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MARKETING RESEARCH OF POTENTIALS OF SPA TOURISM IN SERBIA

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Abstract: *In modern conditions of business tourism is an extremely important economic activity, as it has numerous positive effects on national economies. It affirms the development of regions and localities, and what is particularly important, in the conditions of the global problems of most countries with a large number of unemployed, is employed by the local population, mainly young and educated people. Tourism of the Republic of Serbia has great potential, given the natural resources and geopolitical position of the state. The paper presents the marketing research of the spa tourism potential of the Republic of Serbia, as well as the possibilities of its regional and global (re) positioning. Within the conducted research, the needs, wishes and opinions of two groups of foreign tourists - respondents: Russian - 160 and German - 240, were analysed in the period from 20 March 2016 to April 15, 2017, which were beneficiaries of spa tourism services of the Republic of Serbia. The results of the conducted research provided information of significance for the development of both the spa and the entire tourism of the Republic of Serbia. Foreign users of Serbian spa services: mostly older people (although there are not a small number of young people) with some type of illness (most cardiovascular and spondylosis); Numerous additional spa and out-of-premises facilities are expected; They want a healthy nature and a peaceful environment; The best source of information about a particular tourist destination for them is its personal stay and recommendations from friends; There are Serbian spas with which they are more, less or even at least familiar; The main reason for the arrival of foreign tourists are high quality of thermal water, prices of spa services and healthy climate; And all of these things should be a significant guide in the design and implementation of the policy of further development of Serbian spas, and the creation of a competitive marketing strategy.*

Keywords: *marketing research, tourism, spa tourism, positioning, Republic of Serbia*

1 INTRODUCTION

The share of the tourism and catering industry in the social product of the Republic of Serbia is around 3%, and in the total exports of goods and services up to 9%, so that the tourist activity of the Republic of Serbia is imposed as an unavoidable complex with unused development potential.

The Tourist Centre of Serbia is Belgrade and represents the main tourist attraction in Serbia. Belgrade has a rich cultural and historical offer. In recent years, Belgrade has been promoted as a tourist destination suitable for nightlife, attracting a segment of young people from Europe. Belgrade is the centre of urban tourism in Serbia, and beside it, other Serbian cities are well promoted as urban tourist destinations. This is primarily about Novi Sad, and Subotica (Palic).

Serbia is rich in mountains, rivers, and spas. In recent years, both ethno-tourism and rural tourism are increasingly developing. The most famous Serbian mountains are: Kopaonik, Zlatibor, Divčibare, Rudnik, Goc, Stara Planina, Vlasina ..

When it comes to rural tourism, the villages known are: Sirogojno, Mokra Gora, Koštunići and other villages. Our probably the best promoted and well-positioned ethno village is Mokra Gora (<http://www.parkprirodemokragora.org/> (date of access on January 20, 2017)

When it comes to spa and climatic tourism, among the most famous Serbian spas, Vrnjacka Banja is well known, known in the public as “queen of spa”, Prolom Spa, Lukovska Banja, Soko Banja, Banja Koviljaca, Gornja Trepca, Sijarinska Spa, as well as many other spas.

Tourism must be included in the development agenda of Serbia because of its potential to be a significant part of the gross domestic product of our country.

2 SPA TOURISM IN THE REPUBLIC OF SERBIA - SITUATION ANALYSIS

Tourism increases production, helps the development of economically underdeveloped areas, and in this respect, reduces the unemployment rate. Tourism therefore influences the realization of macroeconomic goals, such as increasing the employment rate, FDI ... (Petković, Zečević & Pindžo, 2011)

The spa in Serbia has a long tradition and rich history. They are known for their medicinal properties. Potential exists, but it is not sufficiently utilized. With strategic management, our spa can become leaders in the region.

According to the Association of Spas Serbia, Serbia has more than 500 sources, and some of them were visited during the Illyrian period, then by the Romans, and are still used today (Association of Spas of Serbia <http://www.serbianspas.org/>; date of access: 01/29/2017).

The spa tourism has numerous, insufficiently evaluated and used capacities. As a basis for positioning and therefore the acquisition of competitive advantage, spas often use medicinal factors, but neglect anthropogenic resources. Serbian Spas should create the perfect combination of health treatments, but combine them with other elements such as:

- Getting to know the tourist destination,
- Cultural and historical heritage,

- Anthropogenic motifs,
- Active vacation,
- Medical treatments, etc.

