

11th International Conference “Ohrid-Vodici 2023”

CHALLENGES OF IDENTITIES, CULTURAL HERITAGE, THE ENVIRONMENT, SUSTAINABLE DEVELOPMENT OR TOURISM RELATED TO THE NEW CRISES

- Conferense Proseedings -



11-та Меѓународна конференција „Охрид- Водици 2023“

ПРЕДИЗВИЦИТЕ НА ИДЕНТИТЕТИТЕ, КУЛТУРНОТО НАСЛЕДСТВО, ЖИВОТНАТА СРЕДИНА, ОДРЖЛИВИОТ РАЗВОЈ ИЛИ ТУРИЗМОТ ПОВРЗАНИ СО НОВИТЕ КРИЗИ

- Зборник на трудови-

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TOURISM RELATED WITH NEW
CRISES**

-Conference Proceedings-

Editor

Rubin Zemon

Ohrid, 18-19 January, 2023

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Предговор

Ова е XI зборник на трудови, што произлегува од меѓународна конференција „Охрид-Водици 2023, која за прв пат се организираше во 2013 година, како меѓународна конференција за културното наследство, туризмот и медиумите, пред големиот христијански и народен празник „Водици“, кое одбележување овде во Охрид е туристичка и медиумска атракција.

Оваа година Конференцијата е посветена на „Глобалните трендови и закани на идентитетите, културното наследство, животната средина, одржливиот развој или туризмот поврзани со новите кризи“.

Светот што сè уште не е закрепнат од пандемијата на КОВИД 19 дополнително, војната во Украина предизвика многу поголема енергетска и економска криза. Овие нови кризи влијаат на нашите животи, особено на економската стабилност и одржливост на нашиот личен, познат, социјален, јавен, културен живот.

Новите кризи покрајот „Крајот на историјата“ или како последица на „Судирот на цивилизациите“ иницираат или враќаат во јавните дискусии некои од прашањата за кои мислевме дека се затворени или надминати со векови, особено во парадигмата на идентитетите. Некои од идентитетите се негираат, некои бараат подобра афирмација, а во јавниот живот се појавуваат и нови идентитети. Очигледно е дека прашањето на идентитетот е многу важно, особено ако се има предвид дека во современиот свет тој е еден од најмобилизирачките фактори.

Во текот на изминатите неколку години, забележан е значителен пораст во употребата на визуелни и дигитални техники за истражување, документирање, управување, презентација и комуникација на културното наследство. Печатените, видео и аудиомедиумите, како и „Новите медиуми“ добија улога на главна мерка за зачувување и афирмирање на културното наследство, но и како главни алатки за промоција на вредностите на културното наследство, особено како туристички производи. Ова драстично го трансформираше начинот на кој ги доловуваме, складираме, обработуваме, претставуваме и дистрибуираме информации.

Во текот на последните неколку децении, човечките активности, како што се климатските промени предизвикани од човекот и другите човечки влијанија врз еко системите, ги трансформираа природните системи на Земјата, надминувајќи ги нивните капацитети и нарушувајќи ги нивните механизми за саморегулација, со неповратни последици за глобалното човештво. Човештвото е веќе сериозно погодено од тековните системски еколошки промени, како што се климатските промени и промената на користењето на земјиштето (особено уништувањето на шумите).

Размислуваме и зборуваме за сценарија, организираме и планираме промени, но тешко е да се постават амбициозни и остварливи цели во исто време. Сето ова бара иновативна, креативна и континуирана соработка, и само ако оваа соработка е сама по себе одржлива, можеме да станеме навистина издржливи. Со таа цел, се надеваме дека оваа меѓународна конференција ќе даде мал придонес за тие достигнувања.

Preface

This is the XI Conference proceedings, resulting from the international conference "Ohrid-Vodici 2023", which was organized for the first time in 2013, as an international conference on cultural heritage, tourism and media, before the great Christian and folk holiday "Vodici", which here in Ohrid is a tourist and media attraction.

This Conference is dedicated to global trends and threats to identities, cultural heritage, environment, sustainable development or tourism related to new crises.

