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MODERN DETERMINANTS OF CONSUMER NEEDS AND ANALYSIS OF THE MARKET OF PELOIDOTHERAPY IN SPA RESORTS

One of the directions of development of the tourism industry is health tourism. Today, having natural opportunities and high potential, it is possible to state the absence of highly competitive positions in this sector of the national economy of some developing countries. For example, in Ukraine, sanatorium-and-spa institutions are one of the priority areas for the development of domestic and foreign tourism, one of the most stable types of tourism markets. So, the object of the research is the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» (Odesa region, Ukraine). The subject of the research is ways to improve the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk».

The available and potential reserves of medical resources, taking into account their qualitative and quantitative characteristics, can serve as the basis for the creation of such tourism products that are now very popular in the world, for example, the provision of spa services. The authors state the absence of highly competitive positions in this sector. In the current market conditions, the sanatorium business in Ukraine is undergoing structural changes. The branding scheme proposed by the authors of the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» allows improving the quality of spa services and marketing effectiveness. After all, the modern basis of the activity of tourist organizations is determined by the factor of informatization of society.

Since the vast majority of visitors to the resort are from Belarus, Moldova, it is interesting that the resort also has its share of international tourists from European countries (Romania, Bulgaria, Germany, etc.). Thanks to the successful identification of the strengths and needs of consumers, it can be assumed that the international tourist flow will increase, because there are all the necessary conditions for this. The new branding scheme developed by the authors will act as a catalyst and stimulator for the growth of the number of visitors to the Odesa region. The prospect of this study lies in the search for new solutions for the promotion, reorganization of SPA institutions in the market of health tourism services in Ukraine. The synergy of the optimal use of natural health-improving resources and the best management solutions for the use of information support create a competitive tourism product, which in turn will lead to an increase in international tourists.

Keywords: SPA facilities, peloid therapy, sulphide-silt mud, SPA services, health tourism.

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1. Introduction

According to the assessment of the UN world tourism organization (UNWTO), tourism and resorts is one of the main industries that affect the general state and trends of the global economy. Its development contributes to an increase in the level of employment, the preservation of cultural potential, an environmentally friendly natural environment, and also increases the level of innovation of the national economy, contributes to the harmonization of relations between different countries and peoples [1].

Sanatorium and resort establishments, having natural opportunities and high potential, are one of the priority areas for the development of a highly profitable economy.

The available and potential reserves of medical resources, taking into account their qualitative and quantitative characteristics, can serve as the basis for creating a competitive national tourism product. The most popular in the world are the provision of spa services [2, 3]. But the existing material and technical base of sanatorium-and-spa institutions in some developing countries, for example, in Ukraine, does not meet international standards, they lack modernized equipment and information communications. This requires significant investment in the development and reconstruction of existing resorts.

So, the object of the research is the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» (Odesa region, Ukraine). The subject of the study is the means of improving

the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk». *The purpose of the study* is to analyze the market for peloid therapy in SPA facilities based on certain modern determinants of consumer needs.

2. Research methodology

When performing the work, the dialectical method of studying phenomena and processes in their interconnection and development was applied. To achieve the aim and solve certain problems, the following general scientific methods were used:

- abstract-logical (for generalization of theoretical provisions, definition of the essence of economic concepts, formation of conclusions);
- system analysis (for the analysis of spa facilities and health tourism);
- graphical (for visual presentation of data);
- tabular and grouping (with SWOT analysis and competitiveness assessment);
- expert assessments (to measure and evaluate social surveys);
- constructive and experimental (assessment of the results of the proposed measures to improve the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk»).

3. Research results and discussion

The history of the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» begins in 1892. Since then, the therapeutic mud of the Kuialnyk estuary has served as a standard in terms of its physicochemical, biological and therapeutic properties. Sulfide-silt therapeutic mud, formed in natural conditions under the influence of geological processes, in a finely divided state mixed with water, is used for medicinal purposes. The main profile of the treatment of Kuialnyk peloids: diseases of the organs of support and movement, female and male reproductive systems, urological diseases, nervous system, skin, circulatory systems [4–6]. Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» operates on the territory of one of the oldest mud resorts. Located at the address: Odessa, resort «Kuialnyk», Clinical Sanatorium named after V. I. Pirohov «Kuialnyk», on the right bank of the Kuialnyk Estuary. The distance from the center of Odesa is 13 km, 18 km from the railway station, 15 km from the central bus station and 0.5 km from the bypass road.

