

CONSIDERATIONS ABOUT DENTAL TOURISM DEVELOPMENT AND ITS SPECIFIC MARKETING IN ROMANIA

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Abstract:

Worldwide, the "actors" of the tourism market identified new needs, this aspect leading to the appearance of various forms of tourism such as: adventure tourism, city-breaks, cultural tourism, religious tourism etc. At the same time current economic development, marked by the recession of recent years, has led directly to the emergence of a social phenomenon: increase of unemployment rate in developed countries with major implications manifested from one to another in the global economy: incapacity of insurance to cover a wide range of medical services, discrepancy between prices for these services, increasing mobility of citizens. All these are direct causes of emergence, and especially development, of a new form of medical tourism, dental tourism. This form of tourism directing tourists from developed countries into developing countries. Romania has a significant potential to develop this form of tourism, recommended by the following advantages: highly qualified doctors, comparable lower prices, cultural, natural and anthropogenic resources. This paper is an argued proposal for the marketing in this field, which can be transformed into a competitive advantage for Romania.

Keywords: *medical tourism, dental tourism, marketing, online promotion*

JEL Classification: I11, I13, I15, M31, M37.

1. Introduction

The 21st century consumer needs have generated and developed into a rapid pace, both new forms of marketing (health services marketing, promotion through social media, IT&C support advertising, rapid distribution, online shopping etc.) as well as new forms of tourism (adventure tourism, cultural tourism, medical tourism, city-break etc.). New forms of tourism listed above, and others are already supported by government programs, creating in a very short time market niches for developing countries and especially competitive advantage for them in the international tourism market. Countries like India, Hungary, Turkey, South Korea are now in the top of medical destinations, and this competitive advantage is also possible because they are practicing proper and supported marketing. On the other hand, it is well known that Romania is a country with a great tourism potential. Also, it is known the success of Romanian doctors who drain their professional activity abroad. Therefore, we consider that Romania - by practicing a proper marketing - could be mapped into the trajectory of countries that are in the top destinations for medical tourism as, for example, in the adventure tourism Romania is one of the first ten developing countries in the world.

Among all types of specific marketing (services, medical etc.), which is the guaranteed for success "combination" of these tourist destinations for medical tourism? This paper aims therefore to create - for the beginning - a debate framework for this market actor which can bring to Romania a well-deserved place among the destinations for travel combined services and medical treatments. Further we present evolutions and perspectives of the worldwide medical tourism and a number of aspects about dental tourism in Romania, and in the last part of the paper, we propose a suitable marketing for these services.

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2. Global medical tourism - development and perspectives

Lately, medical tourism is a peculiar tourist phenomenon who took a global special extends due the increasing of the tourists' mobility, economic changes benefic in some developing countries and unstable economic climate in the developed countries like USA or Germany. In the last decade, the dimensions of this socio-economic phenomenon led to the formation of specialized research teams, using the internet to publish their own studies, providing complete and comprehensive information about medical tourism. One of those is publishing reports named "*Patients Beyond Borders*", thus providing useful information both for actors-consumers (and we propose for that the tourists-patients terminology) and actors-offers of the travel and medical market.

One of the important information provided by *Patients Beyond Borders* is related to the potential of this market, which in 2012 had the structure presented into Table 1.

Table 1 - Estimated number of medical travelers by country for 2012

Country	Number of tourist
Brazil	180,000
Costa Rica	30,000-45,000
India	300,000-700,000
Korea	81,000-150,000
Malaysia	670,000 (80%+ patients from adjacent Indonesia)
Mexico	200,000-1,100,000 (higher number is mostly due to undocumented Hispanics in California, Arizona, Texas returning home for care)
Singapore	400,000-610,000 (70% patients from adjacent Indonesia)
Taiwan	170,000
Thailand	920,000-1,200,000
Turkey	110,000
United States	600,000-800,000
All others	800,000-2,200,000 (Includes intra-EU travel)
Total Estimates 2012	4,461,000 to 8,016,000

Source: Patients Beyond Borders - *Estimated number of medical travelers by country: 2012*, www.patientsbeyondborders.com

(Note from the provider of the data: *Please note that some of the numbers have been listed as ranges due to large reporting disparities (e.g. Deloitte, McKinsey, Gallup, Economist, diverse reporting methods at various health and tourism ministries).*)

Analyzing the estimated data on patient-tourists, by country, for 2012, we find that this new form of tourism, the medical one, mobilizing a large number of such tourists, between 4,461 million and 8,016 million people, representing a significant proportion of those who traveled in 2012. Therefore, we consider that, in terms of marketing and potential, it is a growing market that offers to Romania the possibility of "joining" to it.

