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POTENTIAL OF NEW HEALTH TOURISM PRODUCT – STAKEHOLDERS’ VIEW

In order to provide a comprehensive view about the potential of the new health tourism product development, the consumer survey has been accompanied by a stakeholders survey. Getting to know stakeholders’ opinion and perception, it enables to elaborate a realistic product development process. Gaps identified between travellers’ and stakeholders’ perception can support to map strength (to be communicated more intensively) and weaknesses (to be developed in the future) of the new health tourism product. In the case of the Off to Spas project, the conclusions highlights that stakeholders are more ‘rational’ and focusing on ‘hard’ factors (e.g. infrastructure, safety), meanwhile potential travellers can be attracted by the emotional benefits, and experiences provided by the destination visited.

Keywords: health tourism, stakeholder analysis, product development

Methodology

The Off to Spas project is supported by a comprehensive research activity, based on secondary and primary field work. 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). The consumer (potential senior travellers) survey is accompanied by a stakeholder research. Comparing consumers and stakeholders perceptions enables a holistic analysis of the topic, and helps identify the background motivations and the future potential of the target group.

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

- Identifying perceptions of potential health tourist 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 stakeholder survey included an online questionnaire. The link has been directly sent to more hundred stakeholders (tourism professionals, tourism authorities, spa towns/destinations, senior associations, health insurance companies) by the project partners. The field work (questionnaire link open) lasted between 30 September 2015 and 17 February 2016. The total number of responses is 23.

The main topics covered in the questionnaire were:

- health tourism attitudes,
- image of the destinations,
- potential segments' characteristics,
- marketing channels,
- motivation of potential travellers.

Results

Perceptions of and attitudes towards health tourism

The stakeholder survey (n = 23 relevant stakeholders, 16 of them representing senior associations) focused on the senior travellers from Western and Northern Europeans, identifying their needs and expectations regarding health tourism and the involved destinations (Hungary, Romania). According to the experience of the respondents, safety during travelling is an important issue for seniors. Thanks to their good health conditions and the wide array of travel experiences, elder people need less special care which means that they are rather guest and not 'patients' regarding health tourism's potential (Fig. 1).

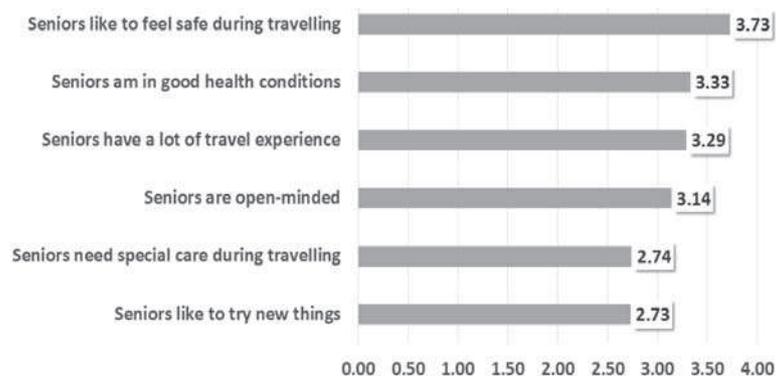


Figure 1: To what extent do you agree with the following statements?
(1 = do not agree at all, 5 = totally agreed) (Source: Off to Spas stakeholder survey) (n = 23)

According to the opinion of the stakeholders involved in the survey, the potential senior travellers are very conscious consumers. They want to travel to accessible destination, they want to have a good value for their money, furthermore cleanliness and safety comes into focus when deciding about a health tourism trip. This means that ‘hard’ factors are in the forefront, meanwhile – according to the stakeholders’ view – emotional factors (e.g. positive reputation of the destination) play a less important role (Tab. 1).

Answer Options	Response Count
<i>Accessibility</i>	16
<i>Good value for money</i>	16
<i>Cleanliness</i>	14
<i>Safety</i>	14
High quality services	12
Positive reputation, attractiveness of the destination	11
Hospitality	11
Quality	6
Availability of treatment/services financed by Health Insurance Company	5
Availability of proven medical treatments	4
Wide range of tourism services, attractions	4
Other (please specify)	0

Table 1: What kind of factors would senior travellers consider when undertaking a health tourism trip? (Multiple answers possible)
 (Source: Off to Spas stakeholder survey) (n = 21)

The most mentioned sub-segments of health tourism could be the wellness (including relaxation, good food etc.), the plastic surgery and medical treatment among the elderly people. Regarding the destinations’ assets, the environment, tranquillity, and – what is non controllable – warm and sunny places are in the forefront (Fig. 2).

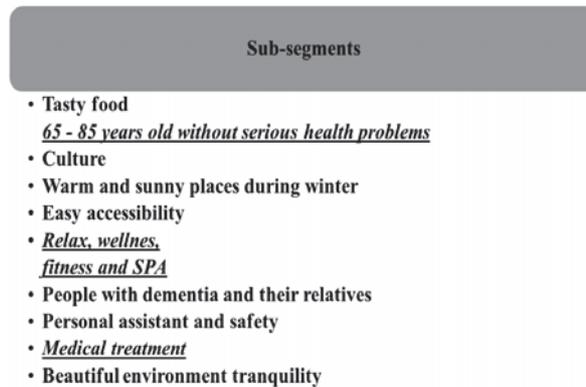


Figure 2: Potential sub-segment of health tourism (open-ended question)
(Source: Off to Spas stakeholder survey) (n = 23)

Drivers & limitations of off-season tourism

The main motivations for Western and Northern European senior travellers for taking a health tourism trip off season (outside of the summer period) could be the favourable costs and the tranquillity.

