism destination. In *DIEM: Dubrovnik International Economic Meeting* (Vol. 2, No. 1, pp. 851-863). Sveučilište u Dubrovniku.
- National Tourist Organization of Serbia. (2015). *Serbia: health, spa & wellness*. Belgrade: National Tourist Organization of Serbia. Retrieved August 1, 2022, from <https://www.serbia.travel/files/Serbia%20-%20Health,%20Spa%20&%20Wellness.pdf>



- Paterson, B. L., Thorne, S. E., Canam, C., & Jillings, C. (2001). *Meta-study of qualitative health research: A practical guide to meta-analysis and meta-synthesis*. London: Sage publications.
- Pecic, V. (2012). *Znacaj sportskog turizma za turistički razvoj Vrnjjacke banje*. Master thesis. Belgrade: University of Singidunum.
- Petroman, C. (2021). Wellness tourism-modern form of tourism. *Quaestus*, (18), 321-329.
- Phuthong, T., Anuntavoranich, P., Chandrachai, A., & Piromsopa, K. (2022). Developing and Validating an Assessment Scale to Measure the Competitiveness of Wellness Destinations. *Sustainability*, 14(7), 4152.
- Podovac, M., & Jovanovic-Toncev, M. (2015). Istrazivanje stavova turista o kvalitetu ponude turističke destinacije Vrnjaska Banja (in Serbian). *Ekonomski pogledi*, 17, 65-80.
- Pundit, M. (2020). *Gender and Wellness*.
- Sidorova, I. G. (2019). Wellness Brand in Personal Internet-blogs and Social Networks. In *SHS Web of Conferences* (Vol. 69, p. 00107). EDP Sciences.
- Singh, P., & Jain, R. (2020). *Critical challenges in wellness industry*.
- Smith, M., & Puczkó, L. (2013). *Health and wellness tourism*. London: Routledge.
- Spa-Serbia. (2022). <http://www.serbia.com/visit-serbia/natural-beauties/spas/>
- Stará, J., & Peterson, C. (2017). Understanding the concept of wellness for the future of the tourism industry: a literature review. *Journal of Tourism and Services*, 7 (14), 18-29.
- Statista. (2022). <https://www.statista.com/markets/409/topic/625/wellness-spas/>
- Statistical Office of the Republic of Serbia. (2022a, May). *Tourist turnover*. Belgrade: Statistical Office of the Republic of Serbia. Retrieved January 8, 2022, from <https://www.stat.gov.rs/en-us/vesti/20220630-turisticki-promet-maj-2022/>
- Statistical Office of the Republic of Serbia. (2022b, May). *Trends*. Belgrade: Statistical Office of the Republic of Serbia. Retrieved January 8, 2022, from <https://www.stat.gov.rs/en-us/publikacije/publication/?p=13654>
- Tüzünkan, D. (2017). The relationship between innovation and tourism: The case of smart tourism. *International Journal of Applied Engineering Research*, 12(23), 13861-13867.
- UNWTO. (2013). *Tourism Highlights, 2013 Edition*. <https://www.unwto.org/>; <https://www.e-unwto.org/doi/pdf/10.18111/9789284415496>
- Ustymenko, L. (2020). Wellness Culture as a Factor of Formation of Wellness-Industry. *Culture and Arts in the Modern World*, 21, 182-190. <https://doi.org/10.31866/2410-1915.21.2020.208253>
- Vicentijevic, J. (2016, June). Wellness as a segment of spa tourism in Serbia. In *Tourism International Scientific Conference Vrnjaska Banja-TISC* (Vol. 1, No. 1, pp. 88-105).
- Vukadin, I. M., Zovko, M., & Krešić, D. (2020). Review and evaluation of existing international systems of tourism sustainability indicators. *Croatian Geographical Bulletin*, 82(1). <https://doi.org/10.21861/hgg.2020.82.01.04>

