

BRANDING STRATEGY OF THE COUNTRIES IN THE BALKAN REGION – FOCUSING ON HEALTH TOURISM

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Abstract : Countries of the Balkan region possess great endowed resources in health tourism, mainly in the area of natural resources, and Mediterranean diet in some countries. The question is whether these countries have already realized their uniqueness in this area? Conscious brand building starting at the so called brand positioning is crucial in the fierce competition of tourism, particularly on online platforms assuring the possibility of easy comparison. The main objective of the paper is to analyze by structured content analysis the issue how consciously Balkan countries build their brands in health tourism through their online communication.

Keywords: Health tourism, well-being, branding, destination branding, Balkan

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INTRODUCTION

The Balkan term is often linked to negative stereotypes as fragmentation and the association of dubious transactions. It should be cleared that the word Balkan itself mean mountain in Ottoman languages and in Turkish language it is derived from the phrase mud or sludge (“balk”). However, the most widely accepted definition is that the origin of

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its name comes from the Balkan Mountains, which was referred to as an Stara-Planina (Old Mountains) on Slavic area (Todorova, 1997). The geographical location of the Balkan Peninsula is not so simple to define, because politically it was always homogeneous and still had some power sphere of influence. Therefore regionally it was not an entity and this is true for the nations. So a lot of confusion and overlap characterize this area, which also makes it very colorful. The Balkan Peninsula is located in Southeastern Europe, on the east, south and west bordered seas (Black Sea, Marmara Sea, Aegean Sea, Mediterranean Sea, Ionian Sea, and Adriatic Sea). The northern border is problematic, Jovan Cvijic's (2008) opinion is that neither country nor ethnic boundaries are not necessary to the geographical location, because they are always changing. His opinion that Krajina and so called Partium (Gorizia, Gradiska, Istria) were parts of Balkans.

Currently Gradiska belongs to Croatia, Istria is shared between Slovenia and Croatia and Gorizia is part of Italy from 1945 (Cvijic, 2008). From the late 19th century the state border shows the Balkan's boundaries rather than geographic boundaries (Bidwlux & Taylor, 1996). After the conflict, the following area is generally accepted to be countries belonging to the Balkans: Albania, Bosnia and Herzegovina, Bulgaria, Greece, Macedonia, Montenegro, Serbia, Croatia, Romania, Slovenia, and Turkey. In particular, the perspective of the Western Balkans and the separation of Eastern Balkan regions exist, which makes it one of the successor states of former Yugoslavia in the western region. Previous research and comprehensive surveys drew attention to a spectacular deviation and falling behind in the quality of life in the Balkans and they show that compared to the European average only Slovenia is in a better position (relative) (Michalkó et al., 2014). The Balkan countries will be the focus of attention at the research questions: how to develop health tourism services in order to increase in the one hand the tourism income-generating impact on the welfare of the area, on the other hand the use of services by enhancing the well-being of local people. The article focus on the supply-side of the health tourism market, especially in communication and branding of the region. The purpose of the article is to examine how is the branding policy of the Balkan countries policies particularly in the health tourism market: how do they develop their services (if they do that) and how they communicate them on their internet site, because internet is the most important platform of communication mainly regarding the international tourism flow of the region. To reach the research objectives, we studied the different approaches of health tourism, especially the well-being tourism as well as the brand and branding process. Building on this literature background we determined key dimensions and questions, which are the following:

- What appears on the official website of the states about health tourism?
- How are these web contents related to the well-being tourism?
- What target groups could be identified for health tourism services?
- How can the brand policy be accomplished in the text and multimedia content of the websites?
- How does the content varies regarding domestic and international travelers?

The last question we found particularly important, because domestic and international travelers travel with different needs and ability to pay, so the differentiated content for the two target groups can be substantial. To answer this question it is essential the know the country's language. We researched health tourism in the following Balkan countries: Albania, Bosnia and Herzegovina, Bulgaria, Greece, Macedonia, Montenegro, Serbia, Croatia, Romania, Slovenia, and Turkey.

HEALTH TOURISM AND WELL-BEING TOURISM

Health tourism is one of the fastest developing areas for tourism. The health tourism trip is characterized by relatively diverse and growing travel motivations which are

supported by global demographic and social trends. The "graying" welfare societies hold growing, active years of the older generation, which is a considerable growing demand for health tourism services. On the other hand, the pension and health care systems of these welfare states face structural difficulties and are overburdened, with high waiting time, which increases the importance of self-financing. In addition to the health motivations focusing on prevention and health-conscious lifestyle became a trend, especially among the younger generation. In Far-Eastern cultures, it is part of everyday life and is considered as a healthy lifestyle in "advanced" societies of the world, as a response to the diseases of civilization. The scope and methods of health-related therapies has been growing and reaching embarrassingly colorful concepts, in which the wellness, selfness, spa, medical wellness, clinical tourism are the highlighted terms (Sziva, 2009).

