



Montenegro as a high-quality health tourism destination: Trends and Perspectives

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Abstract

The main objective of the paper is to provide a theoretical and practical framework in order to identify the key advantages and disadvantages of Montenegro as a health tourism destination. The main method that was used was a SWOT analysis, as well as a survey based on an original and thus self-designed questionnaire intended for this purpose. The results of the research have shown some key advantages and disadvantages of Montenegrin health-tourism. Although Montenegro as a country, has a great potential regarding the health tourism sector, it is a fact that this potential is not adequately valorized. In that sense, a strategy of development of the health tourism sector should be created. Strategy should contain a specific vision, mission, strategic goals, as well as measures that should be carried out and activities that should be realized in order to make Montenegro attractive and high-quality health tourism destination.

Keywords: Montenegro, health, health tourism, destination, medicine

Introduction

Health tourism is one of the oldest types of tourism which was very well known even in the Ancient period when it was realized mostly through "thermal tourism". Through later centuries it was present in different forms, while from the beginning of the post-industrial period the era of "modern health tourism" had started. At the end of the 20th century, it was considered to be a small but very interesting aspect of special interest tourism (especially in Europe), while in the last years it is experiencing an expansion in the global tourist market representing one of the fastest growing branches of tourism in the world, growing globally at a rate between fifteen and twenty per cent a year (UNWTO Annual report, 2015). Trends in population aging and health orientations certainly have a great impact on the extremely high annual rates of growth of this form of tourism and this fact indicates that health tourism has the potential to become one of the main motives for traveling in the future. It is also important to mention the fact that the quality of modern life is in constant decline- with inter alia, a stressful rhythm of life, unhealthy eating habits, ecological pollution of the environment and cities. – all these things cause the necessity of people to be involved activities which contribute to improving the health and overall satisfaction of a person. When tourists travel to another country for medical



treatment as well as for sightseeing, the practice is called medical tourism. In the last few years this trend has increased. This emergent global trend of increased medical tourism is expected to gain momentum in the coming decades as travelers seek destinations abroad that are associated with wellness and affordable medical care (Nicolaides, 2011).

According to the definition of the World Tourism Organization health tourism is a complex activity based on the usage of natural medicinal factors, procedures of physical medicine and programs of physical activities taken in order to maintain and improve the physical, mental and the spiritual health of tourists, and the quality of their lives (UNWTO Annual report, 2015). According to this definition, the main types of health tourism are: wellness tourism, spa tourism and medical tourism.

Health tourism-trends and perspectives

Many factors on the side of the supply and demand caused the "explosion" of the healthcare industry, which includes health tourism. Having in mind stress, the lack of free time, unhealthy lifestyles, the usage of modern technologies, pollution and other influences, it is clear why health tourism has an important role to play in revitalization of the psycho-physical abilities of people.

There are also significant demographic changes; the increasing share of the elderly population, and in parallel with the aging of the population, the life expectancy of the population is prolonged. It should also be mentioned that a baby-boom generation that is highly educated and spend financial resources luxury products and healthcare - wellness services. On the other side, it is also important to mention the fact that health promotion is promoted through different media channels, which has invariably led to an increase in awareness of the importance of the consumption of products that preserve and promote health and human well-being.

It is also extremely interesting to mention some demographic and economic changes that may further influence the development of health tourism - it is assumed that by 2025, two people will live in an average household, which will result in a growth in income per member of the population and increase of spending money on luxury goods and services connected with to their own health.

According to Bartoluci, in order to be able to provide wellness services at a relatively high level, certain prerequisites are necessary, natural resources, facilities and facilities such as: natural beauty, sea, lake, forest, thermal springs, greenery, environmental quality, landscaped parks, promenades, indoor and outdoor facilities in the open space for spatial and recreational purposes, facilities and facilities for relaxation and improvement of the "mental state", premises for medical services and educated, professional and friendly medical employees (Bartoluci & Čavlek, 2007).

