

# **Baltic Health Tourism**

## **Report**

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## **Executive Summary**

This Report provides a summary of research undertaken on health tourism in the Baltic States identifying which resources and products are common to the region as a whole and which are unique to each country. The Baltic States have had a fairly successful collaboration in tourism (especially promotion) for several years. Collaborations and clusters are seen as being useful tools for sharing good practice, improving quality and branding. A Baltic Health Tourism Cluster was established in 2013. Following attendance at the launch of the Cluster, the researcher undertook a Delphi Study involving several respondents from each of the Baltic countries who are experts in the health, wellness, spas, medical field and/or tourism. This analysis aimed to help the countries identify what is specific in their health tourism resources, attractions and products at the same time as working towards collaboration and a common regional brand for health tourism. The results of this study are presented here and will form the basis of a joint Baltic Health Tourism Strategy.

## Definitions

Health tourism has not yet been researched very extensively in the Baltic States even though it is an important and growing sector. In recent years, health, wellness and medical tourism have grown quickly (Smith and Puczkó, 2009, 2013). This includes visits to spas, thermal baths, hot springs, spa and wellness hotels and resorts, hospitals and clinics for surgery and medical procedures, as well as spiritual or holistic retreats. Health tourism is used by many governments as being synonymous with medical tourism and the terms health and wellness are also increasingly being used inter-changeably, however a clear distinction should be made between the concepts. Smith and Puczkó (2009) argued that health tourism should be used as an umbrella term for medical tourism and wellness tourism. One main difference is that medical tourism includes surgical or cure aspects, and that wellness is more preventative than curative. Medical tourists are more likely to be ill than well, although in the case of dentistry or cosmetic surgery, this is debatable. Probably the most widely used definition of medical tourism is that of the Medical Tourism Association (2013):

People who live in one country travel to another country or travel within their country to receive medical, dental and surgical care while at the same time receiving equal to or greater care than they would have in their own country, and are travelling for medical care because of affordability, better access to care or a higher level of quality of care.

This is a useful definition, but it is worth considering whether medical tourism should also include preventative healthcare, healing methods and thermal water-based treatments. The evidence base for the latter is only accepted in certain countries, for example, but this includes the Baltic States and Russian-speaking countries which constitute a very important market for Baltic health tourism.

Wellness tourism is partly based on Dunn's (1961) definition of wellness which was not only about the absence of disease, illness, and stress but the presence of purpose in life, active involvement in satisfying work and play, joyful relationships, a healthy body and living environment, and presence of happiness. Increasingly it has been adopted by the spa industry, for example, the Global Spa Summit changed its name to the Global Spa and Wellness Summit in 2012 and started to focus on wellness tourism in 2013. Spas are important to the Baltic States, but so too is nature and the positive health benefits of spending time in forests or by the sea, for example. Smith and Puczkó's (2013, p. 25) definition of wellness tourism is perhaps the most appropriate for the Baltic States at present:

Trips aiming at a state of health where the main domains of wellness are harmonised or balanced (e.g. physical, mental, psychological, social). There is an emphasis on prevention rather than cure, but some medical treatments may be used in addition to lifestyle-based therapies.

Spas are an important part of both wellness and medical tourism in the Baltic States. In some countries, the association is more with leisure, relaxation and pampering, but in the Baltics the healing and rehabilitation aspect of spas is very important. ISPA (2013) defines spas as "places

devoted to overall well-being through a variety of professional services that encourage the renewal of mind, body and spirit”, but Smith and Puczko (2013, p.10) include the medical and healing dimension “(Spa tourism) focuses on the relaxation, healing or beautifying of the body in spas using preventative wellness and/or curative medical techniques”.

One final dimension of health tourism is the concept of wellbeing, as this is used extensively in Finnish (health) tourism where the landscape and natural resources are quite similar to the Baltic States. The Finnish have no word for ‘wellness’ and have been using the term ‘wellbeing tourism’ for more than ten years now with the health-enhancing qualities of nature and landscape being a major focus (Konu, Tuohino and Björk, 2013). It is possible that the Baltic States will want to include the concept of nature-based wellbeing tourism in their development and promotion of health tourism.

## **Methodology**

This research aimed to identify the unique features and selling propositions for each of the Baltic States in health tourism, followed by a discussion of what is common to the region as a whole and how this could be promoted. Most of the data is derived from a Delphi Study undertaken between autumn 2013 and spring 2014 following the launch of the Baltic Health Tourism Cluster. A Delphi study is a group communication process that aims at conducting detailed examinations and discussions of a specific issue for the purpose of goal setting or policy investigation. In this case, the Delphi was designed with the purpose of informing a future Baltic Health Tourism Strategy as well as helping to define the activities of the Baltic Health Tourism Cluster. Delphi studies usually have a minimum of 10 participants but there is no upper limit if the study is very complex. However, 20-25 is considered to be a good number.

