JUDIT SULYOK

PERCEPTIONS AND POTENTIAL OF NORTHERN EUROPEAN HEALTH TOURISTS

In order to identify the real potential of a new tourism product development – health tourism in this case –, good information about the target group is essential. With this aim, a primary research has been conducted in the framework of the Off to Spas project. The online consumer survey (170 respondents, mainly from Sweden) reflects the attitudes of the potential senior travellers. Besides the general attitudes and travel experiences, the survey focused on the potential of new health tourism product and the elements of a health tourism trip attractive outside of the main season period. As the results show, the already affluent travellers are especially interested in the experiences and discovering new places that can support to maintain their good health condition and support a good quality of life. The introduction of medical treatments and services could be also enriched by the wellness services and non-health tourism attractions, among them culture, gastronomy and nature have the best potential. However, in the case of new, emerging destinations, the general tourism image and awareness should be also communicated, in order to reach successfully these segment.

Keywords: health tourism, perceptions, image, Northern Europe

Methodology

The Off to Spas project is supported by a comprehensive research activity, based on secondary and primary field work, containing a wide range of tourism research methods, such as qualitative and quantitative phases. The primary research methodology, the questionnaires content has been developed with references to the outcomes of the literature review (e.g. references of this article). This enables a holistic analysis of the topic, and helps to identify the background motivations and the future potential of the target group. The research follows the work flow of the project.

Based on the reviewed literature, the primary research of the Off to Spas project has the following objectives/research questions to be answered:

- Identifying perceptions of potential health tourists about health, and health tourism, focusing on balneology;
- Mapping motivational factors for the off-season period, and for the involved Central and Eastern European destinations;

- Providing information about the special needs of the target group, namely of the seniors;
- Providing information about the potential of treatments and balneology services in order to fill this information gap; and
- Mapping information sources used and identifying potential marketing communication channels in order to reach the target audience.

The consumer survey included an online questionnaire, as well. The link has been directly sent to more the potential senior travellers via the project partners. The field work (questionnaire link open) lasted between 30 September 2015 and 17 February 2016. The total number of responses reached 170 persons.

The main topics covered in the questionnaire were:

- health tourism attitudes;
- image of the destinations, focusing on Central and Eastern Europe;
- motivation, drivers and limitations of health tourism and of off-season health tourism;
- general travel behaviour and memorable travel experiences;
- demographics and lifestyle of the respondents.

According to the respondents' demographics, one can conclude that the survey results reflect the attitudes and travel behaviour of *potential Swedish senior health tourism customers* (most of the respondent are Swedish) (Tab. 1).

Table 1: Consumer survey sample's demographic
(Source: Off to Spas consumer survey) (n = 170)

	Response Percent	**Response Count**
Gender		
Male	25.2%	36
Female	74.8%	107
Age		
50–55 years	22.1%	30
56–60 years	16.9%	23
61–65 years	17.6%	24
66–70 years	18.4%	25
70+ years	25.0%	34
Children		
No	29.3%	41
Yes	70.7%	99

Children living abroad		
No	86.9%	119
Yes	13.1%	18
Relatives, friends living abroad		
Yes	67.8%	97
No	32.2%	46
Retired		
Yes	53.8%	77
No	46.2%	66
Education		
Low/elementary school	0.0%	0
Middle	30.8%	44
High/college, University	69.2%	99
Income level (1–10, 1 = very poor, 10 = very rich)		
1–4	23.3%	31
5	24.8%	33
6	24.1%	32
7	17.3%	23
8–10	10.5%	14
Total	**100.0%**	**170**

Results

Perceptions of and attitudes towards health tourism

Potential senior travellers associate ‘health tourism’ mainly with spa, sport facilities, healthy food, relaxation, medical services, health, ‘feeling good’, massage, wellness, tourism, wealth, spa hotel and holiday. This results a very leisure oriented approach where prevention and healthy lifestyle are dominant rather than cures and healing process.

