

Factors of Influence on Successful Development of Lithuanian Resort Wellness SPA Services

Neringa Langviniene and Jurgita Sekliuckiene

*Kaunas University of Technology
Donelaicio 73, LT-44029 Kaunas, Lithuania*

Abstract

The specificity of resort wellness SPA services is described by several key factors of the influence on attendance of SPA centres. People are willing to relax in spite of the difficult economic situation, stress at work or home. Customers, who visit a resort SPA services at the provider's centre, want to relax and there is no necessity or need to attend a supplier as in case of medical SPA. This article addresses the main question: what are the factors of influence on successful development of resort wellness SPA services in Lithuania?

An analysis of trends and the main features of resort wellness SPA service are introduced in the first two parts of the article. These features became necessary for successful development of the sector. The key factors of development are employment of nice location that surrounds the resort area, accommodation that should be provided by resort SPA services supplier and services that are provided near the SPA: package, specialization, accessibility to med or wellness, etc. The factors that have a secondary influence on success of wellness SPA services are individualized programmes, created on customer's request, education, a wide choice of menu, etc. Opinion of suppliers of wellness SPA in Birstonas, Druskininkai and Palanga are represented in the empirical part of this article. According to the research results, the main factors of influence on successful development of resort wellness SPA are ambience, accommodation and services package and assortment. Finally, extra tolls of attraction that enable the development of such business are represented by individualized approach towards a specific client, flexible orientation during winter time, etc.

Keywords: resort wellness SPA services, factors of influence on wellness SPA, successful development.

Introduction

A successful development of Lithuanian resort wellness SPA centres showed that these services are rather resistant to fluctuations of economy that covered the entire world because of recession. More than one centre in the resort area was closed because of decreased number of visitors during 2008-2009. Resorts that are usually not so close to the largest cities of any country attract people because of their nature, natural resources, SPA procedures

based on mineral spring water, mud, entertainment centres, conference facilities, etc. Even if Lithuanian resorts have some natural resources that are not available in other areas, it is necessary to develop extra tools of attraction for customers who want to relax, take health procedures, communicate with friends, spend weekends or holidays with families, etc. Several studies on wellness SPA services (Church and Robertson, 1999; Bennett, King and Milner, 2004) show that there is still a demand to investigate the key factors enabling the development of such kinds of services, development of their package, including extra services the value of which is rather important for customers. Investments in SPA business of East European countries show, that there is a demand for the development of SPAS, clear profile of a customer, transitioning from a 'traditional SPA customer' to a clear profile customer with specific wishes and requirements for a service (Fontanari and Kern, 2003). Development of SPA services is not limited by new entrants to this market. Clear niche and specialization of SPA centre, in order to get a long-term profit, is excluded in the scientific literature (Fontanari and Kern, 2003). Does a specialization have an influence on a successful business in a resort SPA wellness area? Marketing of a medical SPA and a wellness SPA differs a lot (Sadick, Dinkes and Oskin, 2003). Thus, which factors determine the successful development of wellness SPA? What are obligatory attributes that should be provided by supplier and what are additional attributes that can attract a customer? More and more leisure services provided by wellness SPA suppliers are appreciated by customers (Weiermair and Mathies, 2004; Langviniene, 2008; Sekliuckiene and Langviniene, 2009). SPA services provided in the areas far from the largest cities are able to attract more people to come here (Frost, 2004; McNeil and Ragins, 2005). Which services could attract people to go to the resort areas? Do expectations of customers differ now in comparison with an earlier situation? The research problem addressing these questions may be defined as follows: what factors influence the successful development of resort wellness SPA services in Lithuania and what opportunities they dictate for suppliers seeking ways for sustainable development?

Three main resort areas and their services provided for wellness SPA services customers are chosen as an object of research: Palanga, Druskininkai and Birstonas.

The methods of research literature, statistical data analysis, comparative analysis and qualitative research have been employed.

Drawing on the research questions, the structure of the article is as follows: the first part defines the specificity of resort wellness SPA services; the main features of different SPAS are presented. The second part presents groups of variables that have an influence on the development of resort wellness SPA services: economic, demographic, technological situations and changes in the concept of the term 'a SPA'. The third part presents the methodology of the survey. The fourth part p suppliers of three Lithuanian resorts (Palanga, Druskininkai and Birštonas). The main factors of their successful development are presented and opportunities of developing resort wellness SPA services for Lithuanian services providers are presented. Concluding remarks and recommendations for further research are developed at the end of the article.

Features of resort wellness SPA service

Usually a SPA is referred to as '*salus per aqua*' or health through the water. SPA centres were already known from the Roman thermos (Weiermair and Mathies, 2004) and are still popular. SPA services are known not only for procedures using water but also for other services provided by the same suppliers: weight losing programmes, nutrition, training, consultations on health life, etc. SPA and wellness services have become an important part of all leisure services industry. SPA revenue in the USA takes the fourth position in all leisure industry (Monteson and Singer, 2004) after golf, cruise-line and health/racquet clubs' revenue. An intangible product that meets a demand, all financial and intangible products that satisfy needs associated with SPA visitation will be understood as a SPA service (Kapczynski and Szromek, 2008).

SPA and wellness programmes are preventive programmes raising the goal not to become a patient of healthcare services providers. Thus the concepts of wellness and healthcare are different. The concept of SPA and wellness services as a preventive one was analyzed by Church and Robertson (1999) who underlined that wellness programmes help to reduce a risk at work, improve overall health by increasing physical exercises, improving nutrition and addressing stress. They (Church

and Robertson, 1999) provide five main components of SPA and wellness services: physical fitness, stress management, physiological and mental health, nutrition and dietary related issues, alcohol or chemical dependency. All components are interrelated and their role is to guarantee a healthy look of the person and avoid necessity to visit the doctor.

