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## **Wellness as a cure for the problems of Czech spas?**

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## **Wellness as a cure for the problems of Czech spas?**

The paper is focused on spas in the Czech Republic. Czech spas are unique in its extraordinary size, healing natural resources and treatment procedures, but also in the history and architecture of spa complexes in combination with spa landscape, gastronomic specialties and rich social life. In recent years, however, the spas have faced significant problems as insufficient funding, lack of qualified staff or fewer clients. The spas began to offer wellness services to improve their results. The aim of the paper is to present the current situation and to find out whether a greater focus on wellness can become a cure for the spas. The content analysis of the websites and the analysis of review sites related to the issue were used, but also the analysis of the annual reports of individual spa entities. The conclusion says that wellness activities can be used to solve the problem of the spa, but only that isn't enough. It is certainly necessary to increase the attractiveness of the spa offer, but also to invest in balneology research, support the education, maintain stable financial support from the state and make the most of marketing activities in order to preserve the medical function of the spas.

Keywords: spas; wellness; balneology; tourism; Czech Republic

### **Introduction**

In the Czech Republic, spas are considered a specific, valuable part of tourism. It is unique in its extraordinary size, from a global perspective, but also in the fact that it is not only about healing natural resources and therapeutic procedures based on them, but also about the history and architecture of spa complexes in combination with the surrounding spa landscape, gastronomic specialties and rich social life. This is evidenced by the nomination of the West Bohemian spa triangle (Karlovy Vary, Mariánské Lázně and Františkovy Lázně) to the UNESCO World Heritage List. According to Jandová (2014), Czech spas have always been associated with European cultural heritage due to the quality of natural healing resources and a sophisticated treatment system.

Czech spas have long been a popular destination for foreign tourists. According to data from the Czech Statistical Office, they were visited by 252.5 thousand guests in 1930, the majority being foreigners (mostly from Germany, Poland, Austria, but also from Great Britain, Romania, Hungary and the United States). Most guests went to the West Bohemian spas. Since its origin, the Czech spas has been visited by a number of important personalities, aristocrats and personalities of the cultural world, such as Paganini, Mozart, Beethoven, Schiller, Chopin, Goethe, Twain, Edison, Tolstoy, Freud, Empress Elizabeth of Austria and King Edward VII (Český statistický úřad, 2019). In 2019, the Czech Statistical Office lists 884 thousand guests, of which 45% are foreign, mostly from Germany and Russia; two thirds of foreign guests go to the West Bohemian spas (Machová, 2020).

In the last decade, however, spas in the Czech Republic have had to face problems that often threatened their very existence and which in part persist to this day. These are mainly changes in the financing of spa care, the lack of qualified staff, the decrease in the established Russian clientele due to the Ukrainian-Russian crisis and subsequent sanctions or disputes with copyright collectives over fees for distributing copyright works via television and radio in clients' rooms. Czech spas have traditionally had a healing function primarily, but due to the above problems, they have also begun to focus on providing various wellness programs. Wellness in general has become increasingly popular recently. Vystoupil et al. (2017) even talk about wellness as a phenomenon of today. However, wellness stays are significantly shorter; while treatment stays last several weeks, wellness usually up to one week, with extended weekends or two to three days during the week being the most popular (Vampulová, 2016).

However, wellness services are also offered by a large number of other entities that do not have the status of a spa facility. These are hotels, boarding houses or entire resorts that provide wellness services of various scales and levels, from the mere complement to accommodation services to sophisticated wellness programs.

As stated by Vampulová (2016), a wellness stay in a spa differs from other wellness stays mainly by the possibility to use natural healing resources and by the presence of doctors, nurses and therapists, they can include an initial medical examination or some treatment procedures, which could be their advantage in the market.

On the other hand, it is necessary to mention the opinion of the representatives of the spas, who point out that wellness services should not prevail over the medical function of the spas (i.e. procedures under medical supervision). A complication may be insufficient legal regulation of wellness, which allows to assign very diverse activities to this concept and does not clearly define them, in contrast to the detailed and clear legal regulation of the spa functioning (Petráš, 2019).

This paper focuses on the spas and wellness in the Czech Republic. As Petráš (2019) states, not only a clear definition of wellness activities is missing, but also scientific and professional elaborations of this issue. This paper therefore tries to contribute to filling this gap. Due to the ambiguity of the terms, it first explains the terminology used with regard to the conditions in the Czech Republic. It tries to identify the most significant problems of contemporary spas in the Czech Republic. At the same time, it studies the local situation in the field of wellness services, whether it is the facilities that provide them or the products offered, both in spa locations and outside them. To find out the necessary facts, the method of content analysis of websites (spas, wellness hotels and hotel chains focused on wellness) was used, as well as the analysis

of review sites related to the given issue, but also the analysis of annual reports of individual spa entities. The aim of this paper is to present the current situation in the Czech Republic in terms of the issues addressed and to find an answer to the question of whether a possible greater focus on wellness can become a cure for the problems that afflict the spas in the Czech Republic.