In this context, it is interesting to mention the world's most attractive destinations of health tourism. For example, in 2013, 1.2 million tourists whose health was the primary motive of travel visited Thailand. The growth rate of health tourism in Thailand is 16% per year, primarily thanks to high-quality healthcare services, personnel, infrastructure, reputation and affordable prices which are up to 60% cheaper than in the USA. Mexico is very well known for services in the area of reducing overweight and dental surgery. Due to the proximity and affordable prices, 70% of the clientele comes from the United States. The USA is the primary destination for plastic surgery, healthcare institutions in Singapore are specialized in the treatment of cancerous diseases, while India is known for the treatment of especially cardiac diseases and heart conditions requiring amongst others, triple-bypass surgery.



Europe has a health tourism tradition that dates back to the post Renaissance era. In the 16th and 17th centuries, the emergence of "spa towns" (Bath, Baden Baden) significantly improved its position on global health market. Some of the most famous countries in this field are: Germany, Italy, France, Switzerland, Austria, Czech Republic, Hungary, Slovenia and in the last years Turkey, which are considered to be specialized for different types of health treatments.

Having in mind the potential of Montenegro for tourism development which is based on natural beauty, richness of cultural and land contrasts, national parks and protected areas, flora and fauna, gastronomy, climate, geographic position and many other elements, as well as fact that tourism represents one of the three main pillars of future economic development of Montenegro, it is clear that one of the key elements of tourism development in Montenegro should also be health tourism. Although there is a great potential for development of this type of tourism especially regarding sea, mountains, national parks, sand, climate, mineral waters etc. as well as growing number of facilities which are important for its development such as high-quality hotels, hospitals, rehabilitation centers, wellness and spa centers etc., it is clear that there this type of tourism is not adequately promoted and valorized. In addition, there is no any strategic framework for future development, except some general remarks described in the Strategy of Tourism Development (Strategy of tourism Development to 2020, 2008). For these reasons, the aim of this paper is to provide a theoretical and practical framework for the effective development of health tourism in Montenegro which could lead to improvement of the quality of tourist offerings in Montenegro, expansion of the tourist season, achieving a strategic competitive advantage on the global market and also the positioning of Montenegro as a high-quality health tourism destination.

Some authors believe that India and Thailand are two countries Montenegro should strive to emulate in their offerings for the local medical tourism industry especially from the point of view of marketing (Nicolaides, 2011). The economic impact of medical tourism on countries such as India, where it is virtually a routine practice, and the way the tourism may be improved and promoted by the development of medical pharmaceuticals, medical equipment, and medical industry job creation, are aspects worth of consideration for countries like Montenegro (Nicolaides, 2011).

Method

The main method that was used was a SWOT analysis, as well as a survey based on the original questionnaire designed for this purpose. The analysis of trends and perspectives of future development of health tourism in Montenegro started from the SWOT analysis. SWOT analyses and identification of main strengths, weaknesses, possibilities and weaknesses in a given situation (Eisner, Lumpkin & Dess, 2007).

Table 1: SWOT analysis of Montenegro as heath tourism destination

STRENGHTS	WEAKNESSES
- Natural beauty - A favorable climate - The richness of contrasts in culture and nature - Natural potentials for development of health tourism	- Lack of clear vision, mission, clear strategic goals and measures and activities that should be carried out in future - Disharmony of laws in the field of health tourism - Old-fashioned facilities of health resorts and special hospitals



<ul style="list-style-type: none">- Closeness to large emitting markets and availability- State of ecology in the country- Availability, quality and tradition of using natural medical factors- Competitive prices- Growing number of 4 and 5-stars hotels with high-quality wellness & spa offerings- Growing number of quality private health institutions interested in health / medical tourism- Growth in the number of private health insurers	<ul style="list-style-type: none">- Insufficient investment in institutions, centers, hospitals etc. which can be used for health tourism- Lack of market orientation of the spas and special hospitals- Lack of promotion on national and international level- Lack of service quality control- Insufficient power of clusters, associations, societies in the field of health tourism
OPPORTUNITIES	THREATS
<ul style="list-style-type: none">-Anticipated rate of international growth tourism- Prediction of WTO as well as positive trends and perspectives in tourism and hospitality industry in Montenegro- Diversification of consumer segments and health tourism products- International recognition of Montenegro as a tourist destination- Anticipated growth rate of health tourism-The increasing share of elderly population- Stress, lack of free time- Baby Boomer generation- Raising awareness of people regarding the need to preserve health- The process of EU integrations and necessity of creating health system which is complementary to EU	<ul style="list-style-type: none">-Instability of the environment- Climate change- Enough interest of investors- An increasing number of competitive destinations-The rapid development of technology that imposes the need of continuous investment- Increasing demands / expectations of consumers