Bennett, King and Milner (2004) emphasize three main values of SPA and wellness to a customer: 1) staying away from home; 2) wishing to spend leisure time; 3) health improvement. Any pleasure-oriented tourist, coming to a resort SPA and wellness services provider and seeking to relief from stress, could be described as a customer of a health resort or SPA and wellness resort. Monteson and Singer (2004) also observe that emotional reasons are most important for resort SPA and wellness centres' visitors. Four main reasons for visiting the SPA are emphasized: 1) people feel stress; 2) they want to have small indulgence; 3) they wish splurging and 4) want to feel better. Physical reasons become not the most important for coming to a resort SPA or wellness centres. According to Monteson and Singer (2004), the components of SPA and wellness services are related more to physical facilities as reception area, locker rooms and facilities, facility areas, as sauna, whirlpool, cool-dip pool and lounge (some SPAS extend to juice bar, café zone, etc., that is not necessary in the USA, but preferable in the EU), massage and facial rooms, hydrotherapy rooms, staffed fitness studio with exercise machines, exercise studio for classes, retail store, salon for hair, nails, etc. Bennett, King and Milner (2004) define a SPA and wellness resort as a destination resort that offers programmes for guests that are intended for physical or spiritual self-improvement. Spiritual improvement is emphasized before physical. Distinction is often blurred, as resort SPAS and wellness services provide both types of benefit: food (vegetarian or vegan, etc.), exercise (yoga), beauty treatment (facial, mud therapy), medical or wellness diagnosis (acupuncture, vitamin-complex treatment), and distress treatments.

According to Frost (2004), there are seven categories of SPA services (Table 1).

Table 1

Categories of SPA services

Category	Description of particular SPA service
Club SPA	Its primary purpose is fitness; it offers a variety of professionally administrated SPA services on a daily-use basis.
Cruise ship SPA	SPA onboard a cruise ship providing SPA services, fitness, and often SPA-cuisine menu choice.
Day SPA	SPA offering a variety of SPA services on a daily-basis. The emphasis is on pampering services such as facials and body scrubs, not fitness
Mineral springs SPA	SPA with an onsite source of natural mineral springs or seawater, used in hydrotherapy treatments.
Resort/hotel SPA	SPA located within a resort or hotel environment that provides SPA services, fitness activities, SPA-cuisine menu choices and perhaps some wellness components
Med-SPA	A centre where medical and SPA professionals offer some wellness care in addition to SPA services, most often in the area of cosmetic procedures
Destination SPA	Its only purpose and mission of which is to provide guests with an opportunities for lifestyle improvement and health enhancement through professionally administrated SPA services, fitness and educational programming, accommodations, health and healing services

Table 2

Specificity of day, resort and destination (med) SPA services

Attributes <i>Category</i>	Value for customers	Duration	Customer	Choice of services	Facilities	Package and assortment
Day SPA	Pampering	1 hour – 1 day	Relaxed	Free choice	Salon equipment	Facial, body scrubs, massages, beauty care services and procedures
Resort SPA	Vocation	2-3 days	Relaxed-vacationer	Free choice – wish to relax, get well	Accommodation natural surrounding	Accommodation, nutrition, restaurants, wellbeing and trips, extra SPA services
Destination SPA	Health improvement	7-14 days	Needing to improve health	Depends on consultant	Medical-training equipment	Accommodation, consultants-professionals, educational programmes

‘Resort SPA’ is one of the largest sub-classes in the global world after the day SPA, and before the destination, medical SPA. SPA resort services which are analyzed here, are most commonly related to pure vacation. People, coming to a resort SPA and wellness centre, are able to choose from any SPA and wellness services depending more on their own personal wish, not on necessity (for example, state of the body, necessity for dietary nutrition, etc.). The classification depending on purposes – medical or wellness – is used rather widely in the European countries (The European SPAS Association, 2009). Customers of a resort SPA and wellness come for rest and recreational purposes. They are able to order dessert even if it is not healthy, to sleep till the midday, or to exercise, attend a fitness class or just a traditional massage. As mentioned above – a resort should have a SPA – there is no necessity for a resort SPA and a wellness customer to use SPA everyday. Monteson and Singer (2004) write that customers are able to participate in other recreational and social activity typically available at resorts. Even if a visitor uses a SPA not regularly, it is an important thing when making decisions about where to go during vacation, about making travel plans, etc. (McNeil and Ragins, 2005).

Specifics of a day, resort and destination SPA are presented in Table 2. There are rather few surveys related to resort SPA services conception. Services as accommodation, sport activity, health improvement and other remain to be excluded from resort services, or in any case not in parallel with leisure activity, adventure, and pampering. On average a regular customer is well. Thus, they will not need medical services inside the centre. The accessibility to conventional medicine when needed should be added. Usually a resort SPA and wellness services classificatory limit them on listing treatment facilities and medical specialties that they provide. Bennett, King and Milner (2004) suggest categorizing on treatments, such as luxury, pampering, life enhancement, weight management, nutrition and diet, stress control, holistic health, spiritual awareness, fitness and beauty, mineral springs. Drawing on this, Bennet, King and Milner (2004) grant that the most useful distinction made in the literature is between medical and tourism orientation. The primary purpose of a resort SPA and a wellness customer is relaxation. Thus, tourism orientation should be underlined. Even though a priority is given to tourism orientation; medical treatment could be an

attractive tool for visitors choosing the resort SPA and wellness provider. Further a classification could cover mainstream activities or alternative activities could be offered by resort SPA and wellness services providers. The largest part of resort SPA and wellness services providers emphasizes offers of some kind of traditional activities, such as traditional massage, physiotherapy, osteopathy, stop smoking programmes, weight management, etc., before offering alternative massage (for example, shiatsu, tai chi), naturopathy, iridology, homeopathy, meditation, etc. (Bennett, King and Milner, 2004).

McNeil and Ragins (2005) describe the conception of a resort SPA and wellness centres using such attributes as product that is varied based on a SPA market, for example, fresh water or seawater should be used in France, SPA centre should be differenced in Canada and natural surrounding is necessary in Venetia. Second attribute is place, as resorts usually relate to resort area. Promotion of resorts should start from education of children who are going to resorts with their parents, as they are going to become a new generation of SPA users. This attribute is seen as important also attracting men to use SPA and wellness services at resorts educating them, as men are the smallest part of customers of these services. SPA users, that is organizations, are the other promotional opportunity for resort SPAS. McNeil and Ragins (2005) predicated that the last attribute describing the resorts SPA and wellness services should be a price. Indeed, as a lot of services used by a resort SPA and a wellness customer are not compulsory, they are ready to use any extra services only in case if they will appear attractive to them. A pricing should be an attractive tool for new visitors or users wishing to try the new service. Educated and experienced customers will use supplementary services for extra charge.