### **Theoretical background**

In this paper we use definitions from the Interpretive Dictionary of Tourism (Zelenka & Pásková, 2012). We consider spas as a set of activities, specific infrastructure and human resources in the field of knowledge and practice focused on knowledge of natural healing resources (balneology) and implementation of techniques and procedures for the treatment of various somatic, psychosomatic and psychological problems (balneotherapy). The main goal of spas is prevention and treatment of human diseases, regeneration of strength and relaxation, as also Poděbradský (2008) states. It is associated with the use of natural healing resources (mineral springs, peloids, natural gases, healing climate), natural beauty and the composition of cultural environment. Part of the spa therapy is a change of place and customs, meals, etc. for a longer period of time (usually 20 days or more). Spa guests are patients and their health is regularly monitored by a doctor during the entire spa stay. Some of them have medical supervision 24 hours a day. Pellešová and Kostková (2015) point out that in some parts of Europe the term "spa" can be understood as wellness and medical tourism. A similar view is shared by Jakubíková et al. (2019), who claim that in English countries the term has been used for facilities providing facial and body care, relaxation services, etc., while spas within the meaning of the above definition are referred to as medical treatment or health treatment. However, in this paper the term "spa" will be used in the sense of the above definition. Related to this is the term "spa hotel", which is

understood here as a facility corresponding to the requirements of legislation in the Czech Republic (especially Act No. 164/2001 Coll., which is referred to as the Spa Act), i.e. facilities that serve to provide spa care in an area with an environmental conditions corresponding to the requirements of spa care, if there is a natural healing source in or near this area or this area has climatic conditions favorable to treatment. It follows that not every hotel can be a spa hotel; the spas in the Czech Republic are also regulated by a large number of other regulations, which significantly limits these facilities. We understand spa care as healing procedures that use local natural healing resources and that are provided in the spa facilities defined above.

Spas were used as early as in ancient times by the Romans. In later times, people monitored the healing effects of some springs and began to use them to treat various diseases. Spa treatment and prevention are intended to start the human inner organism to a self-healing process. Spas use local natural resources (thermal or mineral water, peat, regional climate). The treatment often includes physical and relaxation activities under the supervision of a doctor. Spas can also offer education – how to prevent diseases, how to live with it better, or in general, how to live healthier on normal days. For example, in the Czech Republic, the doctor currently draws up a therapeutic plan for the spa guest, which lasts 2–4 weeks. A few days may be enough for prevention purposes. Stay, meals, medical care and medical procedures are paid in full or in part from public sources (health insurance companies). In the Czech Republic, they are prescribed by a doctor and approved by a medical examiner of the respective health insurance company.

Spas have a positive impact in at least four aspects: health, scientific research, economic and social. The health impact is based on the fact that spas have the character of holistic medicine, has a positive effect on physical and mental health, is part of the

prevention of civilization diseases and provides personalized treatment procedures to clients of all ages. (MEPCO, 2018). Vildová et al. (2015) states that spa treatment is focused on disease prevention, health improvement and consequently reducing the incapacity for work of the population. Jandová (2014) draws attention to the fact that, for example, in the Czech Republic, spas are a direct continuation of hospital care in the case of subacute states, the so-called "bed-to-bed" translation. This happens in the case of patients where there is hope for a complete recovery or a significant improvement in health through balneology.

The scientific research impact is related to development, research and education focused on the usability of natural healing resources. Efimenko et al. (2020) map the positive effects of the continuous functioning of the Pyatigorsk research institute of balneology. They also point out that it is difficult to imagine a full picture of the past, present and future of the famous resorts of the Caucasus Mineral Waters, as well as the entire Russian balneology and departmental business without the existence of this institute. On the other hand, Jandová (2014) points out the problem of interruption of education in the field of balneology, which occurred in the second half of the 20th century in the Czech Republic.

The economic impact of balneology and spas is based on the continuing attractiveness of the branch in some local economies. This contributes significantly to the prosperity of the spa regions. (MEPCO, 2018). Pellešová and Kostková (2015) state that spas lead to the prosperity of the region and increase the prosperity of business entities. Similarly, Perić et al. (2017) state that spas are important for the development of the potential and the future of Serbia. Molnár (2010) argues that spas and spa tourism are playing an increasingly important role in economic and social processes in Hungary.



This also points to the social influence, as stated in (MEPCO, 2018): spas corresponding to current requirements and trends have a positive effect on lifestyle and encourage rich cultural activities. It improves the social climate of the region.

Despite these positive influences, it is possible to observe certain problems in the prosperity of the spas in the Czech Republic. Vystoupil et al. (2017) also draw attention to certain difficulties. Despite these valuable benefits, in recent years in many countries there has been a decline in spas and the combination of medical function of spas with wellness activities. This form of recreation is often a more attractive option for customers. MEPCO (2018) points out that relaxation stays should only be one of the ways to maintain the spas, not the goal itself.

