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REPOSITIONING OF THERMAL SPA TOURISM OF NORTH-WEST CROATIA IN ACCORDANCE WITH THE EUROPEAN THERMAL SPA TOURISM TRENDS

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Abstract: Tourism represents an important originator of economic activities in Croatia, particularly in its seaside destinations. However, it is developed quite unevenly. The overall Croatian territory can be divided into three different natural and geographic regions, with different levels in tourism development: lowland or Pannonian and peripannonian Croatia, highland Croatia, and seaside Croatia.

From the tourism development point of view, lowland and highland Croatia have been neglected, and therefore their comparative advantages have not been used to their advantage or not used at all because of the lack of interest in local inhabitants and poorly educated economists.

Thermal spa tourism of North-West Croatia has been developing for a long time, so nowadays thermal sources of Krapinske, Stubicke, Tuheljske, Varazdinske, and Sutinske spas are situated in the area. All those thermal spas have natural prerogatives for tourism development, but their tourism product is outworn and has lost its quality and attraction it had in the past. Therefore the repositioning of tourism product of the area is necessary in order to make it desirable in the tourist markets of both Croatia and Europe.

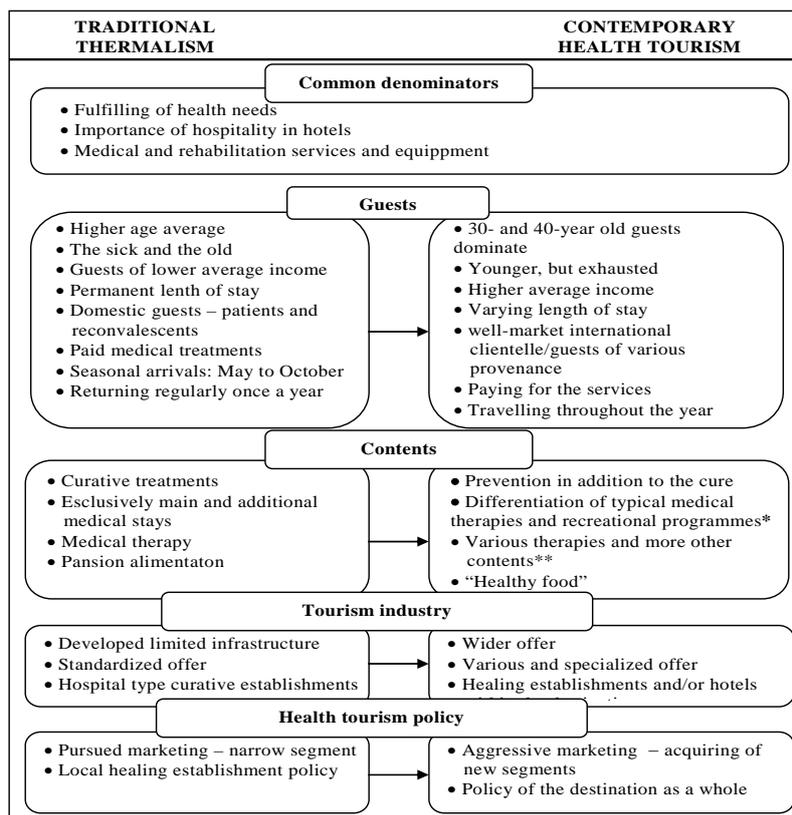
Key words: thermal spa tourism, Croatia, repositioning, Europe.

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1. EUROPEAN THERMAL SPA TRENDS

Following the European tradition, particularly from the first half of the 20th century, thermal spa tourism has been developing in conjunction with the overall social development. As the result of constant changes in demand, tourism is undergoing constant changes too, the main trends being: increase in tourism consumption, increasing number of shorter vacations instead of one long vacation, and attractiveness of senior age clientele with higher payment possibilities. Tourists are spending even more on their vacations, with growing consumption within the place of stay and diminishing accommodating and travelling costs. Considerable trend in deciding on several vacations instead of the unique longer one spent in one place is noticeable, particularly in highly developed countries. (Trendovi u turizmu, [http://www.dugirat.com], 18.03.2009.). Such tourism trends are reflected in particular selective tourism forms, and consequently in thermal spa tourism as well. The thermal spa tourism trend is reflecting the trend in shifting from the traditional thermalism towards the modern, complete, and complex health and recreation tourism (Figure 1).