Definition of health tourism

There is no consensus regarding the definition of health tourism in the literature, which is based on the reasoning that during travels to health-related areas, the emphasis is placed on different areas of each culture, or nations. Health tourism can be defined as follows: "Health tourism is a broad concept of medical and wellness tourism, it is part of the field of tourism, when tourists travel with the main motivation of the improvement of their health status and / or preservation, and use services for healing and / or prevention, and stay minimum one night in the area. (Ministry of Local Government, 2007, p.10). The two basic aspects of health tourism can be defined as medical and wellness tourism, which serve different needs and motivations: the medical tourism is about healing, while wellness tourism is about prevention, and reaching a healthy state in a holistic meaning. Based on the new trends there is a blurring between the areas (Sziva, 2010).

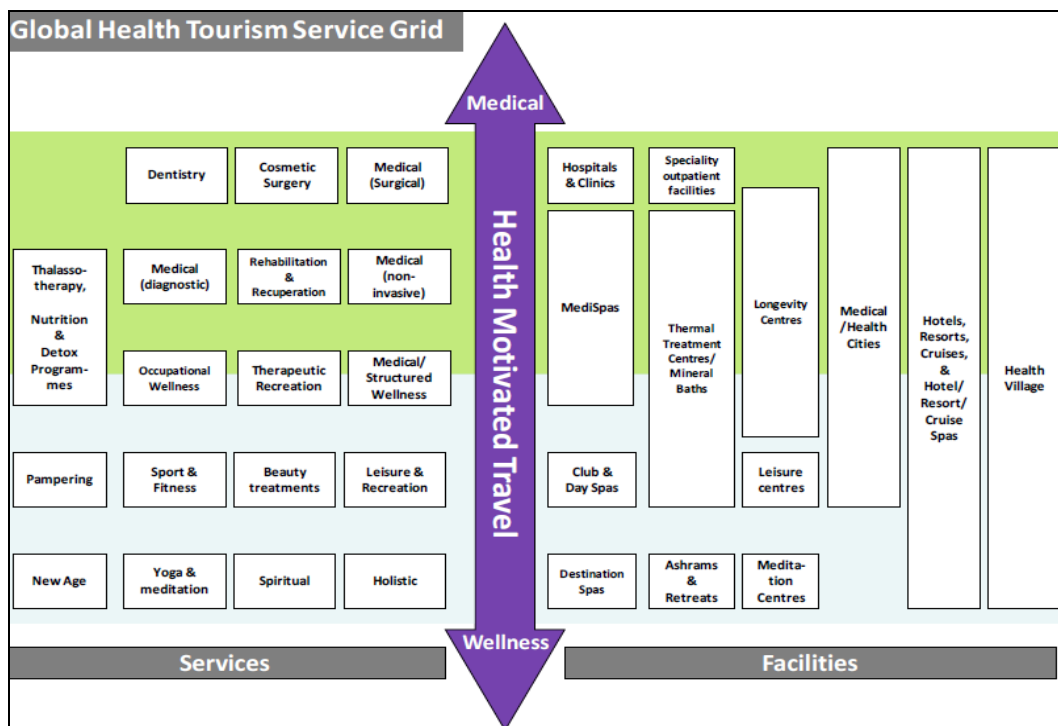


Figure 1: Structured model of global health tourism (Source: L. Puczko, & M. Smith, 2013. p.26.)

The health and wellness concepts have different meanings in different cultures. While in Central and Eastern Europe, services connected to health focus on the physical and medical treatments, in the Western-European countries people are already familiar with the traditional thermal tourism and thalassotherapy (healing treatments based on the benefits of the sea). In Southern-Europe seaside spa treatments are in the focus of health tourism. In Asian countries, the spiritual activities (meditation, yoga, massage) are part of everyday life, and they are accepted as the method of healing. But these traditions are increasingly used in the Western world as well, as wellness tourism offers more and more spiritual activities (Puczko & Smith, 2008).