The question remains what the term wellness actually contains. The characterization of wellness is relatively broad, but the legal definition in the Czech legal system is missing. Wellness (resp. wellness activities) is defined for the purposes of this paper according to the Interpretive Dictionary of Tourism (Zelenka & Pásková, 2012). These are recreational, spa and sports activities aimed at achieving mental and physical health. This does not require the consent of a doctor. “Wellness hotel” is then understood to be a hotel which is not a spa facility as defined above. It is therefore necessary to distinguish a spa hotel that uses a natural healing resource and is a registered medical facility, i.e. the quality of health care, professional qualifications of staff, mandatory equipment and compliance with all rules must be guaranteed by the appropriate permits of the Ministry of Health and regional authorities, and a hotel that is just an accommodation facility with wellness facilities, but not spas (Ulrych, 2017a).

Wellness products can become one of the marketing tools that can significantly help spas. But there are also other marketing tools that are appropriate to involve. For example, NaRanong and Pattarakijkusol (2019) state that all marketing factors, i.e.

product, price, place and promotion, have a great impact on consumers' decisions to use spa services. The need to use new approaches in promotion with the involvement of a sufficient digital platform is also pointed out by Voinova (2020). Now, in relation to the product and processes associated with the provision of spa care, it is possible to consider the use of a new strategy with the involvement of Marketing 4.0. This is confirmed by research (Dewi, 2020). In spas, this approach opens up completely new possibilities for feedback - marketers can use analyzes and unsuspected data connections. This will bring an analytical and business perspective to marketing communication and target specific customers very effectively and in an addressed manner. A personalized offer that responds to the customer's needs and results from his behavior in the past will encourage his more frequent or longer visits.

From the beginning of the 21st century, the rapid growth of the wellness market can be seen, which is associated with growing awareness of the importance of health, as stated by Hashemi et al. (2015). According to data from the Global Wellness Institute (2021), the wellness economy grew by 5.8% per year in 2013-2017, which is more than five times faster than the global economy (1.1% per year). Csirmaz and Pető (2015) then talk about the dynamic development of wellness tourism at the national level as well as internationally. Chen et al. (2008) define wellness tourism as a phenomenon that leads to increased personal well-being by traveling to destinations that provide services and experiences to rejuvenate the body, mind and spirit of participants. Such destinations can be understood as wellness destinations. As Hartwell et al. (2016) document, also in the professional literature there is a noticeable shift in the perception of health, wellness, wellbeing in connection with tourism, from product focus, to a deeper appreciation of many benefits that tourism brings, both for participants and locals. They consider the most challenging task at the destination level to find

professionals who can connect the different worlds of tourism and wellness into an interconnected wellness destination, for the benefit of visitors and locals alike.

The growing importance of wellness for the spa environment is pointed out by Dimitrovski and Todorović (2015), who see wellness tourism as an effective strategy for revitalizing spas facing structural and economic problems. They believe that the strategy must be based on customers' wishes and requirements and reflect the changing profile of a typical spa guest, who is more focused on prevention than treatment today. The importance of wellness for solving problems of spas is also confirmed by Derco and Pavlisinova (2016) on the example of Slovak spas, financial stability of which is based right on the balance between medical products covered by public health insurance and medical or wellness products paid by patients.

In terms of infrastructure, Hashemi et al. (2015) state that many hotels have adequate wellness facilities and offer these services to tourists, but on the other hand there are also spa hotels that provide medical care. The categorization system of spa and wellness facilities is considered by these authors to be an effective tool for ensuring the quality of services. If there is no uniform categorization of spa and wellness facilities, Januszewska et al. (2016) recommend to focus on awards and certificates granted to particular facilities, which are a sign of high quality services and which thus help customers to reduce risk, while they bring service providers prestige and consequently an increase in income.

Life stress and involvement in health prove to be important factors that lead to the intention to visit a wellness destination (Hudson et al., 2017). Positive behavioural intention, such as repeated visits, recommendations, etc., can be supported by spa hotel operators by improving the quality of their spa services, creating pleasant experiences for customers, increasing the level of their satisfaction and arousing their desires (Han

et al., 2019). Chen et al. (2008) found that the main motivating factors of wellness tourists include relaxation, pursuing multiple activities, recreation or nature, with relaxation being the most important. Nevertheless, they point out that there may be cultural differences among different nationalities in the concept of wellness, and therefore the demand for wellness products and services needs to be evaluated from cross-cultural perspectives. However, Adongo et al. (2017) believe that there is some agreement on the choice of wellness activities by visitors across geographical areas and that the type and number of treatments depend on many factors such as age, level of education, travel party size, spa experience, type of guest, length of stay, but also expected benefits. Similarly, Han et al. (2017) emphasize the crucial importance of visitor's cultural background for destination marketing, although they admit that the effects of cultural differences on the behavior of wellness tourists are difficult to investigate. According to these authors, strengthening the loyalty of visitors makes a decisive contribution to the success of the destination.

## **Problems of the spas in the Czech Republic**

### ***Economy of the spas***

The spas in the Czech Republic are primarily associated with the occurrence of a natural healing resource. Spa care is provided by 93 registered entities. There are a total of 231 spa facilities in 32 towns and villages in the Czech Republic. (Novák & Kozelský, 2018) Spa care is provided as a necessary part of the treatment process. It is recommended by the attending physician, confirmed by the reviewing physician and paid for by the patient's relevant health insurance company. The health insurance company pays for spa care expenses in full (comprehensive spa care) or in part (contributory spa care).

