

ANALYSIS OF HEALTH TOURISM IN SLOVENIA

Malči Grivec¹;

Abstract

Tourism is becoming an increasingly important sector of the economy. In Slovenia, a specific place in this area is represented by the natural health resorts. In 2013, the health resorts created as much as 47.7% of the total revenue of Slovenia's hotel industry. A lot of funding has been invested into modernisation of the health resorts' infrastructure and new services, since the providers are aware that this is a product for which a growing demand is expected. Wellness tourism is the fastest growing form of tourism and represents a strong trend in the lifestyle, namely, it accounts for about 6 % of all travels and 14% of all expenditures. At the same time, wellness tourism encourages the preservation of traditional, cultural and natural heritage. In the article we are trying to demonstrate the development of health tourism in Slovenia, along with the fact that the economic crisis has also affected this segment of the economy. The data analysis has revealed that the number of domestic tourists and their overnight stays has been significantly reduced. The mentioned reduction has definitely been influenced by the aggravation of conditions of the health insurance companies for the area of concession health care, as the healthcare activity in individual health resorts represents an important part of the revenue.

Keywords: *tourist offer, natural health resorts, wellness tourism, health care, lifestyle, Slovenia.*

Introduction

Although tourism is not a new phenomenon, it's been gaining increased attention recently. The fact is that in developed economies tourism represents an important share in the gross domestic product, whereby new and new types of tourism appear. We can say that tourism is an activity, which has impact on the development of economic activity, and expands

¹ Malči Grivec, MSc, School of Business and Management Novo mesto, Na Loko 2, 8000 Novo mesto, +386 7 393 00 30, malci.grivec@guest.arnes.si

and alters the structure of production and consumption, and also significantly influences the cultural environment of destinations and the environments tourists come from. Tourism is equally an economic, sociologic, psychologic, cultural and environmental phenomenon, and we need to keep in mind all these dimensions when studying tourism, and even more so when developing new services. This also applies to health resorts, with the offer of wellness services in Slovenia representing one of the most important tourist products of tourism.

The Concept of Tourism

Tourism is not a new phenomenon, and traveling has been known since the period of nomadic tribes. Still, the concept of tourist and tourism appeared about 200 years ago (Vorina, 2012, p. 8).

Even today we can see the traces of different definitions of the concept of tourism, which is a result of two basic features of tourism – multidimensionality and multidisciplinarity of the tourism system, which reflects in the methods and approaches to the study and understanding of tourism. But mainly, the definition of tourism today is based on the definition of the World Tourism Organization (Gojčič, 2005, p. 81).

Thus, the concept of tourism refers to all activities of people, which are directed at traveling and staying in places, which are not their main or permanent residence, to relax, for business reasons or for any other purpose (Maravić&Juvan, 2009, p. 3).

But we have to be aware that it's not only about the location, it's also about a whole set of services, which represent a whole to a tourist. Grlica (2009, p. 841) emphasizes that a tourism product is made up of five components, which impact the satisfaction or dissatisfaction of a tourist in order to generate value for that tourist: location, capacity (accommodation, food, recreation, etc.), destination reputation, price, and method of provision of services. Which of those will prevail in the decision as well as in the satisfaction of an individual guest, also depends on the reasons for traveling. With regard to different purposes of travelling, tourism is often classified to different types or forms.

Picture 1: Classification of tourism with an emphasis on spa tourism



Source: Gojčič, S., (2005). *Wellness: zdrav način življenja: nova zvrst turizma*. Ljubljana: GV Založba, p. 102.

As can be seen from the above diagram, the distinction between wellness tourism and health tourism is unclear, so it is no surprise that wellness holidays are often associated with health tourism. But note, there is a difference between both groups of tourists as regards their motives in decision-making. Gojčič (2012a, p. 75) argues that the motive of tourists is the one element, which separates individual types of tourism. These motives are given in the table below.

We can say that health tourism appears in various forms and as such plays an important role in good physical and mental state of health of an individual (Conell, 2013, p. 42).

