

CONSIDERATIONS REGARDING ROMANIA'S POSITIONING AS A TOURIST DESTINATION FOR HEALTH TOURISM

*Florența Larisa ILE,
Silvia Patricia DODU,
Rodica Manuela GOGONEA**

Abstract

The health tourism potential of Romania, through natural therapeutic factors, but also through the medical scientific offer, including innovations in the field of geriatrics, centers and clinics of the major cities offering medical tourism, positions Romania on the map of health tourism destinations in Europe.

The offer generated by the balneo-climatic and medical scientific potential is supported by a well-represented accommodation capacity at the national level, which, however, is still undersized from the perspective of hospitality structures with a medical treatment function. At the same time, coastal tourist destinations with impressive accommodation capacity are limited by seasonality and insufficient equipment and facilities for medical treatment and wellness, partly relying exclusively on the appeal of natural healing factors. Also, Romania has a competitive advantage in the anti-aging field that can be developed through better exploitation of authentic products that can be used in the field of health tourism, by expanding the Gerovital treatment network in all spa-climatic resorts.

Keywords: *health tourism, tourist market, wellness tourism*

JEL Classification: Z30.

Analysis of the health tourism market in Romania: supply and demand – evolution and perspectives

The tourist market, part of the services market, behaves like any other market, being coordinated by the sale-purchase processes with tourist products, in a certain geographical space and at a certain time. However, the tourist market is dominated by specific characteristics, which differentiate it from the market of transactions with services, given the specificity of the product, varied and dynamic, which is constantly adapting to the demand. Characterized by the complexity offered by the molecular structure of the tourist product containing both tangible and intangible elements, the tourist market is placed in the area of overlapping the goods market with the services market (Minciuc, 2004). The high level of complexity gives the market varied and

* Florența Larisa Ile is Professor at the Kirițescu Economic College in Bucharest.

Silvia Patricia Dodu is Lecturer at the Romanian American University in Bucharest.

Rodica Manuela Gogonea is Associate Professor at the Bucharest University of Economic Studies.

unlimited possibilities of segmentation by imprinting its "fragmented character" (Cristureanu cited in (Minciu, 2004)) included in the multitude of forms of tourism.

The health tourism market is analyzed both from the perspective of tourism demand and consumption in close connection with the motivation related to the need for medical services, but also from the perspective of the offer of tourism services for health and of the medical and wellness tourism product.

The demand for health tourism in Romania

As provided by the classification made by the UNWTO (2010), tourist travel can be classified, in terms of their main purpose, into trips made for personal purposes and trips made for professional purposes. Travel for personal purposes includes two subdivisions: trips made for holidays and recreation which include visiting wellbeing facilities and trips for health and medical care which include medical services provided by clinics, hospitals, sanatoriums or other establishments specialized in the provision of specialized medical services.

Therefore, from the perspective of the purpose of the trip, health tourism involves two categories:

- Wellness tourism
- Travel for health and medical care (medical tourism)

The demand for health tourism is determined by the existence of a need, which, however, must be correlated with the possibility of purchase and the interest of the tourist to obtain these services.

The feature of the demand for health tourism lies in the fact that the need is not always a response to a certain willingness of the tourist, but, in the case of medical tourism, it is the expression of the need for recovery, a certainty of the state of health that imposes a certain motivation, going beyond the range of vacation, relaxation or well-being. Another peculiarity of the demand for health tourism is the fact that in the travel for health are included, especially in the case of medical tourism, the attendants of people who request health tourism services.

Therefore, the demand is segmented into two categories: the recipients of health tourism services and the recipients of tourism services included in the touristic offer for health.

For a complete analysis of the demand for health tourism services, it is important to differentiate between tourists and patients, between people who seek these services by their own decision and those who strictly choose medical services outside the residence for reasons imposed by objective conditions such as: unavailability of treatment, legislation, costs or medical specialization. Travels that incidentally request medical services, called incidental medical tourists and who do not obtain these services through a previous planning, are excluded from the category of health tourists.