A total of 370,573 clients came to the spas during 2018 for treatment. Almost 30% (109,171) of people were treated at the expenses of public health insurance (comprehensive spa care + contributory spa care in total). In 2018, a total of 101,509 patients used comprehensive spa care. Contributory spa care was provided to a total of 7,662 patients. Foreigners accounted for 43.8% (162,137) and domestic self-payers for 26.8% (99,265) of the total number of treated clients. 6,056 people stayed in the spas as an escort paid by the health insurance company. In 2020, during the coronavirus pandemic, when wellness stays and activities were banned by a government decree, the exception remained for spa care covered by public health insurance funds. These stays and care could be further provided, which represented an important source of income for the spas in times of crisis. Patients spent a total of 5,179,526 treatment days in the spas, an average of 14.0 days per person. Within the framework of public health insurance, patients were provided with 2,727,761 treatment days, which is 52.7% of all treatment days. The average length of the patient's stay within the comprehensive spa care was 25.4 days and within the contributory spa care was 20.2 days.

Musculoskeletal disorders are traditionally treated – 57.2% of the total number of adults. This was followed by nervous diseases (17.1%) and circulatory system diseases (7.0%). In 2018, 16,044,310 medical procedures were provided to patients in the spas. Rehabilitation (18.0%), hydrotherapy and massage (17.4%) and other procedures (14.0%) were the most represented. According to the submitted reports, spa facilities had 23,395 beds in the monitored period. (Novák & Kozelský, 2018)

There is a relatively stable interest in spa care in the Czech Republic. In 2013, there was a significant reduction in reimbursements for this care from public sources of funding. As a result, there was a year-on-year decrease in the number of nights (by 6.6%) that tourists spent in spas, mainly due to a decrease in the number of overnight

stays by domestic clients (Český statistický úřad, 2014). Nevertheless, there was still interest in spa care – clients covered the cost from their own resources to a greater extent, but for a shorter stay. This reflects the tradition of spa care in the Czech Republic, where clients visit the spas repeatedly. The reason is the positive impact on their health. Overall, however, there was a decrease in implemented spa care with a negative impact. This situation put pressure on the spas and many began to offer a wider range of services, including wellness, and thus invest in new equipment. In this respect, the spas in the Czech Republic fell asleep for a while and did not respond to the change in demand by using marketing tools that could significantly help the spas to obtain self-payers earlier. In the Czech Republic, spa directors relied more on tradition, revenue from public sources, and maintained the status quo until they could not rely on that revenue more. They should have learned much earlier from wellness hotels how to attract and retain customers. The spa patient has ever-increasing demands. This is due to his customer experience in using, for example, accommodation, gastronomic and wellness services besides spa stays. He subsequently projects this experience into his expectations in the branch of spas. If he is offered a significantly lower standard in the spas (for example, the absence of sanitary facilities in the room, not entirely high-quality food, or an ugly environment where spa treatments take place) then his interest in the spas is not supported. He can thus perceive the spas as a necessity in his convalescence. He will be willing to repeat such a stay only if it is paid from public funds and is not motivated to repeat it and participate in its payment.

### ***Spa occupancy***

Spa occupancy in the Czech Republic is about 70-90%, in the season the demand often exceeds the capacity, e.g. in Kynžvart. Karlova Studánka shows a year-round excess and rejects applicants. The spas increase revenues. For example, Jánské Lázně increased

revenues by 8% in 2018, both from payments of insurance companies and from commercial services (self-payers and commercial sales). Poděbrady shows an increase in revenues by 3.4%, similar to Třeboň, Běláhoř or Bohemia – lázně in Karlovy Vary. But there are also spas that are not so successful. For example, Libverda has declined. It seeks to improve it by increasing marketing efforts and expanding its service portfolio. Furthermore, Teplice v Čechách showed a slight decrease in foreign clients. Spa occupancy of Lázně Bludov is only 54%. Therefore, it cannot be said unequivocally that the spas in the Czech Republic are struggling with low attendance and low occupancy. Occupancy is understood as the quotient of the number of overnight stays in the observed period and of the product of the average number of beds available with the number of operating days (Český statistický úřad, 2021). There are some spas that solve this problem. Other places benefit from their popularity, the uniqueness of the environment or the specifics of natural resources. These spas are trying to maintain their status, but they do not have a significant problem.

### ***Quality of spa facilities***

The quality of spa facilities is one of the most important points, to which increased attention is paid. From a marketing point of view, the environment, its modernity, purity and design are important for the customer. This means that investments in the equipment, interior and exterior of the spa can have a significant impact on customer satisfaction and loyalty. The quality of the environment is one of the pillars of loyalty. (Vildová et al., 2015). Spas are investing in its development, modernizing technological and energy equipment and increasing accommodation capacity. The quality of spa facilities and equipment was significantly neglected in the late 1990s. Since then, significant attention and care have been paid to this area, and this trend is currently continuing. So there is no major problem that needs to be addressed. Rather, there is a

need to secure sufficient funding to maintain the current positive trend in this area and to continue with modernization.