The Delphi group must be carefully selected because of their expertise in a particular field. The researcher was invited to the launch of the Baltic Health Tourism Cluster and used the contacts made at the event to recruit participants for the Delphi from a range of government agencies, tourist boards, academic institutions, health, wellness and medical clusters and associations and spas. Snowball sampling was also used to ensure that a balance of respondents was recruited from each of the countries. Twenty five respondents eventually took part with twenty three from the Baltic countries (fairly evenly distributed with 7-8 respondents from each country) and two health and wellness tourism experts (academics, researchers and consultants) from outside the Baltic countries but who work regularly in the region.

In the first round, respondents were given ten questions which required them to comment on unique and common resources, products, attractions and destinations, as well as existing and potential collaborations or networks. Respondents were also asked for word, colour, image and slogan associations with the aim of later developing a Baltic Health Tourism brand or logo. In the second round, which was completed by fourteen respondents (56% of the original sample), they were provided with information-graphic representations of the results and they were asked to identify gaps and omissions in the data (e.g. health tourism destinations, collaborative initiatives and networks, market segments), as well as to select their preferred definitions,

images, slogans and products for future development. Satisfactory consensus was reached after two rounds of the Delphi. Sources of information also included presentations by experts and round-table discussions at two health tourism events in Estonia in May and Lithuania in October 2013 at which the researcher was a participant and an invited speaker.

## **Health Tourism in the Baltic States**

The Baltic States are not yet that well-known for their health tourism, at least not globally. Leib et al. (2013) demonstrate that many people associate the Baltic States with their capital cities but have less certain images of the rest of the country, except perhaps a notion of nature and landscape. The study also showed that the countries were perceived to be similar but different at the same time. However, their research only focused on a small number of Germans, some of whom had visited a Baltic country and some of whom had not. A different picture would certainly be given if research were undertaken with Russian or Finnish tourists.

The Baltic countries all have a long tradition of health tourism which is closer to that of Central and Eastern Europe and Russia than to Scandinavia (largely due to the past influence of the Soviet Union). There are many traditional thermal baths, rehabilitation centres and sanatoria, many of which are located on the Baltic sea coast (e.g. Pärnu in Estonia and Jūrmala in Latvia). These were and still are used for healing as well as leisure, with an increasing number of Russian and Russian-speaking guests visiting the resorts but also buying properties in the towns. There are many so-called medical spa centres which are licensed institutions, whose main goal is to provide medical care and rehabilitation services, using natural local remedies: mineral water, therapeutic mud, climate, and Baltic sea water. The staff working there often has a medical background. However, there are several national variations as the following country summaries show.

### **Health Tourism in Estonia**

Estonian tourism has been growing rapidly in the past few years. Health tourism is part of the National Tourism Development Plan 2014-2020. There is a national interest in developing a Baltic Tourism brand, but Estonia also has its own distinctive health tourism resources and products. It is claimed that no other country has as many spa hotels per capita than Estonia at more than 40 and still growing (Tooman et al. 2013). The Estonian SPA Association implemented a quality system for medical spa hotels in 2008 which was extended to wellness spas and centres in 2012 (Estonian Spa Association, 2011).

The country currently uses the slogan “Health Republic: Estonia 200 years of spa culture”. Many of the health destinations date back to the 1820s, for example, Pärnu, Haapsalu, Kuressare and Narva. Health specialisms in Estonia include the therapeutic mud, which can be used for many health problems as well as for beauty and relaxation. Research is being undertaken to prove the medical benefits of the mud. Bentsalo (2013) discusses how sleep therapy is also becoming a

popular treatment in Estonian spas. Apart from domestic tourists, the main tourist market in Estonia is from Finland, followed in much smaller numbers by Sweden, Russia, Latvia and Norway. The German and British markets are also growing (but not yet for health tourism) (Kalvik, 2013a).

### **Health Tourism in Latvia**

Latvia's current tourism slogan 'Best Enjoyed Slowly' implies connections to the slow movement (Honoré, 2005). The National Development Plan of Latvia for 2014 – 2020 includes Health tourism and Resort Development with guidelines from the Ministries. There is also a Health tourism strategy for 2012 – 2020, which includes product development, research and joint health tourism marketing activities. Latvia's natural cosmetics ranges (e.g. Madara) are becoming world famous, and like the other Baltic States, green and ecotourism are an inherent part of the tourism product. 'Pirts' or Latvian wood saunas can be accessed almost everywhere. Unlike Finnish saunas which are dry, water is used to create steam. They are heated to 100C ideally and the body is usually thrashed with branches of broom (Olte, 2013). According to the IMTJ (2013) Latvia is becoming famous for its cancer treatments. Latvian health tourism is mainly promoted in Northern Europe and Russia. Latvia is already seeing an increase in the number of medical and wellness tourists due to competitive prices and high service quality.