In order to further study the trend in spa tourism in Slovenia it makes sense to examine in more detail the very concept of spa tourism.

Table 1: Classification factors of health prevention tourism – health promotion and treatment/rehabilitation

Classification factor	Health promotion	Rehabilitation – treatment
Tourists	Healthy	Ill
Motives	Health promotion, primary prevention	Treatment, alleviation and soothing of pain, secondary and tertiary prevention
Goals	Exercise, food, relaxation, mental activity	Doctor defines patient's goals
Offer	Exercise, food, mental activities	Focus on medical care
Decisions	Self-initiative, voluntariness	Doctor's opinion
Length of stay	Often at weekends, 1-2 weeks	Usually 3 weeks at least
Financing	Mainly private patients or partial supplementary insurance	Mostly on the basis of basic or supplementary insurance

Source: Gojčič, S., (2012a). *Trendi v velneškem in ekološkem turizmu. Celje: Fakulteta za komercialne in poslovne vede, p. 75-76.*

Spa Tourism

Spa tourism, which arises from the provision of natural thermal and mineral waters and healing mud, is classified among the oldest forms of tourism, as it existed already in the ancient Roman times (Mrhar, 2014, p. 1363), when people visited spas to enjoy hot springs, to rest, for pleasure and even to seal business deals. There is evidence from that period about the existence of such tourism in Slovenia as well (Gojčič, 2005, p. 76, 109).

We can look for the reasons for early development of this type of tourism also in the fact that treatment is an urgency. With regard to the scope of the use of services, spa tourism is divided to (Gojčič, 2005, p. 76):

- Curative spa tourism,
- Rehabilitation spa tourism,
- Prevention spa tourism,
- Spa tourism as a part of other forms of tourism (holiday, travel, seminar, gaming tourism), and
- Medical wellness.

Irrespective of which type of tourism we are talking about, it is clear the basic motive of guests for visiting spas is health – preservation of health, and also recuperation, improvement or strengthening of health. Gojčič, (2005, p. 79) points out that the basic motive will not change in the future, because health is becoming a fundamental value and the greatest wealth of every individual. Therefore, this trend should be followed by service providers. Namely, Mrhar (2014, p. 1363) points out that just a few years ago spas offered only rehabilitation programmes, and today they are encouraging people to preserve their health.

Spa tourism differs from other types of tourism by features, such as (Gojčič, 2005, p. 77):

- The main part of demand and supply are medical services;
- Demand, to a large extent, depends on the need for medical services and the available financial resources than on the price of services;
- Spa tourist offer is extremely rigid;
- The resources of health insurances used to be the primary source of financing the costs of spa treatments, today this share is significantly lower;
- Average duration of stay is longer;
- Seasonal fluctuations are smaller; and
- Utilization of capacities is increasing.

Furthermore, authors also emphasize that spa tourism has the largest share of regular guests, which in some places amount to as much as 69%. Likewise, spa tourism includes guests with a higher socioeconomic status, which reflects in higher average consumption per guest. And we shouldn't overlook the fact that spa tourism contributes to the reduction of medical costs, which go up in the GDP structure each year (Gojčič, 2005, p. 77-78).

Spa Tourism in Slovenia

On the basis of archaeological findings, today we know that the beginnings of utilization of hot springs in Slovenia date back to the Roman times (Gojčič, 2005, p. 109). This is also supported by the written documents, which date back to 1147 and deliver an account of health benefits of mineral water from Rogaška Slatina (Grlica, 2009, p. 835). Healing powers of these natural springs were later documented by J. V. Valvasor and the poet Anton Aškerc. The milestone in the development

of spa tourism in Slovenia, as in Europe, is the end of the nineteenth century. Gojčič (2005, p.109-110) points out that the beginning of organized business cooperation of spas was in 1957, when more and more guests starting coming to Slovenian spas. Their number, much like today, depended on the currently valid legislation in the area of health care.