The residential and medical zone of the sanatorium consists of three 15-storey pavilions. Building No. 1 is working at 50 %. Building No. 3 has not been operating since 2002. In 2010, building No. 2 was reconstructed. In 2015, cosmetic repairs were made on the 2nd and 3rd floors of the same building, rooms for spinal patients were specially equipped (70 rooms). In the same year, its own heating main was created and new boiler equipment was launched. In 2016, 3 more residential floors of the second building (120 rooms) were renovated (equipped with new furniture and all amenities) and put into operation, 2 new medical departments were opened in the polyclinic [7]. Services provided by the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» is divided into basic and additional.

Main services:

- consultations of a gynecologist, urologist, dermatologist, therapist, cardiologist, proctologist, dental services;

- rheumatic tests, x-rays, ultrasound examinations, laser therapy, massages, hydrocolonotherapy, mineral water, underwater shower-massage, underwater extractor, gas-mud bath, physiotherapy, ozone therapy, oxygen therapy [7].

Additional services: a set of services «Gifts of Kuialnyk», which promotes rejuvenation (processes of regeneration of tissues and organs), improves the overall well-being of the body; infrared sauna, swimming pool with brine, honey and mud peeling, oriental dances [7].

Infrastructure:

- medical building;
- indoor pool with brine ($t=30-32^{\circ}\text{C}$) and sauna;
- beauty saloon;
- tour agency;
- open guarded car park;
- cafes and several bars;
- souvenir shop, mini market and a small market;
- cinema and concert hall (1000 people), a lecture hall (100 people) and a dance hall (200 people).

On the territory of the Kuialnyk resort there is a pump room with mineral water from the Upper Sarmatian aquifer. Water is supplied from a borehole 90 m deep, it has been used in balneotherapy since 1890. Kuialnyk mineral water belongs to the group of low-mineralized medical table sodium chloride waters of the Myrhorod type. There is also a fresh water lake. Between the lake and the estuary there is a zone of sports and recreation areas, which occupies a total area of 1500 m. The beach of the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» is partially equipped. Distance – 300 m, located on the banks of the Kuialnyk Estuary. The city beach, equipped on the Black Sea coast (Luzanovka), can be reached by bus for an additional fee [7].

Despite the powerful natural resources, the medical base and the professionalism of doctors, the marketing policy that contributes to the development of the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» on the Internet is rather weak. Modern strategies related to spa services, marketing and investments require rapid adjustment, because customer preferences are dynamically changing. Previously, supply undeniably shaped demand, but now the trend is reversed. Recreational needs are constantly changing, and the consumer market for travel spa services is increasingly segmented.

In order to analyze the institution in more detail, the assessments of visitors to the sanatorium on the site were considered [8]. Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» has a mark of 8.3 («very good»). This indicator takes into account:

- purity – 7.5;
- comfort – 8;
- location – 6;
- convenience – 9;
- personnel – 9.5;
- value for money – 10;
- free Wi-Fi.

According to reviews, most users complain about outdated treatment areas and rooms, the inconvenience of transport interchange – without a private car – it is not convenient enough to get to the city, since the minibus runs only 1 time per hour. There are no complaints about the food; there are many positive reviews about the professionalism of doctors and attendants, an attractive pricing policy.

On the site [9], the sanatorium is presented with a rating from visitors – 3.0 («not bad»). The analysis of the reviews left is quite contradictory: satisfied guests point to good medical staff and healing mud, negative reviews point to poor infrastructure.

A sanatorium was found on the Facebook portal at the link [10]. The page has 7718 people and has 6439 likes. The content is being actively updated. The page on Facebook has a fairly high bandwidth, reliable communication channels with the provider of tourist spa services, and good information content.

The main site of the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» [7] was recently changed, a new logo was introduced. The design of the new site is very different compared to the old one – the color scheme is restrained and corresponds to the theme, the font of the text is well chosen for reading. A lot of sections and modules have been created, with the help of which it is possible to find the necessary information. The site will be user-friendly if it works smoothly and is filled with basic information, pages load quickly, but fast «feedback» is not debugged. In the Google search engine, the site of the sanatorium is issued on the first pages of the search for key phrases.

It should be noted that the main part of the sanatoriums in Odessa was built in the Soviet period. Most of them were designed to provide decent treatment for their employees. Many sanatoriums do not have modern

equipment, proper comfort, and new methods of treatment. Therefore, after analyzing, it is possible to select a group of spa hotels that can be competitive.