### **Health Tourism in Lithuania**

Lithuania has a relatively rich health tourism culture. According to the Lithuanian Association of Hotels and Resorts research from 2011 quoted by Hood (2013) 26% of tourists stayed in a spa resort or old sanatorium. The spa culture is medically-orientated and 95% of spa visitors have therapeutic experiences or come to prevent or treat illnesses (ibid.). The country has numerous famous mineral waters and therapeutic mud baths and treatments. The southern town of Druskininkai is thought to be the spa capital of Lithuania with its many spa and wellness venues. Lithuania is partly promoted as "The Land of Health and Care". Foreign tourists come mainly from Russia, Poland, Germany, Belarus and Latvia. Foreign guests constitute about 24% of all health tourists in spas (Kazlauskienė, 2013). According to Business Pundit (2009) Lithuania is the 10<sup>th</sup> best country in the world for medical tourism. This includes medical specialisms, mud baths, mineral water treatment, medical massage, tight patient contact (in some medical spas there is a 1:1 ratio), and highly qualified doctors. Although it can be two to four times cheaper than other countries for medical tourism, good quality and experiences at reasonable prices is becoming a more important message (Morkus, 2013; Paškevičius, 2013). Unique treatments include those using amber which has healing properties.

### **The Need for a Baltic Health Tourism Cluster**

Many destinations and countries of the world are recognising the benefits of collaborations and clusters. Clusters can offer good opportunities for increased productivity, innovations and new business formations. Clusters can help in the management of common resources (e.g. seas,

rivers, lakes, mountains); the sharing of good practice (e.g. creating innovative experiences); developing and differentiating products and creating USPs (e.g. establishing complementary not competitive facilities); and developing quality systems and brands (Bertsch et al., 2011). Steinhäuser and Jochum (2006) suggest that wellness (or health) clusters help to build trustworthy and strong brands and quality criteria and describe how the Alpine Wellness brand between Austria, Switzerland, Italy and Germany was a successful example for more than ten years. Nordic Wellbeing (Scandinavia, Finland and Iceland) is a newer cluster which is focused on research, product development and promotion (Nordic Innovation, 2011).

It seems that clusters are often developed at national or local level and then eventually become cross-border. This is true of the Baltic countries in the context of health tourism and it seems that the logic of having a cross-border cluster was based on the existence of some existing collaborations in tourism, as well as national clusters in health and medical tourism. Existing collaborations between the three countries consist mainly of marketing activities between the tourist boards (e.g. Great Baltic Travel 2011-2012), joint press trips, trade shows and tourist fairs, joint publications (such as the Baltic map and brochure), information days and workshops (e.g. Baltic Connecting Event in 2013) (Kalvik, 2013b; Pankova, 2013).

The Baltic Health Tourism Cluster idea was first suggested in May 2013 at a joint event in Pärnu, Estonia attended by health and spa industry practitioners, tourism office representatives, existing national cluster and association members and health tourism academics. Initially, it was to be named a Medical Tourism Cluster, but this focus was deemed too narrow by some of the participants because this would exclude spas and wellness facilities. The Cluster is a partnership of existing national clusters and associations with signatories from all three Baltic countries. A Memorandum of Understanding was signed in October 2013 representing a collaboration between The Lithuanian Medical Tourism Cluster, The Latvian Health Tourism Cluster and the Estonian Health Tourism Cluster. The main purpose is to increase the global competitiveness of the region in health tourism. Secondary aims include the following:

- Enhancing *Trust* and *Co-opetition* among the Partners and their Members;
- Improving *Quality* (accessibility, safety, effectiveness, efficiency, etc.) of the services provided to clients / patients;
- Joint *Marketing* resources and efforts to effectively promote Cluster's services to the potential and new target markets (e.g. Russia, Belarus and Ukraine).

## **Analysis of Research Findings**

This section presents the results of the Delphi Study with critical comment on the results. Although unique national products were identified, the research suggests that there are many commonalities between the three Baltic countries and that they would benefit from some joint initiatives and ideally a Baltic Health Tourism Strategy.

### **Word and Image Associations**

Respondents were asked which words or images came to their mind when they thought of the Baltic States. Their responses are represented in the word cloud below with the larger words being those that were mentioned the most frequently.

### **Word and Image Associations with the Baltic States**



They were also asked which three colours best represent the Baltic countries. The majority of respondents suggested blue and green to represent sea and nature respectively, and many (perhaps surprisingly) suggested yellow to represent the sun.