Before we look at the trend in the number of guests in the recent period, i.e. after the economic and financial crisis started, we should also say that 87 natural thermal springs make Slovenia, with regard to its size, one of the richest countries with natural and artificial sources of balneologically useful waters (Gojčič, 2005, p. 110). Likewise, we can say with certainty that Slovenian natural spas have a specifically important role in the development of Slovenian tourism (Prodnik, 2009, p. 2227). Spa are not just destinations for relaxation of the elderly and the ill any more, but they are increasingly becoming destinations for families and couples of all ages (SPIRIT Slovenia Agency, 2014). Today, there are 14 certified natural spas in Slovenia, which offer a comprehensive view of health. So, in addition to top medical services, they develop innovative forms of prevention and alternative programmes for health as well as programmes for beauty, self-confidence, relaxation and experience, which nurture the spirit (Slovenska turistična organizacija, 2016). Spas are basically spread all over Slovenia:

- in Prekmurje: Terme Radenci, Terme Lendava and Terme 3000 – Moravske Toplice;
- in Štajerska: Terme Dobrna, Terme Topolšica, Terme Zreče, Zdravilišče Rogaška, Thermana Laško, Terme Olimia and Terme Ptuj;
- in Dolenjska: Terme Čatež, Terme Dolenjske Toplice and Terme Šmarješke Toplice;
- in Primorska: Talaso Strunjan.

Next to classic spa tourism, in recent years we have also witnessed the development of wellness services in Slovenia, as the providers realized that wellness can be one of strategic guidelines of Slovenian natural spas. But this area can be further developed. Gojčič (2012a, p. 24-25) points out that this is all the more possible, because wellness as a philosophy of life is not included enough in the activities in the area of health promotion in Slovenia at the moment. She is also critical of the medical profession, which only seldom provides holistic approach to treatment. Gojčič (2012b, p. 15) stresses the known fact that the medical policy directs health promotion and comprises joint management of the measures of organizations and institutes in the sense of demand for health promotion.

Irrespective of the noted criticism, we must acknowledge that spas with their offer of wellness services represent one of the most important tourist products of Slovenian tourism. Good results in Slovenian natural spas are certainly the result of major investments in new hotel capacities, construction of new wellness centres, and new attractive contents to tend to every need and age group. With excellent services and high investment in staff in the areas intended for spa treatment and rehabilitation, Slovenian natural spas deliver the leading tourist product (Grlica, 2009, p. 835), which may continue with an appropriate policy. The SPIRIT Slovenia Agency (2014) also stresses that modern-day spa tourism centres have become one of the most prominent forms of the Slovenian tourist offer. Greater focus on the tourist offer is also indicated by their renaming into “thermae”, “spas” or “wellness centres”.

But policy measures and renaming are not always enough. Tourism is namely, to a large extent, affected by domestic as well as foreign economic and political situation. Just recently this has become even more apparent, since, in addition to the economic crisis, the traveling trends have been marked by political events. Before the 2009 summer season, world research organizations have predicted that the economic crisis will reduce the demand for services in the “free time industry” segment, i.e. in the area of tourism. The result of this, according to Rankel (2009) is that holidays will be more modest, much shorter and, for reasons of costs of traveling, focused on the local (domestic) environment (p. 2290)). Also, the majority will take a vacation only once. The consequences of the above in Slovenia are mentioned in the following chapter.