### ***Lack of professional staff***

The spas in the Czech Republic have long struggled with the lack of qualified staff (doctors, nurses and therapists). The reason is both financial conditions and lower attractiveness of spas for living. Spas are usually located in smaller towns, often in border areas. In such places, there is not as good offer of high schools, job opportunities and leisure activities as in big cities. Because of this, there are also problems with the lack of other staff (waiters, chefs, receptionists, etc.), which also contributes significantly to the overall level of services provided. Spa managers respond to this and repeatedly increase spending on salaries and personal assessment (approximately 10% per year). New technologies could also be used with the spa. They attract new customers. In spas, replacing manpower with Industry 4.0 could be a significant help, however, this possibility seems problematic for the present, as Jakubíková et al. (2019) states.

### ***Lack of support in the education system***

There is one significant problem in the Czech Republic, which may not be obvious immediately, but its impact may be more evident in a few years. Spas have very low prestige among medical students. The reason is that it does not use new approaches or technical possibilities of modern medicine, but builds on classical treatment using available natural resources. The situation is exacerbated by the absence of greater systematic support for spa medicine among physicians and other medical professionals. Balneology is a certain complement in the study of medical disciplines. Lower earnings of employees in the spa sector (with the exception of doctors) than earnings in other



health care sectors contribute to the problem. Quality staff is not attracted to the spa sector and thus the quality of services for clients may be limited.

### ***Lobbying of the pharmaceutical industry***

The situation in the spa sector is also complicated by strong competition and lobbying from the pharmaceutical industry. This leads to the preference of taking medication to spa care. Physicians primarily offer medication, and only if the patient asks the physician to prescribe spa care he will begin to consider this option. Patients themselves are not stimulated to think about spa care. Thus, modern medicine and patients as well are influenced by the rapid development of pharmacology and technology, and the functional adaptation of the human organism and the time required for changes in reactivity are forgotten.

### ***Insufficient research in balneology***

A negative aspect is also the fact that at the end of the 20th century, research in the field of balneology slowed down or was completely suspended (among other things due to the abolition of the Balneology Research Institute in Mariánské Lázně in 1993).

Insufficient balneological research results in a lack of scientifically based effects of spa treatment on the human body. This is associated with a low level of promotion of spa care positive effects (e.g. in disease prevention). (MEPCO, 2018)

This also creates space for research in the economic field. If it is reaffirmed that balneology and rehabilitation are still yielding positive results, it is possible that economic figures will also indicate that there is a greater or comparable benefit of spas compared to medication. In such a case, it is more interesting for the Czech Republic to support spas than foreign pharmaceutical companies. This will enable the development of regions, the employment of citizens and support tourism (arrival of foreigners).

## **Wellness development in the Czech Republic**

In addition to the classic spa treatment, various wellness services are also offered in spas today, and not only there, which is related to the development of wellness tourism.

According to data from the Global Wellness Institute, the average growth rate of wellness tourism in the Czech Republic in 2012-2017 was 8.9% and the increase in wellness trips in the same period reached 2.1 million (Ulrych, 2017b).

Interest in wellness stays has been growing in recent years. In 2018, for example, the most famous Czech discount portal Slevomat sold 25% more wellness stays than in the previous year, and by October 2019, compared to the same period in 2018, even 50% more stays (Slevomat, 2019).

The KOMPASS company database registers 113 spa hotels (i.e. hotels with spa facilities) and 105 wellness hotels (i.e. hotels with saunas and solariums) in the Czech Republic. The Karlovy Vary region predominates in spa hotels, but the distribution of wellness hotels among particular regions is relatively even. However, these data are rather indicative, because the database is not complete and the division into categories is not reliable, especially due to the above-mentioned ambiguity of the terms, particularly the term wellness. Vystoupil et al. (2017) even talks about 700 accommodation facilities (hotels and boarding houses) that have a wellness label. However, they believe that only a tenth of them would be acceptable compared to the European standard.

### ***Wellness hotels***

Despite the above statement, it can be said that significant improvements can be observed in the area of wellness infrastructure. Currently, there are a number of interesting wellness hotels in the Czech Republic that offer top equipment with first-class services. Of course there are various types of saunas, massages (traditional and

exotic), whirlpools, swimming pools, Kneipp path, fitness, etc. However, some hotels also offer non-traditional services in the form of various rituals, own natural cosmetics, unique environment, whether modern design or ancient atmosphere of castles, a sea aquarium with live corals, anemones, colourful sea fish, outdoor heated pools, a sun terrace, a biotope lake with a beach, or panoramic views directly from the pool. The high level of accommodation services and gastronomy must be added to this. The most interesting wellness hotels in the Czech Republic are listed in Table 1. The winners of the Czech Hotel Awards in the Wellness & Spa category are among them. Hotel Troyer won in 2012, Hotel Berg in 2013-2019 and Hotel Alexandria in 2020. Wellness hotel V nebi became the winner in the category of five-star hotels in 2020. Of these hotels, only two are situated in some spa location (Luhačovice) and only one (Alexandria) is also a spa hotel.