### **Definitions**

Respondents were asked in the first round to suggest a definition of health tourism. Many thought that it included a combination of medical, wellness and spa tourism. Diagnostics, medical treatment and rehabilitation were emphasized. Several referred to the importance of natural curative resources and outdoor recreation such as walking, hiking, beaches and forest. In the second round, the researcher compiled three definitions of health tourism based on the responses from the participants and asked them to rank them in order of preference. The suggested definitions were as follows:

- Health tourism consists of medical tourism, including diagnostics, surgery and rehabilitation, and wellness tourism, including spas, beauty, fitness and nutrition.
- Health tourism means travelling for the purpose of preserving and improving health, using natural curative resources and many indoor and outdoor recreational activities.
- Health tourism means travelling away from home to improve the general condition and wellbeing of the body using spas, wellness and medical treatments and services. These may include prevention, cure or rehabilitation.

The majority of the respondents preferred the second definition, which was:

Health tourism means travelling for the purpose of preserving and improving health, using natural curative resources and many indoor and outdoor recreational activities.

This definition would therefore be proposed for a Baltic Health Tourism Strategy. However, care must be taken that a clear distinction is made between rural tourism and health tourism.

### ***Most Important Health Tourism Destinations in the Baltic States***

The most important health tourism destinations in each of the Baltic States were identified as follows. Unlike in other forms of Baltic tourism, the capital cities were mentioned rarely or not at all in the context of health tourism although it was quoted that “Tallinn boasts excellent spas”. In some cases, respondents described the focus of the destinations in more detail which is given in the brackets following the place name. Many of the spas in Latvia were described as “traditional but need improvements”. This may be true of many of the older spas in the Baltic region.

#### ***Estonia***



*Latvia*



*Lithuania*

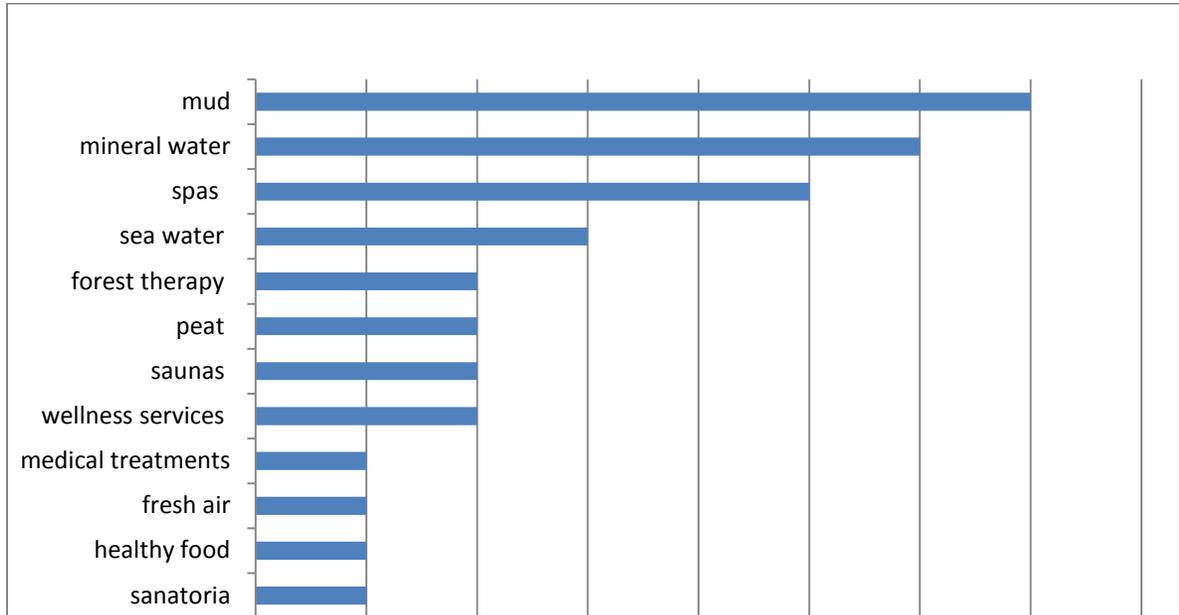


Future discussions might focus on which destinations to develop and for what forms of tourism and markets, including regeneration of facilities and services, as well as considering joint promotion of close destinations, for example Jūrmala in Latvia and Pärnu in Estonia.