These include:

1. «AQUA Paradise» SPA center [11];
2. Grand Marine Spa Hotel [12];
3. Ark Palace Spa Hotel [13].

These accommodation establishments offer accommodation, catering and a range of spa services. Competitors can be classified according to three criteria (Table 1):

- location;
- price policy;
- infrastructure development;
- loyalty system.

According to the comparative characteristics of competitors, each institution can be evaluated according to certain criteria on a five-point scale, Table. 2.

Based on the analysis, a competitiveness polygon was constructed (Fig. 1).

The polygon of competitiveness showed that the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» has the lowest rating in all respects. Despite the loyal pricing policy, the development of infrastructure, the development of the provision of services is very weak. Therefore, the sanatorium needs to find ways for further development: to conduct an advertising campaign, new methods of using peloid therapy.

Table 1

Comparative characteristics of the competitors of Clinical Sanatorium named after V. I. Pirohov «Kuialnyk»

Indicators	Kuialnyk sanatorium	AQUA Paradise SPA center	Grand Marine Spa Hotel	Ark Palace Spa Hotel
Location	distance from the center of Odesa 13 km, resort Kuialnyk	16 km from the center of Odesa, Savinyon residential area	16 km from the center of Odesa, Savinyon residential area	7 km from the center of Odesa, Primorsky district
Pricing policy of the chosen service	3.51 USD	14.73 USD	10.52 USD	15.78 USD
Infrastructure development	medical building, indoor pool with brine and sauna, beauty salon, tour desk, open guarded parking lot, cafe and several bars, souvenir shop, mini market and small bazaar, cinema and concert hall, lecture hall and dance hall	boarding house, bungalow, guest room, apart-hotel, phyto bar, restaurant, bowling, beauty parlor, bath-pool complex, snow room, hydromassage room, winter beach	medical center, restaurant, bar, spa, conference hall, swimming pool, billiard room	restaurant, swimming pool, 10 types of baths, fitness club, SPA center, SPA cinema, 100 types of different massages, beauty studio
Loyalty system	5 % discount is provided to the following categories of citizens: – liquidators of the accident at the Chernobyl nuclear power plant; – disabled people and participants of the Great Patriotic War; – persons with the status of «Veterans of Labor»	700 USD – 5 %, 875 USD – 10 %, above 1050 USD – 15 % discount; it is possible to purchase a subscription for 45 to 90 visits to the bath and pool complex	discounts for accommodation – 15 %; when booking 3 days, 1 day is provided as a gift; 20–30 % discount on all procedures of the anti-cellulite program	every Thursday 20 % discount for all types of baths; 10–15 % for 24 and 36 sessions of kinesitherapy; when paying for 10 massage courses – 10 % discount for the whole family

Table 2

Assessment of the competitiveness of the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk»

Indicators	Kuialnyk sanatorium	AQUA Paradise SPA center	Grand Marine Spa Hotel	Ark Palace Spa Hotel
Location	3	4	4	5
Pricing policy of the chosen service	5	3	4	3
Infrastructure development	2	5	4	5
Loyalty system	2	5	4	4
Advertising	2	4	4	5
SPA zone development	0	5	4	5

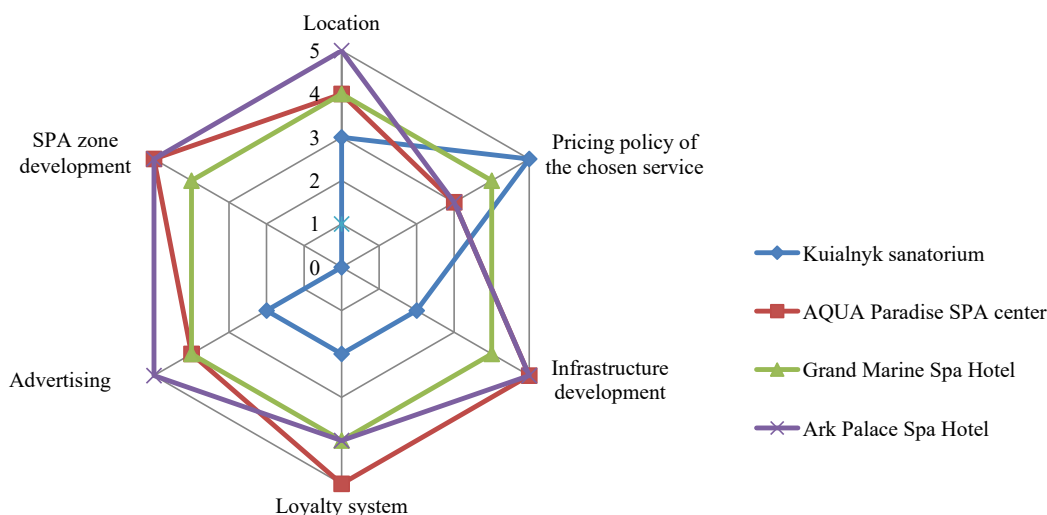


Fig. 1. Assessment of the competitiveness of the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk»