A world that has not yet recovered from the COVID-19 pandemic, in addition, the war in Ukraine has caused a much larger energy and economic crisis. These new crises affect our lives, especially the economic stability and sustainability of our personal, familiar, social, public, cultural life.

The new crises after the "End of History" or as a result of the "Clash of Civilizations" initiate or return to public discussions some of the issues that we thought were closed or overcome for centuries, especially in the paradigm of identities. Some of the identities are denied, some require better affirmation, and new identities appear in public life. It is obvious that the issue of identity is very important, especially considering that in the modern world it is one of the most mobilizing factors.

Over the past few years, there has been a significant increase in the use of visual and digital techniques for the research, documentation, management, presentation and communication of cultural heritage. The printed, video and audio media, as well as the "New Media" have been given the role of the main measure for the preservation and affirmation of the cultural heritage, but also as the main tools for the promotion of the values of the cultural heritage, especially as tourist products. This has dramatically transformed the way we capture, store, process, present and distribute information.

Over the last few decades, human activities, such as human-induced climate change and other human impacts on ecosystems, have transformed Earth's natural systems, exceeding their capacities and disrupting their self-regulatory mechanisms, with irreversible consequences for global humanity. . Humanity is already severely affected by ongoing systemic environmental changes, such as climate change and land-use change (especially deforestation).

We think and talk about scenarios, organize and plan changes, but it is difficult to set ambitious and achievable goals at the same time. All this requires innovative, creative and continuous cooperation, and only if this cooperation is itself sustainable, we can become truly sustainable. To this end, we hope that this international conference will make a small contribution to those achievements.

ASPECTS OF MEDICAL TOURISM: ANALYSIS OF SPA OFFER IN NORTH MACEDONIA

Abstract: Spa tourism is a specific type of medical tourism which is constantly growing and represents a significant part of the tourist offer of many countries worldwide, most of them countries with a tradition of using thermal waters. The rich tradition of using spas for healing purposes in North Macedonia started back in ancient times, and today, there are eighth spa centers located in the five planning regions. For the purpose of the paper, a research methodology and secondary data sources have been used by consulting literature, studies, statistical data and official web pages of the spa centers in North Macedonia. An analysis and review of spa tourism in North Macedonia has been made, based on a systematic evaluation of the current content of spa tourism offer using methodology of content analysis. In the paper, eighth spa centers are analyzed and beside thermal water, other aspects of spa tourism are covered in the research as restaurant services, accommodation and medical facilities. Data presentation in tables and analysis has shown that, in addition to three spa centers, the capacity of the thermal water for spa tourism development in the remaining part of the country is insufficiently used.

Keywords: health, thermal water, spa, wellness, tourism services.

Introduction

Tourism as activity of people traveling to and staying in places outside their usual environment for leisure, business or other purposes is successful story of present time and has shown constant economic grown in past decades. Tourism is characterized by its own specifics and various forms, such as rural tourism, adventure tourism, urban tourism, medical tourism, spa & wellness tourism etc. Medical tourism can be defined as travel for the purposes of gaining health, medical or wellness services, and this term has been explored by various authors and organizations, defining it from different perspectives

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(Botterill & Pennings & Mainil, 2013; Todd, 2012; Connell, 2011; OECD, 2011; UNWTO, 2008; Bookman & Bookman, 2007). Spa tourism implies visit and stay into specialized facilities offering opportunities for healing and relaxation, by using thermal water⁴. Spa tourism is one type of tourism that has significant impact in the modern global trends⁵. The abbreviation “spa” comes from the first letters of the Latin phrase “Sanitas Per Aquam”, meaning “health through water”⁶. Also, in English, the word “spa” implies thermal spring, bathhouse, a place where people use thermal mineral spring to heal by taking a bath or drinking such water. The types of utilisations of thermal springs are most diverse, starting from spas, construction of aquaparks, arranging thermal lakes for tourism purposes, tourist attractions and conserved Roman Spas, thermal water products and cosmetics, etc.

