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Analysis of Health Tourism in Mallorca

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Health tourism, Wellness tourism, Medical tourism, Mallorca Health tourism, Spanish Health tourism

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LIST OF ABBREVIATIONS

AETIB: Agencia de Estratégica Turística de las Islas Baleares (*Tourist Strategy Agency of the Balearic Islands*)

AmSpa: American Med Spa Association

CDTI: Centro Innovador para el Desarrollo Tecnológico (*Centre for the Development of Industrial Technology*)

EEC: European Economic Community

EFQM: European Foundation Quality Management

EOI: Escuela de Organización Industrial (*School of Internation Organization)*

EU: European Union

EU: European Union

FITUR: Feria Internacional de Turismo (*International Tourism Fair in Madrid*)

GDP: Gross Domestic Product

GOIB: Govern de les Illes Balears

GWI: Global Wellness Economy Monitor

IDIS: Instituto para el Desarrollo e Integración de la Sanidad. (*Institute for Development and Integration of Healthcare).*

IHRC: International Healthcare Research Center

IMTJ: International Medical Tourism Journal

INE: Instituto Nacional de Estadísticas (*Institute of National Statistics*)

ISO: International Organization for Standardization

ITB: Internationale Tourismus Börse (*International Tourism Trade Fair in Berlin*)

JCI: Joint Commission International

MTI: Medical Tourism Index

OECD: Organization for Economic Co-operation and Development

OHSAS: Occupational Health and Safety Assessment Series

QH: Quality Manegement

S.E.P: Sanidad Excelente Privada (*Execellent PRivate Health Service*)

SWOT: Strength, Weaknesses, Opportunities and Threats Analysis

TAT: Tourism Authority Thailand

UBES: Unión Balear de Entidades Sanitarias (*Balearic Union of Health Entities*)

UK: United Kingdom

UNWTO: World Tourism Organization

USA: United State of America

ABSTRACT

Nowadays, health tourism is getting more prestige and a high number of tourists travelling worldwide. It is expected that every year in Spain increases 20% more (IDIS, 2018). Mallorca is already well-known because of its extraordinaries beaches, sun, culture and gastronomy. Nevertheless, the island offers a wide variety of medical procedures, as well as, lot of different wellness treatments at the hotels.

The greater advantage for Mallorca regarding to this type of tourism is the location, the conditions, the experience in tourism and obviously the offer in terms of healthcare system and touristic offer.

Health tourism in Mallorca represents also the potentiality for deseasonalize the traditional tourism. At the same, it rises the synergies between health sector and tourism sector where the results are a growth in the economy.

Key words: Health tourism, medical tourism, wellness tourism, Mallorca health tourism, Spanish health tourism

1. INTRODUCTION

Spain is recognised worldwide especially because of its gastronomy, culture, landscape and its beaches. As it is a consolidated tourism destination, it can offer other types of tourism that would not only help different areas of the country to deseasonalize (such as is the case of Mallorca), but this would also help to growth the economy. Health tourism is a type of tourism that could potentially help with the problem of seasonality.

Spain has the best conditions to become a new international power for health tourism. In the same way, Mallorca accomplish with several factors to be well positioned within this sector and thus be able to stand out and increase its reputation in order to be a potential health tourism destination and, at the same time helping to deseasonalize traditional tourism.

1.1. Objectives and method applied

The main objective of this work is to expose the potential of Mallorca in health tourism and visualise its potential as a deseasonalization factor for the island.

In relation to the secondary objectives we pretend to:

- Build an approximate tourist profile;
- Positioning the level of national competition that it represents for Mallorca and
- Finally, to propose recommendations in order to improve the conditions of this sector

The methodology to be applied will be based on a bibliographic review of various sources, studies already carried out and different secondary statistical data about tourism and health tourism. In this way, we will be able to identify the relevant factors within health tourism in Mallorca.

First of all, we will analyse the international and national context of this type of tourism for then to understand the degree of importance that could have the health tourism in Mallorca. To do this, we will study the current situation of health tourism in Mallorca, that is, develop the present circumstances of supply, demand, strategies applied and competition. However, we will not only explain the factors involved in health tourism, but we will also briefly illustrate about the current state of Mallorcan tourism in order to understand how health tourism develops and acts.

To conclude, this study will be reinforced with a small SWOT analysis to later determine some final conclusions, as well as a series of proposals on health tourism and conceive its potential deseasonalization factor for the island.

2. MAIN CONCEPTS

2.1. Health tourism concept

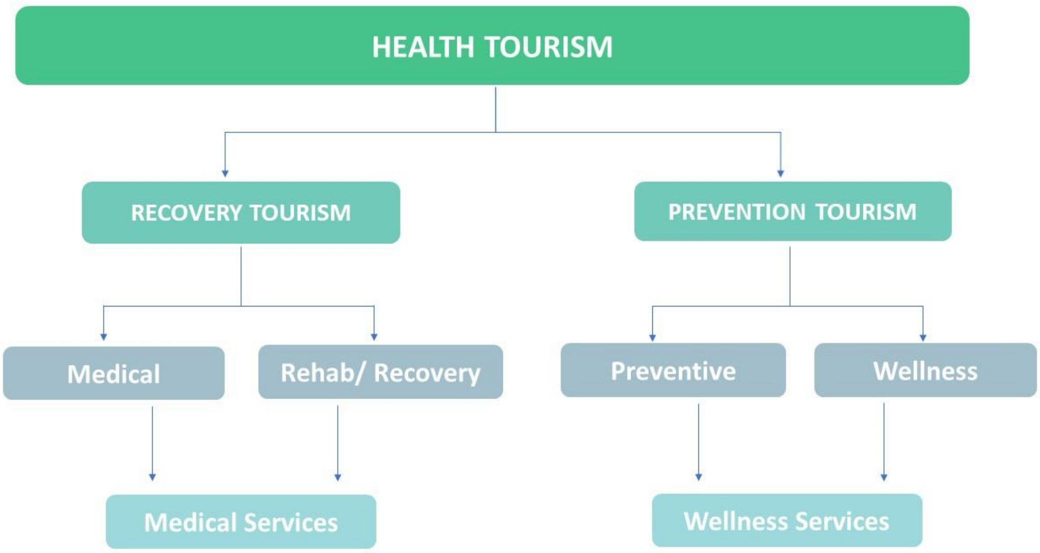
Nowadays, there is no clear, concise and definitive definition for “health tourism”, which could be globally accepted by all the experts and professionals of this sector.

As it is explained in the OECD Report (2011), if we think about health term and tourism term, we will be able to understand what it is medical tourism. On one hand, medical tourism is based on the practice of going to a different country that he or she normally resides in order to obtain a medical procedure. On the other hand, it implies to visit the destination along with the performance of various tourist activities as a post-operative recovery method. In this way, the patient receives a recovery in a much quieter space than if he or she does it in his or her own habitual residence.

Depending on the type of intervention, this implies that the tourist needs to stay overnight for at least one night and less than one year (Neil et al., 2011).

In wider terms, and as we can observe in figure 1, health tourism has two branches. The first branch is the concept of recovery tourism in which, you can receive a medical treatment or receive rehabilitation/therapy where in both cases medical services are applied, and the second branch is prevention tourism, when the individual applies treatments to prevent future ailments or apply methods to “alleviate” mental illness, for instance the case of accumulated stress. This is known as wellness tourism.

Figure 1**. Health tourism branches**



Source: Alberto Martín. (2012). Wikilibro.Productos turísticos en Turismo. *EOI (Escuela Organización Industrial).*

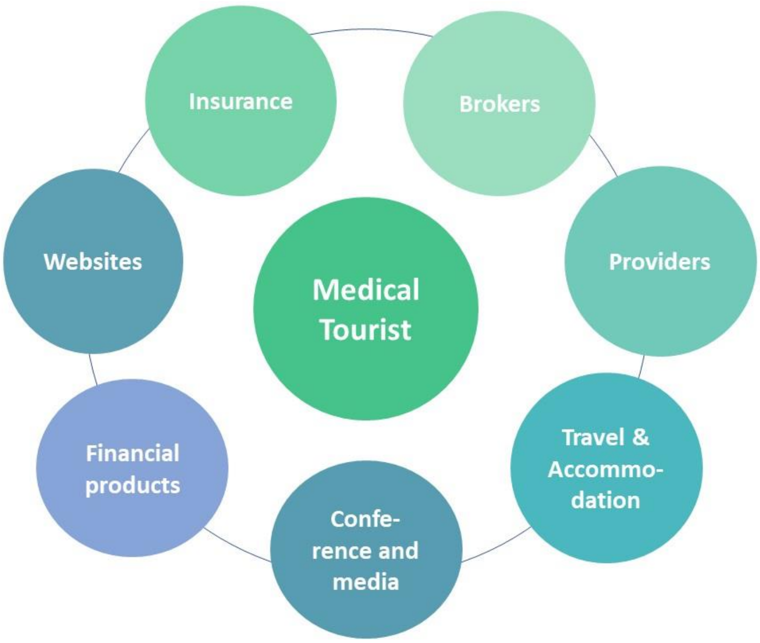
Defined by the UWNTO, “wellness tourism is a type of tourism activity which aims to improve and balance all the main domains of human life including physical, mental, emotional, occupational, intellectual and spiritual. The primary motivation for the wellness tourist is to engage in preventive, proactive, lifestyle-enhancing activities such as fitness, healthy eating, relaxation, pampering and healing treatments."

We should remark that there is the existence of exclusions for health tourism. So, that tourist or international resident which has not gone abroad because the main objective was receiving a medical treatment or a wellness treatment, she or he cannot be considered as health tourist because there must be the willingness to travel and willingness to treat (Neil et al., 2011).

2.2. Health tourism agents

Health tourism agents are a mix between agents from this same area and from the tourism sector. That means the health experts and professionals, as well as, the travel agencies specialized by health tourism, transport, accommodation, etc. In figure 2 we can observe the chain between both sectors.

Figure 2. **Health tourism agents**



Source: Neil L., Smith R., Exworthy M., Green S., Horsfall D., and Mannion R. (2011). *Medical Tourism: Treatments, Markets and Health System Implications: A scoping review.* OECD.

Following the definition from Neil et al., (2011) about medical tourism, explained on its report, the agents of health tourism industry are defined as:

Brokers: Those who are in charge for offering specific packages, for example a health tourism market or a whole country which is characteristic for its medical treatments. We can say they are the "travel agency" of health tourism. However, here we can keep in mind those alliances who offer their services. For example, UBES in Mallorca.

Insurance: It is the travel health insurance which we contract every time we decide to go abroad for receiving a medical cover in case of any incident.

Providers: These are defined as the main suppliers who offer the medical treatment, so it is where the intervention occurs. For a lot of them, the reputation and the quality's certificates are important. These are clinics, hospitals, and medical centres. In the case for wellness tourism, are those establishment where provide this service.

