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Demand for a Polish Health Tourism Product: An Analysis of Tour Operator Offers and the Interest in Polish Health Tourism Based on Tourists from Belgium, the Netherlands, Italy, Spain, and Hungary

Abstract. In Europe, Poland is regarded as a country where health services are cheap and highly professional. Further development of this sector, however, requires building cooperation and networking among institutions interested in sending and hosting tourists. The main objective of this study is to analyze the activities of tour operators regarding the organization of health tourism in Poland, with particular emphasis on the interest in this type of opportunity among customers from selected European countries and on the possibilities of its wider promotion. The analysis of secondary sources points to the fact that the further development of health tourism in Poland on the Belgian, Dutch, Italian, Spanish and Hungarian markets requires consistent implementation of coordination and promotion policies. It is necessary to build contacts and a network of partners (e.g. in Spain). Creating online platforms and using search engines in English or French, as the most reliable source of information and a database for foreign tourists, is essential (e.g. in Belgium and Hungary). Promotion based on facts and analysis ought to be addressed to two different target groups: individual customers (e.g. in Hungary) and payers making decisions about group trips (in Italy and Spain). Constant enhancement of the image of Poland as a European destination with an increasing number of motorways, unspoiled nature, and regional organic foods is also important (particularly among the Dutch and the Belgian). A lot of emphasis should be put on the offered forms of active recreation and on the promotion of modern facilities, a variety of treatments, high hotel standards, infrastructure, as well as, information and booking systems (e.g. in Belgium and the Netherlands).

Keywords: health tourism, Polish offer, tour operators, Belgian, Dutch, Italian, Spanish, Hungarian market

1. Introduction

In the last few years Poland has joined the group of countries perceived as the most interesting destination on the world health and tourism map [Grail Re-

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search 2009] and acquired the title of the hospital of Europe [Property News. pl 2014]. We are regarded as a country worth visiting for treatment as well as health and physical condition maintenance [Biernat 2016]. Foreign journalists and potential business partners visiting Polish medical centers and health spas [Travel Trends Group 2015] notice the high level of medical services and access to highly qualified specialists [Lunt et al. 2011; The Treatment Abroad 2012], well-equipped facilities offering considerably cheaper services compared with Western Europe and the USA [PMR 2015] as well as rich natural resources with therapeutic properties, mineral water sources, microclimate and others [Polska Organizacja Turystyczna (POT) 2015c] Poland is a safe country, attractive for tourists and rich in history [POT 2015b]. All of these factors create a chance for the country to enter the circle of serious players on the world health tourism market. However, being respected on the market and maintaining the position entails extensive promotion targeting potential national and foreign customers of heath and tourism services [Lubowiecki-Vikuk 2011]. This is usually the role of the National Tourist Organization, but the activities of various intermediary agencies (providing and receiving) or "virtual brokers" [Solomon 2011] are crucial in that respect and, as scientists claim [Connell 2013] – constantly growing. First of all, it happens because cooperation and networking between the subjects interested in sending or receiving tourists have been growing more dynamically than individual health tourism [Borek 2013]. It is worth mentioning, though, that contemporary patients expect specialist healthcare combined with a high level of hotel, gastronomic, transport and tourist services, (e.g. sightseeing, active leisure time forms or provision of rehabilitation services as a planned and organized continuation of treatment). Creating such a complex offer (e.g. in the form of financially beneficial packages) is certainly easier and more prospective for specialist agencies. Moreover, in the times of rich offers and services available, attracting customers and competing with the growing competition require a number of promotional and marketing activities. It is necessary to prepare creative, interesting, planned and individual offers and to use any presentation aids (e.g. prices as a means of promotion) – which is also an important function of heath tourism agencies.

Unfortunately, the knowledge regarding tour operators' activities in this scope is not very extensive. In some countries such activities are only limited to cross-border healthcare, while in others they are even forbidden [Biernat 2016]. In Poland, according to POT, there is no inventory of agencies dealing with health tourism so this knowledge is minimal. That is why it seems reasonable to expand this knowledge (on the basis of the existing sources). The aim of this study is to analyze the activity of tour operators in terms of health tourism to Poland, with particular emphasis on the interest in this offer among Belgian, Dutch, Italian, Spanish and Hungarian customers and on wider promotion possibilities.