Relevant research worldwide shows that thermal springs started to be used for healthcare purposes as of VI century BCE (Before Common Era)⁷. The discoveries of the Asian archaeologists point to the data that thermal springs were used for bathing 5000 years ago⁸. Similar is the situation with other continents, such as North and South America (Indians), Africa (Egyptians), Near East, Australia, and Europe (Greeks and Romans). In Eastern Europe, people would use thermal springs for bathing and other purposes for several thousands of years⁹. In Europe, the Romans have left behind the greatest heritage of spas in the territories that used to be part of their Empire¹⁰. Visitors staying in the baths of that time, not only enjoyed the water benefits, but they would have distinct types of party and therefore various theatre plays, athletic competitions and festivals would be organised and held in the places where spas were located. In 1553 in Venice (today Italy), the first guide book was published on European spas, listing more than 200 hot springs¹¹. In the Belgian city Spa, the thermal tourism started its development as of XVIII century, and its rise it denotes in the mid of XIX century, when the touristic infrastructure was built, lasting even nowadays. Similar is the situation in other European countries, such as Italy, Germany, etc. Historically, the thermal tourism shall experience its greatest development in the second half of the XIX century, whose influence is testified by many factors, such as industrialisation, traffic com-

4 Jovanović, V. (2022) *Tematski turizam*. Beograd: Singidunum.

5 Robotić, B. (2013) *Selektivni oblici turizma*. Beograd: Visoka turistička škola strukovnih studija.

6 Jafari, J., Xiao, H. (2016) *Encyclopedia of tourism*. Cham: Springer.

7 Oğuz, D., Küleki, Ö, Akpınar, N. (2010) The contribution of thermal sources to tourism development: A case study from Çankiri Çavundur, Turkey. *Scientific Research and Essays*, 5(8), pp. 819-825.

8 Lund, W.J. (1996) *Balneological use of thermal and mineral waters in the U.S.A.* *Geothermics*, 4(1), pp. 103-147.

9 Lawrence, L.R., Stoyanov, B. (1996) *Geothermal opportunities in Eastern Europe, a survey*. Alexandria: Bob Lawrence & Associates.

10 Smith, M., Puczko, L. (2009) *Health and wellness tourism*. Oxford: Elsevier.

11 Taskov, N., Metodijeski, D., Mitreva, E. (2015) *Thermal tourism in Macedonia*. Saarbrücken: Lambert Academic Publishing.

munication development, economic condition, etc. In Spain, for instance, in 1816 the Spanish King Fernando VII, adopted a Decree obliging the spa resorts in this country to hire medical and administrative staff, to serve the visitors¹². The royal elite in England, during the XVIII and XIX centuries was regularly visiting spa resorts in Cheltenham and Lamington, and these resorts were important places for communication and meetings, discussing political, economic, and social topics¹³. One of the first guide book to describe the baths in England was published in 1841¹⁴. The spa resorts in Serbia were places where royal families would spend their vacations, and in the beginning of the XX century the first Law on Hot Springs was adopted¹⁵. This only attests the view that in this part of the historic development, it was mostly about tourists from the rich social elite that would take part in spa tourism, and in smaller portion was part of poorer classes and local population. In this period, to assert the medicinal features of spa resorts and medical procedures conducted in those, doctors, and professors from leading universities of that time would conduct researches and would publish works, listing the medical benefits of using thermo-mineral water.

After the Second World War, spa tourism, as well as the conventional tourism, started to do its increasing development, both in raising the number of tourists and overnights and in increasing the number and quality of spa services offered in spa resorts, improving the material base and tourism infrastructure, introduce animation of tourists, new products, etc.

The international spa tourism experiences that we may take as positive examples and practices are higher in number. The association of spa centres into national, regional, continental associations contributes to the development of spa tourism. According to the European Spas Association¹⁶, there are more than 1,400 spa centres in Europe, with 10,000 facilities employing around 750,000 workers. The European Spas Association (ESA) was established in 1995 in Brussels, with 21 members from 20 European countries. To accomplish cooperation and exercise the interests of the European spa resorts, the Association has set the following objectives:

- Monitor and analyse the state of spa resorts and health facilities in individual European member states;
- Encourage the Exchange of experiences, best practices, and know-how;
- Produce and develop health and welfare products and programmes, as well as prevention and rehabilitation strategies for all citizens of Europe;

12 Alonso-Álvarez, L. (2012) The value of water: the origins and expansion of thermal tourism in Spain, 1750–2010. *Journal of Tourism History*, 4(1), pp. 15-34.