Table 1: Representative wellness hotels in the Czech Republic

<b>Hotel</b>	<b>Location</b>	<b>Website</b>
Hotel Rajská zahrada	Nové Město nad Metují Hradec Králové Region	<a href="http://www.hotelrajskazahrada.cz/?lang=en">www.hotelrajskazahrada.cz/?lang=en</a>
Miura Hotel	Čeladná Moravian-Silesian Region	<a href="http://www.miura.cz/en">www.miura.cz/en</a>
Chateau Herálec	Herálec Vysočina Region	<a href="http://www.chateauheralec.com/">www.chateauheralec.com/</a>
Theatre Hotel	Olomouc Olomouc Region	<a href="http://www.theatre-hotel.cz/?lang=en">www.theatre-hotel.cz/?lang=en</a>
Augustiniánský dům	Luhačovice Zlín Region	<a href="http://www.augustian.cz/en">www.augustian.cz/en</a>
Hotel Sladovna	Černá Hora South-Moravian Region	<a href="http://www.hotelsladovna.cz/en">www.hotelsladovna.cz/en</a>
Cihelny Golf & Wellness Resort	Bečov nad Teplou Karlovy Vary Region	<a href="http://www.axxoshotels.com/cihelny-golf-wellness-resort">www.axxoshotels.com/cihelny-golf-wellness-resort</a>
Wellness hotel V nebi	Příchovice Liberec Region	<a href="http://www.vnebi.cz/en/">www.vnebi.cz/en/</a>
Chateau Mcely	Mcely Central Bohemian Region	<a href="http://www.chateaumcely.cz/en">www.chateaumcely.cz/en</a>
Alexandria Spa & Wellness hotel	Luhačovice Zlín Region	<a href="http://www.hotelalexandria.cz/en">www.hotelalexandria.cz/en</a>
Hotel Berg	Staré Splavy Liberec Region	<a href="http://www.hotelberg.cz/en/">www.hotelberg.cz/en/</a>
Hotel Troyer	Trojanovice Moravian-Silesian Region	<a href="http://www.troyer.cz/en">www.troyer.cz/en</a>

### ***Hotel chains and groups focused on wellness***

Another sign of the development of wellness in the Czech Republic are hotel chains or groups that focus on wellness, either completely or at least partially. The most important chains of this type are summarized in Table 2.

Table 2: Hotel chains and groups focusing on wellness in the Czech Republic

<b>Orea Hotels &amp; Resorts</b>	The largest hotel chain in the Czech Republic, a wide range of services, including wellness, 15 hotels in the most attractive locations in the Czech Republic
<b>EuroAgentur Hotels &amp; Travel a.s.</b>	Czech hotel chain, a wide portfolio of services including wellness, a total of 40 hotels and resorts under the EA Hotels brand in the most attractive travel and business locations in the Czech Republic, Slovakia and the Russian Federation
<b>ROYAL SPA, a.s.</b>	Czech family chain of spa hotels and resorts, in four spa towns in the Czech Republic (Mariánské Lázně, Luhačovice, Velké Losiny and Ostrožská Nová Ves), classic spa treatment and various types of relaxation and wellness stays
<b>AXXOS hotel &amp; spa management s.r.o.</b>	The group includes four hotels in Karlovy Vary, two in Mariánské Lázně and three in Prague, five hotels are directly spa hotels, wellness is part of most hotels (except two in Prague)
<b>Amenity Resorts s.r.o.</b>	Czech hotel chain, various types of accommodation in the middle of nature, in the most beautiful places in Bohemia (Lipno, Špindlerův Mlýn, Czech Canada, soon also Eagle Mountains), wellness is part of all resorts except for Czech Canada
<b>Pytloun Hotels s.r.o.</b>	12 design and traditional hotels in the heart of Prague, in the centre of Liberec and in beautiful mountain locations, the wellness hotels are three, namely in Liberec, the Giant Mountains and the Ore Mountains
<b>CPI Hotels, a.s.</b>	One of the largest hotel groups in the Czech Republic, hotels in six European countries and 15 destinations, the portfolio includes stylish hotels of Clarion, Quality, Comfort, Mamaison, Holiday Inn, Buddha-Bar, Spa & Kur and other hotels with own brands, the Spa & Kur brand is represented in the Czech Republic by two hotels in Františkovy Lázně
<b>Ensana</b>	One of the largest brands on the spa market in Europe, operates 26 spa hotels in the Czech Republic, Hungary, Romania and Slovakia, in the most famous spa towns. It has seven spa hotels in the Czech Republic, in Mariánské Lázně, which offer a wide selection of wellness and beauty treatments

### *Trends in the demand for wellness services*

In the Czech Republic, official statistics monitor only the spas, and only to a limited extent (guests and overnight stays in spa facilities), statistics on wellness (e.g. average length of stay of guests, their expenses, etc.) are unfortunately not available. The situation in the field of wellness can be at least partially documented by the experience of travel agencies or sellers of wellness stays, or the providers of wellness services themselves. Mráčková (2018) states that short-term stays predominate (the most popular are stays for a weekend, i.e. for two nights), but the average length of stay is increasing – it is determined primarily by the price, which is crucial for the customer, but also age (length of stay is extended with age). Slevomat (2019) adds that people also carry out short stays several times a year, as wellness stays represent variegation of holidays during the year, not the main holiday. Popular locations are no longer occupied only at the peaks of the season, but almost all year round.