Medical factors as the bearer of a competitive advantage, when the Serbian spas are concerned, are not a sufficient carrier because there are far more advanced spas in the immediate environment, that is, in the region (eg Hungary).

Organizations of spa tourism include various institutions such as hotels, wellness and spa centres, rehabilitation centres, health stations, local people, suppliers and the like. Employees of the tourist organization must cooperate with each other when creating a service, especially if we have in mind the above-mentioned idea that the entire offer of a tourist agency should be integrated into a unique tourist product. It is necessary that the employees themselves, which are a very important element of the marketing mix, are well-recruited and selected, and then they are trained to adequately provide tourist services to the tourist organization. Employees, in addition to the service processes and the service environment, play an important role as additional 3P elements in the service marketing mix of the tourist destination, in addition to the existing basic 4P elements, which are present indifferent whether it is about products and / or services. (Radnović, 2013)

Employees within a particular tourist destination are an important factor in achieving the satisfaction of service users, given the specific character of services. It is important that the employees are therefore satisfied, in order to be motivated in the best possible way to provide a quality service. (Perić, Gašić, Ivanković, & Stoiljković, 2015)

Serbian spas have great potential, but it is necessary to conduct repositioning of spa as tourist destinations, or to integrate the offer of tourist destination into a unique tourist product. (Jovanovic-Toncev, Podovac & Stanisic 2015)

2. MARKETING RESEARCH OF POSITIONS OF SERBIAN SPA TOURISM

2.1. Research methodology

When analyzing, studying and applying particular methods in scientific research work, it is necessary to bear in mind the fact that the most effective scientific results cannot be achieved consistently using only one method, but by dialectical connection and by the appropriate combination of several different research methods. (Radnović, 2014)

Therefore, for the purposes of this master's work, we carried out a quantitative survey, through a survey.

The survey conducted a quantitative survey in the period from April 20, 2016 to March 15, 2017. The collected data were used to draw conclusions on the satisfaction of foreign tourist services in the Republic of Serbia in foreign tourists, in this case tourists of Russian and German nationality, as well as perhaps the most demanding foreign guests. Also, this research also examines the perceptions of foreign tourists, Russian and German nationality, the overall positioning of Serbian spas. The statistical gathering included users of spa tourism services - visitors to the spa in Serbia, using the random source method. In this research were included 160 respondents of Russian nationality and 240 ethnic Germans.

2.2. Results, Discussion and Conclusions

Demographic characteristics of the respondents are shown in Table 1. Of the 160 respondents of Russian nationality, 56.86% are male and 43.16% are female, while German respondents are 66.67% of men and in 33.33% female sex.

Both Russian and German tourists are in the largest percentage of over 50 years of age, Russian 30%, and German tourists as much as 41.25%. In the case of Russian tourists, we have almost equally interviewed between 31-35 and 36-40, as well as 46-50 years. When it comes to German tourists, after a tourist for over 50 years, in an almost identical number of respondents, the respondents from this nation are between 31-35, 41-45 and 46-50 years old. What is interesting here is that a large number of respondents - service users have 46-50 years and over 50 years, with Russians 44.37%, and with Germans as much as 58.75%, which indicates that the most frequent users of spa tourism services in the Republic of Serbia mostly older. In neighbouring countries, the example of Hungary and Slovenia, service users are also older, but not in so many numbers, see what is the reason for this, whether the cause of this is positive (the possibility of curing the disease, professional staff, unpolluted nature ...) or negative (poor quality service package, inappropriate distribution channels, old-fashioned service environment, lack of additional content or poor promotion). The answer to all of this was attempted by analyzing the results obtained on further questions.