Weiermair and Mathies (2004) describe the concept of resort wellness SPA by four main elements of a resort SPA and wellness:

1. Professionals (sport scientists, beauticians, nutrition scientists).
2. Programmes (diet, fitness package, peeling).
3. Facilities (sauna, wellness centres, hotels).
4. Wellness bricks.

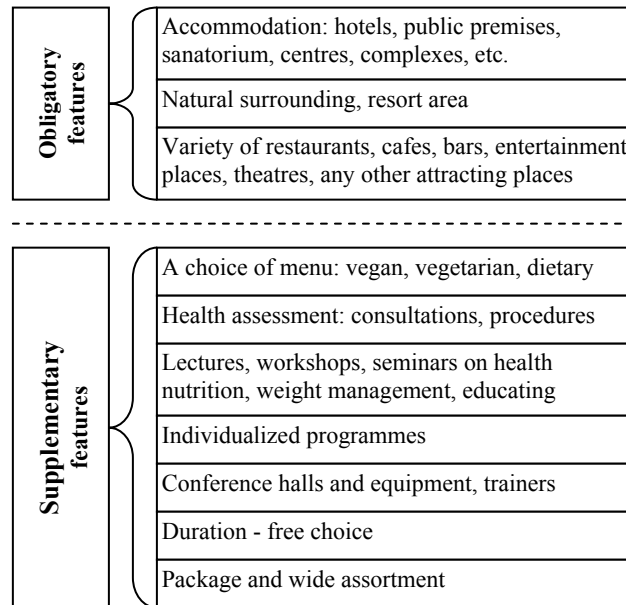


Figure 1. The main features of resort wellness SPA service

These authors noticed that wellness is a continuum of getting well after illness or, on the contrary: if people want to feel well, they should consume resort and SPA services: fitness, diet, beauty procedures, mental activity, meditation, relaxation, etc.

The main features of a resort SPA may be presented drawing on the investigations by Langviniene and Sekliuckiene (2009b) (Figure 1). Analysing features of a resort SPA and wellness, it should be noted that people no longer see the resort SPA and wellness as purely pampering unit (Frost, 2004). Staying healthy and looking good have become urgent tasks for using a SPA. Subcategories of sports activities and nutrition are appreciated by visitors of SPA, too. During past years medically oriented services are included. Already five years ago (in 2004) shorter stays at resort SPAS and wellness centres were noticeable. Other authors (Monteson and Singer, 2004) notice the general trend of shorter vacations at resorts. Weekend vacation becomes very popular. Thus, using a resort SPA and wellness does not relate to annual vacation what happens once per year now. People are able to organize longer or shorter weekends away from home for a SPA and wellness reasons. Extending their findings, it should be clarified that massage continues to be the most popular services in SPAS, after that – facial, body care services, and manicures. Existence of main features of resort wellness SPA services in organization and its environment becomes basis of successful business development.

It should be summarized that the features of resort wellness SPA services describe that visitors of the SPA centre are wishing to relax, relieve from stress, feel and look better. Even if downturn in economy forces to calculate money, people should take a rest; have vacations away from their home. Resort is a nice way to do that taking several wellness programmes, SPA procedures, any extra services related to healthy and beauty look. Even if a priority is given to tourism orientation, as relaxing

massages, treatment, about healthy look, medical services should be accessible, too. Notwithstanding, a customer of resort SPA and wellness services is usually healthy, not sick, as patient of healthcare services, several medical procedures are appreciable by customers and appear as a trend of development of resort SPA and wellness services package.

Main trends affecting development of resort wellness SPA

Resort wellness SPA services have been growing for several years already. This trend relates not only to the former European Union countries, but to all global world, especially the United States of America. Despite of the beginning of economy downturn in 2008, SPA centres remain a popular way to spend leisure time for people in many developed or developing countries. Several of trends should be defined:

1. *Changes in the global economy.* This situation relates to change to the worse in purchasing power of buyers, decreasing capabilities of suppliers to provide products and services at competitive prices, etc.
2. *Changes in buyers and (or) customers profile.* This situation relates to changing characteristics of visitors of SPA centres. As earlier the main groups of SPA centres visitors were families, couples, nowadays more and more single men or women are coming. Particular programmes are provided for mothers with children (child care, etc.), also educating visitors, who are coming for health improvement programmes.
3. *Modernizing and innovations of SPA processes.* This relates to new technologies, opportunities to implement online reservation system, customers' relationship management program, etc.
4. *Changes in resort wellness SPA service conception.* It relates firstly to the term of a SPA. Customers suspect that they will get not only water procedures. After

that, it relates to specialization: med and wellness SPA. Mixed med-wellness becomes to be more popular in order to meet the requirements of various groups of customers.

Changes in global economy relate to any country in the entire world – both developed and developing. This group of variables has the largest influence on development of resort wellness SPA. Influence of changes in economy is identifiable rather easy. However, it is difficult to predict and assess the influence on a separate service sector. The economic prosperity which the EU countries have been enjoying before 2008, has been replaced by the USA's economic recession, which started back in 2007. Before the crisis began, the increasing income of inhabitants increased the demand for resort and wellness services. It is complicated to foresee the consumer behaviour during the economic crisis. On one hand, the economic constraints, decrease in income may have an influence on consumers to choose the goods and services of first necessity, in the framework of which the SPA and wellness services may not be ascribed to. On the other hand, in the context of the crisis, consumers may choose SPA and wellness services as a need for relief from daily stresses.

Changes in profile of a customer are also very urgent for the development of resort wellness SPA. The biggest part of SPA users in the last decades of the 20th century were women and main segment of SPA users were middle aged and elderly SPA and wellness users. Monteson and Singer (2004) in the longitudinal researches of SPA users stated, that there was an increase in the number of younger (less than 30 years old) SPA users. McNeil and Ragins (2005) added that the teenagers segment is one of the fastest growing areas in this industry. International SPA Association SPA Users Study in 2003 also confirmed these propositions. The study also reports on high percentage of younger SPA users. In addition, it is noticeable, that there are changes in comparing consumers by gender. Recently the number of men increases rapidly.