Situation of (Spa) Tourism Today

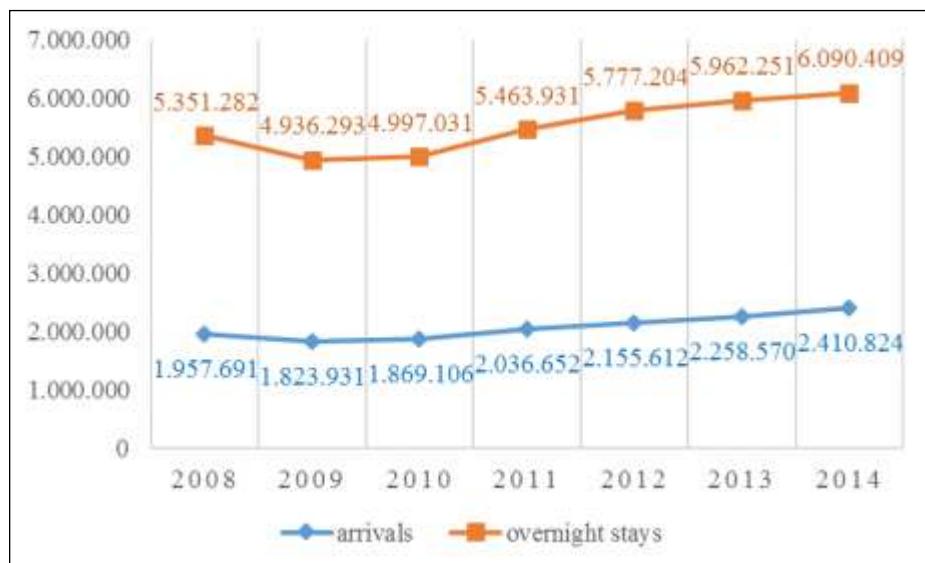
Tourism as one of the most important activities on a global scale contributes more to the global GDP than the car industry, furthermore, there are more people employed in the tourism sector than in the car and chemical industry combined (Novarlič, 2014).

Tourism also has a significant influence on the development of the country and the standard of living in Slovenia. In fact, tourism contributed a total of 13.0 percent to the Slovenian GDP, whereby employing about 13 percent of people (103.000 people or every eighth person employed has a job in tourism) and generating 7.1 percent of total value of Slovenian export (Slovenian Tourist Board, Slovenian Tourism in Numbers, 2015, p. 3).

Tourism also contributes an important share to the budget, with €240 million increasing the budget solely in respect of tax on profit in 2014. Let's have a look at some numbers.

Most arrivals and overnight stays in tourist accommodation facilities in Slovenia by now have been recorded in 2014. This means there have been 3,524,020 tourist arrivals or 4% more than in 2013, and 9,590,642 overnight stays or about as much as in 2013. It's worth noting here that foreign tourist accounted for nearly 2,411,000 arrivals or 7% more than in 2013 and over 6,090,000 overnight stays or 2% more than in 2013 (graph 1).

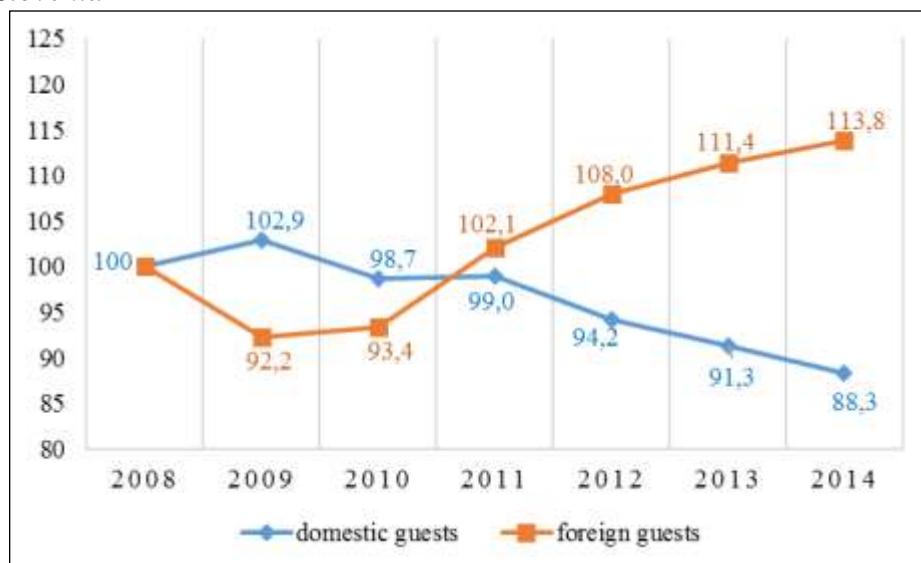
Graph 1: Arrivals and overnight stays of foreign tourists from 2008 to 2013



Source: <http://pxweb.stat.si/pxweb/Dialog/Saveshow.asp>.