Table 1. - Demographic structure of the sample of Russian and German nationality

Demographic variables	Number of respondents	Percentage (%)	Number of respondents	Percentage (%)
	RUSSIANS		GERMANS	
<u>Gender</u>				
Female	69	43,14	80	33.33
Male	91	56,86	160	66.67
<u>Age</u>				
20-25	3	1,88	6	2,5
26-30	12	7,5	4	1,66
31-35	31	19,38	42	17,5
36-40	28	17,5	16	6,67
41-45	15	9,37	31	12,92
46-50	23	14,37	42	17,5
Over 50	48	30	99	41,25
<u>Education</u>				
Elementary	0	0	0	0
High school	111	69,38	67	27,92
Faculty	49	30,62	173	72,08
<u>Marital status</u>				

Not married	22	13,75	64	26,67
Married	125	78,13	154	64,16
Widow	13	8,12	22	9,17
Social class				
working class	22	13,75	72	30
Middle Class	82	51,25	152	63,33
High social class	56	35	16	6.67

Russian tourists are mostly with secondary education, 69.38%, followed by faculty 30.62%, while German tourists also have a high school education of 72.08%, with secondary education of 27.92 %.

Both Russian and German tourists are mostly married, Russian 78.13%, and German 64.16%.

Both in Russian and German tourists, the highest representation is the secondary social class with Russian 51.25%, and with the Germans 66.33%. When the Russians are in the second place in terms of representation, there is a high social class, of as much as 35%, while the Germans in the second place are represented by 30% of the working class.

Table 2. - Previous stay in Serbia

Previous stay in Serbia	Number of respondents	Percentage (%) (%)	Number of respondents	Percentage (%) (%)
	RUSSIANS		GERMANS	
Yes	106	66,25	211	87,92
No	54	33,75	29	12,08

When it comes to previous stay in Serbia, Russian tourists accounted for 66.25% of the population in Serbia, as well as German tourists in the percentage of as much as 87.92%. What is interesting is that 33.75% of the Russians, and 12.08% of Germans for the first time in Serbia. This information is significant because it says more things. If people who were already opted to use the services of Serbian spas, that is, that they already have some satisfactory experience with them. Regarding the new users of services, we are repeating almost a third of foreign tourists - the respondents of Russian nationality for the first time in Serbia. The reason for this may be good recommendations from friends, good promotion of Serbian spas in the Russian market or some other things, such as, for example, good bilateral state relations between Serbia and the Russians is, but also the market opening of Serbia towards Europe and the world. Generally speaking, what is in today's turbulent business environment is more difficult: to maintain (reverse) old ones or to attract new users of tourist services, especially in the environment in which Serbia is located (Hungary, Croatia, Slovenia, BiH ...).

Table 3. - Awareness of the natural environment and natural potential of Serbia

Natural environment and natural potential of Serbia	Number of respondents	Percentage (%) (%)	Number of respondents	Percentage (%) (%)
	RUSSIANS		GERMANS	
Yes	83	51,88	203	84,58
No	64	40	28	11,67
Superficially	13	8,12	9	3,75

Half of the Russian tourists, 51.88% of them are familiar with the natural environment and natural potential of Serbia, while 84.58% of German tourists are familiar with the natural environment and natural potential of Serbia. The fact that as many as 40% of Russian tourists are not familiar with the natural environment and the natural potential of Serbia is partially expected, because even a third of Russian tourists in Serbia are new and did not have the opportunity to do so. But it may also be said that German tourists are more interested in the Serbian natural environment and natural potential. The reason for this can be in the similarity of the Serbian and Russian natural environment and natural potential, so Russian tourists spend more time, or rather the most time spent in the spas and use directly of their contents. On the other hand, the Germans are eager for a healthy nature, a peaceful environment, a stress-free life, and every opportunity that they are happy to use in that sense.

Table 4. - The source of information about the tourist offer of Serbia

The source of information	Number of respondents	Percentage (%) (%)	Number of respondents	Percentage (%) (%)
	RUSSIANS		GERMANS	
Mass media	41	25,62	48	20
Recommendation from a friend	47	29,38	63	26,25
Personally-stay	69	43,13	125	52,08
Something else - a transit	3	1,87	4	1,67

The largest number of tourists, both Russian (38.75%) and German (51.88%), came to personal information about the tourist offer of Serbia. So, it turned out in this case that personally the previous positive experience was the best guarantee for the return of tourists. A somewhat higher percentage of German tourists compared to Russians who came to personal information about Serbia was expected, given their significant previous stay in Serbia, of as much as 87.92%. Both in Russian and German tourists, the second place is the recommendation of a friend, which is also expected, because in all services, in this respect touristic, the recommendation of friends is very important. Here it is also seen that the analysis that indicated that a greater number of new Russian tourists is a result of good recommendation from friends and / or good promotion is correct, since more than 50% of Russian tourists

came to one of these two times, ie. through a friend's recommendation or information received through mass media.