The respondents are very open-minded and active. At the same time, safety during travel is important. Thanks to their good health condition, they do not need special care during travelling. Their active lifestyle is also reflected in that 85.7% of the respondents have any hobbies (e.g. gardening, cooking, summer cottage, handicrafts) (Fig. 1).

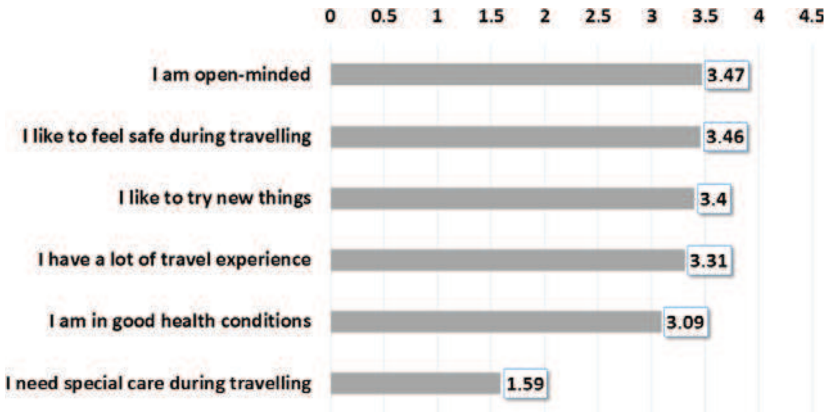

Figure 1: To what extent do you agree with the following statements?
(1 = do not agree at all, 5 = totally agreed)
(Source: Off to Spas consumer survey) (n = 161)

In order to maintain their good health conditions, seniors are engaged in 3.8 activities on average. The most important from the prelisted options are physical exercises (84.9%) and healthy food (79.2%). More than half of the respondents does mental exercises, does wellness activities or goes to spas which are of outstanding potential for health tourism destinations and services (Fig. 2).

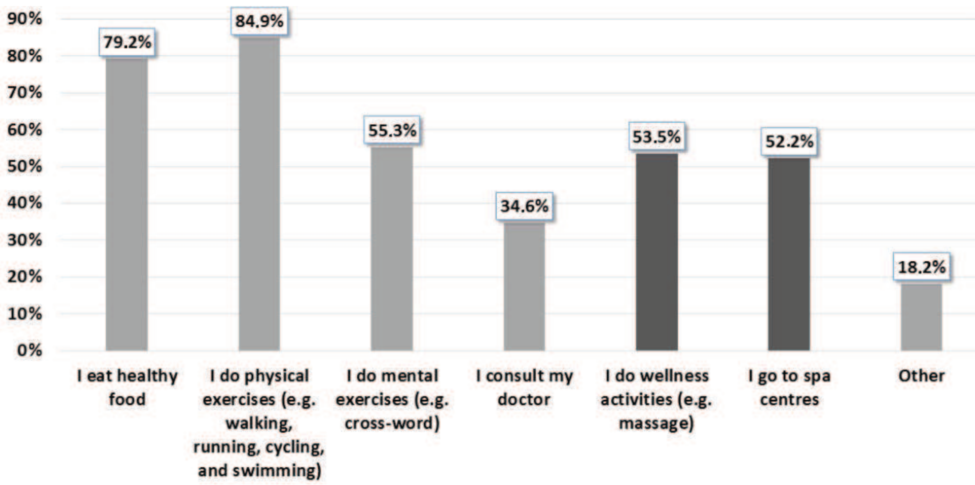

Figure 2: What do you do regularly do for your health? (Multiple answers possible)
(Source: Off to Spas consumer survey) (n = 159)

Travel behaviour

Potential senior travellers involved in the survey are active travellers which means that most of them (71.3%) has taken a domestic and an international holiday both during the period 2012–2015. Further 20.4% has been involved in international tourism, whereby only 3.8% travelled in their home country, and the share of non-travellers is 4.5%. In the case of new health tourism developments, these segment is of high relevance because they do feel familiar with leaving their place of residence with tourism purposes, so the perceived risk and safety is not influenced by the lack of earlier travel experiences (Fig. 3).