The demand for health tourism services is subject to the influence of factors such as: income, culture and availability for tourism, the offer of medical services, the desire to travel, to which can be added other factors related to the peculiarities of the supply space: cultural affinity, specialization in certain therapies, reputation of doctors, distance from demand.

a) Statistical indicators of tourist trips – balance of payments

Statistical data from the analysis of the indicators provided by the Balance of Payments of Eurostat (the Statistical Data System of the European Union) are used to measure the level of demand, which provides information on transactions between residents and non-residents.

The Tourism Satellite Account (TSA) is used to obtain in-depth data and information related to the geographical space covered by statistical indicators. In addition to the Balance of Payments data (in which the data are reported to the permanent residence or centre of economic interest of persons), the Tourism Satellite Account is related to the tourist's residence, for a period of less than one year.

The TSA is a provider of complete information for the tourist activity for health, given that it refers, along with the expenses for medical services provided by clinics or hospitals, also to the services for thalassotherapy, the services offered by the treatment resorts, the services of aesthetic surgery, all but with the condition of medical recommendation.

For a detailed and complete statistical analysis, useful for the entire spectrum of health tourism, there should be a record of the data collected at the level of tourist motivation, correlated with the typology of tourism products. However, such a statistic is very difficult to correlate at international level, given to the strong fragmentation of the tourism market. The statistical analysis is currently carried out by simultaneously researching the data provided by the Balance of Payments from the Eurostat reports (the account "Travels" – "Health-related services" from the category "Personal travel Account") and the data provided by the Satellite Account of Tourism, correlated with the data of the National Institute of Statistics (Vasile (Ile), 2019).

At the level of the European Union states, the information obtained from the analysis of the "International trade in services" account and the "Travel personal, health related" account confirm the increasing trend of this category of expenses. Total exports and those related to travel expenses for health registered an increase of 12% more in 5 years, and at the level of Romania, there is an increase in expenses with travel services from 6213 million euros to 1568.7 million euros, registering a 2.5-fold increase, and spending on health travel increased by more than 5 times (Table 1).

Table 1 International trade in services (since 2010) (BPM6) Travel personal, health related (credit, mil euro)

	2015	2016	2017	2018	2019
European Union - 27 countries (from 2020)	148260.9	150919.6	165302	174258	182348.1
Travel: personal expenses, of which:					
Health-related	2171.8	1871.3	2231.9	2375.2	2520.6
Romania	621,3	733,3	1211,9	1353,9	1568,7
Travel: personal expenses, of which:					
Health-related	4.9	3.3	28.2	21.3	27.8

Source: (Eurostat, 2023)

Regarding the expenses related to personal travel for health, the trend of increasing exports is maintained, at the level of the European Union states, by

approximately 10%, Romania surpassing this trend, through an increase of more than 6 times in exports in 5 years.

The analysis of the statistical data relating to the imports recorded in the debit of the Travel personal expenses account shows an increase in these expenses at the European level by 13% in 5 years, while in Romania, an increase of 39% is recorded (Table 2).

Regarding the expenses related to personal travel for health, there is a trend of increasing imports on European Union states, by over 12% in the period 2015-2019, but Romania registered a reduction in 2019 compared to 2018.

Table 2 International trade in services (since 2010) (BPM6) Travel personal, health related (debit, mil euro)

	2015	2016	2017	2018	2019
European Union - 27 countries (from 2020)	121,986.7	131,194.8	144,165.1	151,575.0	160,159.2
Travel personal expenses, of which:					
Health-related	2222.9	2424.6	2315.4	2559.6	2719.1
Romania	689.0	955.8	2,066.6	2,360.3	2,695.3
Travel personal expenses, of which:					
Health-related	0	0	2.6	3.2	2.7

Source 1 (Eurostat, 2023)