13 Long, P., Palmer, N. (2008) *Royal Tourism: Excursions Around Monarchy*. Bristol: Channel View Publications.

14 Granville, A. (1841) *The spas of England*. London: Henry Colburn Publisher.

15 Perić, G., Stojiljković, M., Gašić, M., Ivanović, V. (2017) Perspectives of development of spa tourism in Serbia. *Journal of Awareness*, 2(2). pp 597-614.

16 European Spas Association (2014) *Balneotherapy care in spas and health resorts in Europe*. Brussels: European Spas Association.

- Establish, promote, and improve standards in all spa resorts and health facilities within Europe;
- Encourage research in spa resorts;
- Define and harmonise joint training course programmes and establish the professional structure of the European spa industry;
- Establish a framework for cooperation and marketing opportunities for its members, etc.

ESA has developed and adopted its own standards of service quality in European spa resorts and it has been issuing certifications recognised by tour-operators and health insurance in Europe. These standards are developed on the basis of more than 1000 quality and safety criteria for the medical use of springs, swimming pools, saunas, diagnostics, types of treatments, quality management, human resources, preparation and types of food, accommodation, environment, and other supplementary facilities in the spa centres.

Table 1. Number of spa resorts and revenue earned per world regions (2017)

Region	Number of facilities	Revenue (in billion USD)
Asia-Pacific	25,916	31,60
Europe	5,967	21,73
Latin America and Caribbean	1,406	1,60
North America	302	0,73
Middle East and North Africa	416	0,41
Sub-Saharan Africa	50	0,08
Total	34,057	56,16

Source: Global Wellness Institute (2018) Global Wellness Economy Monitor. Miami: Global Wellness Institute.

The Global Wellness Institute (GWI), defines the industry of spa resorts (thermal mineral springs) as entirety of establishments making revenue from wellness, recreative and therapeutic utilisation of waters that have particular curing properties. In accordance with this definition, the estimate is that globally there are 34,057 facilities (spa resorts) disposing of thermal mineral springs in 127 countries. The estimate is that these facilities have generated revenue of USD 56,2 billion in 2017, hence employing around 1,8 million staff members. GWI makes a distinction into several regions for spa resorts and spa tourism worldwide, as follows¹⁷:

- Europe: USD 21,7 billion – revenue, 5,967 facilities;
- North America: USD 0,7 billion – revenue, 302 facilities;
- Asia-Pacific: USD 31,6 billion – revenue, 25,916 facilities;
- Latin America-Caribbean: USD 1,6 billion – revenue, 1,406 facilities;
- Sub-Saharan Africa: USD 0,08 billion – revenue, 50 facilities;
- Middle East-North Africa: USD 0,4 billion – revenue, 416 facilities.

¹⁷ Global Wellness Institute (2018) Global Wellness Economy Monitor. Miami: Global Wellness Institute.

The regional deployment of spa resorts (Table 1) is strongly concentrated in Asia-Pacific and Europe, reflecting the centuries-old history of water-based healing and relaxation in these two regions. Together, Asia-Pacific and Europe account for 95% of revenue in the spa industry and for 94% of revenue earned. These two regions are followed by Latin America-Caribbean, then Middle East-North Africa, North America, and lowest percentage of participation globally as per number of facilities and revenues is owned by Sub-Saharan Africa. GWI predicts projected average annual growth rate, for the period 2020-2025 as follows: Wellness tourism 20,9%; Thermal/mineral springs 18,1%; Spas 17,2%; Wellness real estate 16,1%; Physical activity 10,2%; Mental wellness 9,8%; Personal care & beauty 8,1%; Traditional & complementary medicine 7,1%; Healthy eating, nutrition & weight loss 5,1%; Public health, prevention & personalized medicine 5%; Workplace wellness 3,8%¹⁸.