2. Methods

The study is based on a critical analysis of scientific and consulting literature. The basic sources comprised the reports from Polish Tourist Organization Centers Abroad [POT 2015a], Polish Tourist Information Centers [POIT 2015] and the PMR Report "The Private Healthcare Market in Poland 2015. Development Forecasts for the Years 2015-2020" [PMR 2015]. Opinions about the current image of Poland as a destination for healthcare tourists have been analyzed on the basis of the results of the study *Opinions about Poland-Foreigners,* which was carried out by the Polish Tourist Organization [POT 2015b]. Various kinds of expertise, surveys, analysis and Internet sources have also been used. The above mentioned documents supplied information concerning the tour operators' offer in the area of health tourism (its scope, preferences of potential customers and strategies of further promotion).

The aim of promotion is to inform in a conscious and planned way about activities and offers available and to create and enhance a positive image of health tourism which will result in stimulating demand for it [Biernat & Kachniewska 2017]. Advertising, Public Relations, sales promotion and sponsoring are among the most frequently used promotion means. Promotion is a complex process requiring a clear promotional strategy with a defined time frame and monitoring tools. The most popular ones are the push and pull strategy, information strategy, customer relationship strategy as well as branding strategy [Biernat & Kachniewska 2017].

Health tourism is understood in this work as a temporary stay away from the place of residence in order to regenerate physical and mental health, make some beauty corrections or to undergo some treatments and operations in clinics recruiting their customers through advertising in tourism [Łęcka 2003]. The so understood term covers all health services aiming at maintaining, improving and restoring health. Due to its nature, it is a network product requiring involvement of many entities (including those providing one-day services like dental services or recovery services in which wellness constitutes an important part of the offer) [Białk-Wolf 2010]. For the purpose of this analysis, it seems pointless to exclude from health tourism one-day services and non-invasive and wellness treatments. The phenomenon of health tourism is defined by the purposes of travel (needs, motivation and results) which are identical in case of one-day treatments and longer ones. Furthermore, the disappearing difference between wellness and medical treatments (see medical wellness) makes this difference hard to define [Léon-Jordán et al. 2010; Iordache et al. 2013].

The product of health tourism means a well-prepared sales offer (a package) consisting of medical and tourist services offered on the market [Lubowiecki-

Vikuk & Rab-Przybyłowicz 2015]. It is based on the presence of clinics and surgeries providing medical services. The product should be developed by taking into account the place specifics including its historical values, experience of local entrepreneurs and regional culture and identity The size of the area, which becomes a platform for exchanging experiences and making direct contacts between customers and service providers, is also significant since it has impact on the development of cooperating sectors [Simmie 2002].

Research on this topic offers very precise definitions of a health tourist (with division into types and categories) [Cohen 2008; Ehrbeck et al. 2008; Karuppan & Karuppan 2011; Connell 2013; Wongkit & McKercher 2013]. Some authors define them as users of health services only, others as participants of widely understood health tourism. Certain authors also consider so called covert tourists, while others differentiate those who are controlled by their national health services (the categories might also be inseparable). Customers for whom using health services is not always planned in advance and does not constitute the main aim of their trip are sometimes singled out, too.

This work analyses tourists (from selected European countries – Belgium, the Netherlands, Italy, Spain and Hungary) who take advantage a broadly defined offer (regardless of the purpose of travel, time of decision making or type of service. The following research question was raised: What is the potential of the above mentioned markets in that respect? What promotional opportunities are there for Polish health tourism in those countries? It seems that such an analysis could be most useful for entities wishing to promote their health tourism offer in other countries than Germany or Scandinavia.[1] It has been assumed that foreign tourists are a particularly important group for the industry of Polish health tourism: both those who pay individually for their treatment abroad and the ones who have their treatment refunded by their national insurance [Borek 2013].

The number or socio-demographic profiles of health tourists have not been defined because, apart from being impossible to regard them as a uniform group [Wongkit & McKercher 2013], it is quite a complex undertaking. Many people decide on the use of medical services only once they have arrived at the place of their temporary stay. Estimates are also limited by the differences in defining the notion of health/medical tourism and the lack of reliable data [Lubowiecki-Vikuk 2012]. Neither the providers nor the beneficiaries are interested in sharing information concerning this issue due to the confidential nature of the data [Cormany & Baloglu 2011; Lunt et al. 2011]. There is also visible reluctance to inform about certain procedures (e.g. rehab or plastic surgeries).

[1] An analysis of tour operators' activity in other European countries regarding health tourism to Poland is presented in Biernat 2016.