Modernizing of a SPA services process is a way to get a customer and(or) to save cost of production. Technology innovation helps to gather information about customers, to know their preferences, personalize the service package for each permanent customer. Internet as an information resource and web sites of SPA and wellness centres helps to explain and inform potential clients about services packages, to reserve desirable services, build the brand and make the brand recognisable. According to McNeil and Ragins (2005), making information easily accessible and staying up to date with technological advances is a major challenge when attempting to make a SPA more appealing than the competitor's.

Changes in conception of resort wellness SPA is the last, but not less urgent variable for development of these services. We should state here, that the conception of resort SPA in the Western European countries and the USA differs a little bit. Full conception of SPA as a pampering service is perceivable in the USA. Wellness SPA services meet primary wishes and needs of wanting to relax, not necessary needs. Traditions of the European SPA show,

that med SPA or wellness SPA firstly care if needs to improve the health state are met. Recently traditions of the USA and the European countries have become similar. Two main categories of SPA services are separated: med or wellness SPA. Customers of wellness resorts *are able to select all services* offered by package or *extra services that they want*. Customers of medical SPA resorts *use all services indicated by doctors*, any other specialists depending on the state of health.

While analysing the development of resort wellness SPA in Lithuania, it should be noticed that sanatoriums are the origin of these services. First sanatoriums offered medical procedures, using mineral waters, mud, etc. in order to improve patient's health. After that, extra procedures, such as swimming pools, baths, Turkish Hamam baths, beauty care procedures, massages were added.

Investigations on SPA services sector (Langviniene, 2008; Langviniene and Sekliuckiene, 2009a) show, that there is still a demand of classification system of SPA in Lithuania. SPA services providers are free to use the term SPA wherever they want. It should also be mentioned, that there already are attempts to provide suggestions for classification of SPA and wellness services that were developed by the order of Ministry of Economy in Lithuania (Applied science research study: Methodical recommendations for SPA services classification, 2009). New classification of resort wellness SPA would be useful not only for providers who offer quality based services, but also for regulating this market, while new comers should supply services appreciated by local or foreign customers. Similarly guidelines for the development of resort wellness SPAS could be clearer – should providers include more medical or relaxing procedures, which services are obligatory, which – optional, what facilities should be used, etc.

Research methods

In order to identify what services are provided by resort wellness SPA centres, what factors influence the package of these services and purchase of them; and what are key factors on successful development of resort wellness SPA, an exploratory research was carried out. Semi-structured interview was used as the main method of collecting data. Interviews were conducted from May to July, 2009.

Three main resorts as an object of investigation were chosen: Palanga, Druskininkai and Birštonas. There are three more resort areas in Lithuania (Lithuanian resorts and resort area, 2008): Neringa, Anyksciai and Ignalina. The pilot study in order to clarify the situation was done. After the pilot study only Palanga, Druskininkai and Birštonas were chosen.

According to the Lithuanian Applied science research study (2009) there are three kinds of resort wellness SPA services suppliers now:

1. Wellness institutions (sanatoriums).
2. SPA and wellness centres, established at hotels.
3. SPA'S complex centres.

All three categories of suppliers were included into this survey. In total twelve suppliers from twenty available in three resort areas were investigated. Four suppliers of Palanga ('Femina Bona', 'Palangos viesbutis', 'SPA Gabija Palanga', 'Vanagupe'), six of Druskininkai ('Druskininku vandens parkas', 'SPA Druskininkai', 'SPA Vilnius SANA Druskininkai', 'Medea Druskininkai', 'East Island', 'Egles sanatorija') and two of Birstonas ('Karaliskoji rezidencija' and 'Tulpe') agreed to participate in semi-structured interview and answer the questions. The obtained data were processed by qualitative content analysis.

On the ground of several principal factors, listed in the first part of this paper, a questionnaire for suppliers of resort wellness SPA was formed. Obligatory and supplementary features having an influence on successful development of resort wellness SPA were checked. According to Figure 1, such *obligatory attributes* were investigated:

- Location – does a resort as an exclusive place help to attract people to come here?
- Accommodation – how it affects visiting the resort wellness SPA (hotel, public premise, etc.)?
- Services provided – medical or wellness SPA; core and extra services; accessibility to variety of eating and drinking places, etc.

Also several questions to investigate the opinion of providers on *supplementary attributes* of resort wellness SPA were given: do they provide education of customers (potential or existing ones); what changes have been observed in consuming during past two years: attendance, changes in customer's profile, changes in behaviour of customers; what are factors of successful development in the future: attracting local or foreign tourists.

In addition, the influence of changing customer's profile, and influence of neighbouring countries will be estimated.

Findings of the survey

Analysing the key factors – obligatory and main supplementary features for successful development of a Lithuanian resort wellness SPA – all respondents agreed, that wellness SPA sector has a lot of opportunities for development because of quite good main obligatory attributes typical for resorts, and, as research showed, there are many wishes and possibilities to improve the optional attributes from the services providers' side. The interviews with resort wellness SPA managers allowed to show the following findings about the real situation in this sector.

First criteria, that has an influence on the development of resort wellness SPA, is *natural surrounding*. This factor was described in the first part of this paper as *obligatory feature of the resort wellness SPA*. Respondents from Birstonas and Druskininkai have mentioned that natural surrounding can be an advantage for a wellness centre, seeking to attract more tourists, because of resort area and also main facilities, such as a lot of accommodation units that they can find here, entertainment centres, etc. ('We recommend for our customers to go through three kinds of

walking tracks, but unfortunately they are rather lazy'). Providers in Palanga also have a lot of opportunities to use natural surrounding as an attracting tool ('we organize trainings in the park'). Centres, located in the resort area, can fully use the resources of a resort: salt and mud, mineral water both for procedures or swimming pool, herb baths together with volatile oils, etc. A few of SPA suppliers also organize team trainings in the nature; use natural surrounding for walking around, use other activities on the ground of ambience. Resort places attract people, as they come here for holidays, health care. SPA services suppliers from Druskininkai mentioned that a resort place attracts more people for rest purposes ('there are a lot of kinds of entertainment centres, also hotels, here, in Druskininkai'). Resorts of Druskininkai and Birstonas attract customers to their SPA wellness centres through the whole year because of their unique, natural resource. Providers of Palanga acknowledged, that '<...> they do not use natural mud or salt, everything is brought from foreign countries'.