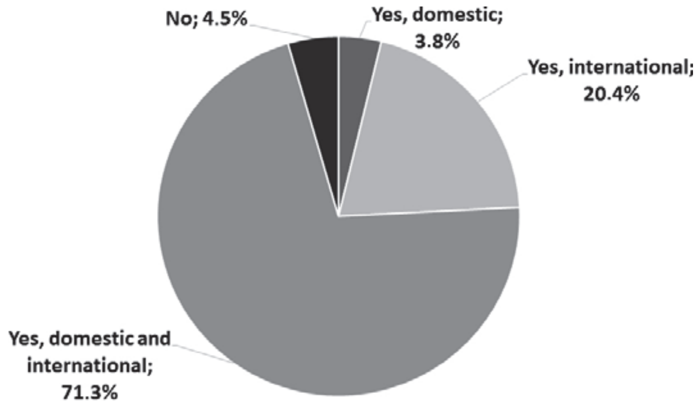

Figure 3: During the last 3 years (between 2012 and 2015) have you taken any leisure trips that lasted at least one night spent away your home?
(Source: Off to Spas consumer survey) (n = 157)

The survey identified also the three most memorable travel experience of the seniors. This information can help to map potential visitors' expectations and perceptions about their future visits, as well. Senior tourist of today are the 'baby boomers' which means that source markets in the developed regions (e.g. Western and Northern Europe) could discover a very wide range of traditional (European in this case) and exotic destinations (e.g. Asia, Africa) during their lifetime.

When coming to taking a health tourism trip, an international destination comes to mind at first. Deciding between summer and other period of the year, foreign destinations have a good split, with a significant potential during the off-season, as well. In the case of domestic health tourism trip, the off-season has a more significant role than summer months. Only 25% of the respondents has not taken any (neither during summer, nor during other season) health tourism trip during the period 2012 to 2015 (Fig. 4).

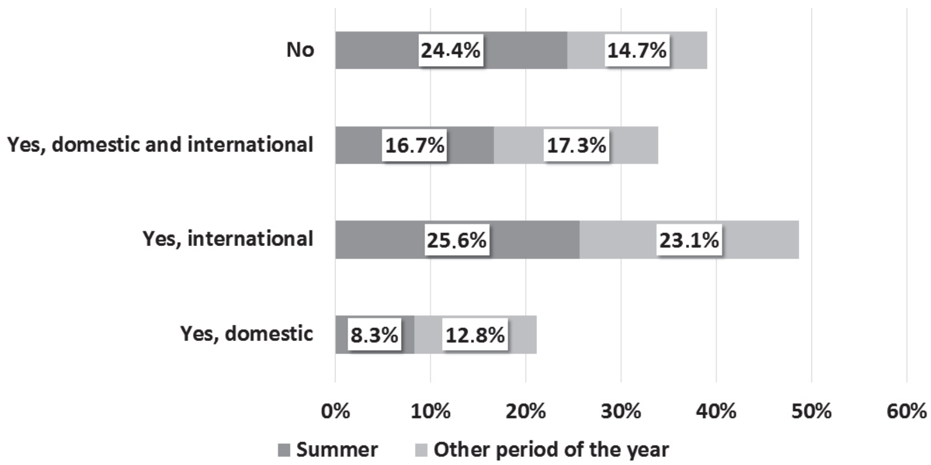

Figure 4: During the last 3 years (between 2012 and 2015) have you taken any Health Tourism trips that lasted at least one night spent away your home? (Source: Off to Spas consumer survey) (n = 156)

Decision-making about health tourism

In order to gain information about how to reach potential customers, the survey mapped decision-making factors, as well. When taking a health tourism trip, respondents highlighted good value for money (80.1%), cleanliness (60.9%), high quality services (60.3%), and the positive reputation, attractiveness of the destination (59.0%) at the first places.

Reflecting the leisure oriented approach, the medical treatments (28.2%) and the availability of services funded by Health Insurance Companies (15.4%) have limited general attractiveness, or have potential in a smaller, more special segment (Tab. 2).

