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## SUSTAINABLE MEDICAL WELLNESS – A CASE STUDY OF HUNGARIAN MEDICAL HOTELS

Health tourism is a dynamically developing sector of the economy with a lot of potential. Medical wellness is the cross-section of wellness tourism and medical tourism, which is continuously growing in popularity. It is a nearly new product which is expected to be one of the most popular trends in the next years but draws heavily on Hungarian traditions. This subtype of health tourism is based on both natural and man-made resources. One of the main types of services providers within health tourism are medical hotels. Issues of sustainability are very important for this segment because these accommodations are based on, and used to operate within sensitive natural resources and conditions. The paper deals with certified Hungarian medical hotels. It analyses the hotels' present situation with the help of structured interviews carried out with medical wellness specialists and questionnaires dedicated to hotels and consumers. The paper's goal is to put emphasis on medical wellness trends, providing solutions for regulatory and registration systems of domestic medical hotels as well as to analyse them in the context of sustainability. In the case of hotels not only the economic sustainability is important but one should pay attention on human, social and environmental contexts as well. The role of medical wellness trends is also important, because in some cases they do not support sustainability and they are able to drive customers towards a non-sustainable form of behaviour. The Hungarian system of medical wellness and medical hotels has some deficiencies and errors however these factors offer opportunities for development which will be elaborated here.

### **Introduction**

Hungary has long traditions in connection with health tourism. Traditionally, the supply is based on medicinal water oriented wellness and medical treatments, however new trends are emerging. Medical wellness is a nearly new product which is expected to be one of the most popular trends in the following years. It is a subtype of health tourism which is a dynamically developing sector full of potentials. Medical wellness can be located somewhere between wellness and medical tourism since it provides special treatments supervised by doctors but its main goal is prevention (Smith & Puczkó, 2009, p. 103.). One of the main types of service providers within health tourism are medical hotels. Because of the sensitive natural resources used for providing medical wellness services environmental sustainability is extremely important for this segment. Moreover we should not

forget the importance of legal and economic sustainability because these service providers are operating within the mixture of legal and economic areas and regulations. Medical services are highly regulated by different authorities while profitability, satisfaction of guests and the sustainable operation also have a vital importance. The problem is that sometimes these viewpoints and needs are controversial. Another problematic aspect is about the regulatory system of medical hotels. It should be transparent and clear without any mistakes to be legally sustainable. Medical hotels are one of the subtypes of traditional hotels, so their definition emerged from the attributes of hotels. Medical hotels are regulated by the GKM Decree No. 54/2003. (VIII. 29.) which was issued by the Minister of Transport. Those hotels can be considered as medical hotels which fulfil the basic requirements of hotels, moreover provide treatments and therapeutic facilities for their guests in their own medical department or with the help of a third party service provider [GKM Decree No. 54/2003. (VIII. 29.)]. According to another regulation denomination ‘medical hotel’ can only be allowed if the given hotel applies natural healing factors by itself or combines with other healing facilities, owns different authorizations [74/1999. (XII. 25.) EüM regulation].

The National Public Health and Medical Office Service (ÁNTSZ) is the national authority in Hungary which has the right to allow hotels to use the word “medical” within their names and to hold the certification of medical hotels. The record, supervision and regulation of medical hotels is another responsibility of this national institution (antsz.hu).

The paper deals with certified Hungarian medical hotels. It analyses the hotels’ present situation from demand and supply point of view. The paper’s goal was to put emphasis on medical wellness trends, providing solutions for regulatory and registration systems of domestic medical hotels as well as to analyse them in the context of sustainability.

### **Methodology**

The analysis is based on qualitative and quantitative researches. As for qualitative ones structured interviews were carried out with ÁNTSZ, Central Statistical Office of Hungary (KSH) and four doctors employed by medical and other types of hotels.

The goal of structured interviews is the high level of standardisation. In the case of structured interviews sequence of questions is created by the questionist on a unified way to have answers comparable with each other. With the help of high level standardisation suggestability of responses is decreasing (Lehota, 2001).

As for the quantitative side two online structured questionnaires were filled by Hungarian medical hotels and potential guests. According to Babbie (2000)

questionnaires are not suitable for measurement of societal actions however they are appropriate for collecting self-memoirs from the past or the future. The questionnaire dedicated for hotels was completed by 28 out of 32 hotels so the research was representative according to the quality level, location and size of hotels.