Table 5. - Familiarization with the spas of Serbia

Spas of Serbia	Number of respondents	Percentage (%) (%)	Number of respondents	Percentage (%) (%)
	RUSSIANS		GERMANS	
Vrnjačka banja	128	33,59	72	11,18
Mataruška banja	13	3,41	0	0
Banja Koviljača	49	12,86	167	25,93
Ribarska banja	0	0	0	0
Sokobanja	33	8,66	87	13,51
Vranjska banja	11	2,89	25	3,88
Sijerinska banja	23	6,04	11	1,71
Banja Vrujci	0	0	0	0
Prolom banja	64	16,8	111	17,24
Banja Vrdnik	4	1,05	34	5,28
Atomska banja-Gornja Trepča	6	1,58	28	4,35
Lukovska banja	16	4,2	64	9,94
Gamzigradska banja	0	0	0	0
Kanjiža	34	8,92	45	6,99

An analysis of the knowledge of foreign tourists, Russian and German, with Serbian spas gave interesting data. Before analyzing them, it should be noted that the respondents could circle one or more answers, so that they wanted to see which of the Serbian resorts foreign tourists were familiar with. Russian tourists as 33.59% have heard for Vrnjacka Banja, and 16.8% for Prolom Spa, and 12.86% of respondents heard about Banja Koviljaca. Knowledge with all other spas is less than 5%, except for the knowledge of Kanjiža Spa (8.92%) and Sokobanja (8.66%). German tourists are most familiar with Banja Koviljača 25.93%, Prolom Spa 17.24%, Sokobanja 13.51%, and Vrnjacka Banja 11.18%. The knowledge of German tourists with all other spas, except Lukovska Spa (9.94%) and Kanjiža (6.99%) is about or less than 5%. These indicators indicate that foreign tourists, both Russian and German, are most familiar with (with partially changed order of ranking) with the following spas: Vrnjacka Banja, Banja Koviljaca, Sokobanja, Prolom Banja, Lukovska Banja and Banja Kanjiža. This tells us that these spas were best positioned in the awareness of the users of tourist services of Serbian spas. Also, it can be said that the potential reasons for recognition by tourists of these two spas are multiple: good service packs that correspond to the health needs of service users, adequate prices for what is being offered, quality distribution channels, good promotion, appropriate service process, European " service environment (for most of the mentioned

spas there is a new or renovated interior and exterior) as well as a quality selection of people. What also answered the answers to this question, and what is worrying is that other Serbian spas are very little recognizable or almost unrecognizable in the consciousness of foreign users of Serbian spa tourism services (Gazimgradska, Mataruška, Banja Vrujci ...). What is the reason for this should be examine with more detailed and comprehensive research, but it is certainly the management of these spas, as well as the line ministry, to see what should and could be done urgently in order to achieve greater recognition of these spas?

Table 6. - Health issues

Health issues	Number of respondents	Percentage (%) (%)	Number of respondents	Percentage (%) (%)
	RUSSIANS		GERMANS	
Bronchitis	17	10,62	11	4,58
Spondylosis	20	12,5	62	25,84
Sterility	0	0	0	0
Anorexia	0	0	0	0
Neurological problems	0	0	13	5,42
Cardiovascular diseases	59	36,88	101	42,08
Psoriasis	0	0	0	0
I have no health problems	34	21,25	21	8,75
None of the answers offered	18	11,25	27	11,25
Other	12	7,5	5	2,08

Both in Russian (36.88%) and in German (42.08%) tourists, most of them male, mainly predominate cardiovascular diseases, as one of the most common diseases of the modern man. The second illness, of which both suffer the most, are spondylosis, with 12.5% of the Russians, and 25.84% of the Germans, which means that every fourth, which is again attributed to the modern way of life and work, the greater part of conducting the day in the most sedentary sitting position. It is interesting that a significant number of Russian tourists, 21.25% of them, stated that there are no health problems, but that they still use spa services. With this information, if we take into account that these are mainly young people in the age categories 20-25, 26-30 and 31-35, we come to significant information for the strategic policy makers of Serbian spa tourism, regardless of whether it is a spa management or the line ministry of the Republic of Serbia. Therefore, in the coming period it is certainly essential to modernize the equipment, as well as the content of Serbian spas and adapt it to young people, without health problems, because young people, as a rule, leave more money for additional content, they are more flexible, more mobile, more curious to get to know the new and faster information (greater use of the Internet and all its services).