Table 2: What kind of factors would you consider when undertaking a Health Tourism trip? (Multiple answers possible) (Source: Off to Spas consumer survey) (n = 156)

Answer Options	**Response Percent**
Good value for money	80.1%
Cleanliness	60.9%
High quality services	60.3%
Positive reputation, attractiveness of the destination	59.0%
Quality	52.6%
Safety	51.9%

Hospitality	48.7%
Availability of proven medical treatments	28.2%
Accessibility	27.6%
Wide range of tourism services, attractions	23.7%
Availability of treatment/services financed by Health Insurance Company	15.4%
Other (please specify)	21.8%

Interestingly, the costs (namely that health tourism is associated with higher cost level) are at the same time the limitations for travelling with health tourism purposes. All other aspects (e.g. distance or health condition) play a much less significant role (Tab. 3).

Table 3: What could be limitations for you for taking a Health Tourism trip?
(Multiple answers possible)
(Source: Off to Spas consumer survey) (n = 152)

Answer Options	**Response Percent**
I usually travel with my children and grand-children	8.6%
Costs	71.7%
Health condition	25.7%
Distance	32.2%
Language	15.8%
Unknown destination	11.8%
Other (please specify)	21.7%

Drivers and limitations of off-season travel

In accordance with the project's main objectives, namely developing a new health tourism product attractive during the lower season period, the consumer survey mapped the drivers and limitations of travelling during the off-season period. The main motivations for taking a health tourism trip outside the summer season are undoubtly the quiet environment, and the lower prices/expenses.

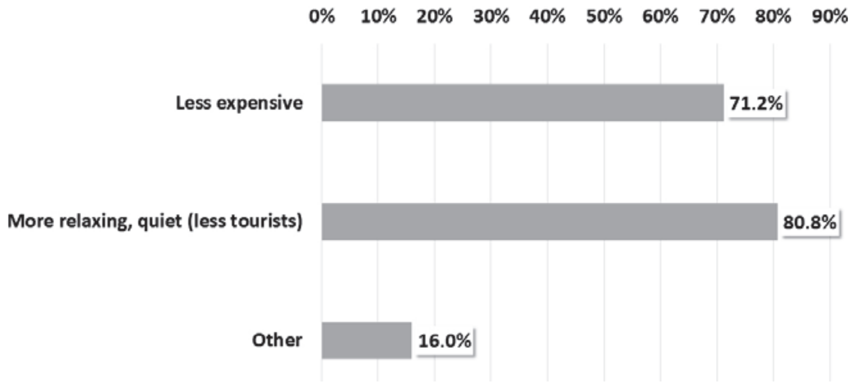

Figure 5: What could be the main motivation(s) for you to take a Health Tourism trip off-season (outside the summer season)? (Multiple answers possible)
(Source: Off to Spas consumer survey) (n = 156)

Those respondents who share their views about the limitations (126 respondents), highlighted the lower choice of available activities (47.6%) and bad weather (37.3%) when considering taking a health tourism trip outside the summer season.

‘Ideal’ Health Tourism Package

According to the opinions of the respondents, the wellness dimension is the strongest ‘ingredient’ of an ideal health tourism trip. Interestingly, culture, wine and gastronomy are the next in the ranking. Potential travellers are interested both in medium (3 stars) and high (4 stars) quality accommodation, however meaning a good quality in both cases. The active tourism facilities and fitness activities have also significant potential, and the medical treatment is also acknowledged in this sense (Fig. 6).

Among the medical treatments, diagnostics and check-ups have the biggest potential. Dentistry and orthopaedic surgery could be also attractive for a smaller segment (Tab. 4).