### **Main Health, Wellness or Medical Tourism Resources, Traditions, Products or Services**

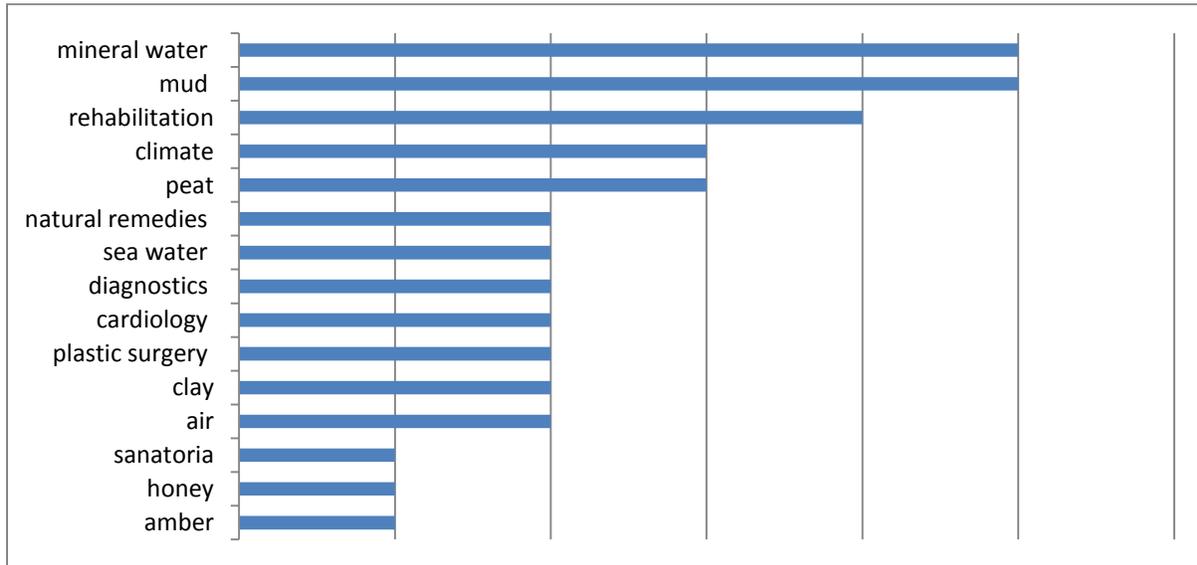
Respondents were asked to identify the main health, wellness and medical resources, traditions, products or services in their own countries. The following graphs show their responses.

#### **Estonia**



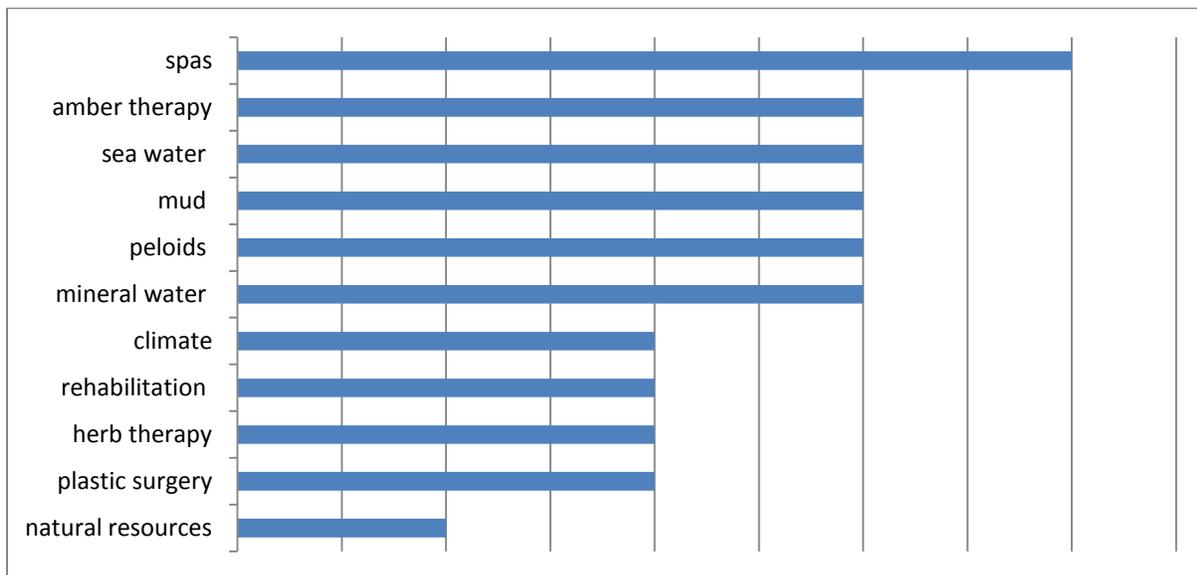
One Estonian respondent in the second round of the Delphi Study suggested adding light therapy, salt chambers, paraffin treatments for hands and feet as well as honey treatments, another thought that herbs should be added. It was thought that peat and medical treatments were also more important than indicated here. Saunas were thought to be more important than forest therapy.