Even though the total number of tourists has been increasing throughout the studied period, we have to know that it is at the expense of foreign tourists. Economic situation and socio-political circumstances in Slovenia have been influencing the reduction in the number of domestic tourists since 2008 onwards, which is graphically shown by graph 2.

Graph 2: Index of overnight stays of domestic and foreign guests in Slovenia



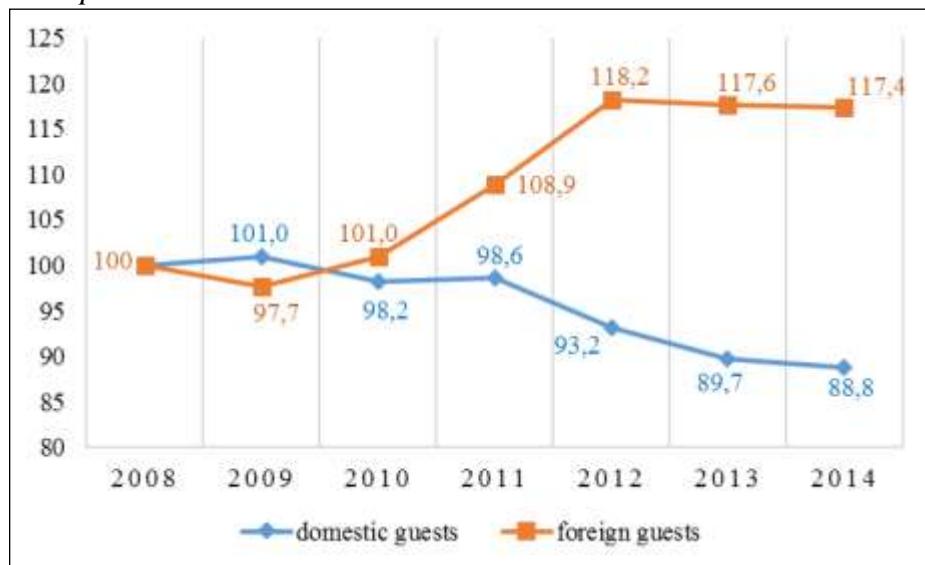
Source: <http://pxweb.stat.si/pxweb/Dialog/Saveshow.asp>.

So, we can see that in 2014 domestic guests generated 11.7 percent of overnight stays less than in 2008, which is the least in the studied period. On the other side, the number of overnight stays of foreign guests, after the initial considerable drop (in 2009 by 7.2%), has been steadily growing. In 2014, thus, foreign tourists generated 13.8% of overnight stays more than in 2008. Gostiša and Jokić (2015) argue that in 2014 domestic tourists generated the least arrivals and overnight stays in the last seven years. Namely, in 2014 domestic tourists generated 1,113,196 arrivals or 1% less than in 2013, with 3,500,233 overnight stays or 3% less than in 2013. The situation is not any different as to the trend in overnight stays in spa municipalities, which can be seen in graph 3.

A reduced share of domestic guests can also be attributed to the reduction in expenditure of the Health Insurance Institute of Slovenia, which is a result of general savings in the public sector. As can be seen from the graph below, the lowest amount of expenditure for the purpose of spa treatment in the studied period was recorded in 2012 and 2013, while it has been on the increase recently. Taking into account the above deliberations and the fact that the number of the elderly is growing, then this is certainly not the correct approach. As we pointed out earlier, spa treatment is not only a curative treatment, but it is also prevention, which

in the long term suggests a more healthy population and, consequently, less healthcare expenditures and, what is even more important, a better quality of life.