Figure 1. Traditional and contemporary health tourism concept



*Recreational programmes can be: manager programmes, active recreation, prevention of stress, etc.

** Along with the medical, thalassotherapy, etc., sports, entertainment, congress and various other contents are offered during the stay in medical destinationi.

Source: Razvojno–marketinski plan turizma Opatijske rivijere (2002), Zagreb: Institut za turizam.

Dynamic growth in thermal spa tourism can be observed. The annual growth by 8-10% in this particular tourism segment (Canadian Ministry of Tourism) can be noticed throughout the world. According to the World Tourism Organization estimate, thermal spa tourism is predictably the most important occupation of the 21st century. Dynamic growth in thermal spa tourism is registered in all European countries. More than thousand thermal spas can be found in Europe, spread in almost all countries (with exception of Scandinavian and Baltic countries, this number includes the countries of the European continent and the Mediterranean), with innumerable contents and specific programs for various pursued groups of visitors, and various lengths of and reasons for their stays in spas (European Spa Industry, [<http://www.visiteuropeanspas.com/>], 14.05.2009.).

The most visited destinations are in Germany, Italy, France, Austria, Switzerland, Czech republic, Slovakia, Hungary, Slovenia, Finland, Romania, and Turkey. There are approx. 900 spa resorts in Germany alone (including mineral and mud spas, climate health resorts (known for fresh air), sea-side resorts, and Kneipp hydrotherapy spa resorts). Approx. 320 thermal spas are registered (Panic Kombol 1999, 149), the most famous among them being Baden Baden with its hot mineral spring, with its founding recorded in the 18th and 19th centuries, when it was visited by European royalty and aristocracy (Spa Resorts in Germany, [<http://spas.about.com/>], 04.05.2009.).

The importance of German thermal spa resorts is noticeable in the fact of approx. 40% of tourism overnight stays realized in thermal spas alone. Up to 3-4 % of Germans spend their vacations in thermal spas and make use of the thermal services (Augé 1995, 68). 261 health spas are registered in France (Bucar Peric 2002, 123), the most famous one in year 2008 being Evian Royal Resort, spreading over 19 ha near thermal springs on Lake Geneva (Favorite Spa in France, [<http://www.spafinder.com/>], 4.05.2009.).

Switzerland, geographically positioned in the Alps, with its widely spread health services network and rich in mineral waters, is known as one of the “healthiest” countries of the world. Natural resources form the prerogatives for the development of numerous thermal spas. Some of the well-known spa destinations in Switzerland are Adelboden, Apenzellerland, Engadine/Scuol, Valais/Leukerbad i Weggis/Lake Lucerne (Spa and Wellness in Switzerland, [<http://www.tsitours.com/>], 17. 04.2009.).

More than one hundred resorts in Austria tied up their offer to the available thermal waters. The leading Austrian spa destinations are: Wienerwald (Baden), St. Kathrine in the Bath, and others (The Spas of Austria, [<http://www.traveldailynews.com/>], 11.05.2009.). Austrian Alpine spas have extensive hot, cold and wet areas, some with five different types of saunas, crystal or salt grottos and indoor/outdoor swimming pools. Hungary is the country of thermal spa sources (approx. 1.500), for which it is named “Land of Spas”. Approx. one half of the overall thermal sources are used for thermal spas. Approx. 450 public baths exist within the Hungarian territory today, which are, according to the contemporary trends, introducing new contents within their offer (Hungary (Magyarország) – spa resorts & hotels, [<http://www.visiteuropeanspas.com/>], (4.05.2009.).