Except SWOT analysis, the scientific research was also carried out, based on the original questionnaire designed for this purpose, and it was conducted in the period from June to September, 2018. The methodology used for the collection of data was a survey. The first phase was the production of a suitable questionnaire to address the needs of this paper.

The questionnaire contained a total of fourteen questions. The first part related to biological, social and economic characteristics, while the second part contained questions that related to the subject of the research itself. The questionnaire contained open-ended questions in which respondents independently presented their opinions and attitudes, and also some closed



questions in which respondents chose one of the offered answers, as well as the so-called, pivot questions in which respondents ranked their responses accordingly their perceived significance.

The questionnaires were in the English, Russian, Serbian and Albanian languages. Respondents were both domestic and foreign tourists. Respondents were selected by a random sampling method, and the sample was stratified. All interviewers were thoroughly familiar with the method of interviewing of tourists.

Empirical data and analysis

In total 140 respondents were interviewed in twelve municipalities (Budva, Kotor, Tivat, Herceg Novi, Bar, Ulcinj, Zabljak, Kolašin, Plav, Plužine, Podgorica and Cetinje). Out of the total number of respondents 52% are female and 48% were male. 25% of the total number of respondents are domestic tourists, 75% foreign tourists (25% were tourists from the neighboring countries- Serbia, Bosnia and Herzegovina, Croatia, Slovenia, Macedonia and Albania while 50% were tourists from other countries). When it comes to age structure of guests, the highest number of tourists 26% was between 20 and 29, 26% between 30 and 39 years, 19% between 40 and 49, 15% between 50 and 59, 7% of tourists between 15 and 19 and 7% has 60 or more years. Most tourists have a high school diploma (40%) or college (40%), 18% have a diploma higher school, 1% has only completed elementary school, and 1% has unfinished elementary school. When it comes to monthly income, the research indicates that 46% of respondents have average monthly incomes, 20% have incomes above the average of their country, 8% are significantly above the average, while 15% have incomes below the average of their country, and 11% were found to be significantly below the country's average. This is completely in accordance with trends and perspectives on the global market- according to Unković and Zecevic the majority of tourists in future will actually be tourists with some average monthly incomes (Unković & Zečević, 2009).

Results and discussion

The results of the research showed that tourists in Montenegro usually reside seven- 40% or ten days - 26%, 24% of tourists in Montenegro stay up to five days, while 10% of tourist stay more than ten days. Trend for shorter, but more frequent breaks is evident in this structure as predicted by Bakić. [6] The results of the research have shown that most tourists- 55% spend between 250 and 500 euros per person (accommodation and travel costs excluded), 12% between 500 and 1000 euros per person, 8% over 1000 euros, while 25% spend less then 250 euros per person during holiday. These data are also completely in accordance with trends and perspectives on global tourist market in which consumption in tourist destination is continuously increasing (Bakić, 2010). For most of the tourists Montenegro has completely fulfilled their expectations (58%), and the percentage of those for whom Montenegro exceeded expectations is also very high - 22%. For 20% of respondents Montenegro only partially reached the expectations or didn't reach them at all.