Travel & accommodation: These ones includes the way to arrive to the destination and also where the tourist is going to accommodate. This means, the complementary services to obtain a pleasant health tourism travel.

Conference and media, and Web: It is all related to the marketing, advertising and the way the health tourism is share through Internet.

Financial products: We must to say that there is no definition for this section. However, what we can say is that all the clinics/ hospitals and the rest of private health entities need funding in order to improve their services. This funding can be internal (from the same entity; collaborators, stakeholders, etc.) or external (public funding or loyalty clients of the hospital/clinic).

3. GLOBAL MEDICAL TOURISM VISION

3.1. Countries with the greatest reception of health tourism

According to the most recent and accessible data that can be obtained in relation to the main destinations of health tourism worldwide, are those presented in the following table (table 1). These data are from the year 2017 and as Hosteltur remarks, "our country occupies the fifth position in the European classification according to the International Healthcare Research Center, and behind the UK that heads the ranking, Germany, France and Italy."

Table 1. **2017 MTI Overall Ranking**

2017 MTI Overall Ranking					
1.	Canada	76,90	16.	Brazil	67,90
2.	UK	74,80	17.	Jamaica	67,70
3.	Israel	74,20	18.	India	67,50
4.	Singapore	74,00	19.	Colombia	67,40
5.	Abu Dhabi	73,00	20.	Panama	67,00
6.	Costa Rica	72,80	21.	Dubai	66,10
7.	Italy	72,00	22.	Dominican	66,00
8.	Jordania	71,10	23.	Poland	65,50
9.	Germany	70,70	24.	Thailand	65,50
10.	Philipines	70,70	25.	Argentina	64,40
11.	Japan	70,40	26.	China	63,10
12.	France	70,20	27.	Southafrica	62,10
13.	South Korea	70,00	28.	Mexico	61,00
14.	Taiwan	69,40	29.	Turquey	61,00
15.	Spain	69,30	30.	Russia	50,30

Source: Hosteltur. (2017).

If we compare the table 1 with the 2016's results:

Table 2. **2016 MTI Overall Ranking**

2016 MTI Overall Ranking					
1.	Canada	76,62	16.	Dubai	67,54
2.	UK	74,87	17.	Jamaica	67,17
3.	Israel	73,91	18.	Thailand	66,60
4.	Singapore	73,56	19.	Philippines	66,40
5.	India	72,10	20.	Taiwan	66,28
6.	Germany	71,90	21.	Argentina	65,37
7.	France	71,22	22.	Brazil	65,22
8.	South Korean	70,16	23.	China	64,78
9.	Italy	69,50	24.	Polan	63,79
10.	Colombia	69,48	25.	Abu Dhabi	63,65
11.	Spain	68,29	26.	Malta	62,97
12.	Japan	68,00	27.	South Africa	62,20
13.	Panama	67,93	28.	Egypt	60,92
14.	Costa Rica	67,67	29.	Mexico	60,70
15.	Dominican	67,58	30.	Qatar	60,07

Source: Health Care Research Center. (2016).

Spain was ranked 11th out of 30[1] countries and 5th compared the European Union countries.

For developing tables 1 and 2, the International Health Care Research Center, on his website, reflects the study carried out by MTI. This study is based on "the development of a *Medical Tourism Index* which is a multi-year, multi-steps and multi-stakeholder approach applied in every evaluated country. The result is a multi-dimensional construct consisting of three main dimensions (country, industry and medical facility and personal) with 34 underlying indicators. It is the first index helping countries, public policymakers, healthcare and tourism industry, place marketers and underlying organizations and people to have an assessment of their place as a medical tourism destination" (MTI Report, 2016).

3.2. Typology of medical procedure in the main destinations

From various reports (Neil, 2011; Health Tourism in Spain, 2013; Horowitz, 2007) and main websites such as medicaltourism.com, healthtourism.com, among others, indicate that the main medical treatments that all of them agree and which are the most popular are the followings:

- Cosmetic surgery (breast augmentation/ mastopexy, breast reduction, facelift/ blepharoplasty, liposuction/ body contouring)
- Dental Care (cosmetic dentistry, dental reconstruction/ prosthodontics)
- Cardiology/ cardiac surgery (coronary artery bypass, cardiac valve replacement/reconstruction, percutaneous coronary angioplasty/stenting, stem cell therapy for heart failure)
- Aesthetics non-surgical/ Rehabilitation (body and mind treatments in spa and wellness facilities)
- Bariatric Surgery (gastric bypass, laparoscopic adjustable gastric banding, body contouring subsequent to massive weight loss)
- Fertility treatment (in vitro fertilization, hysterectomy, prostatectomy/transurethral resection, gender reassignment procedures)
- Hair Transplant
- Ophthalmology
- Orthopaedic Surgery (hip replacement/resurfacing, knee replacement, arthroscopy/ joint reconstruction, laminectomy/spinal decompression, disk space reconstruction/ disk replacement)
- Oncology

As we can observe in the following figure, Figure 5, the main countries in 2016 in terms of overall rank are Canada, UK, Israel, Singapore and India. Nevertheless, the MTI measures and distinguishes the attractiveness of these

[1] The total number of countries ranked were 41. We use 30 just in order to compare the total countries in both year 2017 and 2016.

41 countries according to the destination environment (Canada, UK, Singapore, Israel and Germany), the medical tourism industry (India, Colombia, Mexico, Canada and Dominican Republic) and the quality of facilities and services (Israel, Germany, India, Canada and UK).

This report was obtained through a total of 4348 questionnaires made in the USA. This amount of responses does not imply a global and real sample of the population to determine the displacement factors and a health tourist profile. Despite this, we can get an approximate idea of this information to build a possible health tourist profile in Mallorca in the next points of this work.

Figure 3. **Top 5 Destinations according to MTI Report (2016)**

Source: International Healthcare Research Center. (2016).

3.3. Displacement factors

Travelling to the destination of medical treatment is a decision-making process that requires various factors to determine that final decision. The main objective for the tourist is to obtain good results, so the consumer will be guided by the recommendations from different sources such as Internet, travel agencies, hospitals or doctors, among others.

As we mentioned previously, the MTI Report (2016), says that when the health tourists[2] decide to go abroad in order to receive a medical treatment, it is important to them the following items:

- Destination Environment: Economy, safety, image and culture.
- Medical Tourism Industry: Destination attractiveness and medical tourism costs.
- Quality of facilities and services: Quality care, reputation, internalization and accreditation, and patience experience.

On the other hand, in the case of agents (travel insurance, travel agencies, tour operators, etc.), they must study the destination they want to bet on in order to transmit that message of success to their final consumer. In this same way, they keep in mind, the items explained on the previous paragraph.

[2] Based on U.S.A population. Nevertheless, these factors coincide with the Health Tourism in Spain (2013), where they retrieved similar information from other studies.

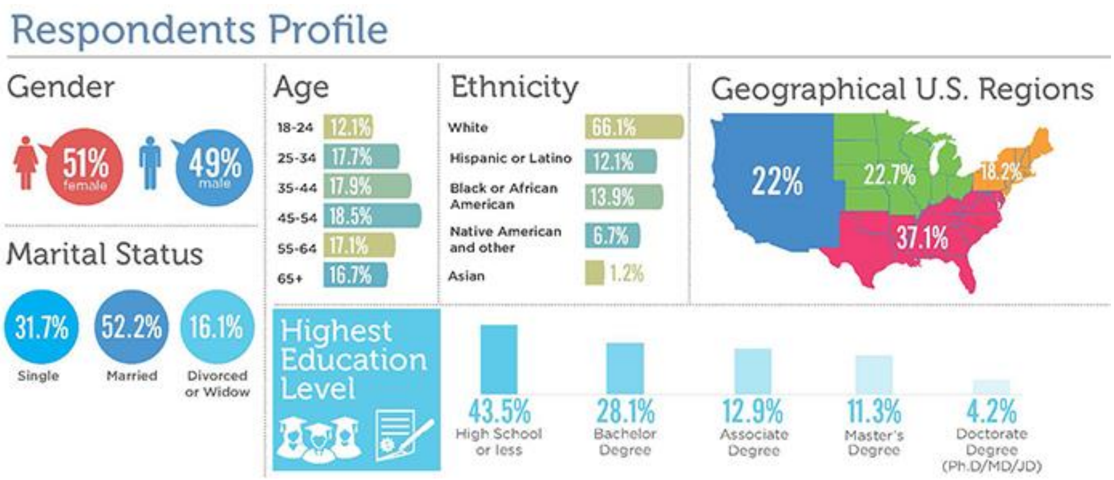
3.4. Customer's profile

First of all, it must be taken into account that in order to determine the customer profile for the health tourism, this will be adjusted to the destination and according also to the customer's needs.

As an example, we can get an idea of the customer profile continuing with the report made by MTI (2016), which has been retrieved from IHRC.

The report indicates that for the USA citizens, who have an average age between 45 – 54 years old, they are considered economically well-situated, who do not have the duty to care for their children because they have already grown up. Furthermore, they do not usually have an enormous debt and have a high-level education, which means also a high income or a high quantity of savings. The Figure 4, which has been retrieved from the same report, the marital status is dominated by married respondents with 52.2%.

Figure 4**. Respondents Profile in health tourism sector**



Source: International Healthcare Research Center. (2016).

Nevertheless, the profile of the respondents between 25-34, 35-44 and 55-64 years old represents more than 17% as potential health tourist. This means, they are willing to go abroad to receive a health treatment, independently that each group has different economic and lifestyle situation (MTI Report, 2016).

3.5. Noticeable cases about health tourism

We can say that health tourism has a really important impact on the economy of each country where it is recognised as another type of tourism. This helps those countries that have one or more types of tourism consolidated and thus become attractive again with health tourism.

This is the reason why in this section we will be able to compare and observe three different countries which attract a high number of fluent health tourists.

3.5.1. Canada's case

According to table 1; 2016 MTI Overall Ranking, Canada is considered as the best country worldwide for the medical tourism. In 2018 the total contribution of tourism and travel corresponding to GDP was 6.4%, and during 2019 they received approximately a total of 22 million tourists. That is why in 2015, Canada had a total inbound medical tourism spending of US $127 million (World Travel & Tourism Council, 2019).

The MTI (2016) table (table 1) also indicates that Canada is the first country ranked with 78.69% characterized as a good destination environment and it is the 4th country with the best quality of facility services.

The reason why medical tourists use the Canadian medical treatment is because they have a medical tourism guidelines and international accreditation, a good direct-to-consumer marketing for this sector, and mainly because of its high quality in the Health Care System, where its overall satisfaction after surgeries is 83.5%. This leads into a low rate of mortality of 1.4% (Findprivateclinics.ca, n.d.).