Graph 3: *Index of overnight stays of domestic and foreign guests in spa municipalities*



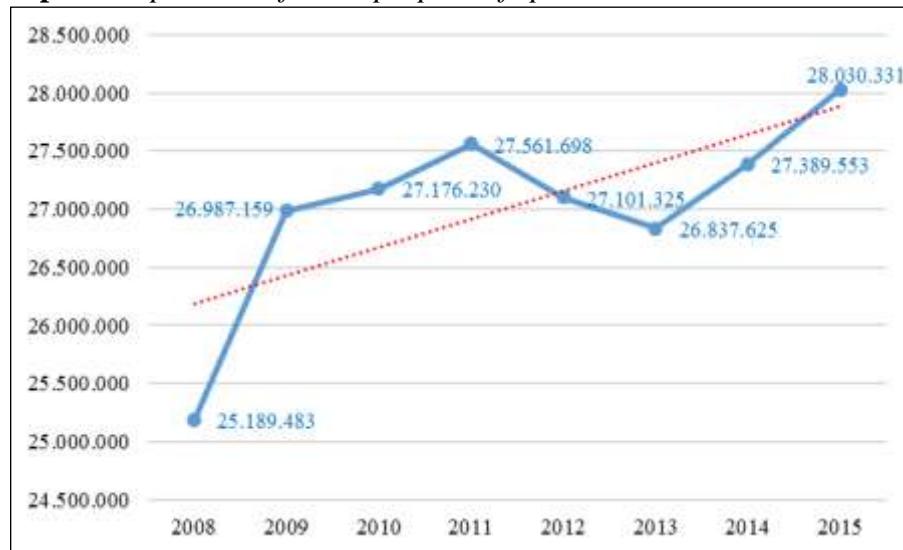
Source: <http://pxweb.stat.si/pxweb/Dialog/Saveshow.asp>.

Regardless of all facts, in 2014, the spa municipalities (i.e. municipalities with spa tourist centres, which meet the required conditions to obtain the status of nationally certified spas and are included in the public health network of Slovenia) generated as much as 31.27% of all overnight stays in Slovenia, i.e. 2,998,959 of overnight stays (Statistični urad Republike Slovenije, 2016).

Because foreign tourists are very important for Slovenia, it's only right to have a more detailed look at where they come from. In 2014, foreign tourists generated 64% of all tourist overnight stays in Slovenia. The key European markets where tourists, who generated the most overnight stays of foreign tourists in Slovenia, come from, were: Italy (16% of foreign overnight stays), Austria (12 %), Germany (11 %), Russian Federation, the Netherlands, and Croatia (5 % each). From the aspect of more significant tourist markets, tourists from Hungary (16 % more), Austria (8 % more), Italy (4 % more) and Germany (1%) created more overnight stays in Slovenia in 2014 than in 2013. Tourists from Serbia generated

about the same number of overnight stays as in 2013. Less overnight stays than in 2013 were generated by tourists from the Russian Federation and the Netherlands (8% less each) and from Croatia and United Kingdom (4% less each).

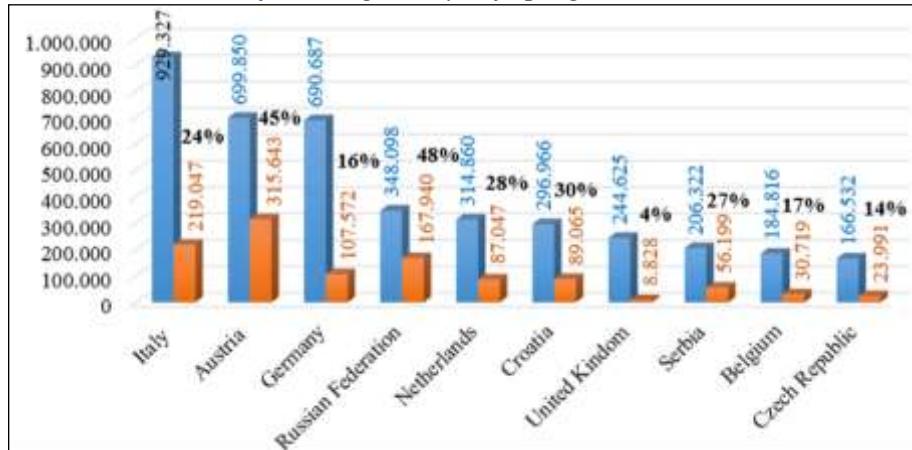
Graph 4: Expenditure for the purpose of spa treatment