When asked about slogan "wild beauty" most of the tourist associated this with wilderness- 63%, 26% with natural beauties, 6% with richness of contrasts, 5 % with other. The results of the research clearly show that although this slogan is clear, effective, and attractive, it does not present the main competitive advantage of Montenegro such as for example, the richness of contrasts, natural beauties, the short distance from the sea to the mountains. The percentage of tourists that perceives Montenegro as a destination which should be visited during summer is quite high- 65%, 25% of tourists perceive it as winter destination, while only 10% consider Montenegro as a whole year destination.



It is interesting to mention that tourists mostly believe that Montenegro has the potential for the development of health tourism which is not at all/ completely valorized (70%), 20 % consider that it has a potential which is completely used, while 10 % believe it has no potential at all. When asked about the main resources that should be the base for the future development of health tourism, most of the tourists mentioned natural beauties and potentials like the climate, sea, mountains, sand etc. - 72%, 17% facilities- hotels, spa and wellness centers, hospitals, centers etc., sports activities- 8%, 3% other. When asked about the main centers of health tourism most of the tourists recognized the seaside- Ulcinj and Igalo (47%), mountain parts (30%) and 23% recognized the combination of sea-mountain as the most important ones.

As a key disadvantage of future development of health tourism in Montenegro, most of the respondents recognized poor infrastructure (42%), noise, crowding and dirtiness (18%), the lack of strategic planning (14%), 12% lack of promotion, high prices 10% and 6% other. It is interesting to mention the fact that respondents identified the main advantages and disadvantages of Montenegro as health tourism destination which is completely in accordance with results achieved through SWOT analysis.

By analyzing the main strengths, weaknesses, opportunities and threats, as well as research on attitudes and beliefs of tourists, it may be concluded that specific configuration of mountain massifs in Montenegro, which literally rises directly from the Adriatic Sea, make the climate in Montenegro more than suitable for the development of health tourism and related medical tourism. It should also be mentioned that the country itself has a lot of natural beauties, including rich flora and fauna and a very favorable geographical position in relation to large European centers. A clear commitment to reach the European market, huge projects in tourism, a growing number of 4- and 5-stars hotels with wellness and spa facilities as well as medical centers and institutions, makes Montenegro a serious candidate for regional, if not a European sought-after destination of medical tourism. In combination with trends and perspectives on global markets, the potential becomes even bigger.

A necessary precondition is adequate protection, promotion and adequate valorization, of all available resources - on the coast, as well as in North and central part of the country. According to Radović (2010) special accent should be put on:

1. Ulcinj which should be given priority in the future having in mind the richness of natural factors for development of health tourism such as: Mediterranean-Adriatic climate, mineral water sources, sea salt, wellness of sand and rich plant ecosystems. It is important to mention that in 1992 by the order of the Kingdom of Yugoslavia, Ulcinj was declared as a "Spa and Climate Health Resort". The sea temperature makes the optimal bathing possibilities in the sea water about 6 months, from May to October. The water clarity in the summer is as much as 38m and on the sea in front of Ulcinj the highest water transparency in the Adriatic Sea is measured at 56m. The long healing factors are sand on the beaches, which is very clean, with unusually fine small particles, there is not even the slightest admixture of soil, sludge, organic materials, etc. According to the chemical composition of Ulcinj sand there are about 30 mineral substances that are biologically very active. It contains mild radioactivity which makes it very suitable for medical applications, especially in the case of diseases of the organs of movement and spine, rheumatism, desmopathy, sciatica as well as conditions after injuries to these organs. The Sulphur water that springs along the sea on the 'female' beach has 'miraculous' medicinal properties and according to legends and stories it has beneficial affects especially for women who do not have children. By mineral composition, the water is thus very rich. Mineral mud extends around the basin of the



Ulcinj saltpan, about 2km from the sea. Scientific tests of this mud confirm that it has one of the best qualities on the Adriatic. Untreated seaweed from the sea saltwater pool in Ulcinj has a 'concentrated sea' effect, which is suitable for the treatment of rheumatism and diseases of the organs for movement. All these natural factors can rarely be found in one place thus making this a unique place.