The analysis of exports and imports of expenses related to personal travel for health concludes that Romania is a provider of travel services for health, with a volume of 27 million euros in 2019, while, for imports, respectively the trips of Romanian citizens to other states for health-related services are constant, not exceeding 2.7 million euros in 2019. Therefore, Romania is a provider of services for personal travel related to health, the statistical data not being sufficient to make a ranking or a comparative table between all member states of the European Union.

b) Statistical indicators of tourist trips - tourist demand of Romanian residents

The statistical data provided by the National Institute of Statistics of Romania offers detailed information on the tourist demand of residents according to the main motivations. The analysis of statistical data collected through questionnaires applied to members of Romanian households aged over 15 highlights the evolution of specific indicators such as: the number of medical tourist trips, the expenditure for these trips or the preferred destinations.

The analysis of the statistical information on the number of tourist trips made for medical purposes for the period 2015-2019 reveals a relatively constant interest, considering that the figures register small fluctuations between 500,000 and 600,000 trips, without, however, exceeding the maximum recorded in 2015 (over 700,000 travels). The 2020-2021 period is associated with the Covid 19 pandemic, being characterized by constraints on travel in general and medical tourism in particular, being irrelevant for the purpose of this research.

Table 3 Comparative number of tourist trips: total and medical purpose

Year	Total trips	Medical purpose trips
2015	18,922,315	713,352
2016	17,367,314	505,216
2017	19,058,365	634,222
2018	19,094,492	570,009
2019	19,976,000	614,014
2020	12,069,388	223,157
2021	17,861,324	393,816

Source: made by the authors based on (INS (b), 2022)

Health tourism trips made by residents in the period 2015-2019 (Figure no. 1) are mainly focused on city destinations (with a peak in 2018) and mountain areas (with relatively stable demand), which can be associated with preferences for those two categories of forms of health tourism: medical tourism that corresponds to urban destinations and medical wellness/spa tourism that corresponds to the mountain area. For the rural area there is no substantial demand, while the coastal destination has registered an increasing trend in the last two years.

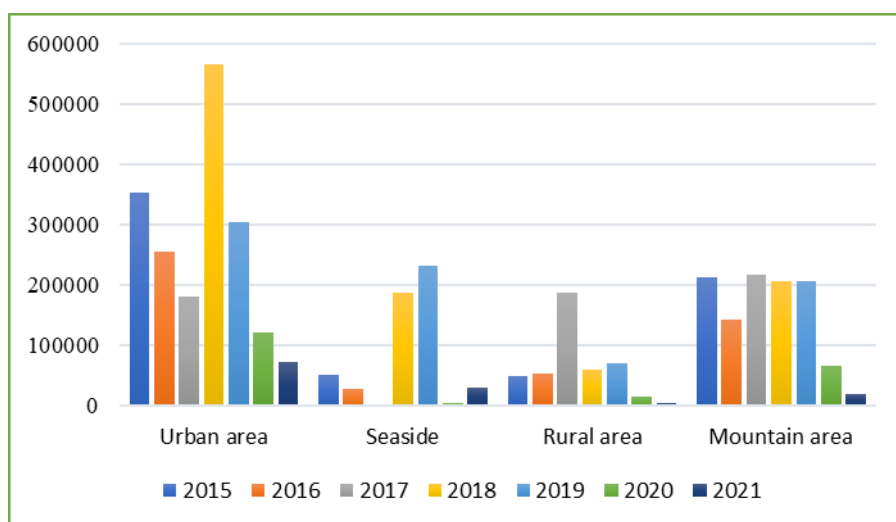


Figure no 1 Domestic medical travel to the main destinations

Source: made by the authors based on (INS (b), 2022)

From the perspective of the types of accommodation categories preferred by Romanian residents in domestic travel for medical purposes (Figure no. 2), the most attractive are hotels and similar accommodation units, with the observation of an increasing preference in 2019 compared to 2018. Accommodation units in the category of campsites, cabins or guesthouses are in a slight decrease, while accommodation with relatives or friends increases slightly in preferences, but is positioned far below the level of hotels. Free accommodation in other types of premises is still a preferred option for health tourists, this occupying the 2nd place after hotels.