The management of spa centers with the modern conditions of spa tourism development is of immense importance for the development of this type of tourism. The work process in spa resorts is very heterogeneous¹⁹. It combines processes of healthcare, accommodation (hotel services), restaurant services (preparing and serving food to guests), additional services. The healthcare part of the spa is performed by doctors with specialisations in the field of medicine. The spa also has medical support staff needed to perform the job successfully, as well as appropriate infrastructure and equipment. This includes the use of additional spa services. The accommodation part of the spa resorts is of immense importance, as it has to meet modern standards and should take into account the guests who may have diverse needs, that is, requirements for accommodation and movement from the hotel to the healthcare area. The restaurant part of the spa resorts is a very important element. It refers to the successful and efficient execution of works in the preparation of quality and healthy nutrition according to the needs of the guests and proper and quality serving of guests. Additional services and animation programmes and supplementary activities designed to meet the tourists' leisure time vary depending on the tourist infrastructure and human potential of the spa centers.

Thermal spas represent a developing market segment, as globally continuous growth is noted of consumers requesting to connect to nature, get to know culture traditions and follow alternative manners of improvement and restauration of health, rehabilitation, and prevention. Following these trends, arising from accelerated tempo of modern life, private investors, as well as governments of many countries have been investing in this sector. The governments in the countries with long-year traditions of using bathing facilities, promote this type of service as a key spa tourist offer. They have been investing in renovation and reopening of obsolete and previously closed-up bath resorts, as well as advancement of service standards and staff trainings, so as to meet the expectations of international tourists.

18 Global Wellness Institute (2021) *The Global Wellness Economy: Looking Beyond COVID*. Miami: Global Wellness Institute.

19 Bertolucci, M., Birkić, D. (2011) Upravljanje kvalitetom ljudskih resursa u zdravstvenom turizmu. *Acta Turistica Nova*, 5(1), pp. 1-142.

1. Material and methods

1.1. Development of spa tourism in North Macedonia

In the Republic of North Macedonia, archeologic researches show that the thermal springs for bathing purposes were initially used by the Romans, and later by the Turks, who were famous spa appreciators²⁰. It was not until the early 1920s when a more systematic approach to the problem has been undertaken (chemical analysis, medical investigations, etc.), however without actually building modern spa centers. The currently existing spas have been built during the period between 1960 and 1980 and after that, a new period of stagnation began, as a consequence of the economical and other influencing factors in the country and the whole region²¹. In the Republic of North Macedonia, according to the Law on Mineral Resources²², thermal mineral hot springs are groundwaters characterized by increased temperature (above 20 °C) and mineralization (larger than 0.5 grams per liter)². The number of thermal mineral springs in the country is over sixty, and for tourist and healthcare needs, that is, spa centers, only 8 are in use. Of them, 5 offer spa services (Debar Spas, Katlanovska Spa, Negorska Spa and Bansko Spa), and 3 do not offer any spa services (Kumanovska Spa, Kezovica Spa and Kocanska Spa). The second group includes the spa in the village of Banje (Kocanska Spa), which is currently not in function. The Kumanovska Spa works only seasonally, and Kezovica Spa works year-round.

Table 2. Review of the spa centers in North Macedonia

	Spa name	Location	Region	Water flow	Water temperature
1	Bansko	v. Bansko	South-East	40 l/sec	72°
2	Negorska	v. Negorci	South-East	1,1 l/sec	40°
3	Debar Spas	v. Banjishte	South-West	51 l/sec	38,8°
4	Kocanska	v. Kosovrasti	South-West	68,8 l/sec	48°
		v. Banje	East	65 l/sec	64°
5	Kezovica	v. Novo Selo	East	36 l/sec	64°
6	Katlanovska	v. Katlanovo	Skopje	1,5-2 l/sec	41°
7	Kumanovska	v. Proevci	North-East	2,5 l/sec	30,4°

Source: Taskov, N., Metodijeski, D., Mitreva, E. (2015) Thermal tourism in Macedonia. Saarbrucken: Lambert Academic Publishing.

20 Marinovski, N., Nestoroska, I. (2016) Balneological values in function of tourism development in the Republic of Macedonia. Tourism International Scientific Conference Vrnjačka Banja - TISC, 1(1), pp.241-257.

21 Taleska, M., Gorin, S., Radevski, I., Dimitrovska, O. (2015) Assessment of the conditions for the development of spa tourism in the Republic of Macedonia. Proceedings book: International Scientific Conference Geobalcanica, pp.487-494.