The main treatments offered by the Canadian country are cardiac surgery (coronary angiography & angioplasty), replacements (elbow, hip, knee and shoulder), epilepsy surgery, drug & alcohol addiction treatment program (Medicaltourism.com, n.d.; Findprivateclinics.ca, n.d.).

3.5.2. USA's case

The USA is definitely the best country in terms of medical tourism services and quality which generates 36% to the global GDP. They get annually, a total inbound spending of US $4 billion (2017). We have to mention as well, that the country is the leader for the outbound spending (US$ 2.3 billion, 2017) in the rest of countries worldwide (Imedicaltourismcenter.com, n.d.; IMTJ, n.d.).

The United States is considered the best one for the cosmetic surgeries in comparison with the rest of medical treatments offered in the country. In addition, regarding to the International Medical Travel Journal (IMTJ), "the American Med Spa Association (AmpSpa) 2019 Medical Spa State of the Industry Report, reveals that medical spas are one of the fastest growing business sectors across the USA". Using data information from this same report, they claim that there are 5431 medical spas which average revenue/ spa was US$1.5 million in 2018.

What the United States offers to medical tourists is the best care mainly from neurologists, cardiologists and oncologists. However, they have a long list os treatments that are: dental, endocrinology, nephrology, ophthalmology, rehabilitation, transplants, cardiology, dermatology, fertility, neurology, orthopaedics, plastic and cosmetic surgery, urology, oncology, paediatrics, bariatric surgery. As we mentioned before, the best medical and trendy procedure is cosmetic surgery (IMTJ, n.d.; Imedicaltourismcenter.com, n.d.).

The reason why they are really good at this is because is a developed country, that is why all the physicians get a high level of education, they can work with the latest surgical method together the latest medical technology; a cutting-edge medical technology, as well as, patented drugs. There is one phrase to descript them; world-class centres of excellence (MyMedHoliday.com, n.d.).

3.5.3. Thailand and Slovakia's case: medical tourism and wellness tourism

Thailand, a medical tourism case

Thailand leads the medical tourism market as one of the main countries worldwide receiving a high volume of medical tourists. It is also one of the main emerging countries in relation to health tourism. All of this is the result of a great strategy of de Thai Government (Thailand's government) because, since 2003, the have been trying to transform Thailand as a global centre for this type of tourism; the health tourism (IMTJ, 2013). The country, in 2016, was ranked as the 18th global medical tourism, this according to the Medical Tourism Index report (2017) – Figure 3.

In the last decade, this country has been experienced a high rate of reputation around the world, we can translate it with the following data; US$42,2 million as the direct contribution of the travel and tourism to the GDP (2017), more than 34 million tourist (2017) visit the country every year, moreover, last year (2019) they got a total of 39.8 million tourist (WHO, 2016; Medical Tourism, 2019; TAT Intelligence Center, 2019). Furthermore, the inbound medical tourism spending, according to the Medical tourism report (2019), for Thailand was US$589 million in 2017.

The Ministry of Health in 2012, and the Tourism Authority of Thailand (TAT), indicated that approximately the total medical tourists were between 2.53 million and 858.000. These data include 26.6% of medical tourists, 41.4% resident expatriates and 26.65% travellers. Therefore, this means that only a 27% of these total medical tourists went to Thailand motivated for receiving a medical treatment.

They specialize in cosmetic surgery, dental treatment, rehab, reproductive treatments, osteopathy, skin, beauty and hair treatments, ophthalmology treatments, medical check-up programs and alternative health (Medicaltourism.com, n.d.).

The reason why medical tourists decide to go Thailand is because of the low cost of the treatments, the high quality offered by the Healthcare system due to also for the 61 international accreditation from the JCI (Joint Commission

International), and because they have great and develop infrastructure in the tourism sector. Another advantage for this country, is that most of the medical staff can speak English without problems (KMPG, 2018).

The best example in this context is Bumrungrad Hospital, which has a spectacular strategy applied to the health tourism. Every year it treats 1.1 million patients from 190 countries. They are of great renown because of its investments of the latest advanced technological innovations, getting by this way a digital and smart hospital for its patients (Bumrungrad, 2019).

Slovakia, a wellness tourism case

First of all, we need to introduce the current situation of wellness tourism worldwide in order to understand the paper that has Slovakia in this sector.

The most recent report of Global Wellness Economy Monitor (released in October 2018, with data from 2017), they consider that wellness tourism is recognized as a fast-growing, high opportunity niche segment. This is the reason why, the global wellness economy in that year was a total of $4.5 trillion market and the total wellness expenditures was $639.4 billion. They confirm also that between 2015-2017, the industry had a growth by 6.5% annually. In addition, its forecast for 2022[3] is to growth 7.5% yearly. Nowadays, Slovakia, Philippines and Chile are leading this market with a high growth rate on the wellness sector (Global Wellness Institute, 2018).

Slovakia was considered the 1st country during 2015-2017 as a leader grown market for the wellness tourism, represented by almost 37% as the average annual growth rate. In the case of Thailand, is allocated as the 11th position worldwide with a 13% average annual growth rate, as we can see in table 3 (Global Wellness Institute, 2018).

Table 3. **Leading growth markets for Wellness Tourism Trips in Slovakia during 2015-2017**

	Number of Wellness Arrivals/Trips added from 2015-2017 (million)	Average Annual Growth Rate from 2015-2017
China	21.9	20.6%
India	17.3	20.3%
United States	15.4	4.7%
Germany	7.5	6.2%
Spain	5.2	17.5%
Mexico	3.3	10.3%
Malaysia	3.3	28.6%
Vietnam	3.2	22.8%
Chile	3.2	29.3%

[3] It is important to keep mind the actual context that we are living worldwide due to the SARS-CoV-2 explained in the footnote of page 13.

Thailand	2.7	13.1%
Japan	2.7	3.5%
Italy	2.7	12.2%
Indonesia	2.7	21.5%
United Kingdom	2.6	6.1%
Russia	2.3	8.4%
Czech Republic	2.2	18.1%
Austria	2.2	7.3%
Canada	2.2	4.2%
Poland	2.0	14.7%
Brazil	1.9	10.4%
France	1.8	2.8%
South Korea	1.6	4.5%
Australia	1.5	8.3%
Slovakia	1.4	36.9%
Philippines	1.1	31.1%

Note. These figures combine both international/ inbound and domestic wellness tourism and also include both primary and secondary wellness trips.

Source: Estimates by Global Wellness Institute based upon tourism industry data from Euromonitor International

Geographically, Slovakia or Slovak Republic is located in the Central of Europe. Because of this, it is surround by national parks, mountains, valleys, forest and lot of rives. It is rich with therapeutic minerals, terminal spring and mountain sources. The country has a total of approximately 25-30 renowned spa and wellness resorts (Slovakia Travel, n.d.).

In 2016, the arrivals were a total of 2.027 million of tourists and according to the World Travel & Tourism council says that the travel and tourism sector has a total of 6.4% to the total GDP. Based on the table 3, during 2015-2017, Slovakia attracted 1.4 million of wellness tourist, and being one of countries with a high growth rate in this sector, we confirm that it represents an important impact on its GDP.

Regarding to the Slovakian Report (2019), only in November the total number of visitors was 480.042, which increased 22.1% as total growth rate in comparison to the 87.018 visitors received during the previous year.

Slovakia is chosen by health tourist not only for the wellness treatment, but also for cosmetic surgeries, dermatological treatments, dental treatments and reproductive treatments (Kongres-Magazine, 2019). The reason why the potential tourist feels confident by the country is due to the quality of the clinics and hospital, as well as, the service offered by them and by the citizens. Without no doubt, the low price offered by all the treatments is a good reason which motived the tourist to decide on Slovakia as a destination, recommends Treatmentabroad.com.

4. CURRENT SITUATION IN SPAIN

According to the Touristic Expenditure Report made by INE 2019, health tourism in Spain generated a total of 87,22 million of euros last year. This amount rised up 6.6% compared with the previous year. For this 2020[4], it expects that this sector gets 200.000 visitors and 1.000 million of euros due to the good results of last year and 2018, when this industry produced 600 million euros and 140.000 visitors (IFEMA, 2019).

The profile for this tourism sector, comes from the North-European countries; United Kingdom, France, Germany, Italy, Holland, and Russia, as well as, from East-European countries and Arabic's countries. Every patient who finally decide to come to Spain for receiving its treatment, has a high average of expenditures; 3.500€/ trip, which is higher than the normal average expenditure of a tourist in the Spanish territory (Varea, 2019).

4.1. Spanish private healthcare system

There is a total of 460 private hospital centers in Spain and it accounts with 51.373 beds, which therefore symbolise the 58% of the total distribution of Spanish hospitals (IDIS, 2019; Ireland, 2019; Ministerio de Sanidad, Consumo y Bienestar Social, 2019).

Currently, Spain occupies the 7th place in the world ranking as one of the countries with the best healthcare, but being more specific, within medical tourism and taking into account private healthcare, the Spanish territory ranks 15th worldwide in the year 2017 (Hosteltur, 2017).

In recent years, private healthcare in Spain has increased (Ortiz, n.d.), despite being totally optional and voluntary, many users end up opting for private healthcare in order to cover the following needs that public healthcare cannot offer (Fundación EOI, 2013):

- Reducing waiting lists in specific areas for appointments and interventions
- Reducing delivery time of medical reports
- Better quality of service and facilities
- Getting services which are not possible on the public healthcare system.

[4] We must emphasize that the forecast of health tourism for 2020 explained along this study in relation to Spain and Mallorca, it will most likely not be adjusted to the practice due to the current circumstances of the global pandemic of SARS-CoV-2. As stated a report made by the *Conselleria de Model Econòmic, Turisme I Treball* (Ministry of Economy, Tourism and Labour) of the Balearic Islands, the scenario is dramatic since it is expected that the sum of negative shocks in consumption, investment and tourism demand would mean a reduction in the Balearic Islands' GDP of 9,273 million euros (-31.6%) and a reduction of 147,732 jobs (-29.2%), (Govern de les Illes Balears, 2020).

As a result of all this, greater confidence is created among users who opt for private healthcare and that according to the 2019 Global Medical Trends report, represented 3.4% of GDP.

We should remark that the private health sector is mainly based on contracting private insurance. In 2018, Spain had a total of 8.5 million insured, meanwhile in the case of Mallorca, we can mention that in 2017 it got a total of 318,144 insured (IDIS, 2019: 80).

4.2. The unfavourable side of Spanish health tourism

As mentioned at the beginning, in point 2.1, in terms of health tourist, he or she must have the willingness to travel and willingness to treat, in other words; to receive a treatment in another country. The process of being treat must be arranged and contracted before of arriving to the destination. Otherwise, she or he cannot be considered as health tourist. It is for this same reason that some find a way to take advantage of Spanish Public Healthcare. Consequently, they cannot be included in medical tourism.