The consumer questionnaire was fully completed by 336 respondents but the full amount of responders was 393. Because of the questionnaire's dynamic structure the partial answers were also suitable for evaluation. Abundance of the research was interested in healthy lifestyle, wellness, medical wellness and treatments. Elements of sample were appointed with the help of careful sampling and the so-called snowball method.

### Results

The freshest register made by ÁNTSZ on Hungarian medical hotels was published in February of 2017. When the research was completed the freshest available database was that one which was published in November of 2015. The two databases are almost the same both of them contain the same errors and deficiencies the only difference is that the group of medical hotels was expanded by one single hotel.

Registration system of Hungarian medical hotels is not sustainable since different authorities have different data on the attributes and amount of certified medical hotels. According to the records of ÁNTSZ there are 39, according to KSH there are only 35 medical hotels in Hungary. The reason for the difference is unknown however according to the research there are only 33 currently operating medical hotels in the country. The errors could emerge from the fact that the database is reviewed only in every 20 years and the notification of changes in hotels' data is voluntary and not monitored. The register contains some wrong hotel names, some hotels which were closed down several years ago and some other ones which do not fulfil the requirements of medical hotels.

Sustainability is solicitous from economic, legal and demand point of view. These errors are able to mislead consumers, nothing to say about other authorities. Medical hotels are continuously developing since guest nights realised by them were increasing in recent years (*Tab. 1*). It is important to turn their registration system sustainable and to clear the market from those hotels which have a not deserved medical certification.

1. Table: Annual number of hotel guests (Source: ksh.hu)

Year	Cumulative number of guests realized by hotels	Cumulative number of guests realized by medical hotels	Proportion of medical hotel guests of the total amount of hotel guests (%)
2012.	6,584,000	501,000	7,6
2013.	7,003,000	509,000	7,3
2014.	7,514,000	565,000	7,5
2015.	8,096,000	663,000	8,2

### Opinion of doctors

The interviewed specialists agreed with the literature that medical wellness can be found somewhere between wellness and medical tourism (OEFS, 2007, p. 90.). It has not got clear boundaries in fact it is the meeting point of modern and alternative remedy (Voigt & Laing, 2013 in: Voigt & Pforr, 2013, pp. 35–36.). In the case of these services the presence of doctors is extremely important because wellness treatments appointed by guest individually can be harmful. The treatments require a condition survey and consultation with highly specialised experts. Treatments are proposed according to the conditions and problems of guests, receiving of them is possible only at the end of this process.

Sustainability of the desired health state is one of the main goals of medical wellness. It has to provide guests with information about healthy lifestyle (nutrition, sport, etc.) and it should ensure a long-term solution for health problems. According to some of the doctors, medical wellness has a primary role in prevention.

A part of the interviewed doctors experienced that guests are able to realise the difference between wellness, medical tourism and medical wellness, but the other part of them thinks that consumers are informed enough to distinguish these services.

Although there are paying guests in medical hotels most of the interviewed doctors consider them as patients not as guests. According to one of them this attitude is absolutely needed because treatments can have serious indications and contraindications. Another of them said that seven out of ten consumers considered themselves as patients not as guests, but as for other opinions this ratio is about 50%.

A big part of hotel guest feedback is informal and a smaller part of them are based on pre-designed guest satisfaction questionnaires.

So, medical wellness is a complex product which is not clearly demarcated. Its elements are mixed with medical treatments and wellness however most of the guests are satisfied with service quality and the amount of information available.

### Results of hotel questionnaires

As for the hotel survey results it is clear that eastern areas have a bit more but smaller medical hotels than western areas of Hungary while Budapest has the biggest medical hotels. Most of the hotels' guests are older than 50 years with a majority of seniors and middle-aged couples travelling without children (*Fig. 1*). The main motivation of them is healing, 57% of them arrives to the given hotel with an existing illness. 39% of guests have emerging diseases with the goal of prevention while the proportion of beauty treatments is infinitesimal (4%).