Table 7. - The optimal length of stay in one spa

The optimal length of stay in one spa	Number of respondents	Percentage (%) (%)	Number of respondents	Percentage (%) (%)
	RUSSIANS		GERMANS	
up to 7 days	23	14,37	183	76,25
10-15 days	89	55,63	19	7,92
over 15 days	48	30	38	15,83
other	0	0	0	0

Russian tourists in the percentage of 55.63% believe that the optimal length of stay in a spa is 10-15 days, while German tourists on the other hand, as much as 76.25%, consider that the ideal length of stay in one bath is up to 7 days. This suggests that Russian tourists are more willing to stay longer in spas, as opposed to German tourists. Also, if the analysis is done by age, short stay was mostly predominantly young as opposed to mostly female tourists, who are for longer stays in the spas. This is very interesting, but, on the other hand, not unexpected, if they know the mentality of both peoples, both Russian and German, in terms of work and vacation, on the one hand, and on the health and condition of the younger and older population on the other. In this regard, these are essential determinants of possible differentiation of the SPA service.

Table 8. - The main factors of the arrival in the Serbian spas (scoring from 1-5, the most important one, the second by relevance, the third important element, the 4th less important, the 5th irrelevant)

The main factors of the arrival	Number of respondents	Percentage (%) (%)	Number of respondents	Percentage (%) (%)
	RUSSIANS		GERMANS	
High quality thermal water	61	38,12	42	17,5
Healthy climate	12	7,5	51	21,25
High quality accommodation capacities	33	20,63	12	5
Rich infrastructure	4	2,5	5	2,08
Cultural and fun content that is in accordance with the spa holiday regime	5	3,12	14	5,84
Price of services	45	28,13	116	48,33
other	0	0	0	0

The respondents answered this question through the ranking scales. Namely, the respondents should rank according to importance (most important 1, least important 5) determined by their main factors of arrival in Serbian spas. For Russian tourists the main (determining) factors of arrival in Serbian spas are: high quality thermal water (as stated by 38.12% of respondents), service price (28.13%) and high quality of accommodation capacities (20.63%). Among the German tourists, this is the price of services (48.33%), and the healthy climate (21.25%), as well as high quality thermal water (17.50%), are the main reasons for visiting the spas of Serbia. Here it is more than obvious that the comparative advantage of Serbian spas, and in this respect, the spa tourism of the Republic of Serbia is above all thermal water of high quality, prices of spa services and healthy climate. It is precisely on these things that we should build both the overall tourism marketing strategy and the promotion of Serbian spa tourism.

Table 9. - Adaptable cultural content while staying in Serbia (score of 1-5, the most important, 2. second in importance, 3rd essential element, 4. less important, 5. irrelevant)

Adaptable cultural content	Number of respondents	Percentage (%) (%)	Number of respondents	Percentage (%) (%)
	RUSSIANS		GERMANS	
Organized visits to monasteries and museums	65	40,63	72	30
Music evenings - original and pop music	31	19,37	81	33,75
Sports and recreational events	24	15	18	7,5
Folklore	33	20,63	17	7,08
Theatres, literary evenings	7	4,37	52	21,67
None of the offered	0	0	0	0
Other	0	0	0	0

Also, in this issue, the respondents had the opportunity to provide answers via the ranking scales. Namely, they should have ranked by importance (with the most important ones marking with 1, and the least important with 5) certain important cultural features for them when visiting the spas. Namely, this is the so-called. additional content that reflects the overall experience of the spa services provided to spa guests. Regarding the aforementioned cultural content, 40.63% of Russian tourists declared that they had important organized visits to monasteries and museums, followed by folklore (20.63%), as well as music evenings - original music, as they said 19.37%. German tourists are mainly interested in musical evenings - original and pop music (33.75%), organized visits to monasteries and museums (30%), as well as visits to theaters and literary evenings (21.67%). It is interesting, but at the same time it would be expected that Russian tourists, and above all the older middle-class population, will place emphasis on organized visits to museums and monasteries, as well as folklore and original music. German tourists, above all, highly educated, regardless of

age and sex, are more interested in visiting the theater and literary evenings. These data are significant from the point of view of the marketing decision maker of tourist decisions regarding the differentiation of service offerings in accordance with different target segments, ie their needs and desires.