The main part of the visitors of the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» are Ukrainians with deficiencies in the musculoskeletal system, female and male sexual diseases. The sanatorium accepts foreign visitors from Belarus, Moldova, Europe. In total, up to 10 thousand people come to the Kuialnyk resort for health improvement for the entire period of the season. On average, their period of residence is 12–14 days. Currently, the sanatorium can accommodate about 1000 people, vacationers live only in building No. 2, which is designed for 990 people. Due to the financial crisis and the unstable situation in the country, there was a slight decrease in visitors to the sanatorium.

To study the preferences of potential visitors, a survey method was chosen. The practice of many sociological studies has shown that, along with interviews, a questionnaire survey or questioning is one of the most common and effective survey methods. It is the technology of questioning that makes it possible to obtain high-quality and diverse sociological information. After the development of the questionnaire was completed, an online survey was started using a special form in Google Drive, in which 356 people took part.

The study showed that 86 % of respondents know that such a sanatorium exists. 30 % of them go to a sanatorium for treatment or just relax there. The next question showed that 56 % of respondents would like to visit the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk», 12 % do not want this, 32 % do not think about it or consider it unnecessary, because the resort is not intended for their age category.

Thanks to the following questions, it was possible to determine how the respondents relate to the spa and the need to create it on the basis of a sanatorium. A significant part of the respondents – 90 % – visited the spa at least several times, that is, such services are already becoming more popular. Regarding the creation of a SPA zone in the Kuialnyk sanatorium, 97 % of respondents support this opinion, and only 3 % of such services do not consider it necessary. Thus, the analysis carried out confirms the need for modernization and the introduction of new services on the basis of the sanatorium.

Among the spa services chosen by the respondents, the answers were distributed quite homogeneously – the majority

of the respondents prefer weight loss and rejuvenation procedures (60 %). The survey involved respondents aged 18 to 45 years, that is, the younger generation, which, with the correct use of the appropriate advertising company, will be interested in such services.

Based on the results of the survey, it can be concluded that the target audience of the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk»:

1) women who take care of their appearance and health want to get a rejuvenating and healing effect, while spending time in a comfortable and pleasant atmosphere;

2) women who want to receive a complex of spa treatments and pay attention not only to themselves, but also to strengthen the immune system, relieve stress, improve mood, and spend time together with pleasure.

The level of abundance is average, above average.

The main goal is to get positive emotions and effect, meet your needs, provide quality services, and support the youth and beauty and health of your child.

Guest portrait:

- female gender;
- age: 25 to 40;
- the level of abundance is medium;
- they like: to take time for themselves, take care of themselves, receive wellness treatments with their child;
- price: loyal pricing policy, affordable price-quality ratio.

The final conclusion on the introduction of new technologies through the introduction of a SPA zone and the development of SPA services based on pelotherapy based on the existing Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» was made, taking into account:

- the main characteristics of the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» and its infrastructure;
- treatment profile;
- powerful natural resources;
- the popularity of the spa services market today.

In order to identify and develop a competitive and original concept of the sanatorium, semantic design was carried out. During the semantic design, answers were received to the question of what the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» is which provides

peloid therapy services. Based on the results, a new concept for the development of the sanatorium and its services was developed.

The concept is to create a new SPA zone on the basis of the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» with highly qualified relaxation services (recovery, treatment and rejuvenation) in the place of the primary source of healing sulphide-silt peloid, not only for adults, but also for children.

The idea of creating a modern SPA area on the basis of the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk», based on the mud of the Kuialnyk estuary. Reconstruction of the number of rooms on the 2nd floor of building No. 2 for the functioning of the SPA zone, the creation of a BeautyBoutique store for the sale of medicines based on peloid. The complete concept is shown in Fig. 2.