3. Characteristics of selected European tour operators' offer concerning health tourism to Poland

3.1. Belgium

Since the sixties about 60% of Belgians have been going on holiday at least once a year [POT, 2015a]. They are indispensable for them and they do not economize on them. The basic criterion for the choice of holiday destination is the climate and an ideal holiday combines sightseeing of cultural heritage with relaxation. Belgians value staying at agro tourism facilities and other places reflecting their authenticity. They are also interested in the offers of health tourism (5% of the whole tourist market) [POT 2015a]. In that case, however, the financial factor plays a decisive role. They come from a country in which patients are traditionally pleased with the quality and availability of their healthcare services [HCP 2013]. They are interested in this type of travel when there are no brokers involved (between the clinic and the client) and when treatments are not paid by their health service. Thanks to good flight connections (low cost airlines) and specialists' reputation, the most frequently chosen countries are Morocco, Tunisia and Hungary [POIT 2015]. On average it costs them 30-60% less to undergo treatment in those countries and most frequently it concerns dental and plastic surgery services.

Poland is present in standard offers of tour operators promoting the attractions of our country as well as in the offers of those who sell specialist tourist offers. There are 41 firms on the Belgian market which advertise 55 different holidays in Poland [POT 2015a]. Unfortunately, there are no travel agencies in Belgium specializing in health tourism. Medical centers all over the world treating Belgian people most often organize their stays by themselves or delegate that to their Belgian offices. Offers reach Belgians either via the Internet or through advertisements in the press. We should bear in mind that 60% of the Belgian population do not use offers from travel agencies [POT 2015a]. Most trips to Poland are booked directly by tourists (in 2012 there were no trips bought in travel agencies).

The ZOPOT survey shows that Poland has great potential in the area of health tourism. Belgians willingly use our dental and plastic surgery services [PMR 2015] – 11% declare their future use of spa and wellness services in an interesting area of Poland [POT 2015a]. The popularity of Polish health tourism might grow even bigger provided certain stereotypes concerning Poland are eliminated (for example, the opinion that Poland is a cold country or that Polish cuisine is stodgy and unsophisticated), and that there are special offers prepared for the Belgian tourist (in terms of hotel facilities, infrastructure, information and booking systems). It is also necessary to promote the image of Poland as a European destination, lying only 1,000 km away from Belgium, with a growing number of motorways, unspoiled nature and regional organic foods. We should sustain the prevailing opinion that Poland is an inexpensive country and promote Polish attractions (e.g. guesthouses, accommodation in castles and country manor houses) using search engines in English and French. It is essential to create platforms which will serve as the most reliable source of information exchange and a database for foreign patients.

3.2. The Netherlands

The Dutch travel a lot in their country and it concerns all age groups (80%). The most often chosen foreign short holiday destinations are Germany, Belgium and France (due to proximity). For the last few years we have been observing an increase in trips to Poland [POT 2015a]. The economic factor plays an important role here (transfer costs, stays in areas rich in nature, green and landscape attractions). Poland provides Dutch people with their dream holidays of active recreation, hiking, sailing, canoeing, agro tourism, cheap lodging and, what is also very important, of wide Internet access, own bank accounts, supermarket chains, and good transport. According to the preliminary findings of the Main Statistical Office, 2014 turned out to be a record year for foreign travel to Poland (from January to June the number of Dutch tourists using accommodation in Poland rose by 4.6%) [MSiT 2015]. They mainly travelled because of the wealth of our national heritage (30%) and unspoiled nature (17%). Sightseeing tours in own camper vans (15%) and stays in the countryside (18%) were also highly popular. As far as health tourism is concerned, Dutch people are quite cautious about any medical services outside their own country. They frequently criticize their own healthcare services, but do not want to use other ones. There are no tour operators organizing medical travels and no real chances of promoting this type of services on the Dutch market [POIT 2015]. However, the analysis of a survey conducted among 2,252 respondents during an Internet competition about Wroclaw [POT 2015a] showed that 186 people (8%) were interested in Polish wellness services. It might be worth encouraging the use of our modern spa and wellness facilities to tourists who are already in Poland. The fact that 36% of Dutch people organize their stays while already in Poland may show growing confidence in Polish products and tourist services, so possibly also in the health ones [POT 2015a].

3.3. Italy

The uncertain political situation, high unemployment rates and economic crisis all have impact on the quality of life of the inhabitants of Italy and their choices regarding forms of spending free time. In 2014 Italians took part in 630,632,000 travels involving an overnight stay which was 9.5% lower compared with the previous year [POT 2015a]. Not only did their holiday destinations change, but also trends in their demand and supply were altered. The number of trips in Italy is clearly decreasing (–15.2%) but foreign trips are increasing (+19.7) which is connected with economic migration to other EU countries (+23.8%). In the choice of travel destinations, the place itself has less importance while the price is becoming more significant. In a general evaluation of tourist traffic in Europe (in terms of the number of visiting tourists) in 2014 Poland equaled place with Croatia and the Czech Republic (with better geographic locations) which became in this way one of the more frequently chosen and more attractive holiday destinations.