According to the server Lidovky.cz (2017), interest in so-called small relaxation stays, i.e. stays in guesthouses including breakfast and access to sauna and whirlpool, is gradually declining. On the contrary, there is a growing interest in large hotels, preferably four-star, with wellness facilities, stylish hotels are popular. Guests prefer half board. Stylish environment is usually one of the key criteria in choosing stays, then the location and the price. Luxury (all inclusive packages) is coming to the fore. People are willing to spend larger amounts on such a service, when they do not have to worry about anything. The standard is unlimited wellness, or at least an hour of private services. Customers are more likely to seek peace, which is reflected in the demand for hotels that are not intended for children. The most popular destinations are spa towns, especially Karlovy Vary, Františkovy Lázně and Mariánské Lázně, but also Poděbrady or Luhačovice. Popular destinations also include mountains, especially the Giant Mountains and Šumava, or southern Bohemia.

The average expenditure is growing, which is related to the growing interest in four-star and five-star hotels and above-standard services (Slevomat, 2019). Differences can be observed between Czech and foreign clients, not only in the case of average spending, but also in service requirements. Last minute packages also appear on the wellness market (Lidovky.cz, 2017). Quality surveys regarding the profile and motivations of wellness guests are not available, it is only possible to obtain information of a general nature that is not based on relevant data and is outdated. Unfortunately, more up-to-date and reliable data describing this issue are completely lacking in the Czech Republic.

### ***Interesting wellness initiatives***

Wellness activities in the Czech Republic include a number of interesting initiatives. In the offer it is possible to find speleotherapy, vinotherapy, beer baths, herbal baths, sun baths, but also, for example, spirit spa or healing with silent. Clients can try sulphur baths, baths with various ingredients (strawberry, cranberry, hemp, chocolate, etc.). Some wellness operators also use their own cosmetics. The products also include meditation, yoga, etc.

Wellness stays are of various types. They can be related to a certain time of year, target group, etc. There are, for example, Advent, Valentine's or New Year's Eve stays, romantic stays for couples, but also stays for single travellers, educational stays for families with children, beauty programs or wellness programs for body shaping, which are aimed at women.

There are also products that deviate from the regular offer. For example, the product called "In the whirl of dance" combines wellness with the teaching of standard or Latin dances. Adventure is promised by "Weekend with murder", which is a package with wellness services, where guests also become part of a special theatre performance

and have the opportunity to participate in the investigation, in period costumes from the 1930s. The weekend is full of excitement, fun and suspense, in a beautiful castle environment. Rituals are part of other exceptional wellness products. The "Nine flowers" product is presented as a royal ritual with nine steps and nine herbs. It includes a relaxing bath in a wooden tub in the wooden "Honey pavilion" by the lake, in winter with a view of the crackling fire in the fireplace. "Augustinian rituals" include, for example, the "Ritual of the garden of six senses", which is a program for guests in the hotel garden. It focuses on promoting health, breathing exercises and harmonization to the natural seasonal cycle.

### **New times bring new challenges**

At the same time, however, the question arises as to whether wellness can replace spas or whether it is more of a certain attraction that can be used within marketing appropriately. Wellness would then bring an increase in interest in the spa sector, thanks to the attractive services it offers, but only in addition to well-developed marketing mix tools that need to be strengthened, too. If spas in the Czech Republic are progressive, then they will not only stay with the attractions that wellness brings, but will change under the influence of the new revolution brought by Industry 4.0. For example, there is the possibility of using digital assistive technologies, which can become a patient's guide in the spa. The digital assistant knows and monitors the current state of health (temperature, heart rate, respiratory rate, etc.), and currently recommends suitable activities in connection with medical assistance. The digital assistant can educate the patient who thus learns new healthy habits faster. The transition to digital technologies brings with it the possibility of modernizing the places of spa procedures performance, which the current spas in the Czech Republic definitely need so that it does not fall behind the material environment of wellness hotels.

A customer, who wants new experiences, likes modern technology, greater comfort thanks to digital assistance, will certainly be fascinated by the new face of Spa 4.0, if such a change occurs. Then the wellness itself will remain only an expected part of the spa environment, which will not bring significant differentiation. It is similar to hotels, where fifteen years ago it was common for bathrooms to be shared by several rooms. Nowadays, it is rather surprising, when the hotel room does not have its own bathroom and the guest does not have a hotel towel and soap.

In fifteen years, spa guests will be looking for healthy entertainment and relaxation at a high level using digital technologies, and it will be surprising if hotels and spa facilities won't offer wellness as a regular part of their services. Spa 4.0 will bring differentiation rather than wellness itself. At the same time, Spa 4.0 will offer help in solving the shortage of staff in spa facilities, which can only speed up the whole process of transformation into greater use of digital technologies.