The largest number of thermal spa baths is situated in Budapest (approx. 80), which has tradition in thermal spa tourism longer than 2000 years. The thermal spas and the spa tourism play an important role in the Hungarian tourism. A large number of bathing establishments are registered as historical sights which, due to their specific atmosphere, healing medical waters, medical services, and their attractiveness, attract tourists from the whole world. The most famous and the most important thermal destination is Héviz, situated 6 km from Lake Balaton (Héviz is largest biologically active natural thermal lake in the world). Slovenian thermal spa tradition also descend from the Roman Empire, but the largest number of spas was beginning to develop in the New Era. 15 thermal spa destinations are registered today (thermal healing places), almost all of them situated in the Eastern part of the state (Bucar Peric 2002, 125). The most important spa resorts are: Terme Olimpia, Terme Rogaska, etc.

Based on classic and traditional therapy programs, thermal spas, as key European tourism centers continually implement new, alternative, and modern trends, including Indian, Chinese, and Oriental therapeutic methods. Cure is replaced by prevention, with recreation, sports, entertainment, congress, and other contents added to the basic and traditionally present medical care. Various offers, like water parks, beauty centers, etc. are even more often included in thermal spa offers nowadays. Thermal spas are not the places visited by "old and sick" any more. They represent busy tourism destinations, visited by both young and older population, individuals, families with children, even becoming convenient places to organize conferences and congresses. Along with the basic multi-week stay, short stays are becoming even more frequent. The length of tourist stays in thermal spa tourism is determined by their individual needs. Beside the primarily medically preventive services, the orientation towards "week-end" visitors is even more pronounced. The potential service users in thermal spa tourism are offered special package arrangements (Razvojno-marketinski plan turizma Opatijske rivijere 2002, 46).

The European Waterpark Association (EWA) exists nowadays in Europe. Waterpark tourism offer is based on thermal waters, emphasizing resting and entertaining component rather than medical. Their offer is mostly thematic (tropical setting, water toboggan, underwater massage). The largest number of such parks is registered in Germany (51).

Consequently, European spa centers combine health and beauty care, resting and recreation as their basic offers and an important segment of tourism movements and needs of the contemporary individuals.

2. THE CONDITION OF NORTH-WEST CROATIA THERMAL SPA TOURISM

Although the combination of rest and medical impacts has been practiced in thermal spas of Croatia for over two thousand years, the contemporary thermal spa development in North-West Croatia can be followed only from the second half of the 19th century. At that period the thermal spa popularity was spread by publications made known by doctors, elaborating on their healing effects. The most famous thermal spas in the North-West area of Croatia at the beginning of the 20th century were Varazdinske spa

(Varazdinske toplice), which entertained a large number of foreign guests. Along with the Roman thermae the modern thermal spas were developing, with their medical healing tradition lasting uninterruptedly until today.

2.1. Analysis of the North-West Croatia thermal spa tourism offer

Tourism started to develop early in the area of North-West Croatia, but because of political and insufficiently stimulating economic reasons, the elements forming the tourism product were not following the contemporary European and the world developing flows in thermal spa tourism, so the tourism product entered the phase of obsolescence and lost its former significance. Therefore the present condition must be analyzed in order to realize the comparative advantages and comprehend the tourism product which will make the North-West area of Croatia competitive within the tourism market.

Most of the thermal sources are situated in North-West Croatia (Termalni izvori, [<http://www.vz.hgk.hr>], 11.05.2009.): Harina Zlaka (32,8°C), source near Marija Bistrica (17,8°C), Jezercica by Donja Stubica (38°C), Krapinske spas (Krapinske toplice) (40,8°C, thermal well 60°C), Krizevci (65°C), the source of Podevcevo (16,4°C), Stubicke spas (Stubicke toplice) (49,8-57,2°C), Sutinske spas (Sutinske toplice) (37,4°C), Semnicke spas (Semnicke toplice) (31°C), Toplicica nearby Gotalovac (27,4°C), Toplicica by Madjarevo (22°C), Tuheljske spas (Tuheljske toplice) (33,1°C, thermal well 33°C), Varazdinske spas (Varazdinske toplice) (57,6°C), Zelina (24,1°C), Lunkovec (140°C), Vuckovec (40°C), Merhatovec (120°C), which form the good developing base of thermal spa tourism.