The unique selling proposition of the new concept of the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» is the introduction of a modernized SPA zone, with the aim of spreading pelotherapy in Odesa, offering the only SPA services in Odessa specially designed for children.

Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» has many disadvantages:

- the stereotype of providing «Soviet comfort»;
- lack of identification marks on the road near the sanatorium;
- low level of awareness of people in the provision of the services offered by the sanatorium and the healing properties of the Kuialnyk peloid;
- lack of amenities on the beach near the estuary;
- passive advertising campaign on the Internet.

Advertising is a targeted dissemination of information about a service with the aim of informing the consumer in order to promote and sell a product, which contributes to the buyer's interest and desire to buy this product. To attract a potential consumer, it is necessary to conduct the following advertising campaign:

1. Social networks today are the most powerful channel of communication with customers, an advertising platform and the largest place of congestion of people on the Inter-

net of different ages, especially young people. Thanks to the survey, it was found that a fairly large percentage of potential customers use social networks. The Sanatorium's Facebook group was recently created and already has a significant number of subscribers. It is just beginning to develop, that is, constant updating of information, interesting facts about the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» and pelotherapy, to stimulate awareness and interest among domestic and foreign users, since Facebook is one of the world's largest social networks today.

2. Advertising on forums is one of the most important and successful SMM (Social Media Marketing) tools where it is possible to find user reviews and advice.

Website promotion: there have been shifts in this direction, the website of the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» is completely updated, but not convenient for use, because it works very slowly, often does not respond to a request or provides incorrect information, which causes an annoying reaction among users. For convenient use, it is necessary to adjust the work of the site. It is also necessary to include in the list of additional services, spa services and camping, or display this information on the main page as an innovation to encourage potential visitors.

3. Internet mailing – mailing will help to attract new customers and create a certain image. In general, only a mailing list that is aimed at specific representatives of the target audience can be successful.

4. Contextual advertising is one of the most effective methods of promotion on the Internet. Such an advertising campaign can be launched very quickly. Advertisements will be displayed in search engine results in response to user requests, that is, only to those who themselves already want to use these services.

Also, one of the methods of advertising the campaign will be outdoor advertising. Outdoor advertising is any advertisement located in the city on the walls of houses, stands, billboards and banners, in the subway and in transport. This method of advertising distribution is considered relatively inexpensive, and it also reaches many people geographically.

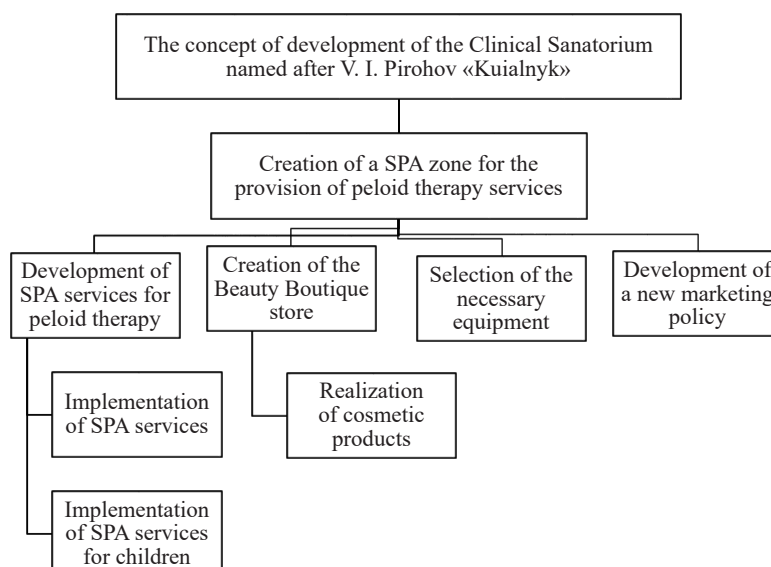


Fig. 2. The concept of development of the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk»

It is proposed to introduce the following types of outdoor advertising:

- shields;
- signs;
- advertising in public transport;
- advertising in elevators.

Installing a billboard advertising new (introduced) services, new equipment of the sanatorium and direction signs to the health resort is simply necessary. Clinical Sanatorium named after V. I. Pirohov «Kuialnyk» is located near the highway, where a large number of cars pass during the day, and one of the largest districts of the city of Odessa is nearby. A bright billboard will attract attention and encourage visitors.