However, SPA suppliers from Birstonas identified not only advantages of resort area location, but disadvantages, too ('our customers want to go somewhere in the evening, to see any play or to go to a concert. We are trying to take them by our bus to larger cities to any event, as it is rather boring to stay in the premises of the hotels in the evenings'). Also '<...> poor transport infrastructure is noticeable. Situation with flights to Lithuania is unsatisfactory. Thus, tourists are looking for ways how to reach Birstonas'.

Nevertheless representing an attribute 'natural surrounding, resort area', an opinion of suppliers of Palanga was different. Palanga is a resort of seashore. However, littoral areas have no natural resources, which are possessed by Birstonas and Druskininkai: mineral water, mud, etc. All inquired suppliers in Palanga have affirmed that '<...> a resort at a seashore attracts more people only during mild season time. Lithuanian people do not come to Palanga in winter period. Only foreigners are coming'.

Accommodation facilities also have an influence on the development of resort wellness SPA. Different kinds of categories, depending on accommodation were noticed ('we have started to work firstly as a senior house, after what we saw, that a lot of people are coming for SPA purposes'). Generally speaking, 1 SPA supplier was established as a total complex, including a hotel, a senior house and a SPA; 2 SPA suppliers exist as a house not related to any hotel or public premises (in Birstonas and Druskininkai); 7 surveyed companies are located at the premises of a hotel in a resort: 3 in Druskininkai; 4 in Palanga; 2 SPA services providers in Druskininkai were located in the public premises. The first of them in the premises of other wellness and SPA resort services supplier, the second – in the premises of medical sanatorium.

The results showed, that the majority of the resort SPA services suppliers were established at the premises of hotel in the resort area. It could be explained, that this is because we have quite young traditions on wellness SPA culture in

Lithuania. That's why we have not much SPA complexes in resorts. And one of the easiest ways to start such kind of business – to try to supply services near other services, as accommodation. And otherwise, there are rather deep traditions of medical sanatorium in Lithuania where medically oriented services are supplied.

Other attribute, which has an influence on possibilities to develop, is *what services are provided* by a supplier. It should be noticed, that services provided by wellness and SPA resort services suppliers in Birstonas, Druskininkai and Palanga are quite similar. They differ only upon the variety of assortment – in width and depth. Near to half of surveyed companies are oriented towards both wellness or medical SPA (*'firstly we were oriented to weight losing programmes, after what every year new med and new wellness SPA services are included*). Not one wellness and SPA resort centre in Palanga was able to provide medical SPA. One SPA service provider surveyed in Druskininkai, well known in Lithuania as medical sanatorium, specified exclusively medical SPA services as sling exercises therapy, balneology therapy, peloid therapy, massages, electro therapy, diet therapy, and psychotherapy (*'There is a possibility to get any consultations of professionals because of the plan of treatment, examination'*). Providers of all three resorts supply water procedures, massage services, and sling exercises therapy, electrophysiological procedures, balneology therapy, health SPA and wellness SPA. That means that both SPA centres use the resources of resort area. Resort SPA services providers in Palanga also mentioned such extra services as *'<...> pool, training hall, tennis courts, basketball field, bicycles'*.

Measuring the accessibility to variety of eating and drinking places, it should be noted that there are rather good choices of these places in all surveyed resorts: Birstonas, Druskininkai and Palanga (*'there are a lot of restaurants and hotels, here, in Druskininkai. People are free to choose where to go in the evening. It is very important when people are staying for several days'*).

Extra or supplementary factors of influence were also investigated during our survey. Additional services often attract tourist and residents to service providers. *Individualized programmes* are provided by both Birstonas wellness SPA services suppliers – they prepare individualized packages for clients (*'we prepare individualized program with anybody in our centre. He or she gets information what he or she is able to get for extra charge'*). Analysis of situation of Druskininkai SPA services providers has shown that the majority of providers supply both tailor and grouping programmes. Medical staff provide consultations for needing specific services, for example, consultations of doctor dietician provides a possibility to create for a patient an individual nutrition both while visiting the centre and after leaving it (*'Short run package or long run package is provided'*). Suppliers in Palanga are flexible by services provided (*'we have a menu of services and customers choose what they want'*). However if anything does not cater for wishes of the customer, they *'<...> are able to change everything in order to satisfy them'*. As in Druskininkai, SPA services supplier in Palanga provide both team or tailor

programmes. Formation of wellness SPA services package in all three resorts is free to choose from. A customer is free to choose to buy a package, specific services, and accommodation.

Different menu enables the supplier to develop their business, too. Availability of different menu: vegan, vegetarian, dietary, is noticed in the centres of both suppliers in Birstonas. Three suppliers in Druskininkai have a supply of dietary menu, three – not (*'we provide information what to eat not only staying in the centre, but also returning home*). Two from Palanga resort wellness and SPA centres – both hotels – have a dietary menu inside the restaurant of hotel (*'even though we are not able to provide a specific menu, people can go not far from our centre to other places. A visitor can go to different places when he or she stays for several days'*).

A part of centres does not provide *education* of their visitors. However, they are ready to answer all questions (*'our specialist of therapy is ready to answer the questions one hour per day'*). Another part of surveyed SPA services suppliers, who have conference facilities inside the centre, educate clients in two ways: individually or in teams (*'typically this work is done by social employee or a doctor during daily visitations'*). Group education or education in teams are also provided (*'Patients and their family are listening to lectures (about SPA concepts, nutrition, psychologists – how to accept the fact of illness, how to live returning home after visiting the SPA centre, etc.)'*). They participate in workshops, seminars, too.

One of a SPA services supplier in Birstonas uses unique and original educational methods (*'we provide art therapy and team work discussing about the new literature on health care. This method of education attracts not only SPA clients, but also residents of Birstonas'*).

New technologies, as Internet sales, customer relationship management (CRM), etc. – for improvement of resort wellness and SPA services are practically not exploited. The only SPA centre, located in Palanga, uses customer's relationship management programme. Another in Druskininkai has mentioned they are implementing CRM (*'we try to change a situation, as we see that it is rather important for our successes; 'We do not use CRM, and this is very bad'*). A few respondents mentioned that they use information about clients from partner's data basis (*'we have a relationship with tourism agencies. Thus, their data basis of customers is used'*). It should be noted, that all centres, established in Birstonas, Druskininkai and Palanga have their websites. Thus information for clients is assessable by Internet.