Figure 1 shows a summary of the different products of health tourism showing the connected services and facilities. The chart above shows the two main directions of health tourism, the medical and wellness tourism, which increasingly overlap, as the body, mind and soul (in the holistic sense) is getting more and more important. Even the traditional western medicine, lifestyle-related wellness treatments play a significant role in the holistic healing. This direction can be seen in the central dimension of so called medical / structured wellness, which is also known as medical wellness (the health check is an important part of the medical wellness, followed by the doctor suggested treatments and procedures). In the process there is an important role of doctors, therapists, dietary and lifestyle counselors, sports instructors, masseurs, beauticians, psychologists and other representatives of complementary medicine.

One of the important directions of wellness is the holistic dimension, with particular emphasis on the psychological balance and the question of spirituality, and most important locations of these services may include a huge stretch of area, offering numerous services, as destination spas, or retreating centers. The wellness trend has a traditional arm, which is leisure recreation: a well-known part of this is fitness, which typically appears in club and day spa. The traditional therapeutic medicinal tourism is part of the medical tourism (during non-invasive therapies) which includes medicinal treatments based on medical water and other natural healing factors (sludge, sea water, micro-climatic conditions). Special, but dynamically growing branch is the clinical (or health-care) health tourism, during which the traveler takes part in health interventions (such as orthopedics, cardiology treatment) by its own decision. The health interventions are primarily in traditional medicine which may be supplemented by alternative and therapeutic medicinal methods (eg. Ayurveda in India, or balneology treatment in Hungary).

As a summary it can be said that clinical tourism includes trips to abroad with the voluntary (main or part) motivation of obtaining medical health services based on particularly Western medicine, which might include alternative healing methods as well as outpatient surgeries, but excludes treatments for expatriates and emergency cases (Sziva, 2010).

Definition of wellness tourism

The concept of wellness tourism is linked to lifestyle change, not the cure of the disease. The main point is physical, mental and spiritual health and the services they typically servereaching this holistic wellbeing, and prevention of health. It includes exercise and healthy eating, relaxation and indulging, as well as various lifestyle programs. These can be seen on the basis that participation in wellness tourism requires a conscious decision, being thus regarded as a component of health awareness.

According to Puczko-Smith's definition: "The wellness tourism is a form of tourism which aims harmonization and balancing of some dimensions of individual life, including physical, mental, emotional, employment, intellectual, and spiritual dimensions. The wellness tourism is more about prevention than healing, but a number of items are used to the lifestyle-based therapies (Puczko-Smith, 2013, 25.p.). The wellness tourism sub-

categories are very broad and include all activities which are suitable of balancing the body and mind, so often also includes the retreat tourism (especially what is the purpose of the retreat, holistic travel), just like spa tourism (Puczkó & Smith, 2013).

Well-being and well-being tourism

The welfare, quality of life and well-being concepts appear increasingly to tourism and health tourism researches, seeking answers to the question on how does the journey effect the traveler's life and satisfaction. Clarifying these concepts is important: "As long as the welfare focus on the quality of life belong to objective factors (income, health, technical infrastructure, school care public safety etc), the well-being to alludes to subjective factors (pleasure, esteem, affection, etc.)" (Michalkó, 2010, 19 p.).

The full sense of well-being increased focus in many countries around the world (eg. Australia, Finland) is not new, because in many places one uses the term well-being instead of 'wellness' terminology, referring to the health-conscious lifestyle in everyday life. "The well-being is more than happiness. This means that we are satisfied and developing from human point of view, as well as in belonging in to a community" (Shah & Marks, 2004 p.2). Based on these approaches the so called welfare tourism can be defined as a form of tourism that improves the individual's satisfaction of life by physical activity, harmony of job-private life, and by developing and improving the relationship with others and with him/herself. In this regard, many forms of wellness tourism can be included, such as the retreat, occupational wellness and spa tourism, which in addition includes healthy meals and beauty treatments (Puczkó & Smith, 2013).

Concept and process of brand and branding

In the competition of tourism market the role of brands not only has become a top priority for multinational tourism companies, airlines and hotels, but also for the tourism destinations. The brand as one of the most important concept of marketing theories got a lot of approaches, models and terms. In this article, we focus on destination branding from the practical approach of tourism marketing, and branding. American Marketing Associations' definition highlights the key benefits of the characteristics of branding: "A brand is defined as a name, term, symbol or a combination of these that identifies the product or service and distinguishes them from the competition" (Kotler, 1998, 491 p.).

It is also important to see that in the fierce competition the brand itself can reach its objective if it gives a so called emotional surplus to the customers, and it is particularly in the case of services where we buy first of all a promise. This is especially important according to the following definition: "The brand is a person's visceral feeling about a product, service, or company" (Neumeier, 2005 In: Papp-Váry, 2009, 5p.). The emotional level of outstanding importance was highlighted by Sulyok Judit (2014) in connection with the tourism brands. Continuing analysis of the central role of the consumer it is logical that visceral feeling is actually a picture, the so called image, which was established in the consumer's mind. In this regard, we agree with those approaches (Ilies & Ilies, 2015; Papp-Váry, 2005; Keeble, 1991) that the image is a brand of the customer side, the picture, which is in the consumer's mind, in terms of the brand. In fact, the same advantages and features can be identified in the case of tourism destination branding as well.