22 Law on Mineral Resources (2012) Official Gazette of RNM, No. 136.

It may be seen from the table 2, that most of the spa centers (5) in the Republic of North Macedonia, are located in the eastern part of the country, two are located in the western part and one in the central part. The regional distribution of hotels offering spa services in the Republic of North Macedonia is as follows²³: Skopje Region 11, South-West Region 6, East Region 4, Polog Region 3, Pelagonija, South-East and Vardar Region 2 each, and North-East 1 hotel offering spa services. In total, there are 31 hotels in the country offering spa services. In addition to hotels offering spa services, there are specialised facilities in the country with built-in infrastructure and purpose-built spa services such as: Endomak, Silhouette, Aseana Royal Spa, Babor Beauty Spa, Bliss Beauty Centre & Spa, Dior Spa, Aura Spa & Beauty Centre, Sky Wellness as part of Cevahir Sky City, Synergy Fitness & Spa and others.

Table 3. Illness which are healed by waters in the spa centers in North Macedonia

	Bansko	Katlanovska	Kezovica	Negorska	Kumanovska	Kocanska	Debar Spas
Nerve illnesses	√	√	√	√	√	√	√
Rheumatism	√	√	√	√		√	
Diabetes			√		√		√
Allergies and skin infections		√	√				√
Kidney and urinary tract illnesses		√			√	√	√
Breathing tract illnesses		√		√		√	√
Inflammation of gallbladder				√	√	√	√
Gynecological illnesses	√	√	√	√		√	√
Bronchitis	√		√	√			
Cardiovascular illnesses		√		√			
Digestion tract illnesses	√	√		√	√	√	√

Source: Taskov, N., Metodijeski, D., Mitreva, E. (2015) Thermal tourism in Macedonia. Saarbrücken: Lambert Academic Publishing.

One of the primary motives for visiting the spa centers by tourists is the healing effect of the water. Thermal water is used to treat in several ways: by bathing, drinking, inhalation and mud coating. Researches has shown, that spas in Republic of North Macedonia, treat various diseases due to higher

²³ Metodijeski, D., Filiposki, O., Todorovic, E., Taleska, M., Michev, G., Dimovski, C., Taskov, N., Dzambazovski, K., Cuculeski, N., Micevski, M. (2019) Study on spa tourism in the Republic of North Macedonia. Skopje: Ministry of Economy.

levels of minerals. Table 3 is listing some of the diseases that can be treated in most spas in the country.

1.2. Methodology

The subject of this paper is the analysis of spa tourism offer in North Macedonia. The paper presents review of relevant literature concerning spa tourism and spa tourism offer in the country. For the purpose of the paper, a research methodology and secondary data sources have been used by consulting literature, studies, statistical data and official web pages of the spa centers in North Macedonia. An analysis and review of spa tourism in North Macedonia has been made, based on a systematic evaluation of the current content of spa tourism offer using methodology of content analysis²⁴. The main source of secondary information and data used in this research is Study on spa tourism in Republic of North Macedonia²⁵. Also, the data collected from the State statistical office (MakStat database, Tourism and catering trade), are used to prepare tables showing: accommodation capacities in the spa centers, arrivals of tourists and overnight stays in the spa centers in North Macedonia for the period 2017-2021. Primary sources of information for the purposes of this paper were collected by conducting non-formal and non-structured interviews with managers of spa centers in the country.

2. Results and discussion

2.1. Statistical data related to tourism in spa centers

Statistical data related to tourism in spa centers will be presented through the arrivals and overnight stays of tourists in spa resorts. The volume and structure of tourism frequency best reflect the developmental dimension of spa tourism in the country. For the purpose of the paper, accommodation capacities in the spa centers in North Macedonia are also significant part of the research.

Table 4. Accommodation capacities in the spa centers in North Macedonia (2017-2021)

	Rooms	Beds
2017	529	1,267
2018	242	518
2019	242	518
2020	242	518
2021	244	518

Source: MakStat database, Tourism and catering trade.

24 Ritchie, B., Burns, P., Palmer, C. (2005) *Tourism research methods: Integrating theory with practice*. Oxfordshire: CAB International.