In accordance with Regulations (EEC) 1408/71 and 574/72, it regulates the right of insured persons in EU Member States whose objective is to receive healthcare in the country they are in. Such healthcare must be provided in the same circumstances as if you were treated in your own country of residence. Subsequently, and in accordance with the protocols, the settlement of said health expenses used are settled between both EU countries. However, the deficit appears at the time of liquidating healthcare costs among the EU Member States, which is not a rarity. Much less, when it comes to the Spanish public health (Díaz et al., 2014).

As explained by the Court of Accounts in its Audit Report on the management of healthcare benefits derived from the application of community regulations and international Social Security agreements of March 29th in 2012, it is explicitly explained that Spain does not recover 100% of these annual accounts with the rest of the Community States. Due to these circumstances, which occurred during many years, the Royal Decree-Law 16/2012, of April 20 was created to determine urgent measures to guarantee the sustainability of the National System of Health and improve the quality and safety of its benefits (Díaz et al., 2014).

Díaz et al., (2014), point out that the difference between the magnitudes of << Spain Creditor >> and << Spain Debtor >> is due to the fact that Spain is an eminently recipient country of tourists and foreign residents to whom health coverage is provided. The Report of the Court of Accounts highlights several errors related to the management of the billing of the INSS (National Institute of Social Security) of expenses derived from public healthcare to foreign insured persons or to Spaniards assisted abroad.

4.3. The favourable side

4.3.1. Why to choose Spain?

During last year 2019, Spain received a total of 83,7 M of tourists, 1.1% more than in 2018. By the same way, the expenditure made by all the tourists increased by 2,8% which is translated as 92.278 M euros. All this symbolise that Spain is the 2nd country that receives tourists annually (Mincotur, 2019; Tourespaña, 2019; INE, 2019).

The main issuing markets in 2019 were UK, Germany and France. 18M of UK tourists visited Spain which corresponds to 2,4% less than in 2018; 11,2M of German tourists represented 2,1% less than in 2018 and 11,1M of French tourists which were 1.2% less than in 2018 (Mincotur, 2020).

The reason why Spain is attractive to foreigners is because you can visit the Spanish territory the whole year. Each season can offer a different kind of tourism that will be plenty of culture, gastronomy, flora and fauna, and astonishing landscapes that surround this country. All this added to a cheerful and talkative people that opens its doors to anyone who wants to know both local life and the essence of Spain in general.

The climate is another reason that tourists visit Spain. Mostly during high season (since May to September) beacuse everyone wants to enjoy the wonderful sun, sand and landscapes offered by the extraordinaries Spanish coasts. Although, you can enjoy Spain in different ways, thanks to its tourist variety.

The political stability, the good economy and being one of the 28 European Union, offers a good image in front of the eyes of everyone. The total GDP during 2019 was 1.244.757 M€ (Datosmacro, 2019). In addition, the general security in Spain, it makes to tourists feel more confident and comfortable during the visit.

In case of any incident during holidays, the Spanish healthcare system is available for every person who needs it, as well as the availability of the medical professionals to achieve a proper communication with each patient.

On the other side, the private healthcare system of Spain joins different accreditations of quality such as ISO, Joint Commission International, EFQM, DIAS, SEP, etc. The IDIS offers to the public healthcare system, as well as, to the private the QH Accreditation (Quality Healthcare Accreditation). This is the reason why Spain is the 1st European country in ISO 15224 certifications and 2nd with JCI certifications (Spaincares, n.d.). As highlighted in an IDIS press release in 2016, Manuel Vilches declared that quality-assistance is the key to Spain's positioning in health tourism. He also said that with cross-border healthcare, we can already say that million of foreigners have used the health system through agreements between the countries in both provision systems[5]. Therefore, the Spanish healthcare system has to continue improving its quality-assistance because many tourists have already had a first surgical experience.

If we add to all this the fact that Spain is known worldwide because of its international tourism, this is translated into a great advantage for the health tourism, making of him a real competitive destination. All this set of qualities would bring to Spain a greater number of tourists.

4.3.2. Medical tourism Cluster

Spaincares is the Spanish group of health tourism. It is a strategic tourism and health alliance between travel agencies, medical facilitators and other companies, whose objectives are to ensure personalized health care for their patients, maintaining the highest quality of treatment in their own language and providing comprehensive care from arrival to departure in their country of origin. In addition, it offers a wide range of complementary services for recovery and to enjoy the essentials of Spanish people. (Spaincares.com, n.d.).

This alliance is compound by Collectives and Collaborating Partners. Collectives are those who would like to offer a high-quality services for its customers, for instance a travel agency. The advantages are (1) getting customised agreements, (2) access to special offers and (3) being in touch with the commercial team of the cluster. On the other hand, due to the variety of Spanish tourist areas, the Cluster fits each particular area according to their requirements and features. This is the reason why they have Collaborating Partners. Valencia Salud, Tenerife Medical Destination and Illes Balears, Health Experience are the actual partners.

According to Spaincares (n.d.), in the medical tourism, the main treatments offer are fertility treatments, ophthalmology, oncology, plastic surgery/ cosmetics, neurosurgery, cardiac surgery, traumatology, odontology, paediatrics, among others, and regarding to wellness tourism, the Cluster confirm that Spain has more than 100 spas with medicinal mineral water and 10,000 clinical trials.

Spaincares estimated years earlier that throughout this 2020 Spain would receive 200.000 health tourists which is translated to 1M€. Until 2019, this sector generated around 500 thousand euros and having 100.000 tourists. Annually, health tourism increases 20% due to the necessity of looking a treatment for a physical/mental pain or just cosmetic (Spaincares.com, n.d.; IDIS, 2018).

[5] With the provision system, it refers to the public and private healthcare that Spain has.

5. HEALTH TOURISM IN MALLORCA

5.1. Offer analysis

5.1.1. Tourism sector status: current numbers, nationalities and seasonality

During 2019, the Balearic Islands received a total of 16.453.697 tourists, of which a total of 11.869.977 tourists visited Mallorca. In comparison to the previous year (2018), there is a 0,7% less (CAIB, 2019).

On the other side, as stated the CAIB's Report (2019), the total average expenditure that experienced Mallorca is translated to a total of 12.042M euros, a total average of 1.014,5€/ person and 150,1€/person and day. In reference to the total average of days expended were 6,8 days (-0.3% compared to 2018).

Table 4**. Total number of passengers in Mallorca and its % according to the total number of passengers of the Balearic Island (2019)**

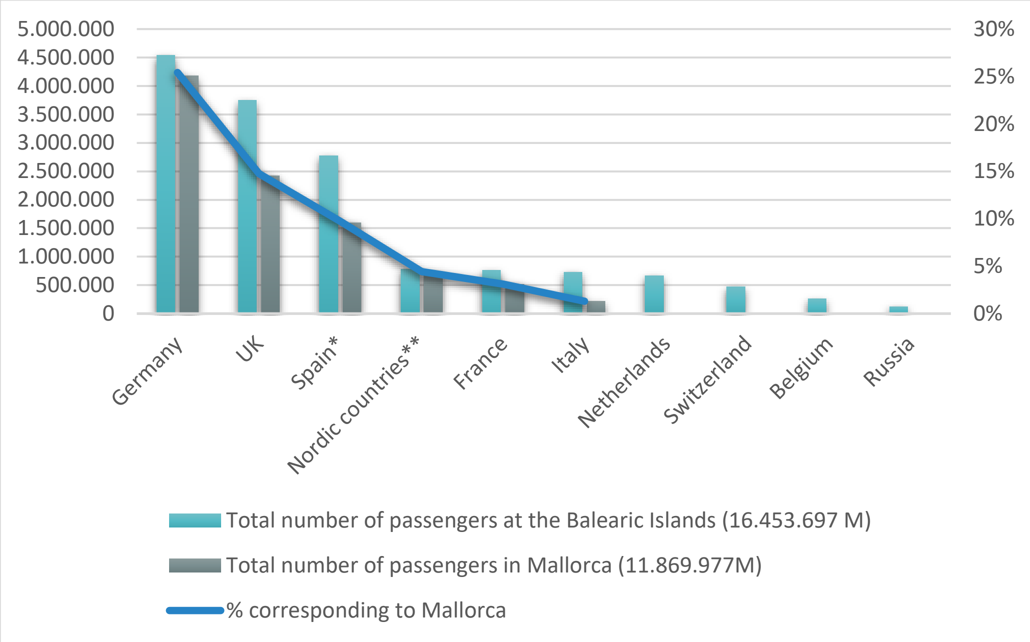
ISSUING COUNTRY	Total number of passengers at the Balearic Islands (16.453.697 M)	Total number of passengers in Mallorca (11.869.977M)	% corresponding to Mallorca
Germany	4.539.921	4.182.626	25%
UK	3.745.545	2.425.356	15%
Spain*	2.772.773	1.597.915	10%
Nordic countries**	780.278	730.205	4%
France	757.849	512.935	3%
Italy	725.032	214.998	1%
Netherlands	664.493	…	…
Switzerland	470.002	…	…
Belgium	257.161	…	…
Russia	119.852	…	…
TOTAL	16.453.697	11.869.977	59%
	100%	72%	

***Without taking into consideration the other Spanish islands**
****Denmark, Finland, Norway, Sweden**
(…) Hidden data due to poor quality and inaccurancy

Source: Elaborated by the author using data from Agencia de Estrategia Turística de Las Illes Balears (AETIB). Gobierno de las Islas Baleares.

Through this following graphic (graphic 1) and the previous table 4, we can observe that 72% of the total percentage of passengers who visited the Balearic Islands, decided to stay and visit Mallorca in 2019.

Graphic 1. **Total percentage of passengers that visited Mallorca in 2019**



Source: Elaborated by the author using data from Agencia de Estrategia Turística de las Illes Balears (AETIB). Gobierno de las Islas Baleares.

We can confirm that Germany, UK and Nordic countries remain as our main target market in Mallorca. All of them, and together a minority percentage of French and Italian tourists represent a 59% of the total passengers that receive the Balearic Islands, which means that they prefer to visit or stay at the Mallorcan island instead of the rest of the islands.