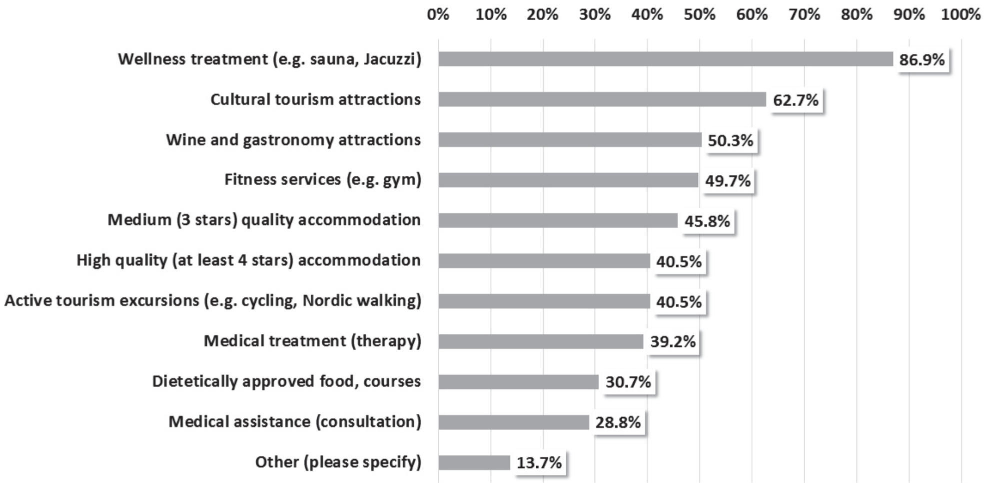

Figure 6: According to your opinion, what kind of services and attractions would a health tourism trip ideally include? (Multiple answers possible)
(Source: Off to Spas consumer survey) (n = 153)

Table 4: According to your opinion, what kind of medical treatments would a health tourism trip ideally include? (Multiple answers possible)
(Source: Off to Spas consumer survey) (n = 117)

Answer Options	Response Percent
Diagnostics and check-ups	96.6%
Dentistry (cosmetic and reconstruction)	12.0%
Cosmetic surgery (breast, face, liposuction)	6.8%
Eye surgery	6.0%
Orthopaedic surgery (hip replacement, resurfacing, knee replacement, joint surgery)	5.1%
Cardiology/cardiac surgery (by-pass, valve replacement)	1.7%
Bariatric surgery (gastric by-pass, gastric banding)	0.9%
Organ, cell and tissue transplantation (organ transplantation; stem cell)	0.9%

An ideal health tourism trip would last one week (7.7 nights) on average, there were a significant number of respondents (27 persons) who marked two weeks. Most of the travellers would go with their spouse/partner (58.7%) or/and with friends (55.3%). The share of travelling alone (32.0%) or with a senior group (16.7%) is also significant. 24.0% would be interested in travelling with their family (including children, grandchildren). Although the project is aimed at supporting off-season tourism flow, still the summer season would be the most attractive for the respondents to take a health tourism trip. After then, winter, autumn and spring could be the most popular.

Information sources & booking

Potential customers are affluent travellers, the internet (87.3%) or/and the travel agency (44.0%) could be the most important booking channels. Although we are talking about seniors (Swedish seniors), they are familiar with the new technologies, and probably the wide range of travel experiences does also influence the trust in the online available booking options. Health tourism is a bit more 'sensitive' than general leisure trip, where the travel agencies can do a lot in transmitting reliable and comprehensive information, minimizing the potential risks of disappointments during the trip (Tab. 5).

Respondents consult 4.4 information sources on average before taking a health tourism trip. Not surprisingly, the internet is also the number one among the information sources used when planning such a trip. This is followed by family/friends recommendation, and past experience. From the 'traditional' channels, TV programmes, newspaper/magazine articles, and travel agency has the most potential in order to reach the customers (Tab. 6).