**Latvia**



Latvian respondents felt that there were many more medical treatments available than were mentioned here, for example, infertility treatment, aesthetic dermatology, orthopedics, and vein treatments. However, this is probably true of the other two countries too which are increasingly offering more medical tourism services. Honey and amber were thought to be more important than represented here. More than one respondent felt that sanatoria should be removed.

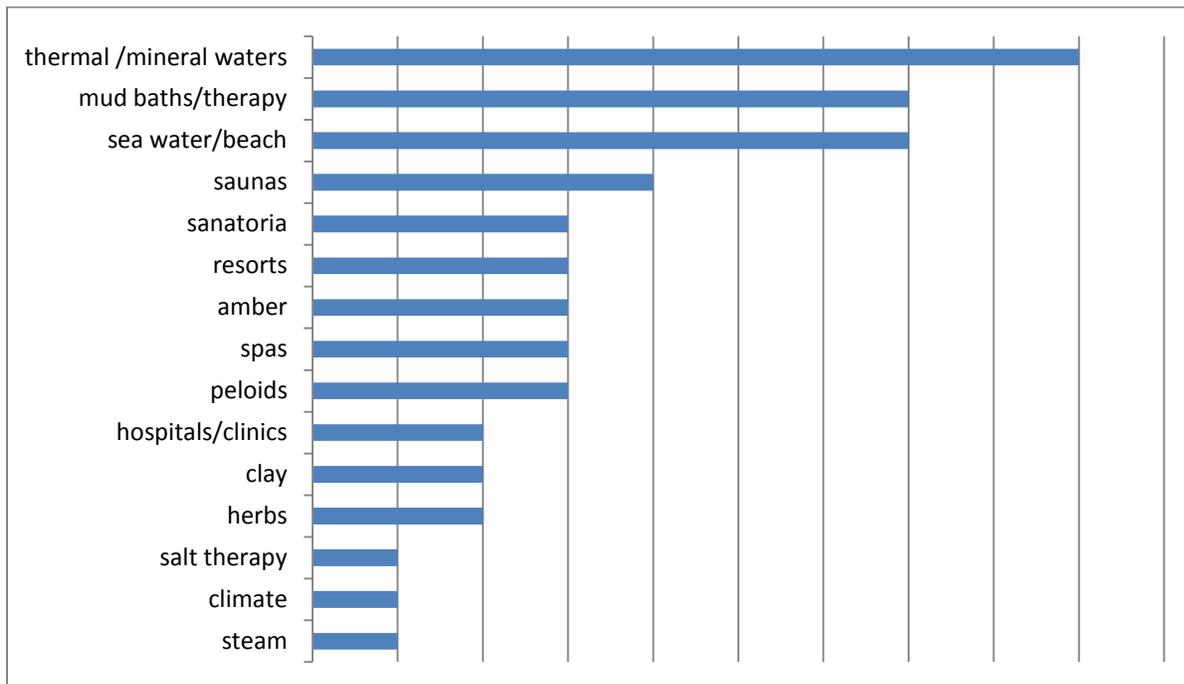
**Lithuania**



In the second round of the Delphi respondents suggested that mineral water is more important than amber therapy, although it seems to be a unique selling point for Lithuania. However, mineral water is no doubt incorporated by many respondents in the spa concept. Forest therapy and fresh air were also identified as being important elements for health.

***Health, wellness and medical resources, traditions, products or services which are common to all of the Baltic countries***

The following figure shows the health resources which were thought to be common to all of the Baltic countries. These are perhaps the most important for a joint Baltic Health Tourism Strategy, whereas countries may focus on country specialties for their national strategies.



It was stated more than once that the word ‘sanatoria’ should not be used in marketing or promotion of health tourism as it has negative connotations in some countries. Instead, the term ‘rehabilitation centre’ was proposed. It was also thought that more emphasis should be placed on medical spas and medical treatments offered in hospitals and clinics. Spas were considered to be more important than represented here, but it should be remembered that most spas contain thermal or mineral waters which were cited the most times.

***Collaborations: Existing and Potential***

Respondents were asked about existing collaborations in the health, wellness, spas and medical fields. They identified several, but most of them were national clusters and associations as mentioned earlier (e.g. the Estonian Spas Association, Medicine Estonia, Lithuanian Resorts Association, Lithuanian Medical Tourism Association, Latvian Health Tourism Cluster). Apart from

the Baltic Care Alliance (an alliance of private healthcare clinics offering medical services) there seemed to be no other identified network for health or health tourism across the Baltic States. However, collaboration in health tourism was seen as something possible and positive, for example, one respondent stated that:

Cooperation between the Baltic States in the area of health tourism is highly supported by our geographic location, mild climate, and the fact that there are no mental and language barriers. Acknowledging the fact that our internal market is small and internal consumption is low, there is mutual understanding that it is necessary to specialize in certain areas and services, and that there is a need to develop new products that could be marketed together in larger markets, such as Germany, Norway and the UK. Specialization or offering of tailor-made products is one of the key factors to stay unique and maintain the quality of services.