25 Metodijeski, D., Filiposki, O., Todorovic, E., Taleska, M., Michev, G., Dimovski, C., Taskov, N., Dzambazovski, K., Cuculeski, N., Micevski, M. (2019) *Study on spa tourism in the Republic of North Macedonia*. Skopje: Ministry of Economy.

Table 4 shows the accommodation capacity of the spa centers in the country. It can be noticed that in the period 2018-2021 there is no change in the number of rooms and beds in spa centers. In the period 2017-2018, there is a decrease in accommodation capacity of the spa centers by more than 50%, due to the closure of part of the spa centers.

Table 5. Arrivals of tourists in spa resorts in the spa centers in North Macedonia (2017-2021)

	2017	2018	2019	2020	2021
Total for spa resorts	32,189	31,244	11,254	5,513	7,524
Domestic tourists	28,227	26,778	10,165	4,701	6,791
International tourists	3,962	4,466	1,089	812	733

Source: MakStat database, Tourism and catering trade.

Table 5 shows that in the analyzed period from 2017 to 2021, the number of tourists in the spa centers in the country is steadily decreasing. Factors leading to this condition in the period 2020-2021 is COVOD-19 pandemic, and other factors are the lack of long-term strategy for development of spa tourism, insignificant investments in spa resorts, poor promotion and so on. It can also be seen from the table 5, that biggest number of tourists who visit spa centers are domestic, and only small amount are international tourists, which means that steps should be taken in the future to improve the quality of services in the spa resorts and expand their assortment, as well as devise a promotional strategy to attract international tourists.

Table 6. Overnight stays in the spa centers in North Macedonia (2017-2021)

	2017	2018	2019	2020	2021
Total for spa resorts	245,074	237,551	98,435	49,113	75,482
Domestic tourists	217,064	206,804	86,515	36,798	66,086
International tourists	28,010	30,747	11,920	12,315	9,396

Source: MakStat database, Tourism and catering trade.

Table 6 shows the number of overnight stays in the spa centers. Data shows that the number of overnight stays in the spa centers in the country is steadily decreasing. Factors leading to this condition in the period 2020-2021 is COVOD-19 pandemic, and other factors are mentioned concerning number of tourists. As we mentioned earlier, spa centers and tourism policy makers in the country need to take serious steps to improve the tourist offer in the spa resorts and promote it both, in the domestic and international tourism markets.

Conclusion

Spa tourism implies visit and stay into specialized facilities offering opportunities for healing and relaxation, by using thermal water. The number

of thermal mineral springs in the North Macedonia is over sixty, and for tourist and healthcare needs, that is, spa centers, only 8 are in use. For the needs of this paper, considering the global methodologies, the spa centers in North Macedonia are divided into two basic groups: spa centers offering spa services, and spa centers not offering spa services. The first group includes the spa centers: Bansko spa, Debar Spas, Katlanovska spa and Negorska spa. The second group includes the following spas: Kezovica, Kumanovska and Kocanska spa.

Within the National Strategy on Tourism Development, the following analyses on the spa centers was made²⁶:

- At the moment, the spa destinations around the mineral hot springs consist of accommodation facilities, such as hospitals with medical treatment space.

- The visitors of such resorts are mainly Macedonians, or Macedonians living abroad, with a specific disease, who wish to improve their health condition.

- The several hot springs used at the moment in the Republic of North Macedonia due to health purposes – are mainly located in the North-East and South-East region.

- In the majority cases, several accommodation units were constructed around the hot springs for medical treatments.

- Same as many other European spa destinations in the 1980s, the focus of the North Macedonian spa destinations is exclusively intended for medical treatments of people with specific diseases.

- There is a limited number of spa and wellness products offered in the majority of these spa destinations (excluding Debar spas).

Taking into consideration the natural potentials of the country for development of spa tourism, it is necessary that the state, as well as all interested parties undertake urgent measures for creation of quality development strategy for spa tourism, on the basis of which they would attract capital and other investments and would create a spa tourist product that would present the country in the international tourism market.

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²⁶ Koll & Partner (2016) *National Tourism Development Strategy of the Republic of Macedonia, 2016-2021*. Skopje: Ministry of Economy.

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