Italians are interested in Polish history, culture, monuments, museums, friendly atmosphere, holy places and places linked with the Holocaust [POT 2015a]. However, they are not particularly interested in Polish health tourism. It does not mean that there is no interest in it at all. Trips to spa and wellness and health baths are very popular among Italians. Participation in active and health tourism (including dental) is also rising. The problem is that when they travel abroad they usually go to Romania (where these services are considerably cheaper) or simply use the ones available in their own country because their costs are partially refunded by the National Health Service [POIT 2015]. Because of the not very low prices of the Polish offer, tour operators are not interested in it. Maybe it would be worth preparing an of – season offer with lower prices.

3.4. Spain

The economic situation in Spain improved considerably in 2014. The number of foreign travels rose by 9.3% and the number of domestic trips fell by 2.6% [POT 2015a]. Traditionally, their favorite destinations have included highly developed countries with a high standard of living, established reputation and security like Italy (25%), France (23.4%), Great Britain and Ireland (16.4%) and Germany (7%). Poland is not a country of their first or even third or fourth choice [POT 2015a] due to product prices. According to Spanish travel agencies, offers to Poland do not have competitive prices which makes them more difficult to sell. Spaniards who come to Poland look for culture, in the broad sense of the word, monuments as well as history and arts in big cities.

Only 0.2% of foreign travels of Spanish people are organized for health reasons [POT 2015a]. In the opinion of POT [2015a], a highly specialist range of tour operators' services prevents such offers from appearing in their catalogues. As a consequence, only three tour operators offer travels connected with wellness and spa stays, operations and medical treatment. Removal of varicose veins or dental services are offered as long as their prices are competitive in relation to Spanish ones. Plastic surgeries and dental treatments are quite expensive in Spain, but specialist firms enable payments in installments, which probably cannot be offered by the Polish side. Medical offers should then be directed towards private health insurers. It is also essential to reach Spanish travel agents and to train them so that they could promote and sell programs to Poland and to inspire people with interesting offers (since their knowledge of Poland is still very small). Considering the hermeticism and identity of the Catalan customer, much bigger financial resources should be earmarked for promotion in the local media. A significant problem with promotion and activity on that market is connected with the language (the level of foreign language knowledge in Spain is not high) [POIT 2015].

3.5. Hungary

According to ZOPOT [POT 2015a] in 2014 there were 3 million one-day trips in Hungary out of which 1.6 m were of tourist nature and the others belonged to the category of shopping. The number of multi-day trips amounted to 12.3 m, including 4.3 m tourist ones. On average, Hungarians spent 50% more on foreign tourism than on domestic travels. Most frequently they visited the directly neighboring and coastal countries (over 80% of them were EU countries). With regard to Poland, the number of tourist trips (according to the data from 2014) increased by 10% [POT 2015a]. Poland is close and it is easier and quicker to get to the south of the country than to the Lake Balaton, for instance. Fuel prices are also slightly lower. Services, accommodation and food are cheaper and, in the opinion of Hungarians, at a high level. Also, they are well familiar with Polish hospitality (Polish people like Hungarians and enjoy hosting them). It all contributes to the fact that the demand for Polish products is constantly growing. In 2014 pilgrimage trips were very popular. Hungarians were also interested in our common historical heritage (reminders of our common history). They were also more willing to take advantage of medical stays. According to the data of POT [2015a], health tourism (including spa stays) is in the third place as far as the motivation for travelling among Hungarians is concerned. Despite the fact that Poland is one of Hungary's biggest competitors, they are of the opinion that Polish health tourism is of high quality and offers treatments based on natural resources which are not available in their country. We use salt mines and brine graduation towers which allow for other forms of treatment of upper respiratory system diseases, for example. It might be interesting for Hungarian families with children and for senior citizens. That is why ZOPOT regularly organizes workshops and study tours presenting various forms of treatment and recreation (especially active) in Poland. It results in the growing interest of tour operators and inclusion of health – related elements in their offer. Further activities should include attempts to reach individual customers (for instance, through Internet platforms). Hungarian people prefer to organize their stays on their own by booking treatments directly with service providers or through reservation systems of travel agencies.