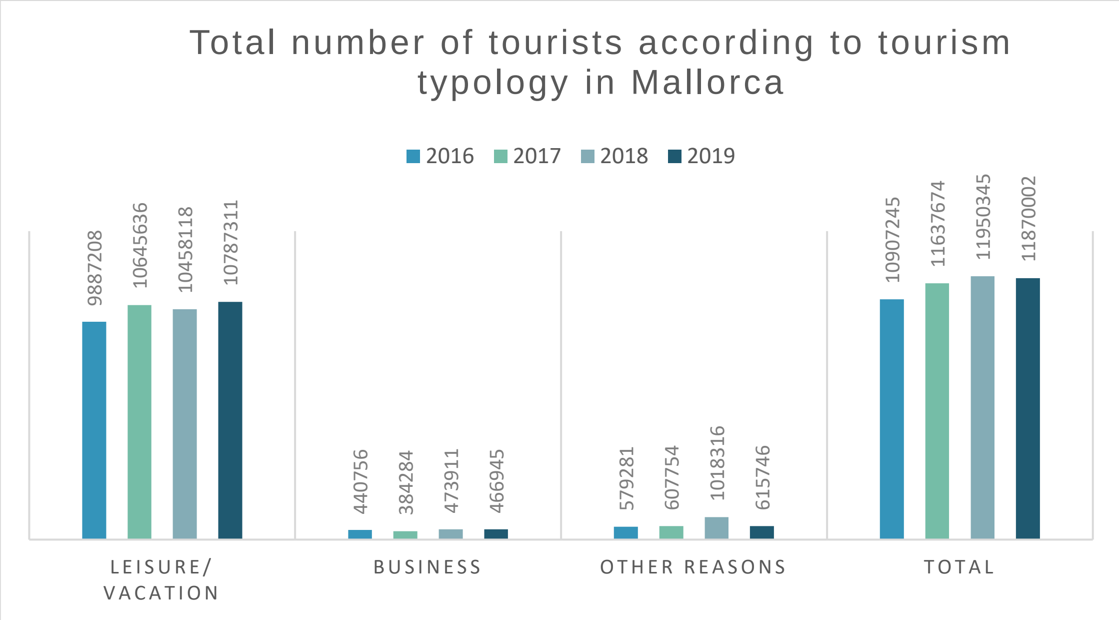
We can say that these nationalities are linked to health tourism in order to attract them. As the AETIB in his report *Pla d'Acció 2019* about health tourism and other tourism alternatives (2018), they affirm that one option to promote this tourism and attract more health tourists should be through social media in our issuing countries; Germany and UK.

Despite the fact that no further analysis is available regarding the total number of health tourists who visited Mallorca during 2019, we can use the definition of UWNTO (n.d.) about what is "the main reason for a tourist trip" [6] to interpret the data provided by the CAIB in its reports in relation to a tourist's main reasons. In their reports they reflect 3 main types of tourism, which are leisure/holidays, business and other reasons. We can understand that this last group encompasses the rest of main reasons for a tourist trip when the tourist decides to come to Mallorca, i.e. the group Other Reasons includes health tourism. In

[6] It is defined as the reason without which the trip would not have taken place (UWNTO, n.d.).

this way and the explanation given, we can have an approximate idea of the total number of health tourists with the following data.

Graphic 2**. Total number of tourists according to tourism typology in Mallorca**



Source: Elaborated by the author using data from IBESTAT (2016 - 2019).

As we can see in graphic 2 and considering the annex I, during the last four years (2016 – 2019), the total number of tourists for "other reasons", it has been rising up. 2018 is the year with more tourists that encompasses a total of 1.018.316, and compared to last year in 2019, there is a decrease with a total of 615746 tourists.

Continuing with the previous explanation, the data that are available about health tourism in INE (2016 - 2019) and more specific about expenditures of international tourists, the term they use to refer to health tourism is **voluntary health treatment**, which is defined as the category that includes trips made to spas, thalassotherapy centres or other specialized centres in order to receive voluntary medical or surgical treatments. Although these data (reflected in table 5) do not refer to Mallorca, we can use these numbers to have a rough idea of the average expenditure that a health tourist could have in Mallorca.

Table 5. **National Results in Health Tourism - Spain**

National Results - SPAIN

Expenditure of international tourists according to main reason for the trip
Units: Euros, Millions of euros, Rates, Days

	2016	2017	2018	2019

Voluntary health treatment				
Total cost				
Base data	87,61	103,22	81,79	87,22
Annual variation rate	19,24	17,82	-20,76	6,63
Average cost per person				
Base data	1.422	1.611	1.392	1.568
Annual variation rate	1,66	13,32	-13,57	12,61
Daily average cost per person				
Base data	187	146	170	190
Annual variation rate	16	-21,93	16,5	11,64
Average duration of trips				
Base data	7,6	11,03	8,18	8,25
Annual variation rate	-12,37	45,15	-25,81	0,86

Source: Elaborated by the author using data from INE (2016 - 2019).

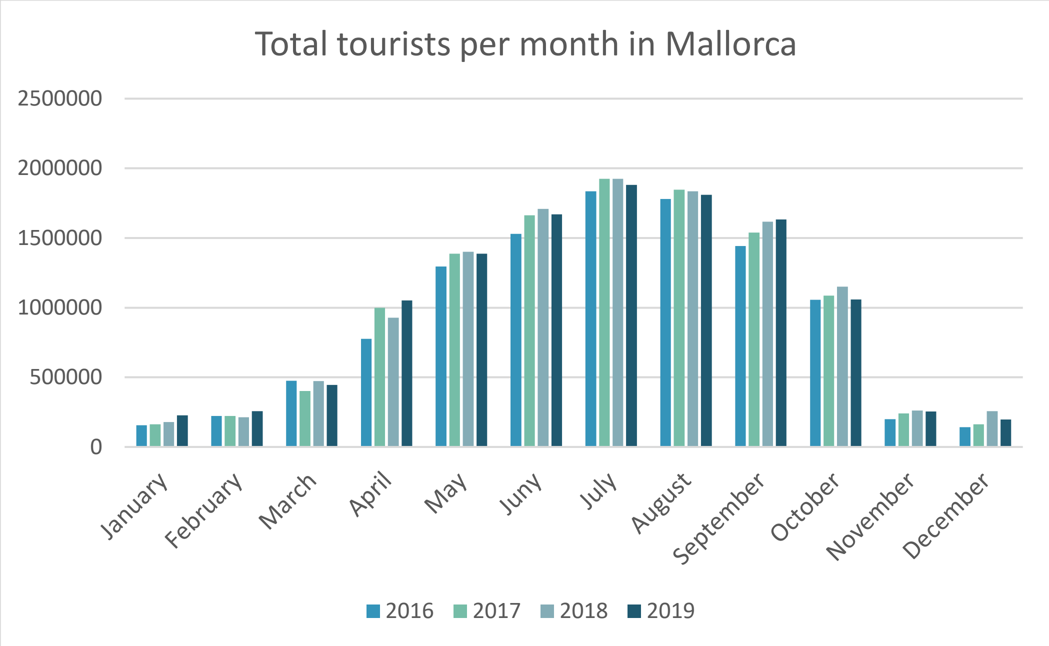
Observing table 5, about health tourism in Spain, we can say that there is a total annual cost of about 100 – 87 million euros in the Spanish health tourism sector, an estimated average cost per person of 1500€ and a an average daily cost of 173€. In reference to the average duration of trips it is 8.7 days.

Seasonality

On the other side, even though that Mallorca joins a wonderful weather and temperature the whole year, there is the presence of a seasonality in the tourism sector, as explain Coll (2013) in his study, he says that despite limiting the practice of sun and beach tourism for part of the year, this means during April and October (high season), the island's climate plays a vital role of creating and promoting new emerging tourism products, which can contribute to reduce seasonality and to increase the arrival of tourists during low season (from January to March and November and December). This period of seasonality that Coll talks in his study of 2013, it is reflected in graphic 3, where the tourism in Mallorca is divided by a seasonality, the high season (April – October) and low season (November - March).

In reference to the new emerging tourism products explain by Coll (2013), here we can take into account health tourism, which could help to reduce seasonality and therefore, it could be an interesting deseasonalization factor for Mallorca. As we are able to observe in graphic 3, during 2019, almost every month increased in comparison to the last years (2016 – 2018). This is a sign that every year, the number of tourists in Mallorca tends to rise up, therefore, there is a high possibility that the number of health tourists as well.

Graphic 3. **Total tourists per month in Mallorca (2016 - 2019)**[7]



Source: Elaborated by the author using data from IBESTAT (2016 - 2019).

5.1.2. Healthcare system and medical procedures

The private healthcare system of the Balearic Island is quite widely. According to the UBES' information (Unión Balear de Entidades Sanitarias – *Balearic Union of Health Entities)*, Mallorca has 24 healthcare hospitals, clinics and medical centres. In addition to this and according to the Excellent Hospitality Index Report (2019) or in Spanish *Índice de Excelencia Hospitalaria* made by the Instituto de Coordenadas, the best private and public hospitals are situated in Madrid and Barcelona. Nevertheless, in this same report, the Hospital Universitari Son Espases is the best hospital of Mallorca although, it is a public hospital.

These rates are based on 2000 questionnaires made to the professionals of the sector, where they evaluated the quality, i.e., hospitality service, well-being and patients' satisfaction, innovation capacity, personalized attention and sources efficiency.

The private hospitals and clinics from Mallorca offer a total of 1259 beds which means according to National Hospital Catalogue (2019), it represents a 37% of the total private beds available in the island. However, we need to keep in mind that from this 37%, a 7,1% are those hospitals which are private but at the same

[7] The total amount of tourists per month that visited Mallorca between 2016-2019 that represent this graphic (graphic 3) implies the three main reasons for which a tourist come to the island, this means, leisure/ holidays, business and other reasons. We should remind the explanation about *other reasons* develop in this same point (5.1.1) together graphic 2. [See annex 1 and 2].

time a non-profit entity. To be precisely these are Hospital Sant Joan de Deu and Hospital de la Cruz Roja Española.

In the following distribution we can observe the Mallorcan clinics and hospitals which offer a wide rank of treatments. Nevertheless, here are reflected the main ones that all the health entities have in common.

Figure 5. **Mallorcan Private Healthcare entities and its main medical procedures**

Clinics/ Hospitals

Clínica Juaneda – Palma
Clínica Juaneda Muro
Clínica Mutua Balear
Clínica Rotger
Hospital Cruz Roja Palma de Mallorca
Hospital Juaneda Miramar
Hospital de Llevant
Hospital Quirónsalud Palmaplanas
Hospital Sant Joan de Deu
Hospital Clínic Balear
Policlínica Nuestra Señora del Rosario
Aliviam Clínica del Dolor
AMA Centro Rehabilitación y Fisioterapia
Atenzia Servicios de Teleasistencia
Centre COT Manacor
Centro Médico PALANAS SALUD
Centro Rehabilitación 2010
Clínica IVI Mallorca
Clínica Universitaria de Odontología ADEMA
Dental Palmaplanas
Diaverum
Institut Oftàlmic de Mallorca (IOM)
MESSALUT integral
Oftalmedic Salvà

Main treatments

Allergology
Cardiology
Traumatology
Cosmetics surgery
Nephrology
Neurosurgery
Odontology
Urology
Rehabilitation
Pediatrics
Psicology/ psychiatry
Ophthalmology
Rheumatology
Podology
Obstetrician/gynaecology

Source: Elaborated by the author using data from the different hospitals' websites of Mallorca.