Table 5: How would you book such a Health Tourism trip? (Multiple answers possible)
(Source: Off to Spas consumer survey) (n = 150)

Answer Options	Response Percent
Via the internet	87.3%
Via a travel agency	44.0%
Directly at the hotel/destination	18.7%
Via Health Insurance Company	4.0%
Other (please specify)	6.0%

Table 6: What are the most important sources of information for you when planning a health tourism trip? (Multiple answers possible)
(Source: Off to Spas consumer survey) (n = 146)

Answer Options	Response Percent
Internet	91.8%
Friends/family recommendation	60.3%
Past experience	56.2%

TV programme	42.5%
Newspaper/Magazine articles	37.7%
Travel agency	27.4%
Travel information received by e-mail	24.0%
Guide books	21.9%
Social media	18.5%
Newspaper/Magazine advertisements	15.8%
Travel information received by mail	15.8%
Maps	10.3%
Medical referral	8.2%
Health Insurance Company	8.2%
Radio programme	6.2%

Awareness & image of health tourism destinations

Among the most attractive health tourism destinations in Europe, one can find the closer – like Estonia – and the 'traditional' areas – like Hungary, Czech Republic. The Mediterranean region – especially Spain – is also often listed, and some respondents also mentioned Romania.

Rating selected Central and Eastern European countries (among them the Off to Spas project's destinations, namely Hungary and Romania) on a five items' scale (1 = not attractive at all, 5 = very attractive), Hungary has the best potential, followed by Austria and the Czech Republic. Romania is well behind Slovakia and Slovenia, as well, in regard of health tourism attractiveness (Fig. 7).

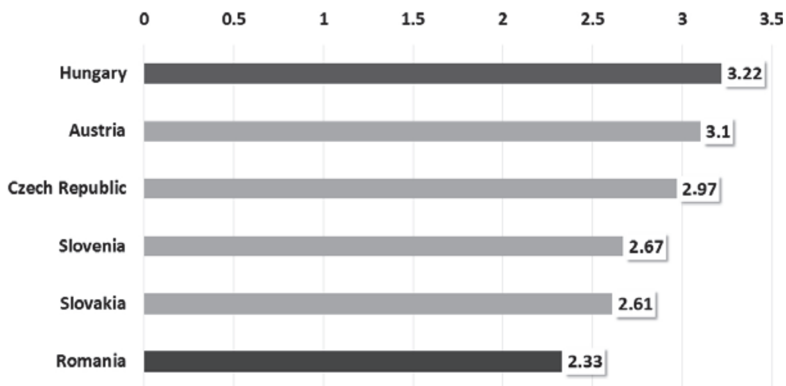

Figure 7: How attractive do you consider the following countries
as health tourism destinations?(Source: Off to Spas consumer survey) (n = 146)

This is also reflected in the earlier experiences. Most of the respondents have not been to Hungary or Romania, either. In the case of Hungary, the health tourism visitors have a significant share, whereby in the case of Romania, the 'other' purpose follows the non-visitors.

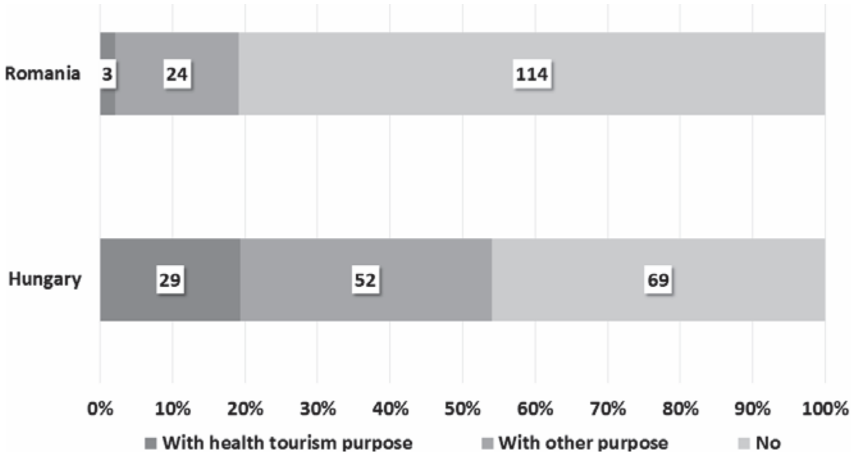

Figure 8: Have you already visited the following destinations? (Number of respondents)
(Source: Off to Spas consumer survey) (n = 146)

In order to identify potential messages, the survey included a special question about the perceived unique selling points (USP) of Hungary and Transylvania/ Romania as health tourism destinations.