At the same time, costs could be crucial limitation for taking a health tourism trip, followed by health condition and distance (which is an important issue in the case of the involved destinations, Hungary and Romania) (Tab. 2).

The limitations for a health tourism trip outside of the summer season are the bad weather and the lower choice of activities.

Table 2: What could be the limitations for Western and Northern European seniors for taking a health tourism trip? (Multiple answers possible)
(Source: Off to Spas stakeholder survey) (n = 20)

Answer Options	Response Count
Costs	14
Health condition	10
Distance	10
Unknown destination	9
Language	7
I usually travel with my children and grand-children	3
Other (please specify)	2

‘Ideal’ Health Tourism Package

According to the stakeholders’ view, the ‘ideal’ health tourism holiday could include rather a medium (3 stars) than a higher (4+ stars) category accommodation. From the wide range of health tourism services, wellness has the greatest potential, followed by treatment, medical assistance and dietetically approved food. Health tourism experience could be enriched by cultural activities, wine and gastronomy, and to a less extent by active excursions (Tab. 3).

Those who share their views about it, indicated diagnostics and check-ups, followed by dental treatments to have the best potential for senior travellers (Tab. 4).

Health tourism trip’s ideal long is 8.63 nights. Tourists would like to travel in senior groups because of the same language and problems, or/and with spouse/partner. Most of the respondents indicated Spring or Autumn as the most preferred date for health tourism holiday.

Table 3: According to your opinion, what kind of services and attractions would a health tourism trip ideally include (for Western and Northern European senior travellers)? (Multiple answers possible) (Source: Off to Spas stakeholder survey) (n = 20)

Answer Options	Response Count
Cultural tourism attractions	15
Wellness treatment (e.g. sauna, Jacuzzi)	13
Medium (3 stars) quality accommodation	12
Wine and gastronomy attractions	12
Active tourism excursions (e.g. cycling, Nordic walking)	9
Dietetically approved food, courses	8
Medical treatment (therapy)	8
High quality (at least 4 stars) accommodation	7
Medical assistance (consultation)	7
Fitness services (e.g. gym)	6
Other (please specify)	0

Table 4: According to your opinion, what kind of medical treatments would a health tourism trip ideally include (for Western and Northern European senior travellers)? (Multiple answers possible) (Source: Off to Spas stakeholder survey) (n = 20)

Answer Options	Response Count
Diagnostics and check-ups	14
Dentistry (cosmetic and reconstruction)	6
Cosmetic surgery (breast, face, liposuction)	1
Cardiology/cardiac surgery (by-pass, valve replacement)	1
Eye surgery	1

Information sources & booking

Stakeholders agree that senior travellers from Northern and Western Europe are also familiar with the technology (9 stakeholders indicated that seniors would book by the internet), but – according to the opinion of the involved stakeholders – travel agencies are the most important intermediaries regarding health tourism trip (mentioned by 16 respondents). Some of the respondents mentioned also the senior groups' associations as a link between demand and supply side.

Even if the internet is not the main platform for the booking process, it has a crucial role in finding information. Besides that, friends/family recommendation and – again – travel agencies were indicated. From the traditional marketing communication, TV programmes and newspaper/magazine articles could be a good way to communicate the segment (Tab. 5).

Table 5: What are the most important sources of information for Western and Northern European health tourists when planning a health tourism trip? (Multiple answers possible) (Source: Off to Spas stakeholder survey) (n = 18)

Answer Options	Response Count
Internet	14
Friends/family recommendation	14
TV programme	14
Travel agency	10
Newspaper/Magazine articles	8
Social media	7
Medical referral	5
Health Insurance Company	5
Newspaper/Magazine advertisements	4

Past experience	3
Travel information received by e-mail	3
Guide books	2
Radio programme	2
Travel information received by mail	0
Maps	0

Awareness & image of health tourism destinations

Among the European destinations for health tourism (open-ended question), Hungary, the Czech Republic and Spain has been mentioned as the most attractive places for senior travellers.

Among the Central and Eastern European destinations, Hungary and Austria are the most attractive, followed by the Czech Republic, Slovenia, Slovakia, and finally Romania.

The next question focused on the potential USP (unique selling point) of the two involved destinations, namely Hungary and Romania (Transylvania in this case).

Hungary’s USP could be:

- bath tradition;
- old culture, history;
- good prices;
- good hospitality;
- good food;
- good wine;
- beautiful nature;
- water/mineral treatment;
- river tours;
- Balaton.

In the case of Romania (Transylvania), there is a lack of awareness among the segment. Most of the respondents don’t know the destination, those who shared any ideas, were: fresh air, good prices, nature, and spas. At the same time, this – relatively unknown destination – could have much more potential in the future.

Conclusions

The stakeholder survey results share a lot of common implications with the consumer survey which support the successful realization of a new health tourism product development. The nature of attractive health tourism product is similar, with a wellness and experience dimension in the forefront. However, stakeholders involved in the health tourism value chain think more 'rational', they emphasize the availability of (non-tourism) infrastructure in the destination more than travellers. According to the opinion of the stakeholders, safety and special needs are a must for seniors, meanwhile seniors consider themselves much more 'active' and mobile tourists who would not need any special service. In the mind of the travellers, emotional benefits of the visited places are more important drivers for travelling with health tourism purposes.

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Website

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