Loyalty systems of the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk»:

1. Creation of club cards. Club cards allow receiving a monetary reward from the provided service and paying with them in the future. Issued after the first visit, and after the second – a bonus of 3 % is credited to your personal account. And after the 6th visit to the SPA zone, the guest receives a 5 % discount. The card is valid until the 10th visit inclusive. After 10 visits, the guest receives a 5 % discount on services.

2. Free lotteries in social networks. On Facebook, on the official page, it is possible to post the rules of the competition, for example, for the maximum repost, the «rejuvenating lymphatic drainage massage» service is provided for free. Such draws can be carried out using different conditions of the competition with different provision of free services.

3. Action «bring a friend». According to the terms of the promotion, coming to the SPA zone with a friend or loved one, the visitor receives a 30 % discount on the selected service.

4. Action «gift for the birthday boy». All birthday people receive 30 minutes of relaxing massage and paraffin hand therapy for free within a month after their birthday.

The proposed methods of advertising on the Internet have begun to gain momentum, because many potential customers daily communicate on social networks, search for information about products and services, recommend and request advice. Therefore, it is necessary to use all

these opportunities to attract visitors. Convenient communication with clients on social networks will stimulate the encouragement of visitors to pelotherapy. All this contributes to the formation of the tourist brand of the resort.

For a more specific analysis of development opportunities and demand, a SWOT analysis has been developed. Table 3 shows the SWOT analysis of Clinical Sanatorium named after V. I. Pirohov «Kuialnyk». Thus, the strengths and weaknesses of the sanatorium were considered, allowing to identify those aspects that are in a winning position, because they should be maintained at the proper level. As well as aspects, the modernization of which can accelerate the process of improvement and avoid the loss of the image of the sanatorium.

Based on the above, the following conclusions can be drawn:

- it is necessary to increase the popularity of the sanatorium institution, the Kuialnyk estuary and attract consumers to domestic recreation;
- it is necessary to modernize and introduce new methods of treatment;
- the sanatorium has powerful natural resources that need to be used without giving a reason to fall into decay of the healing resort;
- create a new direction for the promotion and marketing of products;
- to establish a convenient transport connection with the sanatorium;
- to use and use the free area of the territory.

Under these conditions, the need for branding a spa institution is growing, because unique natural resources may be of interest not only to internal, but also to external tourists. To coordinate their own activities in all developed countries there are associations of health tourism, exhibitions and other special events are held to train staff and attract more potential tourists. The study allows looking at the Ukrainian consumer's angle of real problems and the possibilities of their solution from the side of the reorganization of SPA establishments. International travel agencies in search of new travel programs receive a new improved offer to visit the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk».

Table 3

SWOT analysis of the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk»

Strengths	Weaknesses
<ul style="list-style-type: none"> – location near the Kuialnyk estuary (a unique specificity of the sanatorium); – a wide range of medical services; – professionalism of doctors; – a large territory; – close to the highway; – according to the chemical composition and healing properties, Kuialnyk mud is not inferior to the mud of the Dead Sea 	<ul style="list-style-type: none"> – part of the premises and territory is in a state of decay; – outdated medical base; – insufficient arrangement of rooms; – weak marketing company; – lack of identification marks near the sanatorium on the road; – located outside the city; – it is problematic to get to the sanatorium by public transport; – not intended for different age groups
Opportunities	Threats
<ul style="list-style-type: none"> – carrying out repair work; – access to the international market; – absence of direct potential competitors; – creation of a spa zone; – opening of a cosmetic shop for preparations based on Kuialnyk mud; – carrying out a marketing policy 	<ul style="list-style-type: none"> – lack of visitors; – risk of drying up of the Kuialnyk estuary; – closing of the sanatorium; – the impact of unforeseen situations in the country, global crises, etc. Deterioration of the ecological situation; – increasing demand for services from guests; – problems with the selection of qualified personnel

4. Conclusions

Taking into account the international trends in the development of medical and health tourism and the digitalization of the tourism industry, the authors proposed a new branding model for the Clinical Sanatorium named after V. I. Pirohov «Kuialnyk». The paper gives a characteristic of social networks in which the object of study is presented, a comparative description of competitors and an assessment of the competitiveness of the sanatorium are given, the main preferences of potential tourists are identified by the questionnaire method and a portrait of the tourist is drawn up. Thanks to semantic design, a concept for the development of a spa institution was formed and five necessary branding measures were proposed. Based on the SWOT analysis, the main opportunities for the development and increase in demand for spa services are identified. Ensuring the competitiveness of the tourist product to enter the international market is possible through the introduction of the developed branding model.

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