Thermal and mineral water sources form the base for the medical offer of North-West Croatia. Quality medical employees, contemporary diagnostic equipment, quality and well-organized programs form the thermal spa health offer. Within the long-lasting spa tourism tradition connected to the thermal spa medical role, investments were made into education of employees, in accentuating medical employees, while at the same time no adequate attention was devoted to the education of personnel supplying tourism services. In distinction from the personnel, the thermal spa tourism infrastructure was neglected, and there were no significant investments in accommodating and recreational facilities for a long time. However, efforts were made in modernization of the preventing, healing, and rehabilitation equipment, as well as in organizing various programs which follow the needs of contemporary individuals.

All North-West Croatia thermal spas have organized medical programs, with the only distinction of Varazdinske, Krapinske, and Stubicke spas mostly oriented towards healing and rehabilitation of patients, while Tuheljske spas oriented towards medical prevention. A lot of importance is paid to the medical prevention programs in Varazdinske, Krapinske, and Stubicke spas.

Along with the natural resources, the important development factor of thermal spa tourism is formed of direct tourism resources: (Cetinski 2000, 260): receptive component (accommodation and alimentation) and environment component consisting in tourism out-pansion offer (catering objects (regional cuisine, special offers)), excursion resorts (tourism rural estates, wine cellars), cultural offer (museums, galleries, libraries, etc.), sports objects, entertainment centers, shops, services). Medical and tourism offer

consists of new contents included within wellness tourism, like “wellness centers”, “beauty farms”, “gesundheistfarme”.

North-West Croatia disposes of poor accommodating offer, both in quality and quantity. Accommodating offer mostly consists of basic capacities – three star hotels with the total capacity of 3.135 beds (in 2005), and the small range of complementary capacities – mostly private accommodation rooms, in the total capacity of 167 beds. Most of those accommodating capacities are situated within thermal spa destinations – in Varazdinske, Krapinske, Tuheljske, and Stubicke spas. Beside in those destinations, considerable accommodating objects are available only in the towns of Varazdin, Kapina, and Marija Bistrica. Restored hotels are oriented towards wellness offers (the Terme Tuhelj hotel).

Table 1. Accommodating capacities of the North-West Croatia thermal spas

	Number of beds
Varazdinske spas – Special hospital for medical rehabilitation	973
Objects:	
Stari Grad	6
Konstantinov dom	195
Lovrina kupelj	117
Terme	214
Minerva	441
Krapinske spas	
Objects: hotel Aquae Vivae	245
Stubicke spas	
hotel “Matija Gubec”	220
Special hospital	
objects: Maksimilijan, Toplice i Dijana (63 beds)	340
Termae Jezercice	
Object: hotel “Terme Jezercice”	108
Tuhelj spas	
object: hotel “Terme Tuhelj”, 3 stars	231

Source: The authors.

Catering offer consists of 55 restaurants, 13 coffee-shops, 17 night-clubs and discotheques, and a large number of coffee bars, inns, and taverns. When comprehending the overall catering offer of the area, the conclusion can be drawn, with several exceptions only (the restaurants “Slamnati krovovi”, “Zelenjak”, “Dvorac Mihanovic”, “Presa”, “Zlatne gorice”, “Zlatna guska”, “Beli konj”, “Kneginecka hiza”), of the monotonous and gastronomically non-inventive catering offer. The offer is somewhat improved by the even stronger orientation towards rural tourism with its offer of traditional home-made specialties (i.e. “purica s mlincima”, “zagorski strukli” i dr.) and the top-level game specialties. However, the lack of well-organized gastronomic offer capable of fulfilling the needs of particular medical tourism segments (vegetarian menu, “healthy food” menu, etc.) is noticeable.

Tied to the thermal spas is also the sports and recreational offer. It mostly deals with recreational contents related to thermal water swimming pools, which in most cases fall behind the contemporary concept of “attraction pool” building, characterized by various contents (i.e. toboggans, waves, “jacuzzi”, waterfalls, etc.).