Despite the previous information in figure 5, regarding to Illesbalears.com, the official tourism website of the Balearic Islands, Rafa Nadal Sports Centre, Clínica Ortigosa, Clínica Humana, Clínica A2 Dental and Atenzia Servicios de Teleasistencia are considered too as part of the health tourism offer in Mallorca.

One remarkable point is that "a memorandum of understanding with a foreign medical school or a foreign treatment centre is an unspoken promise that quality will be upgraded until it reflects well on the international name" (Reisman, 2010: 74). By this way, as we are well-known enough because of our traditional tourism, this could be considered by those smalls Mallorcan clinics or centres which are not recognised in the international market. This statement can be related to the information mentioned before, which says that it is a great opportunity to have bilateral agreements, in other words, not just between countries for having a special visa for free movement between their citizens but also between different hospitals or clinics to increase that prestigious.

Knowing how works the private healthcare in Mallorca, we must to point out that in reference to the unfavourable side of Spain (section 4.2), during 2018 IB-Salut invoiced 31.730.000 euros to tourists from the European Community. This quantity compared to the previous year (2017), the total was 26.620.749 euros. To understand how this type of invoicing works, these amount are compensated between the Spanish government and the European Union. In the case of the Balearic Islands, the amount recovered has been already subtract by the amount invoiced by those residents of the Balearic Islands who have been treated in other countries of the EU or in other Spanish Autonomous Communities. For example, Son Espases just invoiced 40% of the total expenses in 2018, where of the 57.590 cases produced during that year, 16.555 were from UK, 13.200 from Germany and 11.293 from Italy (Vidal, 2019).

The main causes that remarks Díaz et al., (2014) for these debts are:

- Lack of control of foreigners with coverage.
- The excesses of France and Portugal, whose citizens carry out proximity tourism to use Spanish public health services.
- Failures in charges for British tourists, whose amounts had been made through an estimation system.
- Information deficiencies between the Autonomous Communities and the central administration.

5.1.3. Wellness sector and its treatments

The wellness tourism implies to get a service where the main objective is receiving a treatment or a therapy in order to improve and/or enrich not just the body but also the mental and physical well-being. In the case of Mallorca, tourists can disconnect, relax and enjoy this exceptional and distinctive type of tourism during their stay on the island.

In Mallorca what we can find are hotels that have facilities of wellness and spa, and then, establishments that offer wellness and spa services. In comparison to the north of Spain, the island could not take advantage of the natural resources such as the case of the water springs. However, Mallorca can provide to its health tourist the quality of the complementary services of the island.

The mainly treatments that predominate in Mallorca are the followings, according to the most stand out establishments:

Figure 6. **Hotels considered with the best wellness and spa facilities in Mallorca and its trendy treatments**

Wellness and Spa	**Main treatments**
Spa Barceló Illetas Albatros	Thermal hydro-massage/ hydrotherapy
Spa Be Live Collection Palace de Muro	Bubble loungers & jacuzzi
Spa Be Live Collection Son Antem	Waterfall
Spa Bella Playa Hotel & Spa	Inside and outdoor swimming pool and cold pool
Spa Belmond La Residencia	Yoga private or groupal sessions
Spa Biomar Spa Turó Pins	Wellbeing packages (sports massage, osteopathic techniques, etc.)
Spa Blau Colònia de Sant Jordi Resort & Spa	Beauty treatments
Spa Blau Priviliege Porto Petro Beach Resort & Spa	Massage & Body treatments
Spa Boutique Can Alomar	Thalassotherapy
Spa Boutique Hotel Calatrava	Sauna & steam baths
	Sensory shower
	Fitness Room

Note. These are the 10 best Hotels with wellness and spa facilities according to the official website of tourism in Mallorca. The main treatments were selected regarding the repeating treatment on every hotel's website. https://www.illesbalears.travel/es/baleares/salud-y-bienestar/turismo-sanitario

Source: Elaborated by the author using data from each hotel website and from the official tourism website of the Balearic Islands

5.1.4. Suppliers

At this point, we already know that suppliers are the basis of health tourism. The correct and ideal organization among them, together with complementary services, make for the potential health tourist acquire an excellent and comfortable experience meanwhile she or he is taking part of the medical procedure.

Insurances

Nowadays, the person interested on travel to a health tourism destination, she or he makes sure of acquiring an adequate travel insurance in case of any incident. This is the reason why, we can find international insurances which are well-known around the world, for instance Mapfre (Spain, Latin-America and some European countries) or Allianz. On the other side, if we speak in terms of the issuing countries, we obtain a national insurance before the departure of our holidays, for example, in the case of Spain is well-known OCASO.

For both cases, their services are applied in the international territory according to the type of travel insurance hired.

In Mallorca, the international insurances such as Mapfre or Allianz have their offices on our island.

Travel agencies/ brokers

At the national level, we can find Spaincares as the main healthcare broker who tries to encourage every year the health tourism in Spain and also in one of its principal national destination and Collaborating Partner, which is Mallorca. On the other side, at the local level, we can find UBES, the healthcare association which work in all the Balearic Islands. In Mallorca we can identify the majority of hospitals, clinics and medical centres due to its geographically dimensions, compared to the rest of the islands where medical entities are in the minority.

Healthcare providers and Media

Regarding to the healthcare providers are all the current clinics, hospitals and medical centres of Mallorca, as well as, the main hotels with spa and wellness facilities mentioned in figures 5 and 6.

Here, it is important to mention the considerable importance of the media, i.e., how all the medical institutions reach the potential health tourist. Nowadays, everything is linking to technologies, so the latest innovations have been Big Data and 5G. The first one, allow to collect all the information every time that a person gives any kind of information to the website's hospital, for example. 5G, allow us to get faster connections between all our electronical devices. By this way, the IT server of all the medical institution will facilitate the interaction between customer-medical healthcare institution and between all the suppliers.

5.1.5. Certifications and accreditations

Certifications are one of the best ways to give credit to hospitals, clinics and including medical centres. As we have already mentioned on previous points, one of the most recognized certifications on the health field is the Joint Comission International.

In Mallorca we can find mainly ISO certifications, which are also well-known worldwide even though it is not focus on the health sector. Despite of this, it certificates the service's quality, the environment management and others. There are also the existence of other types of certifications that imply the equality and integration, fair work situation, etc.

IDIS (Institute for Development and Integration of Healthcare), grants a certification called as Quality Healthcare (QH*). It is based on accrediting excellence in healthcare quality of public and private health entities whose objective is to apply and understand quality as a culture of continuous improvement. This type of certification is a pioneering and innovative system of IDIS.

Table 6. **Certifications and accreditations of Mallorcan Hospitals**

Medical's certification	Quality's Certification	Others

	Joint Comission International	IDIS	ISO 9001: Quality Management	ISO 14001	OHSAS 18001	EFQM	Equality and work fairness, S.E.P*, etc.
Grupo Juaneda	✓		✓			✓	✓
Quirónsalud Palmaplanas & Clínica Rotger	✓		✓	✓	✓	✓	
Hospital Sant Joan de Déu				✓			
Clínica Mutua Balear		✓	✓	✓	✓		✓
Hospital Clinic Balear**	✓		✓	✓	✓	✓	
Hospital Cruz Roja Española				✓			

*S.E.P (Excellent Private Health Service or Sanidad Excelente Privada).
** It is part of Quirónsalud Group since 2017

Source: Elaborated by the author based on information of all the hospitals websites mentioned

Following the recommendation that makes Reisman in Health Tourism (2010), “others are prepared to send patients to hospitals that have been accredited by the numerous other international bodies that have ISQua (International Society for Quality in Health Care) status.” In this case, Mallorcan hospitals, clinics and medical centres are accredited by these types of certifications, as we expose them on the previous table number 6.

5.2. Patient profile and demand

Mallorca is specialized in to attract north-European tourists, this means mainly Germany and UK tourists. However, a minority are Denmark, Finland, Norway and Sweden citizens (Nordic countries). On the other side, we can find South-European countries such as France and Italy. This is the reason why, we can relate these market nationalities to health tourism due to they are the usually issuing countries that receives Mallorca every year (CAIB, 2019).

Other potential countries could be Netherlands, Switzerland, Belgium, Russia and the rest of the world. Even though these countries currently visit Mallorca, the percentage is quite low. We should keep in mind also the number or tourist who are from Spain, the inbound market (CAIB, 2019).

Considering the previous explanation about the issuing countries that Mallorca has, we can present the characteristics for an approximate health tourist profile. Here, we can take into consideration the information retrieved from Fundación EOI about Health Tourism in Spain (2013) and from the MTI Report of 2016:

- Medium or medium-high purchasing power
- 35-65 expectancy life average. Even though, depending on the tourist's age, she or he will has a different purchasing power.
- Most of them are not in charge of little children and normally, they are married.
- Usually, they have high-education level.
- At least once, they have visited Mallorca in the past, so they already know the island.
- She or he is a tourist which depending on the type of treatment, decides to stay more longer than usually. As we explained on section 5.1.1, the last four year, a health tourist in Spain had expended an average of stay of 8,7 days.

5.3. Displacement factors

As we have already explained at the beginning, health tourist decides its final destination according to a series of factors such as the environment of the destination, the medical tourism industry and the quality of facilities and services provided in the destination. (MTI Report 2016). Factors that we are going to use it as a basis in order to complete it with information from Health Tourism in Spain (2013), MTI Report (2016) and Sánchez (2016). The result will be a micro-analysis about possible factors of displacement applied in Mallorca. All of them could be useful for a tourist and for an external agent who want to sell our destination in its country.

Destination Environment:

- Study of the market which implies the knowledge of the customer's needs, as well as, the expectations of those potential tourists. For the agents, it is applied the same market study in order to cover and develop those needs of the tourist in the moment of offering the destination and the hospital, clinic or medical centre.
- The varied complementary services offered by Mallorca after the operation such as accommodation, transport, tourist attractions, local traditions and festivals, etc
- The political and social stability of the country, which means also for Mallorca, it is a decision factor for both tourists and agents.
- Public safety: security on the streets.
- In the case of the USA, most citizens do not have health insurance, which is why they are motivated to travel to another country to carry out

the medical interventions of their interest for a much lower cost than the United States.

- Border countries with better quality of health service and family residing in countries with better health conditions, as well as, colonial historical connections, motivate to the patient for getting a medical intervention in a familiar space. Mallorca reflects this due to the proximity with France, Portugal, Germany, Italy, among others but not just with these countries but also people who lives here but are from Latin-American, for example, and the fact that a familiar from its country wants to be treat in Mallorca, makes everything easier.