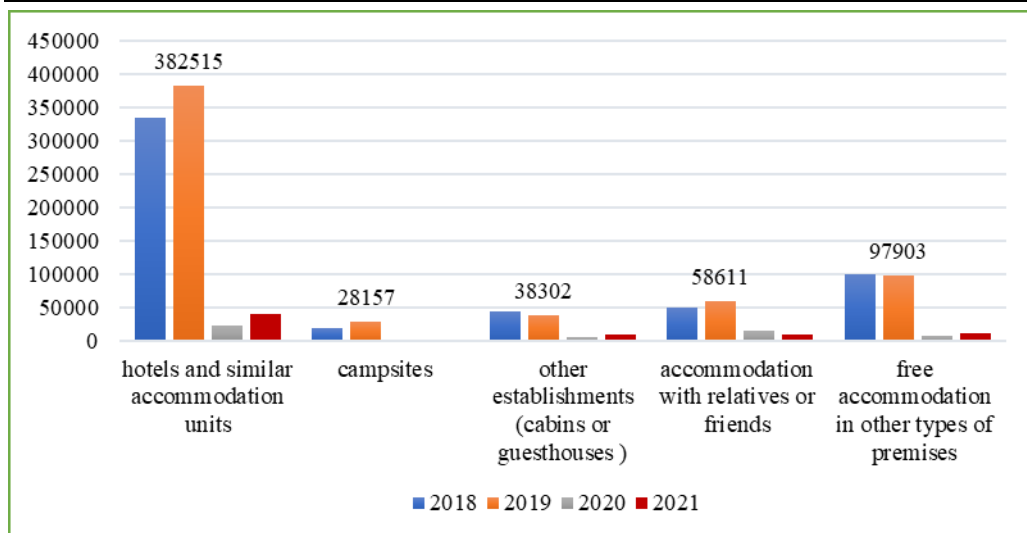


Figure no 2 Domestic travel for medical treatment by type of accommodation, 2018-2021

Source: made by the authors based on (INS (b), 2022)

The presence of hotel-type accommodation in a proportion of over 63% demonstrates the role and importance of accommodation spaces in the tourism product for health, but at the same time, the relatively high share of accommodation in other spaces without payment, including with relatives and friends, warns of the relatively low purchasing power of Romanian tourists, with demand for health tourism.

The offer for health tourism in Romania

In Romania, the offer for health tourism respects the structure of the forms of health tourism, being classified into the supply for medical tourism, located especially in the main cities, medical university centers, and the supply for spa tourism, which includes both the offer of wellness and medical wellness tourism.

Table 4 Existing accommodation capacity (number of places) by types of destinations

Total number of places	2015	2016	2017	2018	2019	2020	2021	2022
Total	328313	328888	343720	353835	356562	358119	364507	367386
Spa resorts	35342	35786	36631	36173	35643	36554	36362	36643
Resorts in the coastal area	83353	81635	80618	80665	85081	85200	84794	86271
Resorts in the mountain area	55775	57282	63921	65025	64767	63943	66374	66742
Bucharest and the county seat cities	86565	85826	87901	91800	92018	90098	89657	89607

Source: made by the authors based on (INS (a), 2022)

Romania has an important accommodation capacity, distributed in destinations such as spa resorts, coastal, mountain areas or county seat cities. The largest share is the accommodation in the coastal area, an important destination for health tourism,

both through the supply of spa treatment for recovery and healing (thalassotherapy, climatotherapy, peloidotherapy), as well as for the wellness one. Out of the total number of existing accommodation places in Romania, the existing accommodation capacity on the coast represents over 23%, the spa resorts add up to 10%, the mountain area 18%, and the cities 24%.