Within accommodating objects tourists have on their disposal various contents, like trim-cabinets and fitness, bowling alleys, shooting ranges, table tennis, tennis courts, volleyball and handball grounds, and mini-golf. Apart from thermal spas, sports and recreational contents can be found in rural households as well, which try to expand their offer. A large number of mountain trails is also offered, part of them well-arranged and adequately marked, and others unadjusted and still waiting to be put in order. In spite of everything stated, poor and insufficient sports and recreational contents are still present, and investments into their building and organizing should be made in order to satisfy even the most demanding guests.

The thermal spa tourism offer is completed with various entertainment contents organized within the destination (Spancirfest in Varazdin, International lace festival in Lepoglava, Krapina festival in Krapina, etc.). Thermal spas are orienting towards congress offer as well, with considerably large capacities in congress halls. The area of North-West Croatia has approx. 1.100 sitting places in congress halls of Varazdin, Krapina, Stubicke spas, Varazdinske spas, Krapinske spas and Tuheljske spas and in Jezercica Thermae, with potential in congress tourism development in Kumrovec, within the "Kumrovec memorial park" (Strateski marketinski plan turizma za zupaniju Krapinsko-zagorsku, 1996, 14-15).

With its poor offer, the thermal spa tourism of North-West Croatia dissatisfies completely or satisfies to a smaller extent the tourists' needs, and suffers the consequences of the long-lasting falling behind the similar European destinations. Thermal spa resources are by no means put to profitable use, and thermal spa capacities are too small. Implementation of new contents suitable for contemporary trends of European thermal spa tourism is significant in renovated thermal spas.

2.2. Analysis of tourism demand in thermal spa tourism of North-West Croatia

Medical tourism demand is before all formed by healthy persons, and after that by individuals with particular chronic difficulties; the latter are mostly persons with damaged locomotive system, particular heart and blood vessel diseases, respiratory organ diseases, specific skin diseases and allergies, and gastroenterologic problems (Pancic Kombol 2000, 153). In year 2008 thermal baths of Croatia had 1.2 million visitors, an increase by 14.1% in relation to the year 2006, or approx. by 4.7% annually (Tab. 6).

In the county Krapinsko-zagorska, which had 6 thermal baths functioning in 2008 and participated with 55% in the total number of thermal baths of Republic of Croatia, more than 40% of the total number of thermal bath visitors was effectuated. Together with the county Varazdinska, it has a share of approx. 49% of the total thermal bath visitor number for the Republic of Croatia (Priopćenja važnijih turističkih znamenitosti i atrakcija, [<http://www.mint.hr>], 09.05.2009.). For the county Krapinsko-zagorska, the growth in the number of visitors by 17,8 % is perceptible.

Surveys undertaken in the area of North-West Croatia thermal spas during September, October, and November of years 2004 and 2005 comprehended the guests in

Varazdinske spas, Stubicke spas, Krapinske spas and Tuheljske spas. The surveys were undertaken on the sample of 230 questionnaires for the year 2004, and on 255 questionnaires for the year 2005 (Fister 2007). The aim of the research was to obtain the socio-demographic profile of guests, the characteristics of their voyages, and the level of guests' satisfaction in North-West Croatia thermal spas. Basic instruments for data gathering were the questionnaires printed in two different languages (Croatian and German). Casually selected tourists and hotel guests were interviewed.

Table 2. Thermal bath visitors in the Republic of Croatia by counties

	2006	2007	2008
Krapinsko-zagorska county	429,037	510,810	505,445
Sisacko-moslavacka county	130,409	157,058	144,859
Varazdinska county	95,334	83,587	78,343
Bjelovarsko-bilogorska county	77,416	70,672	67,578
Osjecko-baranjska county	229,149	225,147	210,310
Istarska county	9,824	13,081	14,708
Medjimurska county	84,237	114,757	182,450
	1,055,406	1,175,112	1,203,693

Source: Information gathered from important tourist sights and attractions, <http://www.mint.hr> (11.04.2009.)

The survey result indicate the North-West Croatia thermal spas are mostly visited by older age group tourists (56 years of age and more), by 56% (by 48,6 % within the overall tourist number). Within the tourist gender structure, women prevail (by 52,6 % in year 2004, and by 52,2% in year 2005). Most of the domestic guests arrive to the North-West Croatia thermal spas individually (56,1 %), while foreign tourist practice organized arrivals. The arrivals to thermal spas are mostly undertaken by proper vehicle (58,8 %). Tourists' stays in thermal spas last 8 to 10 days on average. However, younger age group guests practice shorter stays (1 to 3 days).