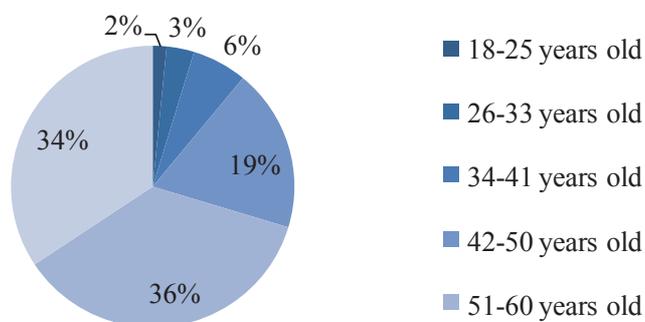


Figure 1: Clientele of Hungarian medical hotels  
[Source: own editing (based on 28 responses)]

Based on the results of the questionnaire it is clearly visible that most popular services of domestic medical hotels are musculoskeletal treatments (78%) while beauty treatments are on the second place (21%) and fertility problems are the third with only one per cent.

The most important sending countries are Germany, Russia and Romania, followed by Austrian and Hungarian guests. 12 out of 17 hotels consider Germany as the most important sending country, in the case of five hotels Russian guests are dominant while four of them hosted the most guests from Hungary (*Fig. 2*).

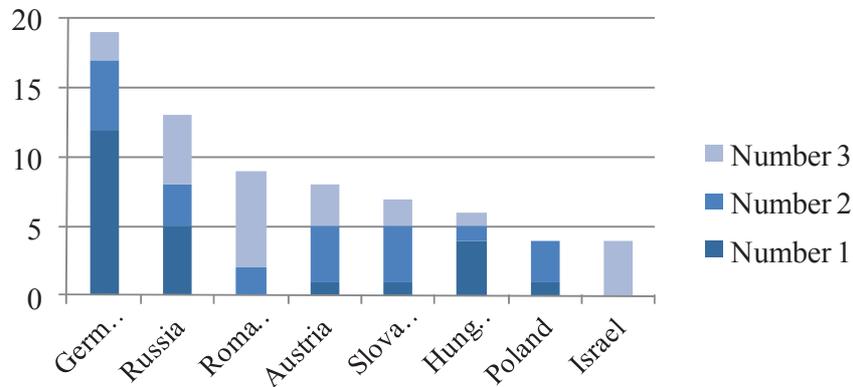


Figure 2: Most important sending countries  
[Source: own editing (based on 27 responses)]

The average amount of treatments and other wellness and medical services consumed by guests is parallel to the amount of guest nights. The most common is to have only one medical treatment per day. Most popular medical wellness services are therapeutic massages, mud and other wraps, physiotherapy and treatments based on the spa and pools as well.

16 out of 28 hotels experienced the changing of trends during the last years connected to wellness, medical wellness and medical treatments. According to the hotels' experiences guests are actively seeking for information and simple, cheap but useful treatments as well prevention opportunities which can have an effect within a short period of time by using modern technologies. Basically the consumers want cheap, but modern and efficient therapies. Long-term natural and economic sustainability can be a problem in the case of this emerging trend. Exploitation of natural resources is problematic while quick treatment of consumers can be ineffective or harmful in several cases or illnesses.

In my opinion considering guests as patients is not sustainable. If the consumers would like to feel themselves as patients they would search a hospital. However, a medical hotel is a combined service provider of tourism and health system. It has more expensive and higher quality services which are not only focusing on healing but relaxation and having fun. The results of the questionnaires were different than the experiences of doctors. 25 out of 28 hotels considered that they are treating their consumers as guests not as patients.

### Results of consumer questionnaires

The majority (75%) of the respondents were female and the rest of them were male. As for the ages of responders 19–26 years old potential consumers were the most active, however, the majority (58%) of fillers were older than 27 years old. Most of them (69%) had a stable income on a monthly basis, 20 per cent were students and 11 per cent were inactive persons or pensioners.

91% of the respondents considered healthy lifestyle as important or very important. The majority of them pay attention on the healthy nourishment (87%), but only 12% of responders are doing sports regularly. More than the half of them used to do sports only on monthly or yearly basis.