Changes of customers profile and their influence on the development of resort wellness SPA could be described by customers, who were attending. Segment of customers of resort wellness and SPA centres is very different: 1 surveyed centre focus on patients who come for medical purposes and nursing patients (in Birstonas), 1 – on tourists (in Palanga), 1 – on tourists and patients (in Druskininkai), 2 – on pampering with short run procedures (in Druskininkai and Palanga), 3 – on tourists and pampering (1 – in Druskininkai, 2 – in Palanga), 4 – on tourists, patients, pampering and other clients (1 in Birstonas, 3 in

Druskininkai). Thus, the majority of providers in Birštonas and Druskininkai try to diversify their risks ('We are oriented towards each segment: pampering, taking health care or beauty procedures', 'we are appealing to tourists and pampering visitors').

Respondents agree that there is a large influence on changing profile of a customer – influence of global economy situation. Number of visitors has decreased ('A number of clients decreased by 20 percent'; 'behaviour of customers did not change, but visiting has decreased by 20 percent'; 'A number of visitors decreased due to Poland's currency. Price has become the most important factor when choosing a centre. Actions, discounts have become very important marketing means for our customers'; 'Popularity of beauty procedures has decreased. Only traditional massages are popular'). It is interesting to notice, that a five star hotel in Palanga did not feel the changes in consuming ('we have not suffered from the decrease of customers and hope that a number of visitors will not decrease in the future').

Neighbouring resort wellness SPA centres and traditions in the Western and European countries also have an impact on Lithuanian SPA services consuming and possibilities to develop such kind of business. Majority of experts have stated that they constantly observe innovation and news about wellness resort SPA centres in neighbouring countries' ('We try to use any useful information available about foreign novelties in SPA'; 'Our managers were gone to use wellness SPA services practically in 60 countries in order to use know-how in Lithuania'). Some of Lithuanian resort SPA centres have close relations with partners in Portugal, Greece, and Russia. The first results are achieved when sharing and applying the best practice in Lithuania – the first two ESPA (European SPAS Association) MED certificates were given to Birštonas and Druskininkai SPA resort centres "Karaliskoji rezidencija" and "SPA Vilnius SANA Druskininkai". These certificates affirm that the SPA-centre meets the requirements of ESPA regarding therapy infrastructure, safety and hygiene.

Surveyed respondents identified main tendencies in neighbouring countries that also influence Lithuanian wellness resort SPA sector:

- Focus on healthy life, health preservation. Reasons of health disorder are investigated and conditions for rehabilitation are created ('People, who used health procedures earlier, still use them, despite the economic recession').
- Orientation to natural and ecological SPA procedures, including beauty products, food, activities, such as walking tours, bicycles, etc. ('Firstly we educate our visitors, after that they choose services from the package')
- Focus on a specialization – med or wellness ('Eastern countries are more oriented to med SPA').
- A large attention is paid to the Eastern countries' philosophy and life style, seeking to approximate to European needs and life style ('Hungarian traditions are very deep. It would be enough to come here and to

use their knowledge in Lithuania'; 'Each country has preferences: med or wellness').

- Ecological SPA, energetic SPA, SPA med and wellness SPA in complex with other leisure services have become more popular in all European countries.

These tendencies are similar to the Lithuanian recent tendencies. Resort wellness and SPA centres were also influenced on promoting health life style, providing health oriented ecological procedures, East massages, etc ('A demand for a healthy life becomes popular'; 'Deeping traditions in resort development enable to develop such kinds of business'). Using good practise in Lithuania develops a lot of opportunities for resort wellness SPA service providers.

Based on the findings of the survey, such opportunities for service providers seeking ways for successful development could be developed:

1. *Clearly expressed orientation towards the resort SPA centre.* It relates to specialization: med or wellness SPA services are provided, or a mixed one. It also relates to duration of the major package of services: short run or long run. Orientation also covers: does a centre have any niche, or does it try to supply a wide assortment of services. Availability of tailor programmes can serve as a specific orientation of the centre. Aside that a choice of special menu, nutrition could attract specific category of customers to a centre. Education of potential and existing customers should be provided. As a philosophy of SPA is not known to everybody, education, and lectures accessible to both customers and their family is means to attract more users of SPAS. New services should be presented (free of charge or with a discount for trying purposes). Flexible orientation depending on the season should be organized. During winter period – more entertainment inside the premises should provided; natural surrounding should be engaged in group or individual trainings.

2. *Cooperation activities.*

- *Cooperation with the Government of the country and Municipalities of the region.* It relates to cooperation with instances, that take initiative to implement unites system of using the term SPA in Lithuania, in certification of SPA centres, etc. Partnership with Municipalities, taking role in National Resort Association enables to solve problems of poor transport infrastructure, common tasks, trying to attract tourist to Lithuania, etc.
- *Cooperation with other services and(or) product suppliers.* It relates to cooperation with other providers, related to wellness industry: hotels, beauty saloons, cosmetics suppliers, etc.
- *Cooperation with tourism agencies both locally and globally.* It relates to common tasks trying to attract tourists to Lithuania and trying to attract them to go far away from the largest cities to resort areas.

3. *Marketing communications.* It covers effective marketing means, advertisement of wellness and SPA resorts in Lithuania for foreigners through general websites of Tourism association, national Resort association, any other in tourism engaged associations. Marketing strategy should not be restricted only to trying to decrease a price in

order to compete. It is the easiest way to compete based on price, but it does not solve a problem. Specialization, niche procedures enables suppliers to get more profit and to stay in the market, to develop.

Taking into account the opportunities for successful development of resort wellness SPA, Lithuanian SPA service providers should use first what we have – natural surroundings; and after that – supply services related to wishes and needs of local and foreign tourists, in order to achieve the long-term profit and exceptional competences in such kinds of business.

Concluding remarks

Describing characteristics of resort wellness SPA service, the main points should be emphasized. Category of SPA services describes the value for a customer using the SPA service. Resort wellness SPA service providers firstly should employ natural surroundings of resort area. After that comfortable accommodations should be accessible. Primary and extra SPA services should be provided in one place or territory.