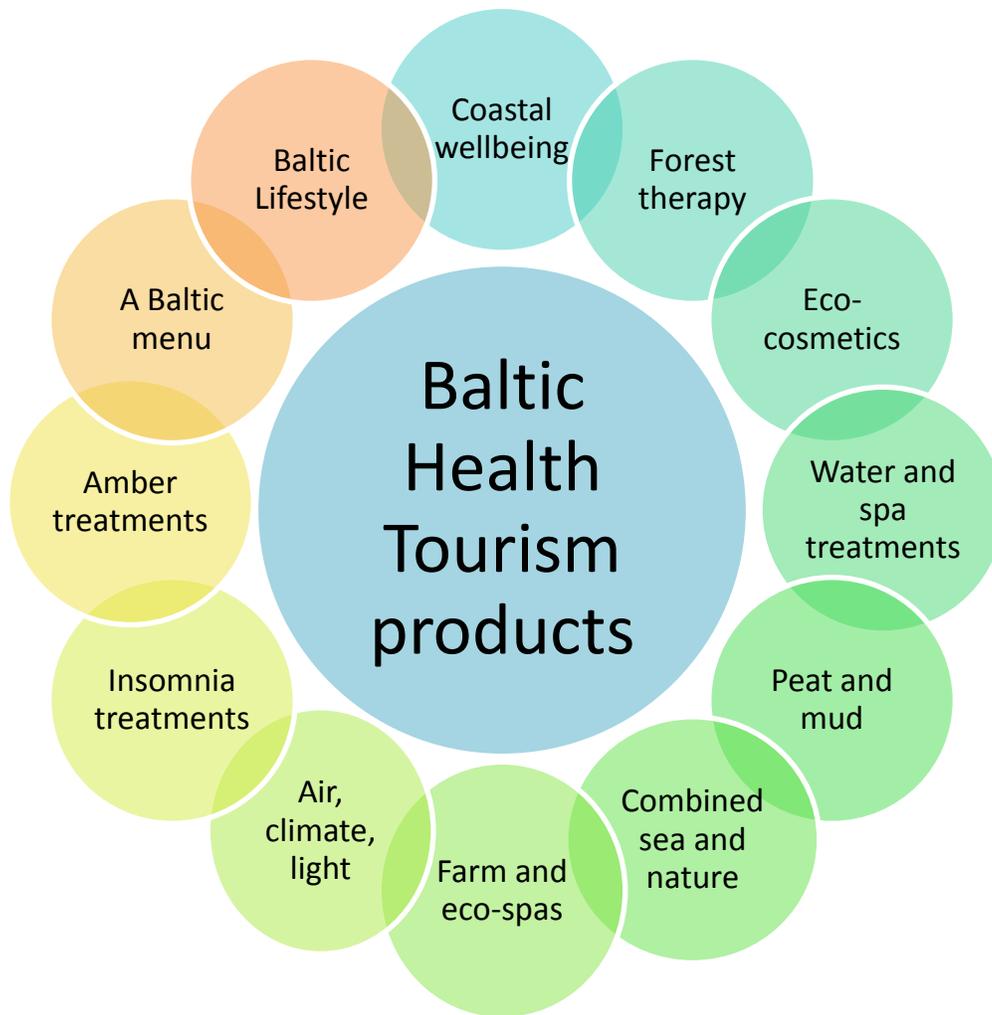
Another respondent made the point that some markets do not really distinguish between the Baltic countries, for example, “The Baltics are all the same in the eyes of many Russians”.

When asked in which areas potential collaboration could take place, the respondents agreed on the following:

- Joint promotion and branding
- Joint education and training
- Exchange of information
- Pooling financial resources
- Quality standards
- Natural resource treatments
- Three-in-one packages
- New joint products

### ***New Product Development***

The possibility of new joint health tourism products was discussed in more detail with respondents being asked in the first round to make suggestions for new products, in the second round to narrow down their choices and to select their preferred top five. The following products were suggested in the first round.



When asked in the second round to select their top five, the most popular were coastal wellbeing, followed by water and spa treatments and combined sea and nature. Other popular answers included forest therapy, Baltic lifestyle, a Baltic menu, farm and eco-spas and eco-cosmetics.

***The Main Markets for Health Tourism: Present and Future***

The respondents were asked to identify the main markets for health tourism in their own country, followed by potential markets which could be attracted to the Baltic region in the future. The following table shows the main identified markets at present (in the suggested order of importance).