4. Conclusions and recommendations

Analysis of secondary materials clearly points to the lack of quantitative research on health tourism in Poland (number of tourists, expenses etc.). Studies of this type are necessary for strategic planning and brand building of health tourism as an export product. Policy of coordination and promotion, scheduled on this basis and consistently implemented, can support the process of dynamic development of this sector and make it a strong branch of Polish economy – comparable with Asian leaders. However, it is necessary to solve the problems of definitions in terms of health tourism. Without standardization of terminology, collating data and inference is impossible.

The presented data indicate that development of the Polish health tourism sector requires support from private and public service providers in making contacts with payers, insurance companies and brokers. It is necessary to establish contacts and partner networks between travel agencies, insurance brokers, service providers from other countries or the media and international Internet portals such as www.treatmentabroad.com, for example.

Such platforms are a reliable source of information exchange and a database. They provide information about the available services, service providers, doctors, national quality supervision, effectiveness and infections as well as the ranking of medical centers (including the certified ones). It indicates the need for building an inquiry system informing about security, quality and efficiency of medical procedures and to create a favorable legal environment. Because tourists tend to book services directly from service providers or through booking systems of travel agencies, it is important to create platforms promoting Polish attractions using search engines in English, French and Spanish.

Study visits for travel agents and tour operators, especially the ones who specialize in niche products, are a very good promotional form of the Polish product of health tourism. It is also essential to promote our modern facilities, various forms of treatment and recreation, in particular the active ones, among those tourists who are already in Poland. Individual markets require offers specially prepared for their tourists (regarding hotel facilities, infrastructure, information and booking systems). Emphasis should be put on the widespread opinion that Poland is not an expensive country. A special lower-price off-season offer would provide a promotional opportunity. It is also necessary to strengthen the image of Poland as a European destination with a growing number of motorways, unspoiled nature and regional organic foods. Promotion based on facts and analysis ought to be addressed to two different target groups: individual customers and those who make decisions about group trips and insurance providers. Thus, it is necessary to conduct some market research (complex, qualitative and quantitative) which would give basis to strategic planning and building the brand of Polish health tourism as an export product. The policy of coordination and promotion, which is planned and consistently implemented, will definitely support dynamic development of health tourism and turn it into a strong branch of Polish industry.

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Popyt na polski produkt „turystyka zdrowotna" a analiza oferty touroperatorów i zainteresowania nią turystów z Belgii, Holandii, Włoch, Hiszpanii i Węgier

Streszczenie. Polska postrzegana jest przez Europejczyków jako kraj, w którym usługi zdrowotne są tanie i wykonywane z wysokim profesjonalizmem. Rozwój tego sektora wymaga jednak budowania współpracy i sieci powiązań między podmiotami wysyłającymi i przyjmującymi turystów. Celem pracy jest analiza działalności touroperatorów w zakresie organizacji turystyki zdrowotnej do Polski, ze szczególnym uwzględnieniem zainteresowania tego rodzaju ofertą odbiorców z wybranych krajów europejskich i możliwości jej szerszej promocji. Badania przeprowadzono na podstawie krytycznej analizy piśmiennictwa o charakterze naukowym i konsultingowym. Z analizy materiału wtórnego wynika, że dalszy rozwój polskiej turystyki zdrowotnej na rynkach: belgijskim, holenderskim, włoskim, hiszpańskim i węgierskim wymaga konsekwentnie wdrażanej polityki koordynacji i promocji. Konieczne jest budowanie kontaktów i sieci partnerskich (np. w Hiszpanii). Istotne jest tworzenie platform – jako najbardziej wiarygodnego źródła wymiany informacji i bazy danych dla zagranicznych turystów (np. w Belgii i na Węgrzech), z wyszukiwarkami w języku francuskim i angielskim (a w przypadku Hiszpanii po hiszpańsku). Promocję – opartą na analizach i faktach – należy kierować do dwóch różnych grup klientów: indywidualnych (np. na Węgrzech) i płatników decydujących o wyjazdach grupowych (we Włoszech i Hiszpanii). Istotne jest także stałe wzmacnianie wizerunku Polski jako destynacji europejskiej o wzrastającej liczbie autostrad, nieskażonej przyrodzie i regionalnej, ekologicznej żywności (szczególnie wśród Holendrów i Belgów), a także propagowanie nowoczesnych obiektów, rozmaitych sposobów leczenia i wypoczynku (zwłaszcza aktywnego), wysokiego standardu bazy hotelowej, infrastruktury, systemów informacyjno-rezerwacyjnych (np. w Belgii i Holandii).

Słowa kluczowe: turystyka zdrowotna, polska oferta, touroperatorzy, rynek: belgijski, holenderski, włoski, hiszpański, węgierski