## **Conclusion**

The spas in the Czech Republic stand on several pillars. One is their character – it is based on treatment using rehabilitation techniques and balneology (Zelenka a Pásková, 2012). It has significant medical effects, thanks to which it is included in comprehensive medical care (Jandová, 2014) and is paid for in full or in part from public funds of the state. This is the second pillar. The third pillar is customers' interest in spa care. Customers return to the spa and foreigners seek spa care in the Czech Republic (MEPCO, 2018). Thanks to this, additional financial resources from self-payers come to the spa sector.

It is evident that all three pillars mingle and complete with each other. If one of them suffers damage, it will have a significant negative impact on the entire spa sector. The threat to the first pillar comes with low support for spas in the education system and



also with low support for research activities in the field of therapeutic effects of balneology (MEPCO, 2018). As for the second pillar (i.e. revenues come from public sources), the spa sector became significantly shaken around 2013, when health insurance companies reduced payments for their clients (Český statistický úřad, 2014). This step was subsequently evaluated as threatening for the spa sector with a secondary impact on population health. The situation stabilized in the following years. This step has helped to expand the range of spa services, including wellness activities. At the same time, however, this unpleasant situation helped to expand the range of spa services and their better orientation to customer requirements, among others by including wellness activities. The third pillar (customer interest) is conditioned primarily by the quality of care, the modern environment of spas and their effectiveness on health. The spa environment is continuously modernized and there is an effort to offer new services to clients. At present, this pillar is threatened by a shortage of staff, both professional and non-professional. This would have a negative impact on quality and customer satisfaction. At the same time, this pillar is connected with the first pillar – the reduction of support for spas in the education system and for research activities reduces the quality of professional care and thus the impact on improving health.

From the above, it is clear that the mere increase in investments aimed at a wider range of wellness activities can't be the cure for the spas in the Czech Republic at present. Due to the specific phenomenon of spa care in the Czech Republic, it is much more important to invest in research into the therapeutic effects of balneology and rehabilitation. It is necessary to present these results sufficiently to the professional medical public and encourage young physicians to focus on this field, which could enter its Renaissance phase. At the same time, it will be necessary to build public relations towards the general public and thus support their interest in spa therapy, which they will

request from their doctors. Moreover, there's the new challenge of Industry 4.0. Spas should not miss the challenge, but make the best of it maximally.

If the neighbouring countries move their spas significantly towards wellness, this will create an important competitive advantage for the Czech Republic. Currently, four spa towns are aspiring to registration among UNESCO monuments (three in the supranational candidature and one separately). If this succeeds, then spas in the Czech Republic will gain a huge competitive advantage for the entire segment of spas and tourism throughout Europe.

Depending on research into the therapeutic effects of spas, it is possible either to pursue the support of spas and promote this unique heritage, or change policies and direct spas even in this country to different activities that will concentrate on wellness and relaxation.

At the moment (before sufficient research is carried out on the medical and economic impacts of spas), wellness can only be recommended as complementary business, which partially contributes to the overall customer satisfaction. We admit that in some spas already now wellness can become an attraction, thanks to which they will attract other than spa clientele and improve thus the occupancy of their facilities. Though, even this can be only a certain wave of interest. However, this is not the case in most spas in the Czech Republic, and the spas remain very exclusive and attractive. They still have a lot to offer and there is still interest in their services. In order to maintain this position, it is necessary to do more than just attract self-payers, foreigners and offer wellness products. In the future, it is necessary to involve research in balneology, education concerning its benefits and transform spas into modern and timeless places suitable not only for relaxation, but for restoring and strengthening

health under professional medical supervision. This combination is not yet offered by other places than spas.

The limits of this paper are in a narrow focus on the Czech Republic, so its recommendations cannot be automatically applied to other countries. Individual states may have a similar approach to understanding spas and wellness, but differ in legislation, cultural customs and traditions, people's approach to their own health, etc. The findings of the paper are further limited by the availability of sources. It has not been possible to carry out a comprehensive survey and subsequent analysis of all involved entities, and secondary data on this issue are very limited or absent. Inaccuracies are also caused by inconsistencies in terminology.

Therefore, a number of areas are offered for the focus of further research. As far as wellness is concerned, there is neither clear definition of terms, resp. unification of terminology (Petráš, 2019), nor relevant data. Both quantitative data, mapping the number of facilities, occurrence within regions, number of customers, length of their stay, list of services offered, etc., and qualitative data tracking the reasons for using these services, expectations and satisfaction with services. Here it would be appropriate to monitor data within customer segments defined by segmentation criteria, such as age, gender, employment, education, socio-economic situation, residence, etc. Based on such data, it would be possible to better describe the development of wellness in the Czech Republic. At the same time, it would be appropriate to focus separately on wellness hotels and spa hotels, which would make it possible to achieve an appropriate comparison.

However, despite its limits, this paper provides a basic view of the problems concerning the relationship between the spas and wellness in the Czech Republic, which is not yet sufficiently described in the literature. The information provided by the paper,

as well as its findings, can be a useful basis both for spa management and for various international comparisons, especially within Europe.

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