The destination brand is actually synonymous with the "spirit of place", the local atmosphere and the central value of the tourism experience that differentiates the destination from its competitors. So the destination brand refers to the totality perceptions of a place (based on experience or beliefs) that affect the traveler's attitude towards the destination, on an emotional level (Anholt, 2011). The destination branding, as a branding fundamentally is, more than a logo and a slogan: is based on brand positioning, which identifies the unique added value, which holds the uniqueness of the

place (Northover, 2011). The so called integrated marketing activities can be built on this, which co-ordinate the strategic messages linked to the brand position at the level of all target groups based on well-developed products and experiences. So the branding of the destination should focus on the integrated marketing activities so that such products could be established for the target groups, which support the values of uniqueness.

THE RESEARCH AND ITS RESULTS

The diverse culture, the life-affirming attitude of the people on the Balkan hold a great base on which health tourism products can be developed, furthermore health tourism-focused brands can be created, according to our presumptions. The main research question is how the Balkan countries brand themselves in the tourism market how they focus on health tourism, particularly wellness services. Structured content analysis was used as research methodology. The platform of the analysis was the internet, as the main channel for communication in the tourism industry nowadays, as stated by several authors (Law et al., 2015; UNWTO, 2014; Digital Think Tank, 2013). The analysis was carried on in the spring of 2015. The analyses of the sites have been set up on a uniform system of analyzed dimensions below, based on a dimension creating process, during which experts were involved in an iterative process.

The results were double-checked by the researchers to avoid the subjective interpretations. Though it should be highlighted because of the nature of the qualitative research methods, minimal subjectivity should be named as the limits of the research. Hereby the questions and the concrete method of the analysis are introduced to make the steps explicit and followable in the future researches.

- How does health tourism appear on the main site of the official tourism website of the country? – Operationalization: Analyzing photos, messages to see whether there is content of health tourism.

- How does the content of the main site (text, photos) refer to that direction, that the wellbeing of the travelers arrive to the country will be improved during the travel? – Operationalization: Analyzing photos, messages on the main page to see whether there are references to the improvement of happiness, satisfaction of life of tourists during travelling.

- Are there specific subpages for health tourism, and /or wellness tourism? – Operationalization: Checking the dedicated sub website pages of health tourism, and /or wellness tourism.

- How does the content (text, photos) of the subpages of health and wellness tourism refer to that direction, that the wellbeing of the travelers arrive to the country will be improved during the travel? - Operationalization: Analyzing photos, messages on the sub pages to see whether there are references to the improvement of happiness, satisfaction of life of tourists during travelling.

- How does segmentation appear on the website (based on offered services, packages) Operationalization: Checking the segmented offers, packages (e.g. offers for families, couples).

- What kind of services and destinations appear among the wellness tourism offers? Operationalization: Checking the wellness service suppliers (e.g. spas, spa hotels) on the webpage.

- Is there a specific slogan for health and wellness tourism, and if there is, what is it? - Operationalization: Checking whether the slogans contains reference to wellness or / and health tourism.

- What kind of services, atmosphere do the multimedia content show about the country? - Operationalization: Analyzing photos, messages on the sub pages to see whether there are references to health and wellness tourism.

- What kind of fundamental differences can be realized between the pages in English and in native language? Operationalization: Checking the contents in English and native language to see the nature of differences, whether there are different offers with special focus on domestic tourists.

In terms of results, we can say that health and wellness tourism appear on the websites of the countries with great endowed natural resources, but they do not get enough attention. Regarding the content of the main site, health tourism appears only at one place: Slovenia's website, but only in the form of images. The health tourism websites can be seen in the case of 8 countries: Bulgaria, Greece, Montenegro, Serbia, Croatia, Romania, Slovenia, and Turkey, and can be easily found in the case of Albania, Bulgaria, and Romania. The issue of improvement of wellbeing through tourism can be seen on the main website in the case of Croatia, Slovenia and Romania, but mainly through photos showing this, while in the other cases photos of landscapes, historical and cultural memorials can be seen on the main site. Regarding the text, there can be seen messages that the wellbeing of the tourists will be improved through traveling to the given country in the case of Serbia, Montenegro, Romania, Turkey and Greece. Serbia proclaims himself to be the place which offers relaxation, pleasure and recreation, Montenegro has promised a full rebirth. On Greece's website the improvement of wellbeing of tourists can be clearly seen, and health tourism services are built around it, mainly in the area of wellness, though medical tourism offers can be seen as well. On the site of Turkey, there is a message about giving new hope to patients by exceptional health care services.