Table 6 Tourist accommodation capacity in operation at tourist destinations (2015-2021)

Capacity in operation	2015	2016	2017	2018	2019	2020	2021
Total	81872539	83323220	87655762	89075891	88.789.656	64040595	79191834
Spa resorts	9136031	9321299	9852659	9845187	10075072	6798034	9167043
Resorts on the coastal area	9411584	8797917	9221634	9032938	9129918	7771086	8758769
Resorts in the mountain area	16004784	16600153	18258593	18510155	18218169	12895299	16224148
Bucharest and the county seat cities	29586854	29871346	30417360	30959939	30741036	22371705	26779366

Source: made by the authors based on (INS (a), 2022)

Out of the total touristic accommodation capacity in operation expressed in number of bed places, 11% is represented by the accommodation capacity in the spa resorts, 11% the accommodation in resorts on the coastal area, 20.5% the capacity in the mountain area and approximately 34% the accommodation capacity in operation in Bucharest and the county seat cities.

Comparing the data according to the existing accommodation capacity and the accommodation capacity in operation in the main destinations of interest for health tourism, it is observed a small share of the touristic accommodation capacity in operation of the coastline resulting from the highly seasonality of the offer in this area (11% capacity in operation compared to 23% existing capacity), low seasonality of touristic accommodation capacity in operation in spa resorts (11% capacity in operation compared to 11% existing capacity), a low affected capacity in operation in the mountain area (18% existing capacity and 20.5 capacity in operation), while the city's supply is slightly affected by seasonality throughout the year (24% existing capacity and 34% capacity in operation).

From the perspective of the supply of medical services, the providers of accommodation services in the coastal area who have their own all year round treatment facilities and touristic products adapted to both the medical and wellness offers are in insufficient number to provide consistency to the medical offer in seaside resorts

The health tourism supply for the Romanian seaside area sums up several permanent touristic establishments with health treatment infrastructure localized in Mangalia, Saturn, Neptun, Techirghiol and Eforie Nord resorts (Tabel 7).

Table no 7 Accommodation and treatment providers from resorts located on the Coast

Tourist resort (Seaside)	Accommodation with treatment bases
Mangalia	• Mangalia Balneary Sanatorium • Paradiso Hotel
Saturn	• Hora, Balada, Sirena Hotels
Neptun	• Doina Hotel
Techirghiol	• Techirghiol Balneary Sanatorium • "Sf.Maria" Pastoral Social Center
Eforie Nord	• Steaua de Mare Hotel Complex • Bran-Brad -Bega Hotel Complex • Europa Hotel • Traian Hotel, • Aqvatonic Med Spa • Mirage MedSPA

Source: made by the authors based on (balneomedica.ro, tratamentbalnear.ro, bioclima.ro, thrmareaneagra.ro, 2022)

The supply of health tourism is insufficiently developed compared to the touristic accommodation capacity of the seaside area, which makes the destination, contrary to its potential, to have a limited impact in the total supply for health tourism of Romania.

The supply analysis of the touristic reception establishments in the context of the health tourism product is also carried out by identifying the touristic reception capacity by development regions of Romania (Table 8). By comparing the data, the trend of increasing the supply of accommodation in the North-West, Center, North-East, South-East regions is obvious.

Table no 8 Accommodation capacity by Romanian development region

Development regions Places	Year							
	2015	2016	2017	2018	2019	2020	2021	2022
NORTH-WEST region	32210	33848	37792	40897	40154	42451	44007	45188
CENTER region	68899	67496	71038	70696	69113	70176	71654	70848
NORTH-EAST region	28184	28763	31170	31328	31469	32585	33242	33997
SOUTH-EAST region	100921	98769	98070	103753	107908	108047	108888	110571
SOUTH-MUNTENIA region	29881	30347	31529	30380	30246	28760	28788	27931
BUCHAREST - ILFOV region	21576	22242	22956	23873	24294	23449	24888	25551
SOUTH-WEST OLTENIA region	18821	19190	21000	22244	22927	21722	22867	22893
WEST region	27821	28233	30165	30664	30451	30929	30173	30407