Source: Zavod Zavod za zdravstveno zavarovanje Slovenije. Poslovno poročilo zavoda za zdravstveno zavarovanje Slovenije za leto 2008 – 2015. http://www.zzzs.si/ZZZS/info/egradiva.nsf/poslovno_porocilo_slo?OpenView&count=1000.

More and more tourists to Slovenia also come from non-European countries. So, in 2014, tourists from non-European countries accounted for 12 % of all overnight stays of foreign tourists in Slovenia. In 2014, tourists from the Republic of Korea, for example, generated 146% more overnight stays than in 2013; the respective number for China is 24 %, for Japan 13%, for the United States 11%, for Canada 8%, and for Australia 5%. But there were 11% less overnight stays accounted for by Israeli tourists (Gostiša&Jokić, 2015). But if we look at where foreign guests come from to spa municipalities, we can see that the highest share of overnight stays in spa municipalities is attributed to Russian and Austrian guests. As much as 48% of Russian tourists, who visited Slovenia in 2013, stayed in spa municipalities (Agencija SPIRIT Slovenija, 2014). The trend in the share of overnight stays in spa municipalities as regards other guests is shown by the graph below.

Graph 5: Top 10 countries by the number of overnight stays in Slovenia in 2013 with shares of overnight stays of spa guests



Source: Agencija SPIRIT Slovenija (2014). Zdraviliški turizem v Sloveniji: analiza podatkov, p. 5.

Before we look at the future of spa tourism, we should also mention that the total revenue of 15 Slovenian natural spas in 2013 amounted to 220 million € (2.5-percent growth of net turnover in the period 2009-2013). But as we can see from the table below, a significant drop has been registered in the recent year. The drop outside of the B&B consumption is particularly worrying (Agencija SPIRIT Slovenija, 2014, p. 14).

Table 2: Structure of operating income

Operating income of SSNZ members/activities	2009	2010	2011	2012	2013
Accommodation	92.078.888	86.330.035	86.997.878	94.776.787	104.896.252
Food and beverage	59.135.250	60.122.786	62.317.677	73.077.388	55.900.139
Healthcare	42.856.167	44.345.898	46.072.181	45.051.445	42.019.943
Pool entry	20.618.314	19.992.046	20.103.980	21.307.433	17.230.756
TOTAL	214.688.620	210.790.765	215.491.717	234.213.052	220.047.090

Source: Agencija SPIRIT Slovenija. (2014). Strategija razvoja in trženja slovenskih naravnih zdravilišč 2015 – 2020, p. 12.

It is also interesting that Slovenian natural spas contribute 47.7% in the structure of income of total hotel management in Slovenia. Certainly, also at the expense of longer average duration of stay of guests, which amounts to 3.98 days, while the Slovenian average is 2.9 days. On the other side, it should be said that natural spas have 13,570 beds at disposal, with 22,399 beds in spa municipalities as a whole (Strategy 2015-2020).

Future of Spa Tourism

We can certainly argue that the development of tourism in Slovenia is based on the principles of sustainable development, which takes into account equal treatment of economic, social and environmental component. All of this was also observed in the strategic document Development Plan and Guidelines of Slovenian Tourism (Gojčič, 2012a, p. 11-12). These aspects were also observed in the Strategy for the Development and Marketing of Slovenian Natural Spas 2015-2020, where the goal is to facilitate 3.3 million overnight stays (increase by 20%) and generate an income of €300 million (increase by 30%) by 2020. This would be achieved by strengthening the competitiveness of the Slovenian spa offer (Public Agency SPIRIT SLOVENIA and the Association of Slovenian spas and health resorts, 2014, p. 3). For this purpose, SWOT analysis was also carried out.