Main groups of factors of influence are changes in the global economy, changes in customer's profile, changing possibilities to employ, to use modern technologies, and changing conception of resort wellness SPA. Findings of the survey showed that three main attributes have an influence on developing the resort wellness SPA: 1) location surrounded by nice, exceptional nature – it still attracts and is going to attract people to go for a rest, for improvement of health far from home; 2) accommodation – hotels, sanatoriums, complexes with extra services – are appreciated by customers visiting and using SPA; thus specialization here is possible (sanatorium – for med SPA, hotels – for pampering purposes); 3) services provided – specialization of services (med and wellness SPA, mixed packages, free choice of services), accessibility to individualized programmes (as educating in weight losing or other), consultants and professionals, variety of entertainment centres.

Extra factors of influence on successful development could be described by supplementary attributes, provided by resort SPA service providers. Only a few of service providers are focused on specific niche of services. Complementary services as tailoring programmes, various menu types could be as additional attributes for attracting more clients not only residents of Lithuania, but foreigners, too. Developing factors of influence for providers in different resorts, such points should be underlined: Birštonas should add pampering, providers in Palanga – health improvement procedures. Druskininkai has chosen the right way for sustainable development – the diversity of services, and also, the risks. Adding more services as entertainment possibilities in Birštonas, more visitors from the largest cities of Lithuania that are not far from Birštonas could be expected. Supplying more services from medical services menu, more visitors wishing to improve health during winter period could be waited. As one of groups of factors of influence, as changing profile of customers was noticed, new strategy to sell the service

should be implemented. Summarizing, providers should improve the quality of services, maintain a staff, focus on popular traditional services as classic massages, bath procedures, balneology therapy, etc. These and other factors have a positive affect on successful development of wellness and SPA resort.

Further research should cover not only local resort wellness SPA service providers, but neighbouring countries, too. Customers wishing to relax are going for a weekend to Poland, Finland and other countries that are not far from Lithuania. Both med or wellness SPA service providers should be covered. Besides that, longitudinal survey of wellness SPA services customers in Lithuania could be done in two-three years.

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N. Langviniene, J. Sekliuckienė

Sėkmingos Lietuvos kurortų sveikatingumo SPA paslaugų plėtros veiksniai

Santrauka

Sėkminga Lietuvos kurortų sveikatingumo SPA centrų plėtra parodė, jog šios paslaugos yra pakankamai atsparios ekonomikos svyravimams, kuriuos sąlygojo visą pasaulį apėmusi ekonomikos recesija. Nė vienas iš centrų neuždarė savo veiklos kurortuose dėl sumažėjusių turistų srautų 2008-2009-aisiais metais. Kurortai, kurie paprastai nėra arti kitų traukos zonų, didžiųjų šalies miestų, turistus traukia savo natūraliais ištekliais, gamta, druskos ar purvo procedūromis, pramogų centrais, galimybėmis pailsėti. Netgi jeigu Lietuvos kurortai turi gamtinių išteklių, kurių neturi kitos teritorijos šalyje, būtina analizuoti, ko nori vartotojai, atvykstantys į kurortus. Keletas sveikatingumo SPA paslaugų studijų (Church ir Robertson, 1999; Bennett, King ir Milner, 2004) parodė, jog tebėra poreikis analizuoti pagrindinius veiksnius, turinčius įtakos plėtoti tokio pobūdžio paslaugas, vystyti jų paketą, įtraukti papildomų paslaugų, kurių vertė vartotojams yra pakankamai didelė. Investicijos į SPA paslaugų verslą Rytų Europos šalyse rodo, kad tebėra poreikis SPA plėtrai. Be to, „tradicinis SPA paslaugų vartotojas“ tampa specifiniu, individualiu vartotoju, kuris turi tam tikrų norų, ketinimų naudotis šia paslauga (Fontana, Kern, 2003). SPA paslaugų plėtra neapsiriboja naujų centrų atėjimu į rinką. Mokslinėje literatūroje (Fontana, Kern, 2003) dažnai vartojama aiški nuostata, kad SPA centras turi būti aiškios specializacijos ir užimti tam tikrą nišą rinkoje, jeigu šio centro vadovai, žinoma, siekia ilgalaikio pelno. Ar specializacija turi įtakos sėkmingam kurortų sveikatingumo SPA paslaugų verslui? Medicinos ir sveikatingumo SPA paslaugų rinkodara labai skiriasi (Sadick, Dinkes, Oskin, 2003). Taigi kurie veiksniai gali nulemti sėkmingą sveikatingumo SPA paslaugų plėtrą? Kokios pagrindinės savybės, sudėtinės SPA paslaugų dalys pritraukia vartotoją, o kurios kuria tik papildomą vertę? SPA paslaugų centrai kurortuose siūlo vis daugiau laisvalaikio priskiriamų paslaugų (Langviniene, 2008; Sekliuckienė, Langviniene, 2009). Kurios iš tų paslaugų iš tiesų pritraukia vartotojus atvykti į kurortus net iš didžiųjų miestų? Ar vartotojų lūkesčiai anksčiau ir dabar šioms paslaugoms skiriasi? Atsakant į šiuos probleminius klausimus, straipsnyje siekiama atsakyti į mokslinę problemą – kurie įtakos veiksniai yra svarbiausi sėkmingai kurortų sveikatingumo SPA paslaugų plėtrai Lietuvoje ir kokias galimybes šie veiksniai diktuoja SPA paslaugas teikiantiems verslininkams?

Pirmojoje straipsnio dalyje analizuojama kurortų sveikatingumo SPA paslaugų specifika, ypatumai. Išskirtos pagrindinės SPA paslaugų klasės, siekiant parodyti kurortų sveikatingumo SPA paslaugų vietą visoje SPA struktūroje. Pateikta lyginamoji trijų pagrindinių SPA paslaugų analizė: dienos SPA, kurortų SPA ir tikslinė ar medicinos SPA. Išskiriamos pagrindinės SPA savybės, būdingos tik kurortams: relaksaciniai vartotojų tikslai, trukmė, būdinga kurortų SPA paslaugų vartojimui, būtinos ir papildomos paslaugos, būtina įranga bei kiti fiziniai ištekliai, naudojami kurortų sveikatingumo SPA. Pirmosios straipsnio dalies pabaigoje pateikiami privalomieji ir papildomi kurortų sveikatingumo SPA paslaugų veiksniai bei vykdomos funkcijos.