In spite of low quality service level in North-West Croatia thermal spas, guests express their satisfaction with the expected services, and financial means invested lately into service quality resulted in the growing number of tourist arrivals.

3. REPOSITIONING OF THERMAL SPA TOURISM OF NORTH-WEST CROATIA

Quality development indicators of thermal spa tourism for the area of North-West Croatia can be sublimated by SWOT analysis (figure 2) and by guests' preferences. The main motive of tourists' arrivals are the medical reasons, followed by rest and recreation (Table 3.).

Table 3. The motives of tourist arrivals to the North-West Croatia thermal spas

Motive	2004 (in %)	2005 (in %)
Medical reasons	30.0	29.8
Rest and recreation	29.6	31.2
Natural beauties	12.0	13.3
Proximity of the destination	8.0	7.3
Cultural sights	8.0	3.9
Business obligations	5.2	7.2
Other motives	2.8	1.6
Entertainment	2.4	1.4
Sports	2.0	4.3

Source: Authors' research

The largest number of tourist retain the North-West Croatia thermal spa offer satisfactory and in accordance with their expectations. The elements marked by average grades are: personal security, accommodating comfort, ecologic preservation, climate and weather, hospitality of local inhabitants, and place neatness. Tourists are particularly satisfied by cordiality of personnel in accommodating objects and by medical services quality, while they find insufficient cultural offer, offer in organized excursions and entertainment offer.

Figure 2. SWOT analysis of North-West Croatia thermal spa tourism

<p>Strengths:</p> <ul style="list-style-type: none"> • richness in thermal and mineral sources • favourable natural and geographical conditions (climate, vegetation) • proximity of emissive markets • cultural heritage • tradition of thermalism and quality medical personnel 	<p>Weaknesses:</p> <ul style="list-style-type: none"> • old-fashioned product • obsolete concept of accommodating offer and the overall tourism infrastructure • thermal spa identity crisis: hospital-healing or preventive-recreation concept • falling behind the competition • insufficient marketing, non-organized and passive promotion and sale • low level in cooperation between hospital and other tourism offer potentials
<p>Opportunities:</p> <ul style="list-style-type: none"> • finishing of Croatian thermal spas privatization process • investments into infrastructure • growing segment in tourism demand for thermal spa services • further improving of traffic infrastructure • constant improving of integral quality • year-round tourism managing • sustainable development 	<p>Threats:</p> <ul style="list-style-type: none"> • growth in competitiveness • competitiveness of thermal spa destinations in immediate proximity (Austria, Hungary) • vague tourism policy towards thermal spa tourism • limited capital access • world recession, weaker purchasing power

Source: Authors' research

When the strengths are affirmed, the weaknesses limited, the opportunities valorized, and the threats minimized, the prerogatives can be formed for the creation of competitive position of thermal spa tourism in the foreign market.

Medically elaborated programs offered in thermal spa tourism of North-West Croatia are highly attractive, but no high competitiveness can be obtained within the segment of medical tourism of Croatia. Within the medical tourism service market, wellness and spa have particularly significant places. However, particularly weak competitiveness of Croatia is shown within this particular segment of medical tourism, although some changes in wellness and spa service development can be noticed recently. Thermal spas which tend to become competitive in both domestic and foreign markets, invest large financial means in their offer enlargement, particularly in wellness and spa service segments. Into the Tuhelj Thermae, which from 2003 form part of the Slovenian Olimpia Thermae and have the largest wellness center in this part of Europe, more than EUR 15 million were invested. In the next three years half a billion of kuna should be invested into the medical tourism of the Stubicke therms by the Sunce Concern, the private partner of the county Krapinsko-zagorska. Building of luxury class hotel, restaurant, sports center and polyclinics is planned (Kontinentalni turizam novi adut u turistickoj ponudi, [<http://www.pazin.info>], 3.03.2009.).