The team at *Patients Beyond Borders* also offers a top - estimated, of course - of the most popular destinations in the world for this purpose, according to the data into Table 2, among the reasons for which they are claimed (according to www.patientsbeyondborders.com) being the following:

- Government and private sector investment in healthcare infrastructure
- Demonstrable commitment to international accreditation, quality assurance, and transparency of outcomes
- International patient flow
- Potential for cost savings on medical procedures
- Political transparency and social stability
- Excellent tourism infrastructure
- Sustained reputation for clinical excellence
- History of healthcare innovation and achievement

- Successful adoption of best practices and state-of-the-art medical technology
- Availability of internationally-trained, experienced medical staff

Table 2 – Estimated top destinations by treatment

Country	Treatment	Comment	Approx savings
Antigua	Addiction and Recovery	Crossroads Centre, a 12-step addiction and recovery program founded by Eric Clapton, has welcomed international patients from 30 countries.	40%
Barbados	Fertility/IVF	Barbados Fertility Centre offers IVF and a host of fertility treatments at 40-60% savings. Success rates are improved over conventional strategies by offering a stress-reduced environment in a resort setting.	40-50% (IVF)
Brazil	Cosmetic Surgery	Luxury medical travelers often visit the world-renown Ivo Pitanguy Clinic.	20-30%
Costa Rica	Dentistry	Dentist's lobbies in San Jose and swanky suburb Escazu are filled with Americans and Europeans seeking savings on expensive restorative and cosmetic work – crowns, bridges, implants, dentures. Meza Clinic is fully accredited by the American Academy of Cosmetic Dentistry.	30-70%
Hungary	Dentistry	Germans, Austrians, Swiss and other patrons flock to Hungary for cost savings on dental work. One town – Gyor – in NW Hungary, boasts more than 150 dental clinics serving international patients.	40-75% (for restorative and cosmetic procedures)
India	Orthopedics, Cardiology	India is the world's medical travel "thrift" destination with savings of 60-90% on an array of procedures. Harvard-affiliated Wockhardt Hospital has performed more than 20,000 heart procedures, with 98%+ success rates (surpassing US and EU standards).	50-85% (for restorative and cosmetic procedures)
Israel	Fertility/IVF	Israel is one of the world's top producers of medical instrumentation, and a well-known center for inexpensive fertility treatments.	30-50% (IVF)
Malaysia	Health Screenings	Malaysia is medical travel's best-kept secret, with fluent English spoken everywhere and cost savings comparable to India in less culturally jarring setting. Savvy patients can obtain a full executive "well-man" or "well-woman" screening - including vision, dental, hearing, MRI, PET Scan - for around \$US1500 - more than enough savings to pay for a vacation in Kuala Lumpur and environs.	70% (Executive Health Screening)
Mexico	Dentistry, Bariatrics	Monterrey boasts four first-rate American-accredited hospitals offering bariatrics and weight-management programs to obese Americans at 40-60% savings. Each year more than 50,000 Americans cross borders into Mexico for dental work alone.	30-60% (Dentistry) 40-70% (Bariatrics)
Singapore	Cancer	Singapore ranks 6th in healthcare worldwide (compared to the US 36th ranking (source: World Health Organization). For cancer, Singapore's clinics and hospitals boast some of the world's best diagnostics. Patients visit for diagnosis, then head home for treatment. John's Hopkins International Medical Centre in Singapore specializes in cancer treatments.	30-40%
South Africa	Cosmetic Surgery, Cardiac	The classic "Surgeon & Safari" cosmetic surgery destination. World's first heart transplant performed at Christiaan Barnard Medical Center in Cape Town	40%