Medical Tourism Industry:

- The location and the weather of Mallorca makes the recovery easier for the paint after the operation during the whole year.
- The wide offer of the medical services and therefore also, the price at which the intervention is valued.
- The privacy and confidentiality of the interventions have a high level of relevance for the patient.
- No languages barriers. Every single hospital, clinic or medical centre are able to speak with their patients at least in English
    - In the tourist areas there is neither language barrier.
- The legal differences between the country of origin and destination, in this case Mallorca, related to medical treatments.

Quality of Facilities and Services:

- High level of knowledge and global reputation for Mallorca in terms on tourism.
- The quality certification granted by various internationally recognized healthcare entities. In this way, security is demonstrated in relation to the services that the clinic or hospital is going to offer, as well as, for wellness establishments. This also, increase the reputation and good management for futures health tourists.
- Innovation as a technological, product and tourism marketing concept. The aim is to reinforce that message of safety which needs the patient or the agent for knowing which destination to choose and to know which differentiation factors are compared to its competitors.
- High quality service in medical institutions. In addition, modern facilities and services, as well as, the popularity of the medical entity, guarantee the patient greater security.

Mallorca is full of advantages that make everything easier for the tourist who is looking for a final hospital abroad. Choosing Mallorca, makes them more familiar with the European lifestyle and even more with the Mediterranean life.

5.4. Competitors

In terms of international competition in reference to health tourism, we can base on the table 1 and 2 that show us the International Healthcare Research Centre & The Medical Tourism Index from 2016 and 2017. In both cases, Spain is situated between 11th and 15th position among 41 countries evaluated as health touristic destinations.

Spain has a wide offer for those health tourists who are looking for a pleasant place where to choose their medical procedure or receiving a good therapy for relaxation, for example.

The following Spanish areas have been chosen as the main competitors in terms of national level according to the most repeated areas that appears in Spaincares for each type of treatment that the website offer. This is the reason why the Autonomous Communities of Madrid, Catalonia, Andalusian, Valencia, Murcia, Navarra and Canary Island have been classified as main national competitors for Mallorca. [See Table 7].

Table 7. **National competitors in the Mallorcan Health Tourism Sector**

NATIONAL COMPETITORS	
Area	**Characteristics**
Madrid	It is the Spain's capital. Madrid offers the characteristic Spanish essence making the tourism focus on art and culture, gastronomy, shopping, sports and tradition. Some of the important private hospitals well-known are Hospital Gregorio Marañón specialized on Cardiology, Hospital Universitario Clínico San Carlos specialized on neurology and Hospital La Paz, which is the best one on orthopaedics, paediatrics, gynaecology and rheumatology. Madrid offers also different hotels with spa and wellness facilities, such as VP Plaza España Design. There is the existence about a lot of different and independent massage centres, wellness boutique, etc.
Catalonia (Barcelona, Lleida)	Catalonia gives you the change of enjoying a little bit of everything due to its wide touristic offer for everyone. The plus, in comparison with Madrid is the coast. The private hospitals more recognized are Hospital Vall d'Hebron, which is well-known by cardiology, pneumology, neurology, and oncology. Hospital Clinic Barcelona is well appreciated by gynaecology, pneumology and rheumatology. Clínica HLA Perpetuo Socorro, one of its main medical procedures is plastic surgery in Lleida. On the other hand, Caldes de Boí (Lleida), is a specialized wellness hotel, as well as, Termes Montbrió in Tarragona.
Andalusian (Sevilla, Málaga, Almería, Granada, Cádiz)	Andalusian is recognized worldwide because of Flamenco. Nevertheless, the south of Spain offers to the tourist a variety of tourism typologies. In health tourism, Hospital HLA Jerez Puerta del Sur (Cádiz), Clínica HLA Santa Isabel (Sevilla) or Hospital HLA Inmmaculada (Granada) provide the best physicians on plastic surgery, for example. On the other side, Alhama de Granada or San Nicolás (Almería), apart of being hotels, the prestige of them is the wellness product.

Valencia (Alicante and Valencia)	The Autonomous Community of Valencia is plenty of tourism attractions. Between on traditional tourist markets that receive Spain, it is one of their main touristic destinations. In Hospital Clínica Benidorm (Alicante), one of its specific treatment is spinal surgery. Hospital Universitari i Politècnic la Fe (Valencia) is identified by orthopaedics and rheumatology. Moreover, on the wellness sector, Hervideros de Cofrentes (Valencia) or Benassal (Castellón) are well-known on the Autonomous Community.
Murcia	Its nature, the coast, the mountains, its cultural heritage and its gastronomy, provide to the tourist an incredible experience in Murcia. This is the reason why, its geographical location can offer different wellness treatment such as Mar Menor muds. Balnearios de Archena is one of characteristic hotel complex which offers health resort services. Moreover, regarding to one of the main private hospital from here, Hospital HLA La Vega is focus on gynaecology.
Navarra	Navarra surprise you because of its history, its cultural heritage, gastronomy, and its impressive nature. Spa at Fitero, is well-known due to its aquifer, making of him, a pleasant place for enjoying the two springs, as well as, its own accommodation. On the other side, Clínica San Miguel is specialized in sports examinations, health examinations, alongside too, plastic, restorative and aesthetic surgery.
Canary Islands	The Canary Islands are the unique Spanish place where the temperature is warm the whole year. At the different islands, the tourist offer is and extraordinary and sole experience. Despite of the wide tourist offer, Tenerife is the island which is more specialized on the health tourism., an example is Hospital Hospiten Rambla, which has an extensive type of medical procedures, for instance paediatric cardiovascular screening. Thalasso Center and Princesa Yaiza (Lanzarote) is the best Suite Hotel Resort that offer to its guest the best Wellness and Spa experience.

Source: Elaborated by the author based on information of all the official tourism websites of each Autonomous Community.

Without no doubt Mallorca's competitors offer great services not just on terms of traditional tourism but on health tourism too. Each place provides his best version and Mallorca accomplish that expectation.

We should remark that due to the geographical location, all the North Autonomous Communities of Spain can take the advantage of its natural resources in order to be an international wellness reference and these are Galicia, Asturias, Basque Country, Cantabria, Navarra and Catalonia.

5.5. Marketing and financial and government support

Marketing

The marketing applied worldwide in health tourism sector is done mainly through websites, social networks, mailing, etc.

Hospitals, clinics and medical centers of Mallorca have their own online platform where the person interested in them can search for any information. All of them are at least in English and German. In the case of wellness sector, its promotion and marketing is based on the hotel's website. Their offer is in different languages such as German, English, French, Russian, etc.

Another way where we can find promotion and marketing is through the website of Spaincares and UBES, where they offer the main information about the clinics, hospitals, medical centres, health resort and transport support. In the case of Spaincares, they offer two travel agencies specialised in the health tourism sector and hotels focus on this type of tourism.

The previous information states that health tourism sector needs to work together with technology. Remarking the Medical Tourism Association survey made in 2009, they obtained the following analysis; when they asked in a survey how they found out about medical tourism, 49 per cent of respondents said the Internet, and only 2 per cent said their doctor. Asked how they researched the alternative destinations and hospitals, 73 per cent said the Internet, 5 per cent said a friend, and 5 per cent said a facilitator. Books were not mentioned. The clued-up nowadays are all online (Medical Tourism Association, 2009: 34). This affirm completely that tourism and technology must continue working together.

Trade fairs, fam trips, and workshops are very useful to promote the destination in order to attract possible investors, clients, travel agencies, and so on. This means an interaction between B2B or B2C. For example, at FITUR in Madrid, there is an area called *Fitur Health*, where they can present and expose the health tourism sector. This year, the Balearic Island were present there and the AETIB introduced to all the professional its strategy called Strategic Health and Wellness Tourism Segment or *Segmento Estratégico Turístico de Salud y Bienestar*. It is part of the Pla d'acció 2019 of the AETIB (FITUR, 2020; AETIB, 2018).

Medical Tourism Pavilion is another eminent area during the International Tourism Trade Fair of Berlin. This 2020, it was cancelled but they made some conferences through Internet giving the opportunity of sharing knowledge. The *Balears, Agència d'Estratègia Turistica Illes Balears*, was going to participate in the ITB representing the Balearic Islands in order to exhibit its four products; the alternatives for deseasonalization (ITB, 2020).

Financial and government support

Regarding to financial support, hospitals, medical centres and clinics can upgrade their facilities and their medical equipment and technologies with public funding or private. This is the reason why, CDTI (Centre for Industrial Technological Development or *Centro para el Desarrollo Tecnológico Industrial*), promotes the R&D through its public funding. During 2014-2018, 0.2M€ were assigned to the healthcare sector, according to its presentation about funding on the digital era organised by Turistec in February of this same year (CDTI, 2020).

Spain applies different investments on health tourism sector, mainly investing in technology and know-how, such as is the case of Juaneda Group, which is the first Voice Laboratory with computerized speech assessment and strobing of the vocal cords (Juaneda, 2019).

On the other side, we need to explain that beginning of 2019, the AETIB started to apply its new strategy: *Pla d'acció 2019,* which aims is to attract tourists for the support of its alternative tourism: culture, sports, gastronomy, luxe, MICE, active tourism, ecotourism and health tourism. By this way the result is promoting deseasonalization through a sustainable tourism and getting a better international position in the tourism sector (AETIB, 2018).

For the health tourism actions, they propose 6 lines:

1. **Management:** To continue being part of Spaincares, consulting and training in specialized accommodation for health tourism, various workshops, working table with tours operators and tourist agencies to find out what is being offered and what the client is asking for.
2. **Generation of demand:** Participation in different tourist trade fairs, workshops and fam trips, among them; Fitur Salud, Ibiza Congress, ITB Salud, IMTJ Medical Travel Summit, joint actions with Spaincares, and among others.
3. **Offer support:** Provide a manual edition of product sales, newsletter edition for medical tourism and wellness tourism and professional presentation edition.
4. **Regulation and standards:** Participation of the committee to prepare the ISO standard and to analyze with the sector the possibility of applications of the cross-border directive.
5. **Marketing:** strategic alliances (an immersion trip) and marketing of experiences through the website illesbalears.travel.
6. **Innovation and competitiveness**: competition for the development of innovative projects related to health tourism.

5.6. SWOT Analysis

Through the following SWOT analysis we will be able to have a clear perspective about health tourism in Mallorca.