From the aspect of its thermal tourism, North-West Croatia is positioned as the curative destination, with dominant medically programmed services. Although it represents a great attraction within this segment of medical tourism, it nevertheless cannot obtain competitiveness within the foreign market. This is indicated by facts according to which most of the tourist arrivals and stays in Croatian medical spas are obtained by domestic tourists (57,5 % of tourist arrivals and 63,6 % of tourist stays for the year 2008) (Priopcenje, Turizam – kumulativni podaci, [<http://www.dzs.hr>], 11.05.2009.).

The thermal spa product is directed towards older population with health problems. Changes appearing within the segment of thermal spa tourism in the area of North-West Croatia indicate the necessary repositioning of thermal spa tourism in the potential tourist's perception. The product must be formed according to the thermal spa tourism market trends, stressing the wellness contents. The already existing products must necessarily be improved in quality and adopted to the requests of tourism demand, and such thermal spa tourism modalities must be developed by which the market competitiveness can be obtained. Such well-proportioned product must be necessarily directed towards the pursued groups of tourists. With offer differencing the impact on various pursued groups can be obtained and thus the demand enlarged for thermal spa tourism services. Priorities of activities in repositioning the tourism product of North-West Croatia within the tourism market are the following:

- Defining the plan of actions for enlarging the physical turnover for the already existing tourism supra-structure in thermal spas,
- Enlargement in average consumption of all thermal spa visitors, to the level obtained by thermal spas in neighbouring, competitive countries,

- Operational marketing plan in order to contribute to the comeback of North-West Croatia thermal spa tourism product to the tourism market and to occupy the place it deserves.

Main strategies for the repositioning of North-West Croatia thermal spa tourism product must derive from the basic values of natural and social resources' balance, accentuating the traditional values, the quality of tourism and medical personnel, and high thermal water quality. The basic goals must be the following:

1. Innovative thermal spa offers based on health prevention, rest, entertainment, trends implemented from the European market and accentuating the autochthonous values, socio-cultural dimension, and sustainable development.
2. Building of recognizable identity which can associate with North-West Croatia thermal spa preferences and their repositioning within the perception of potential tourists as the destination suitable for contemporary tourists' needs.

Without the complete valorization of the already existing natural sources and the corresponding organizational and personnel thermal spa destination profiling, the thermal spa tourism undoubtedly cannot count on positive trends in the future. Re-conception of thermal spa managing must be based on new relation towards tourists, and on enlargement and diversification of the tourism offer.

The contemporary tourism development particularly stresses the prevention program offer, which will primarily ensure the active participation of tourism in program of quality free time use, stressing the health preservation and/or invigoration, implementation of various pursued program demanded by the market, which obtain even more preferences of up to now highly accentuated rehabilitation and recuperation programs, and of the pursued medical programs (Persic 2000, 39).

The product must be oriented towards the new segment in tourism demand, accentuating the younger population and families with children. Effective thermal spa tourism development in North-West Croatia implements the acceptance of contemporary trends (not only declaratively), along with the stimulation of personality and recognition. The development must be based on the valorization of competitive advantages, autochthonous values, differential offer, original contents, quality improving offer, and sustainable development.

CONCLUSION

The long-lasting tourism tradition representing the result of a number of quality thermal water sources in the area of North-West Croatia has been attracting visitors from ancient times. Two essential motives brought to the tourists' visits to the thermal spa resources of North-West Croatia: medical reasons and sports and recreation. Most of the tourists visit the spas accompanied by a partner, coming either by personal vehicle or by bus, with their stays lasting from 8 up to 14 days. Longer

stays in the thermal spas of North-West Croatia demand a high-quality and better organized offer, in order to fulfill all the wishes and the needs of their visitors. Such a situation demands the shaping of North-West Croatia thermal spa tourism offer in accordance with the trends existing in the tourism market, and its repositioning within the perception of tourists as an attractive tourism destination. Moreover, in order to prevail all the existing shortcomings, to accentuate its advantages, and make the most of the possibilities for the development of tourism in North-West Croatia, the described situation must be objectively considered. The spa offer, as an essential positioning factor, must be adequate and suitable for the immediate market objective.

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