Country	Treatment	Comment	Approx savings
Thailand	Everything	Thailand boasts world-renown Bumrungrad International, the granddaddy of international hospitals and Asia's first American accredited facility, with 225 US board certified physicians and surgeons. BI welcomes 400,000 international patients annually from 120 countries, including 25,000 American patients each year. Thailand also known for meticulous cosmetic surgery, including gender reassignment. Dr. Preecha (the King (Queen?) of transgender procedures, has performed 3500 sex reassignment surgeries	40-75%
Turkey	Vision	Closer to the US and EU and a coveted tourist destination, Turkey has more American-accredited hospitals (41) than any other country. Tourists take vacation breaks for inexpensive eye check-ups and LASIK treatments. Dunya Goz World Eye Centers, based in Istanbul, have centers all over Europe and Asia.	40-50% (LASIK)

Source: Patients Beyond Borders – *Estimated top destination by treatment*, www.patientsbeyondborders.com

Looking at the data in the table above, we note – on the practice of dental tourism – that the countries of the former Eastern European communist region, like Hungary are among the top destinations recommended by these specialists.

About the value dimensions of this medical tourism market, globally, this experts group considers that is around 24-40 billion USD, and about 8 million tourists-patients who, on average, spend between 3,000 and 5,000 dollars, an amount that includes health care, transportation, border costs, accommodation etc. Also, it is estimated as an emergent market, with a growth rate of 15-20%, with higher rates in the North and South-East Europe and South Asia. Dental tourism is a niche segment of the tourism industry, with a rapid growth that is still studied globally.

3. Aspects of dental tourism development in Romania

In a study entitled “*Romania Dental Market Analysis*”, published by *RNCOS Industry Research Solutions from India* (as the press release) in October 2010, the Romanian dental tourism market has a strong growth potential. At that growth has contributed the current economic recession which, for example, in the U.S. or any other developed country in the world, has led to the unemployment increasing. In turn, the unemployment has, as a direct result, the medical uninsured population growth. The economic aspect is accompanied – according to the authors – by attractive prices for medical services in Romania, thus our country being a strong competition to those already established in the practice of this new form of tourism in the Middle East and Latin America.

Prices attractiveness is complemented by very high specializations, on international standards, of the Romanian dentists, by short period of treatment, by massive investments in new technologies and by the large number of existing dental clinics in Romania, being estimated an increase of about 17 % of the market in 2010-2012. *RNCOS Industry Research Solutions* specialists also appreciate that dental tourism market in Romania is only at the beginning of development, with a great potential.

Moreover, in this report, Romania is presented as one of the most popular destinations for dental tourism in Europe, this form of tourism enjoying government support and promotion worldwide in order to develop this additional dental services and tourism market.

Internationally, Romania is presented as one of the best candidates for dental tourism, according to the UK promoting website (<http://www.dentalimplantro.co.uk/>). Main arguments are: a Romanian valuable specialty educational system, retrieved in eleven profiled universities; quality standards and low prices, many and varied opportunities to practice at the same time leisure and recreation tourism (mountain tourism in the Carpathian mountains, the monasteries of Moldova, castles of Transylvania, the Danube Delta and the Black Sea etc.).

According to the same sources from UK, for many Italian people Romania was an important and preferred destination for dental tourism, promoted by strong Romanian community from this country. In recent years, also increased the number of patient-tourists from Hungary, even this country holds first place where in the dental tourism.

One reason for this sector spectacular growth was the support of the government policy in 1997, after which private dental services are beginning to make their appearance, offering dental services comparable to the international ones, as well as dental implants, aesthetic services. Moreover, for foreign citizens coming to Romania, the dental services are mainly: dental implants, crowns, whitening, facets, dentures etc.

It should be noted the advantage that Romanian dentists are good English speaking persons, communication with foreign patients being not an impediment to the development of dental tourism in Romania.