Table 8. **Mallorcan Health Tourism SWOT Analysis**

Strengths	**Weaknesses**
- Well-known as tourism destination - Qualified healthcare system; public and private	- Internal competitors: other tourist points where they offer health tourism too. - Lack of brokers; necessity of

- Well-known medical procedures such as cardiology, neurosurgery or fertilization treatment. - Knowledge of the Cluster Spaincares and UBES - Competitive prices in comparison with the rest of European countries and with the UE. - Geographically well-located and also strategically - Financial support by the CDTI for example. - Potential type of tourism for deseasonalization in Mallorca - AETIB strategy, *Pla d'acció 2019*	more travel agencies specialized on health tourism - More promotion as health tourist destination in different trade fair or workshops - The necessity of improvement on the websites
Opportunities - Increase of health tourism worldwide, which also means increasement on Mallorca as health tourism destination - Growth in the economy - Improvement of technologies for instance 5G, as well as, improvement on medical technologies - Free movement between countries of the European Union - More synergies between wellness tourism and medical tourism of Mallorca - More synergies between the health tourism sector and the traditional tourism sector - Financial support - Attracting different physician who are specialized on gender reassignment, for example. - Health tourist visa - Future bilateral agreements	**Threats** - Competition with the rest of countries due to cheaper prices, for instance Thailand or Turkey or due to better medical technology on the surgery room, for example USA. - Disease transmission, for instance, SARS-CoV-2 due to the free movement between all the countries.

Source: Elaborated by the author according to all the previous information and Fundación EOI (2013).

6. CONCLUSION

Health tourism is increasing more and more, this means a 20% annually worldwide (IDIS, 2018). For that same reason we have to take advantage of healthcare system and tourism area conditions that Mallorca offers in order to attract a greater number of health tourists.

Through the analysis carried out in this work, we can verify that those countries like Canada, stand out mainly for their cutting-edge technology. However, Mallorca could reach that maximum point in the coming years as long as there is a lot of technological and innovative investment.

Along this study we have also been able to observe that Mallorca accomplish with different favourable factors that could be very useful to attract those health tourists. The island is already well-known because of its traditional tourism of sun and beach, which means that we have experience on tourism and at the same time, due to its strategically geography, the objective set out in the AETIB's Plan, *Pla d'Acció* 2019 could be achieved, which is to attract more tourists during the whole year while offering various types of very attractive and beneficial tourism for the island, such as health tourism. All this, while reducing the seasonality present in Mallorca at the same time.

Within the health sector, Mallorca offers quite qualified conditions both in the service provided and in the facilities. Therefore, the health sector, together with the tourism sector, means continuing to work together, obtaining mutual synergies. The result would be reflected in both areas and in the economy of Mallorca.

However, although throughout the work we have described the supply, demand, competition, as well as national and local strategies, we believe that there are certain points of weakness as points to be further strengthened. Therefore, we propose the following aspects:

1. **Getting the goal of the strategy from AETIB** in order to attract more tourism for the different tourism alternatives which implies the health tourism at the Balearic Island. The result is to end with the current seasonality that presents Mallorca during April to October.

2. **Increase government support:** As we have already mentioned in this research, bilateral agreements should be further strengthened, the technological changes that are emerging must be applied and having government support as other countries do in order to facilitate the visa issue for this type of tourism and increasing financial support (internal as external), which would lead into a better development in technology or better infrastructures for the hospitals, medical centers or clinics.

A current example that explains UNWTO in his Exploring Health Tourism Report (2018), says that mainly Asian governments, as it is the case of Turkey, focus on medical tourism with the provision of building infrastructure, legislative support (e.g., a special visa for medical tourists) and focused image campaigns, increase and improve their promotion worldwide.

3. **Technological recommendations:** Most of the Mallorca hospitals' websites need an innovation, a new structure in order to be more practical and modern, for instance as Juaneda or Quironsalud Palmaplanas website which already apply. Hospital Clinic Balear is one of online platform that needs a renew.

   Moreover, since the first moment they are offering the service and how to do all the process, as well as, how to contact them for any doubt, this is a pertinent point between supply and demand, and this is the reason why these websites should be renewed constantly in order to adapt to all technological change, such as the case for the chat robot, 5G, etc.

4. **New products/ treatments:** We can attract another type of market segmentation such as patients which want to reassign their gender. The reassignment gender is not offer in Mallorca but it could be a new product offered by the island in the long-term. For this same reason, as Mallorca has not physicians specialized on this type surgery, it could be interesting to create a strategy focus on this.

5. **To continue participating on trade fairs, fam trips or workshops**: If we want to attract more tourists or suppliers for our island, offered as a health tourism destination, the island must continue to participate in different trade fairs or workshops. The same happens with fam trips which would help to issuing countries to be in first contact with the hospital, clinic or medical centre from Mallorca for then transmit a good feedback to the potential health tourists.

The option of becoming a very important sector in the long term should not be ruled out, since if the correct strategies are applied, this objective can be achieved.

Therefore, to conclude, we can say that the conditions presented by Mallorca for health tourism are quite optimal and taking into account that this type of tourism can be done throughout the year, which would help to deseasonalize the island. This bibliographic review could be the beginning of a possible hypothesis in reference to health tourism and its real potential deseasonalization, which could be useful in future research and/or studies.

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9. ANNEXES

Annex 1**. Tourists with main destination at the Balearic Islands by period, island and main reason for the trip (2019 – 2016)**

Total tourists according to tourism typology in Mallorca				
	Leisure/ holidays	**Business**	**Other Reasons**	**TOTAL**
2016	9887208	440756	579281	10907245
2017	10645636	384284	607754	11637674
2018	10458118	473911	1018316	11950345
2019	10787311	466945	615746	11870002

Source: Elaborated by the author using data from IBESTAT (2016 - 2019).

Tourists with main destination at the Balearic Islands by period, island and main reason for the trip									
Mallorca - Montly Data									
2019M12		2019M02		2018M04		2017M06		2016M08	
Leisure/ holidays	118032	Leisure/ holidays	171536	Leisure/ holidays	815631	Leisure/ holidays	1569200	Leisure/ holidays	1712422
Business	15744	Business	30588	Business	33357	Business	37773	Business	16647
Other Reasons	64329	Other Reasons	55278	Other Reasons	79654	Other Reasons	56280	Other Reasons	50312
2019M11		2019M01		2018M03		2017M05		2016M07	
Leisure/ holidays	182896	Leisure/ holidays	139162	Leisure/ holidays	367093	Leisure/ holidays	1257987	Leisure/ holidays	1754987
Business	32957	Business	21716	Business	48028	Business	64438	Business	26077
Other Reasons	37927	Other Reasons	65258	Other Reasons	58125	Other Reasons	63917	Other Reasons	54228
2019M10		2018M12		2018M02		2017M04		2016M06	
Leisure/ holidays	946560	Leisure/ holidays	170972	Leisure/ holidays	150309	Leisure/ holidays	884420	Leisure/ holidays	1422964
Business	76314	Business	21290	Business	29485	Business	34134	Business	58584
Other Reasons	35188	Other Reasons	64853	Other Reasons	33571	Other Reasons	80031	Other Reasons	47403
2019M09		2018M11		2018M01		2017M03		2016M05	

Leisure/ holidays	1535494	Leisure/ holidays	181865	Leisure/ holidays	124236	Leisure/ holidays	318248	Leisure/ holidays	1154359
Business	45978	Business	32772	Business	20485	Business	37805	Business	85252
Other Reasons	51370	Other Reasons	47765	Other Reasons	34358	Other Reasons	46687	Other Reasons	55602
2019M08		2018M10		2017M12		2017M02		2016M04	
Leisure/ holidays	1755927	Leisure/ holidays	1039376	Leisure/ holidays	103180	Leisure/ holidays	161024	Leisure/ holidays	666513
Business	22161	Business	55933	Business	20696	Business	25809	Business	44776
Other Reasons	31703	Other Reasons	55075	Other Reasons	37798	Other Reasons	34721	Other Reasons	63812
2019M07		2018M09		2017M11		2017M01		2016M03	
Leisure/ holidays	1800473	Leisure/ holidays	1503414	Leisure/ holidays	171177	Leisure/ holidays	103183	Leisure/ holidays	383914
Business	26776	Business	53259	Business	23960	Business	20460	Business	33418
Other Reasons	53658	Other Reasons	59345	Other Reasons	46313	Other Reasons	40102	Other Reasons	58946
2019M06		2018M08		2017M10		2016M12		2016M02	
Leisure/ holidays	1556924	Leisure/ holidays	1635601	Leisure/ holidays	980296	Leisure/ holidays	88954	Leisure/ holidays	160607
Business	62808	Business	30099	Business	51737	Business	16161	Business	22362
Other Reasons	50349	Other Reasons	169028	Other Reasons	54516	Other Reasons	35890	Other Reasons	38397
2019M05		2018M07		2017M09		2016M11		2016M01	
Leisure/ holidays	1292019	Leisure/ holidays	1723480	Leisure/ holidays	1472414	Leisure/ holidays	129359	Leisure/ holidays	100342
Business	46599	Business	26861	Business	34727	Business	30135	Business	15199
Other Reasons	47922	Other Reasons	174306	Other Reasons	32679	Other Reasons	39634	Other Reasons	40503
2019M04		2018M06		2017M08		2016M10			
Leisure/ holidays	935276	Leisure/ holidays	1481169	Leisure/ holidays	1781194	Leisure/ holidays	964647		
Business	42901	Business	71127	Business	17789	Business	57106		
Other Reasons	74038	Other Reasons	157267	Other Reasons	47245	Other Reasons	35462		
2019M03		2018M05		2017M07		2016M09			
Leisure/ holidays	353012	Leisure/ holidays	1264972	Leisure/ holidays	1843313	Leisure/ holidays	1348140		
Business	42403	Business	51215	Business	14956	Business	35039		
Other Reasons	48726	Other Reasons	84969	Other Reasons	67465	Other Reasons	59092		

Source: Institut d'Estadística de les Illes Balears (IBESTAT) a partir de datos de FRONTUR. España (CC BY 3.0). Retrieved from https://ibestat.caib.es/ibestat/estadistiques/043d7774-cd6c-4363-929a-703aaa0cb9e0/bf3c6e6b-3050-4718-84f6-1d616be9b5b2/es/I208002_n203.px

Annex 2. **Total tourists per month in Mallorca (2016 – 2019)**

Total tourists per month in Mallorca				
	2016	**2017**	**2018**	**2019**
January	156044	163745	179079	226136
February	221365	221554	213364	257402
March	476278	402740	473246	444141
April	775101	998585	928642	1052214
May	1295214	1386342	1401156	1386540
Juny	1528951	1663254	1709563	1670080
July	1835293	1925734	1924647	1880906
August	1779381	1846229	1834728	1809791
September	1442271	1539821	1616018	1632842
October	1057215	1086549	1150384	1058062
November	199128	241450	262402	253780
December	141005	161674	257114	198104
TOTAL	10907246	11637677	11950343	11869998

Source: Elaborated by the author using data from IBESTAT (2016 - 2019).