2. Igalo is a place which should be valorized as a center of modern therapy, thalassotherapy, rehabilitation, prevention and recreation. In order to reach this, it is necessary to undertake some measures such as: modernization of existing centers and creation of new ones, providing additional values for consumers of services, modernization of traffic and communal infrastructure, realization of promotional activities focused on specific target groups etc. Near the mouth of the Sutorina River to the sea, along the sea shore, there are several sources of mineral water, four of which are located. These mineral waters are based on chloride, muriatic, and according to the German classification, this mineral water belongs to the group of sodium chloride waters. It can be used in the treatment of various diseases, such as: hypo-acidities, dyskinesia, gallbladder, chronic constipation, slow peristalsis. It is also used in the form of aerosols in respiratory tract diseases. Thanks to the healing sea mud, Igalo has developed into the largest centers in former Yugoslavia and one of the largest in Europe. This mud has pronounced hypersensitive, respiratory and analgesic effects, and is used in the treatment of many diseases, primarily those related to rheumatism.
3. Prčanj in which there is already a center for the rehabilitation of children with asthmatic diseases should be further valorized in this direction. In order to reach this, it should provide additional capacities, modernize the existing ones, provide more diversified services etc. It should definitely include Vrmac in order to reach the combination of medical and recreational contents on the route between sea and the mountains which would give this center a completely new quality.
4. Risan, which is already affirmed as a classical health resort, needs to be modernized and further specialized in order to attract a larger number of different target groups.
5. Tivat which should also be considered as a new health center given the fact that sites Solila and Bigovo, as well as the assumptions about the existence of mineral water are present.

Except in the coastal area, health and recreation centers should be developed in the continental and the mountainous parts of Montenegro, for example on Orjen and Lovcen, as well as in lower altitude zones of Durmitor, Bjelasica, Komovi and Prokletije.

It is also important to mention the fact that except for the already mentioned centers, the quality of other capacities in Montenegro should be further improved by the introduction of different programs such as wellness, spa, recreation programs such as massages, saunas, fitness, yoga, weight loss programs etc. In that sense, building fitness wellness centers is no longer a factor of comparative advantage, but a necessary prerequisite for competitiveness on the market and the key factor for the extension of the tourist season itself. Special emphasis in future development should be put on the popularization of areas in which sources of thermo-mineral water are found, healing sand, mud, thermos mineral (Ulcinj, Igalo, Lim and Ibar basin and Komarnica canyon).

Conclusions

Although Montenegro as a country has a significant potential regarding the health tourism, it is the fact that this potential is not adequately valorized. In that sense, the Strategy of



Development of Health Tourism and its related Medical tourism should be created. This strategy should be a result of the systematic work of experts from different fields such as medicine, tourism, economy, sustainable development, sport etc. in order to take account all aspects of this phenomenon and create the approach which would provide high quality solutions of preservation, protection, promotion and valorization of existing and new resources in order to offer high quality services. In that sense, the special accent should be put on five defined centers Ulcinj, Prčanj, Igalo, Risan, Tivat which are situated on the South and use all their potentials such as sea, sand, mug, sources of mineral water etc., as well as continental and the mountainous parts of Montenegro, for example on Orjen and Lovcen, as well as in lower altitude zones of Durmitor, Bjelasica, Komovi and Prokletije.

The results of the SWOT analyze as well as the survey that was carried out among tourists have shown that there are a lot of strengths regarding the future development of this kind of tourism in Montenegro such as: specific configuration of mountain massifs in Montenegro, climate conditions, sea, natural beauties, rich flora and fauna, very favorable geographical position in relation to large European centers etc.

All aspects considered, and with a clear commitment to reach the European market, huge projects in tourism, a growing number of 4- and 5-stars hotels with wellness and spa facilities as well as medical centers and institutions, makes Montenegro a serious candidate for regional, if not a European sought-after destination of health tourism. In combination with trends and perspectives on global markets, especially the increasing share of the elderly population, aging of the population etc. this potential becomes even greater. Because of that, it should work very intensively on improvement of quality of this kind of tourism and its future promotion which should further lead to the future development of special interest tourism, as well as all tourism industry of Montenegro.

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