To support the fact that in Romania the prices for dental services are very affordable, we present comparatively in Table. 3 some prices used for health care in the European Union (Germany and Italy) and in our country.

Table 3. Comparative prices of major dental services

Dental procedure	Rates (euro)			
	Italy	Germany	Hungary	Romania
Temporary filling	37	-	free	3,5
Filling	-	100-150	60-80	15-22
Extraction	-	300	70	6-15
Dental implant	-	1,200-3,000	1,000	400
Crown	1,000-1,800	-	255	110-140
Complete prosthesis	2,000	-	560	135

Source: http://stiri-medicale.clinicistomatologice.ro/turism-stomatologic.html#right_col

Many studies in the field of health tourism (<http://worldental.org/dental-tourism/cheap-dental-tourism-growing-fast-romania/4025/>) argue that Romania will become one of the most affordable dental tourism countries, because:

- patients will find affordable prices for quality dental services;
- dental treatment periods are relatively short;
- dental offices are equipped with top devices of medical technology;
- specialized staff is highly trained;
- huge innovations in cosmetic dentistry are also possible to be exploited. This is particularly important because cosmetic dentistry is the most expensive in the highly developed countries and, usually, is not covered by a standard insurance policy.

4. Dental tourism marketing

The proposal of appropriate marketing forms for dental tourism starts from and takes into account *the profile of tourist-patient for dental services and tourism*, result of an American specialist's complex research (research conducted by Vequist on 1,800 subjects). He has the following socio-demographic characteristics:

- gender: female
- average age: 36 years

- education: at least college – for 34% of the investigated subjects
- revenues: high
- marital status: in general, unmarried persons
- living environment: urban

An endogenous feature highlighted by the quoted study, refers to the fact that the profile of this tourist-patient type *develops professional influence* on others around him and, therefore, we can deduce that he is *an innovative consumer*. For marketers this feature is... perfect! Receptivity to new products and services is required by any market actor. If this is complemented by the influence on the group membership, then we can recommend to the medical tourism, particularly to the dental tourism, on *a personal relationship-based marketing*. The more welcome is this feature, the more professional influence reflects on colleagues, meaning people with similar socio-demographic characteristics (often educated, high income etc.), that will positively appreciate and understand the message becoming, in turn, potential customers.

The marketing types that can be used, in parallel, in dental tourism based on their interdependence are:

- branding;
- digital and online marketing;
- website development: online advertising, email marketing, social media;
- blog marketing;
- public relations;
- video-marketing;
- event management: event marketing, event branding, event consultation.

5. Conclusions

Internationally, already circulate the *dental marketing* expression, with advice like this: “make sure that «online smile» of the company which use online marketing leaves a first good impression to the site visitor”. This advice is based on the adage, now classic, which teaches us that a smile is a good visit card. Also, it matters more the specialists' opinions which practice the *dental marketing* and collaborate with institutions such as the American Academy of Cosmetic Dentistry (AACD). Following studies in the field, AACD showed that nine out of every 10 adults in America consider an attractive smile being an important social asset and eight out of 10 believe an unattractive smile makes a person less appealing to the opposite sex (according to www.medicaltourimmarketing.com).

In conclusion, Romania must take into account and align to these trends in tourism and health, and travel agencies, tour operators and dental offices conceive but, especially, promote on the online support attractive complementary travel-dental services packages at competitive prices. It would be a real developing opportunity of this new tourism form and gaining the competitive advantage in this market with growth potential.

The health tourism development is seen as a priority by the ministries involved, but tourism infrastructure leaves much to be desired, passing, yet through a period of reorganization, together with the overall infrastructure of Romania, which is one of main weaknesses of tourism in our country. There are necessary an authority concerted effort at all levels and a viable strategy that can be implemented and applied to solve the problem as quickly as possible. It is received a very favorable message from doctors and tour operators, and if it will be supported effectively, not only in words, then in Romania could be attracted significant revenues.

The liberalization of medical market in the EU space would be another strong point for the development of dental tourism in Romania. As in developed countries health tourism brings about 3.4% of GDP, in Romania it can happens too.

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