Antrojoje straipsnio dalyje išskiriamos pagrindinės tendencijos, turinčios įtakos kurortų sveikatingumo SPA paslaugų vystymuisi: ekonominiai veiksniai, demografiniai veiksniai, technologijų panaudojimas bei kintanti pačios SPA paslaugos koncepcija. Pateikiami esminiai skirtumai tarp SPA paslaugos suvokimo JAV bei Vakarų Europos šalyse. Išskiriama medicinos ir sveikatingumo SPA paslaugos koncepcija, pateikiant esminius skirtumus tarp vartotojo ir jo ieškomos naudos iš SPA paslaugos. Jeigu medicinos SPA paslaugų vartotojas iš esmės yra sergantis žmogus arba žmogus, kuriam reikia reabilitacijos, tai SPA paslauga jam būtina. Praktiškai jis neturi galimybės rinktis, ar jam naudoti SPA, ar ne, ir kas į SPA paslaugos paketą įeina. Minėtas aspektus sąlygoja jo sveikatos būseną, jo perkamoji galia ir medicinos personalo

konsultacija. Tuo tarpu sveikatingumo SPA paslaugos vartotojas iš esmės yra sveikatas asmuo, kuris tiesiog nori pailsėti, gal ir sustiprėti, tačiau tai lemia tik jo noras, o ne poreikis, ir, aišku, jo finansinės galimybės.

Trečiojoje straipsnio dalyje pristatoma tyrimo metodika, tyrimas, kurio metu buvo siekiama išsiaiškinti Lietuvos kurortų – Palangos, Druskininkų ir Birštono – dvylikos sveikatingumo SPA paslaugų teikėjų nuomonę apie tai, ką jie teikia savo klientams, kas sudaro jų paslaugos paketą, kas jų nuomone, yra kertiniai dalykai, turintys įtakos šios paslaugos plėtotei bei pasikeitimams. Struktūruoto interviu metu buvo siekiama išsiaiškinti pagrindinius sėkmės veiksnius, kuriuos nurodo autoriai mokslinėje literatūroje: 1) kurorto teritorija – ar išskirtinė kurorto vieta pritraukia turistus atvykti naudotis SPA paslaugomis; 2) apgyvendinimo paslaugos – kokią įtaką turi paslaugos vartojimui tai, kur yra įsikūrusi kurorto sveikatingumo SPA paslaugas teikianti įmonė: viešbutyje, visuomeninėse patalpose ar kt.; 3) kokios paslaugos yra teikiamos: medicinos ar sveikatingumo, kokios yra pagrindinės ir papildomos paslaugos, siūlomos klientams, ar yra galimybė gauti individualizuotas paslaugas, ar būtina pasirinkti iš teikiamo asortimento, ar platus maitinimosi ir pramogų vietų pasirinkimas. Be pagrindinių sėkmės veiksnių, interviu metu taip pat buvo siekiama sužinoti papildomų veiksnių įtaką kurorto sveikatingumo SPA paslaugų plėtotei: konferencijų rengimo galimybes SPA centruose, teikėjų nuomonę apie tai, kaip pasikeitė per pastaruosius dvejus metus vartotojas, jo elgsena, kokios galimybės, siekiant toliau sėkmingai plėtoti šį verslą.

Ketvirtojoje straipsnio dalyje pateikiami tyrimo rezultatai. Interviu su kurorto SPA paslaugų teikėjais rezultatai atskleidė, kad kurorto vieta yra privalumas siekiant pritraukti klientus. Birštono ir Druskininkų kurortuose įsikūrę SPA ir sveikatingumo centrai gali naudotis gamtiniais ištekliais – purvu, mineraliniu vandeniu, gražiu gamtovaizdžiu. Tuo tarpu Palangos, kuri nėra turtinga gamtiniais ištekliais, įsikūrusios Baltijos jūros pakrantėje, patrauklumas labai priklauso nuo sezoniskumo. Daugiau nei pusė tirtų SPA ir sveikatingumo paslaugas teikiančių centrų yra įsikūrę viešbučiuose, kita dalis - visuomeninėse patalpose arba veikia kaip atskiri kompleksai. Apgyvendinimo tipas dažniausiai sąlygoja vartotojų tipą, kuris apsistoja tikslingai pasirinktame SPA ir sveikatingumo centre. Tyrimo rezultatai rodo, kad kurortų SPA ir sveikatingumo centruose siūlomas platus paslaugų asortimentas, kuris papildomas individualizuotomis paslaugomis, individualizuotu menu klientams, edukacinėmis paskaitomis bei kitomis iniciatyvomis. Deja, tyrimo rezultatai rodo, kad SPA ir sveikatingumo centrai nenaudoja ryšių su klientais valdymo sistemų, ribotai naudoja naujausias technologijas marketingo veikloms. Straipsnyje taipogi identifikuojami pagrindiniai SPA ir sveikatingumo paslaugų vartotojų elgsenos pokyčiai, sąlygoti ekonominės recesijos, bei esminės tendencijos užsienio šalių SPA ir sveikatingumo paslaugų sektoriuje, kurios tiesiogiai sąlygoja ir Lietuvos kurortų SPA ir sveikatingumo paslaugų vystymąsi. Remiantis tyrimo rezultatais, buvo išskirtos šios pagrindinės tendencijos: orientacija į sveiką gyvenseną, sveikatos išsaugojimą, siekiant naudotis ekologiškais procedūromis, fokusavimasis į sveikatingumo arba medicininę kryptį, siekis pritaikyti geriausių Rytų filosofijos praktiką europiečių poreikiams, kompleksinių SPA ir sveikatingumo centrų kūrimas. Pagrindinius sektoriaus sėkmės veiksnius galima suskirstyti į sąlygojamus pačios įmonės ir aplinkos. Remiantis tyrimo duomenimis, įvertinus užsienio šalių tendencijas bei šių šalių kurorto sveikatingumo paslaugų plėtrą, pateikiamos rekomendacijos Lietuvos kurortų sveikatingumo SPA paslaugų centrų plėtotei, galimybės eliminuoti nepalankios ekonominės situacijos įtaką sumažėjusiam šių paslaugų vartojimui.

Raktiniai žodžiai: SPA paslaugos, kurortų sveikatingumo SPA paslaugos, įtakos veiksniai sveikatingumo paslaugų sektoriui, sėkminga plėtra.

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