It's also worth noting here the opportunity delivered by the European Act on patients' rights in cross-border healthcare (Cross Border Healthcare Directive – Directive 2011/24/EU), whereby we can expect increased development of health tourism in Slovenia (Marulc, 2013, p. 184). Marulc (2014, p. 513) also notes of the issue of many Slovenians looking for medical services abroad on account of the shrinkage of rights. This fact should not be overlooked, but it exceeds the purpose of this article. It would, however, make sense to examine this area in more detail in the future.

But all is not that well. Hence, the authors warn that the greatest obstacles in achieving higher competitiveness of Slovenian tourism, in general, include insufficient scope of resources for the development and marketing of tourism, specifically pointing out the unsystematic use of the brand and poor recognisability of Slovenia in target markets.

Table 3: SWOT analysis – internal advantages and weaknesses and external opportunities and threats

Advantages	Weaknesses
<ul style="list-style-type: none"> - Scientifically proven natural healing factors – first and foremost, unique thermal and mineral waters. - Rich spa tradition and wellness offer developed in accordance with modern trends (Aquafun, wellness – particularly strong segment of saunas and active relaxation). - Knowledge of people based on tradition and on two decades of research, further professional training and scientific proofs of natural healing factors. - Diverse, unspoiled and beneficial climate. - Good price-quality ratio – good value. 	<ul style="list-style-type: none"> - Lack of specialization among spas (similar indications/programmes/products, target groups, we are too much alike, not distinguishing enough). - No distinguishing products with a higher added value, lack of sales products, which are the basis for more successful marketing. - No established/set international quality standards. - Lagging in the quality of provision of services (less qualified and less motivated staff), due to rationalization measures also stagnation in the area of quality of offer and infrastructure. - Poor connection with the local environment and poor urbanistic planning of spa towns.
Opportunities	Threats
<ul style="list-style-type: none"> - Permanent health care (body, spirit and mind health) = selfness or mindfulness. - Introduction of permanent business models to the operation of spas (and spa destinations) and development of the “local-vital” concept. - Entry of international chains to the market of spa providers. - Public private partnerships at the level of destinations, for the development of destination offer and tourist infrastructure. - Openness of the European medical insurance market. 	<ul style="list-style-type: none"> - Discouraging and non-competitive business environment. - Unstable business environment due to ownership structure and high indebtedness – and further pressures on the rationalization of operations at the expense of quality. - Business strategy, which is not based on distinction, but on prices (further battle in the generic spa or B&B market). - Self-willed contraction of the public health network, no dialogue and no listening to experts, and further stagnation of umbrella promotion. - Insufficient internationalization.

Source: Agencija SPIRIT Slovenija. (2014). Strategija razvoja in trženja slovenskih naravnih zdavilišč 2015 – 2020, p. 23.

Another future challenge is also low added value of tourist products and modest actions in the area of sustainable tourism. According to Bergant (2014), development is further aggravated by poor accessibility (flight, road and railroad connections), discouraging business environment

(inefficient inter-sectoral coordination, discouraging capital investment environment) as well as legislation (licenses and duties). We should also not disregard global trends, where Novarlič (2014) points out, in particular, political riots, regional conflicts and terrorism, as well as climate changes.

Conclusion

As regards natural splendours, cultural, culinary and climate features, Slovenia has a lot of potential for development, but how we will make the best use of these opportunities largely depends on the providers of tourist services as well as on the institutional environment, which can facilitate development with appropriate measures. We must be aware that tourism offers an opportunity for greater economic growth and, consequently, better employment opportunities and improved standard of living. No matter which type of tourism we are talking about, we must be aware that guests are increasingly demanding. This particularly applies to the area of tourism related to health, such as spa tourism, which is presented in this article. Tourist products in this area, in particular, will also be one of the key opportunities for success in the European and global tourist market in the future. And the words of Ban Ki Mun, the United Nations Secretary-General: “Tourism has become one of the most important economic sectors and social activities of today,” will not lose their weight.

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