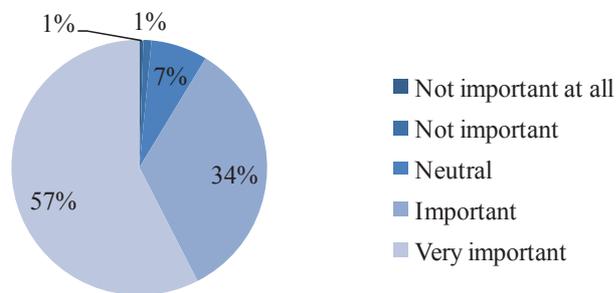


Figure 3: Respondents' attitudes towards healthy lifestyle  
 [Source: own editing (based on 393 responses)]

Wellness services had a huge popularity among the answered consumers. Only 27% of them indicated that he/she never takes these types of treatments/services. Ignorance of wellness is generated mostly by the low discretionary income (56.1%) and spare time (30%). About the half of the respondents has never heard about medical wellness and only one per cent of them got information about it from his/her doctor. The partly inaccurate knowledge on specific medical wellness treatments is emerging from the formerly explained results.

The majority of the surveyed potential guests (78%) would stay maximum three days in a domestic medical hotel and the biggest part of them (65%) would prefer 3–5 star hotels during the potential stay. The preferred types of accommodation are important especially if we compare them with the financial situation of respondents. On a 10 element Likert scale, when 10 indicated the best and the worst financial situation, the majority of them (56%) chose the medium level (5; 6), three per cent chose the lowest level (1; 2), 24% of them picked the appropriate level (3; 4). 18% considered his/her financial situation as good (7; 8). It is important that nobody indicated the very good level (9; 10).

## Conclusion

By carrying out structured interviews and the representative survey of Hungarian medical hotels I realised that measurement of consumer satisfaction is not suitable in domestic medical hotels because most of them are not using modern and effective tools to measure customers' satisfaction. Most of the specialists employed by hotels treat guests as patients.

Only a part of customers is able to make difference between medical wellness, wellness and medical treatments. It is because of the lack of information and rare usage of the expression "medical wellness". Further problem that medical wellness services target mostly seniors however the main aim of the product would be prevention.

Health related attitude of consumers is not necessarily connected to sports and other preventive services. A big part of them have not enough information about the price and quality level of hotel services. Many times they have unreal expectations compared to their financial possibilities.

Domestic regulation and registration system is a bit chaotic and inaccurate. Databases of different national authorities such as ÁNTSZ and KSH do not match each other and with the reality either. Those hotels which fail to announce their changes are not really sanctioned and regulatory control of authorities used to happen only in every 20th year.

## Suggestions

The situation for medical wellness and medical hotels is favourable in Hungary. However development, transformation and change of attitudes can result a higher guest satisfaction and quality.

The Hungarian regulation and registration system of medical hotels requires serious changes. It is essential to penalize those hotels which miss to report the changes concerning their conditions and data. Reporting of changes is mandatory for them however sanctions haven't been used too often. Nowadays the control period of medical hotels is 20 years. It is important to reduce this time interval to 4 years. More often control of the system can ensure that databases will be correct and all the hotels will fit to the requirements of medical hotel qualifications. These changes are needed as soon as they are possible because current data is not up to date. Unification of ÁNTSZ and KSH databases is also important together with rectification of them. An online notification system would be also useful for hotels to make their job easier.

As for medical hotels, setting of a guest satisfaction measuring system is needed to monitor the amount of loyal guests as well as their main motivation. Development

of this system can happen in cooperation of Hungarian medical hotels to save money and avoid mistakes. Within the framework of joint work, resources can be optimised and testing of the system is more efficient. Because of the different ages of customers online and paper based formula is important too.

Technological development of medical hotels is also required. Existing treatments and related assets should be constantly modernized to be able to follow the current trends. Concerning the consumer survey and opinion of hotels most of guests would like have very effective services. That means that they want to reach the maximum possible effect within the shortest time. A new type of treatment is needed, which is able to provide prevention, healing and relaxation facilities within a short time frame. Acquisition and usage of modern diagnostic tools is needed.

Shaping the views of guests is also essential to consider themselves as guests not as patients. Specialized sanitary staff of hotels' medical departments should be incited to treat customers as guests not as patients to create a friendlier environment and avoid the feeling of being sick. As it was clarified by the interviewed doctors, independently selected wellness treatments can also be harmful. As medical wellness and wellness are similar to each other online and offline promotions are required for customers to know the exact differences and to be able to decide safely among treatments moreover to recognize that cases which require the assistance of doctor.

As a summary, it is clear that well planned and precise changes and development are needed in cooperation with domestic medical hotels, specialists and national authorities.

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