Table 1. Summary of responses to specific questions of content analysis 1

Dimension/Countries	Slovenia	Croatia	Serbia	Montenegro	Bosnia and Herzegovina
Health tourism appearance of the main page	Appear	X	X	X	X
The content shows that the tourists wellbeing increasing	The atmosphere of the photos refers to it	The atmosphere of the photos refers to it	X	X	X
Health tourism and spa tourism appearance as sub-page	Appear	X	Appear	Appear	X
The well-being of tourists appearance of subpage	X	X	Appear	Appear	X
Target group to whom recommends the product	Health-conscious segment	X	Health-conscious segment	Wellness tourist	X
Services and main destinations appearance	Appear	X	Appear	X	X
	Appear	X	X	Appear	X
Health and wellness specific slogan	X	X	X	X	X
The messages of the pictures	Health tourism appear	X	X	X	X
The difference of content analysis between native and English page	Same	Same	Same	Not exactly the same	Same

Considering segmentation, offers specialized for target segments can be seen on the site of Romania, Turkey, Slovenia, Montenegro and Greece, in other cases there is no specific targeting and only the list of service providers can be seen. There is no health

tourism-specific slogan in the analyzed countries of Balkan region. It is relatively general that the countries have overall slogans for tourism, and there is a lack of touristic slogan only in the case of Serbia, Macedonia and Albania. The images of the health tourism subpages show topics of health tourism in the case of Slovenia, Croatia and Greece, while on the sites of Serbia and Montenegro photos are about nature. The messages of pictures on Greece's website are luxury, wellbeing, calm and purity, in harmony with the textual content. In case of Albania, Bulgaria and Turkey the photos illustrate mostly coastline experiences, with a promise of a pleasant rest and relaxation. Macedonia and Romania's pictures focus on active tourism, hiking and other sporting activities. The English- and native language content is in harmony in the case of the rest of the analyzed countries, with the exception of two countries. On Bulgaria's native language website, there are other images, than on that one of native language. In the case of Greece, the same content but shorter texts can be read in the English-language website. The summary of the analysis can be seen on the table 1, 2 illustrating the results of each dimensions.

Table 2. Summary of responses to specific questions of content analysis 2

Dimension/Countries	Greece	Macedonia	Albania	Bulgaria	Romania	Turkey
Health tourism appearance of the main page	X	X	X	X	X	X
The content shows that the tourists wellbeing increasing	X	X	X	X	On the images it appears	X
Health tourism and spa tourism appearance as sub-page	Appear at 2 times	X	X	Appear	Appear	Appear
The well-being of tourists appearance of subpage	Appear	X	X	X	Appear	Appear
Target group to whom recommends the product	Health and wellness tourist	X	X	X	Health and wellness tourist	Health and wellness tourist
Services and main destinations appearance	Appear	X	X	X	X	X
	Appear	X	X	X	X	X
Health and wellness-specific slogan	X	X	X	X	X	X
The messages of the pictures	Health tourism appear	Health tourism appear	X	X	X	X
The difference of content analysis between native and English page	Not exactly the same	Same	Same	Difference between the pictures	Only in one language	Same

CONCLUSION

During the research it became clear that most of the analyzed countries - despite the excellent resources - do not take advantage of health tourism potential and not (yet) take advantage of the increasingly important trends today. All of this was seen in the fact that there are no concrete sophisticated content, and customized offers for lifestyle, interest.

In case of Slovenia, Serbia, Montenegro and Greece, the content roughly include services, but none of them provides detailed information. Further the problem is that the service providers do not focus on differentiation and uniqueness. There is one exception: in Greece a certain complexity can be seen, because the wellness and spa services are built around the well-being and luxury, which seems to be unique illustrated by photos. For other countries, health tourism appears on the images, however, do not reflect uniqueness, as the pictures do

not provide information about health tourism in the given country. Overly it can be said, that the country's tourism brand building needs significant improvement, and through the online appearance more emphasis should be placed on both branding and tactical communications. All this is essential for the conscious brand positioning process, which includes identifying values of uniqueness. Therefore these countries may draw values from the area of holistic health tourism and focus on the target group-related product development, and on the conscious brand building process from brand positioning to segment-based communication.

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