Estonia	Latvia	Lithuania
<ul style="list-style-type: none"> <li>• Finnish (aged 60+ for medical and some wellness tourism; families aged 35+)</li> <li>• Russian (35+ for health, wellness and medical tourism; families for relaxation and leisure)</li> <li>• Swedish (for relaxation and wellness)</li> <li>• Latvian (for weekends and family recreational trips)</li> <li>• Estonian (couples and families of all ages for recreation and leisure)</li> </ul>	<ul style="list-style-type: none"> <li>• Russian (aged 40+ for medical tourism and health prevention)</li> <li>• Latvian (50+ for state supported spa, health and medical tourism)</li> <li>• Belarussian/Ukrainian (seniors for rehabilitation and health prevention; families and children)</li> <li>• Swedish/Norwegian (50+ for health prevention, medical tourism and spas)</li> <li>• Finnish (60+ for spas and some medical services)</li> <li>• Estonian/Lithuanian (for health prevention)</li> </ul>	<ul style="list-style-type: none"> <li>• Russian (40+ for health and medical tourism)</li> <li>• Latvian (50+ for health and medical state supported tourism)</li> <li>• Belarussian (seniors and families; health prevention and rehabilitation)</li> <li>• Scandinavian (50+ for health prevention, recreation and wellness)</li> <li>• German (middle-aged and seniors)</li> <li>• Polish (middle aged and seniors)</li> </ul>

There was a consensus that the Russian market was the most important potential market for the future, followed by Nordic countries and then CIS countries. In Latvia it was thought that 80% of spa visitors come from Russia. It was stated that Scandinavian tourists usually come for wellness tourism and their visits are shorter, but the rest come for medical spas and rehabilitation and thus for a longer time period. Germany was also considered to be important, especially in Latvia, as was Israel but this was partly because of the Russian diasporas living in these countries. Latvians living abroad (aged around 30-50) were also mentioned as a market who come back home for medical treatments. Young people especially couples were also mentioned as growth markets. Asian countries could also be targeted better it was thought, and the UK market is growing slowly but surely, especially in Estonia and Lithuania. The USA was also thought to be a possible market for Latvia.

### ***Slogan and Image***

Finally, the respondents were asked to suggest slogans for Baltic Health Tourism. In the first round, they suggested seventeen different slogans. In the second round, respondents were asked to choose their preferred slogans. There was some variation in the responses, but those that were chosen included the following (in order of preference):

- Pure Baltics
- Natural by Heart
- Health – the true value of the Baltics
- Discover the Baltics – where real health is from

- Be better in the Baltics
- Health from Nature
- Baltic Sea – Health Sea

Respondents were also asked to propose what kind of images should be used to promote Baltic Health Tourism. In the second round, they were asked to select maximum three to be used in promotion. The most commonly suggested included the following:

- Combination of sea and forest
- Images of land and nature
- Promoting amber
- Using a pearl or star to indicate small but beautiful
- Something warm and cosy like a sauna and a typical meal
- Using the number 3

## **Conclusions**

The research in this paper forms the foundations of a future Health Tourism Strategy and has shown that health tourism is a very important sector for all of the Baltic States and that there is a clear justification for developing a Baltic Health Tourism Cluster, despite the many initiatives and collaborations that already exist at national level. Baltic States still suffer somewhat from the lack of a distinctive tourist image in many parts of the world and the countries are often perceived to be synonymous with their capital city or some nationalities fail to recognise the differences between the countries. For these reasons, it is currently beneficial to establish the image of the Baltic States jointly in order to put them on the fast-growing and highly competitive world map of health tourism. According to the research, collaboration can help to improve not only image but also improvement of quality, new product development, packaging, education and training, exchange of information and the pooling of financial resources. Future product development in health tourism is likely to focus on coastal wellbeing, spa and water-based treatments, forest therapy and Baltic lifestyle possibly including a Baltic menu.

The image may focus on the concept of purity, slowing down, the combination of nature and the sea and the use of the number three to symbolize the alliance of the three countries and the potential to develop 'triangular' packages. The colours blue, green and possibly yellow may feature in future logo development, with a slogan relating to the purity of nature in this region. Existing target markets are likely to remain loyal, such as the Russians, Finnish and Scandinavians, but it might be necessary to consider the new needs of younger generations from these countries who may be more interested in wellness than in medical tourism. It is also worth considering how far Asian markets could be targeted, especially as Chinese tourists have already started to show an interest in traditional mud treatments in the region. Overall, although the health tourism market only represents a small percentage of the overall tourism

demand for the Baltic region at present, for many destinations it is a tradition that is not likely to diminish in importance any time soon.

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