2 CONCLUSIONS

The results of the conducted research on a sample of 400 respondents - foreign tourists, of which 160 Russian and 240 German nationals, during the period from March 20, 2016 to April 15, 2017, showed the needs, wishes and opinions of foreign tourists - users of Serbian spa, important for the improvement of spa tourism services and the development of tourism in the Republic of Serbia. The results obtained by the conducted research enable marketing decision makers, primarily the management of spa centres, as well as local tourist organizations, as well as the national tourism organization and the line ministry of the Government of the Republic of Serbia, to look at the needs, wishes and opinions of tourists in this research of foreign tourists and Germans) - users of spa services of the Republic of Serbia.

Serbia is a developing country, which tourism can and must be a significant driver of economic and overall development. Tourism encourages the development of regions, local self-governments and small communities (villages), and in this connection it represents an important basis for the rapid employment of a large number of unemployed, primarily young and educated people. Serbia is a country with rich and still unpolluted nature: mountains, rivers, lakes, spas etc., and as such it is extremely receptive to foreign tourist's eager to relax in nature without any pressure and stress. Spa tourism is a type of tourism where Serbia needs to build its competitive market tourist advantage. The main precondition for the development of the tourism of the Republic of Serbia is the inclusion of all tourist stakeholders (the state - line ministries, tourist organizations - national and local, managers of the spa ...) to one goal of defining and implementing the appropriate tourism policy, which must have a complete consideration of tourist needs. It was through this work that, through a comprehensive survey on a sample of 400 respondents, 160 Russian tourists and 240 German tourists wanted to point out this. The results of conducted marketing research of spa tourism in the Republic of Serbia showed the following:

- A large number of returnee's tourists (especially Germans), which is a good basis for tourism development;
- There are also a number of new tourists, and they should look at the "source" of their arrival;
- The users of Serbian spa services expect numerous additional spa and out-of-house activities (organized visits to monasteries and museums, visits to theatres and literary evenings, folklore and original and pop music evenings ...), which means that the compulsory spa of this existing content Should be improved, as well as additional ranks;
- Foreign tourists (primarily Germans) are eager for a healthy nature, a peaceful environment, without everyday stress, and should continue to be used to put nature, purity, health and peace into the forefront;
- Tourists for themselves are the best source of information about a particular tourist destination. Personal stay (this once again shows how important is the act of providing services), recommendations from friends (their satisfaction), but certainly mass media (TV,

press, internet ...) In parallel with strengthening of the spa contents and capacities, the promotion of media promotion through regional and continental TV stations should also be promoted;

- Most of the tourists are familiar with the following Serbian spas: Vrnjaska Banja, Banja Koviljaca, Sokobanja, Prolom Banja, Lukovska Banja and Banja Kanjiža), which shows that these spas, unlike the others (Gazimgradska, Mataruška, Banja Vrujci) Marketing management, and above all the very process of serving as a “moment of truth” of the overall marketing strategy, have done a lot;

- The health problems of most foreign tourists are primarily cardiovascular diseases (this is the area where Serbia has top experts), as well as spondylosis;

- It is interesting that a certain number of (not so small) users of spa services in the Republic of Serbia are young people, and the content of Serbian spas, especially in terms of additional services and out-of-the-box content, should be adapted to this target market segment;

- As far as the length of stay is concerned, the research showed the difference between both Russian and German tourists, as well as between tourists from the younger and older population. This could be used as a determinant of the diffusion of service delivery to different market segments;

- The main reason for the arrival of foreign tourists in Serbian spas are: thermal water of high quality, prices of spa services and healthy climate, and these things should be a significant guide in designing and implementing further development of Serbian spa and creating a marketing strategy

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