Hévíz (Hungary) is a mature destination with a well-known thermal lake. This is reflected in the potential unique selling points, as well. Besides the natural healing assets, good price level (compared to Northern/Western Europe), the culture and the gastronomy/food could be in the core of the marketing messages. At the same time, for a number of potential travellers, the destination is still unknown (being out of the main flows, hub destinations).

In the case of Transylvania/Romania, most of the respondents could not mention any unique selling points. The lack of awareness does have a significant influence on the promotion of new health tourism products. Besides that, the wonderful natural environment, the good prices, and discovering new places, new experiences can be the motivation for future senior travellers.

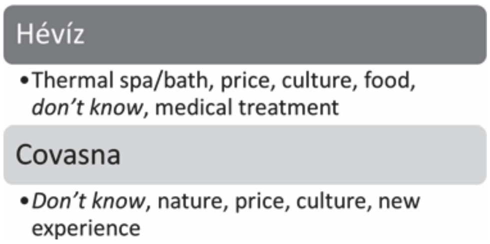

Figure 9: USP of Hungary and Transylvania/Romania as a Health Tourism Destination (Source: Off to Spas consumer survey) (n = 170)

Conclusions

The theoretical and practical implications of the consumer research can be summarized as follows.

- The target group – senior citizens – can be characterized by *active ageing*. They are open-minded, and have *no special needs during travelling*;
- Northern European seniors have a *wide array of travel experiences* that cover all over the world. From the project point of view, this can result *higher expectations* towards the visited destinations and their attractions, services;
- Health tourism in general has the potential of *low-season tourism*, and also *international destinations* are in the forefront of desired places to visit;
- The *good value for money* has a cutting-edge role. It is very highly ranked among the decision-making factors, together with high quality of services. Parallel with this, health tourism oriented factors (e.g. treatments) have less influence which supports that first of all the wellness and well-being dimension of health tourism could be of interest for a wide range of travellers. At the same time, favourable prices and tranquillity can the main drivers to take a health tourism trip outside of the main season, whereby cost is also considered the most important limitation for health tourism trips;
- The *'ideal' health tourism trip* reflects also the wider understanding of health tourism, so a wellness oriented approach. In order to maintain travellers' good health conditions, health tourism services can be accompanied by culture, furthermore by wine and gastronomic delights of the destinations. An ideal trip is actually not a family (with kids) happening, during a one-week lasting holiday, first of all couples and friends would travel with. The role of senior groups is also significant;
- From the medical services, *diagnostics and check-ups* have the most potential. Any other special treatments could attract special interest groups, and so could be communicated via non-traditional channels;

- The segments is familiar with the technological advances, the *internet* plays the leading role in reaching them. However, travel agencies can help to provide more detailed information and build trust towards health tourism services;
- Among the *information sources* consulted before travelling, internet is followed by the recommendations of friends and family, furthermore the past experiences. The most relevant channels to transmit marketing messages can include also TV programmes and newspaper/magazine articles;
- Among the European health tourism destinations, closer (e.g. Estonia) and well-known (among them Hungary) places are the most attractive, Romania (also being included in the project) has less potential. The reason for that is mainly the lack of awareness in general.

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Website

www.offtospas.eu

Judit Sulyok is a senior lecturer at the Department of Tourism, Faculty of Business and Economics, University of Pannonia, since 2015. She graduated as an Economist specialized in Tourism at the College of Commerce, Catering and Tourism in Budapest in 2001. She got her MSc degree at the University of Pécs. Her PhD research focused on the Lake Balaton and its branding. She has experience in working in tourism practice, as well. Before joining the University of Pannonia, she worked as a researcher at the Hungarian Tourism Ltd. for several years where she got experience in international cooperation, in organization of conferences, and in other marketing communication activities, as well. She teaches health tourism, problemsolving, strategic destination marketing, and regional marketing. On behalf of the University of Pannonia, she has been one of the coordinators (technical) of the Off to Spas project.

Contact: sulyokj@gtk.uni-pannon.hu