Source: made by the authors based on (INS (a), 2022)

In the mid term, in the last 8 years, the largest increases in accommodation supply are observed in the North-West region (+40%) and the North-East region

(+18%), while regions such as the South-East, which have the highest capacity, register an increase of only 10% in 2022 compared to 2015. The South Muntenia region registers a slight decrease of 7%. It is noted the increase in the accommodation capacity in the Central, South-western and Northern areas of Romania, regions where health tourism products are also developed, especially in spa resorts with thermal and mineral springs offer.

In addition to the supply of balneo-climatic tourism and medical tourism developed in the main cities, Romania is one of the initiating countries of anti-aging treatments, being at the same time a pioneer of the development of medical tourism products, since the 1970s.

Doctor Ana Aslan developed a method of prophylaxis and treatment of health deficiencies generated by oldness through her revolutionary treatments Gerovital and Aslavital, which she applied, at that time, in an incipient form of medical tourism, at Flora Hotel in Bucharest.

Commonly, the anti-aging treatments, very appreciated at the international level, are approached by the National Institute of Geriatrics and Gerontology in Bucharest, as well as in several other establishments for health tourism from some spa-climatic resorts.

In the same time, in addition to the innovations of Doctor Aslan, Dr. Ionescu-Călinești conceives another product of great impact in the spa treatment, resulting from the peloid extract from the Amara and Balta Albă lakes, called Pell Amar, successfully used in the treatment of rheumatic and dermatological diseases.

Currently, the Gerovital and Pell Amar therapy is reduced to the offer of the Institute of Geriatrics in Bucharest and balneary anti-aging treatments in resorts such as: Băile Felix, Băile Herculane, Amara, Băile Govora, Eforie Nord, Neptun, Mangalia, Saturn, Sinaia, Sovata. At the same time, the dermato-cosmetic products of the Gerovital and Pell Amar range are used in spa and wellness procedures both in the treatment centers of the balneo-climatic resorts, as well as in spa and wellness centers associated with hotels all over the country.

Romania, in addition to the medical and wellness offer for adults, has also developed treatments for children's medical recovery in resorts such as Băile Felix, Băile 1 Mai (medical recovery for children), Băile Olănești (treatment of allergies and aerosol therapy for allergic rhinitis), Băile Govora (respiratory diseases treated with iodized and sulphurous mineral waters), Sovata (salt cave therapy for respiratory diseases), Mangalia and Techirghiol (treatment of locomotor disabilities), along with the treatments of natural salt mines from Turda, Praid, Ocna Dej, Ocnele Mari, Slănic Prahova, Cacica.

The offer of medical tourism of the spa resorts in Romania fits both aspects of health tourism: wellness (including medical wellness) and medical tourism. Romania has destinations of interest for the development of therapies based on natural cure factors, oriented towards various types of tourists: seniors, children, adults, young people, who are looking for healing therapies, or relaxation and health preservation.

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Romania's tourism potential, through natural therapeutic factors (bioclimatic, salt mine, peloids, thermal and mineral waters, sea and lake water), but also through the medical scientific research, including innovations in the field of geriatrics and treatment

with sapropelic mud extract, and medical tourism offer from centers and clinics in major cities, places Romania on the map of destinations for health tourism in Europe.

Romania has several exceptional competitive assets through its authentic health products that could be better exploited and used in the field of anti-aging health tourism, by expanding the Gerovital treatment network and sapropelic mud therapy in all spa resorts.

Taking into account the development perspectives of the global health tourism, it requires Romania to adapt to the European policy of promotion and investment in tourism strengthened by strategies assumed both at the level of macro-destinations and at the level of local and regional organizations for the management of health tourist destinations.

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