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Health Tourism 2018

Attitudes and Expenditures of Visitors to Croatia

Research methodology



Scope: Wellness, health spa and medical segments

Instrument: Structured questionnaire

Data collection: Personal interview with users (CAPI)

Sample size: 2.540 interviews at 43 facilities

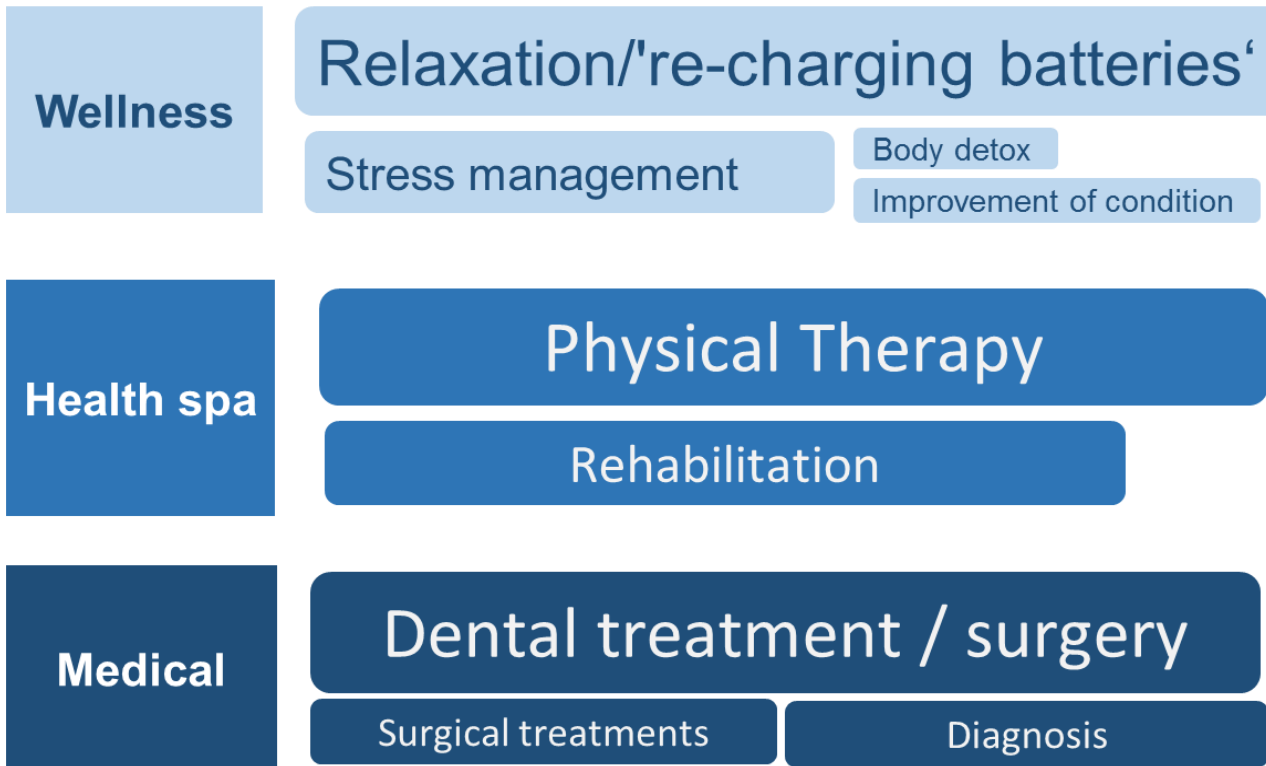
Surveying period: July - December 2018

Demographics

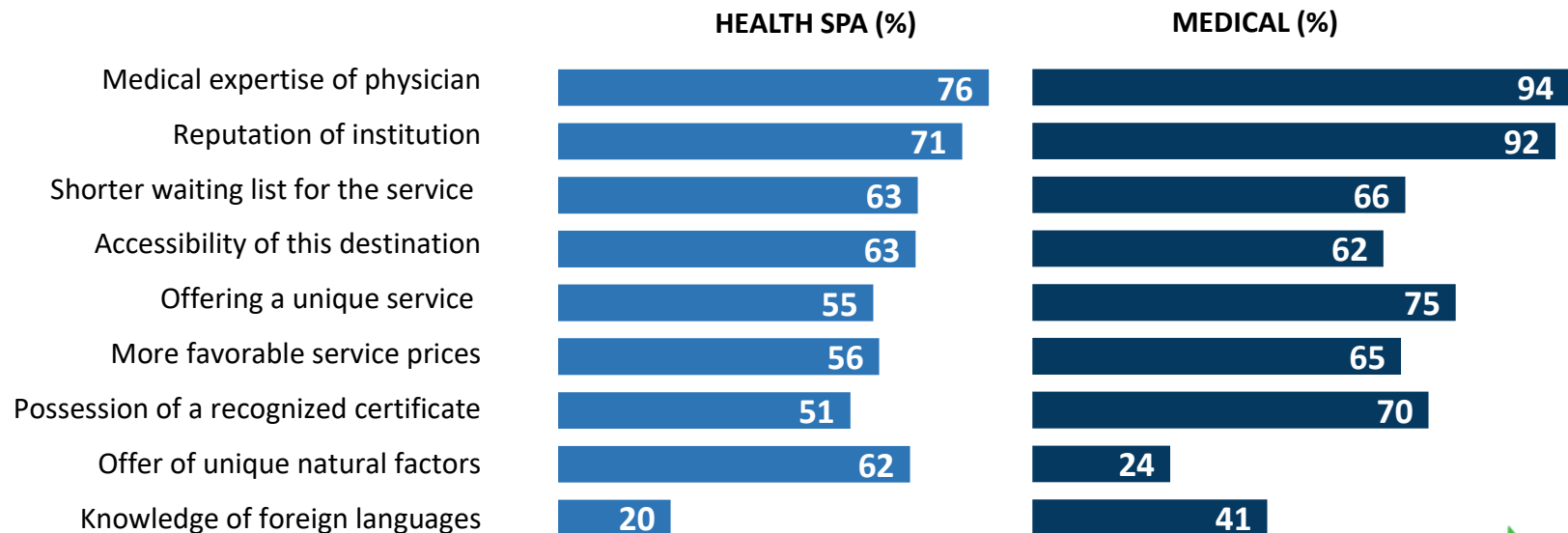


Wellness	<p>Nationality: Predominantly foreign (82%)</p> <p>Average age: 43 years</p> <p>Education: Mostly university degree and higher (53%)</p> <p>Income: Mostly Eur 3.000+ (49%)</p>
Health spa	<p>Nationality: Mostly domestic (62%)</p> <p>Average age: 58 years</p> <p>Education: Mostly high school and lower (55%)</p> <p>Income: Predominantly up to Eur 2.000 (75%)</p>
Medical	<p>Nationality: Predominantly foreign (73%), namely Italy (56%)</p> <p>Average age: 48 years</p> <p>Education: Equally high school and college (38% + 36%)</p> <p>Income: Predominantly up to Eur 2.500 (75%)</p>

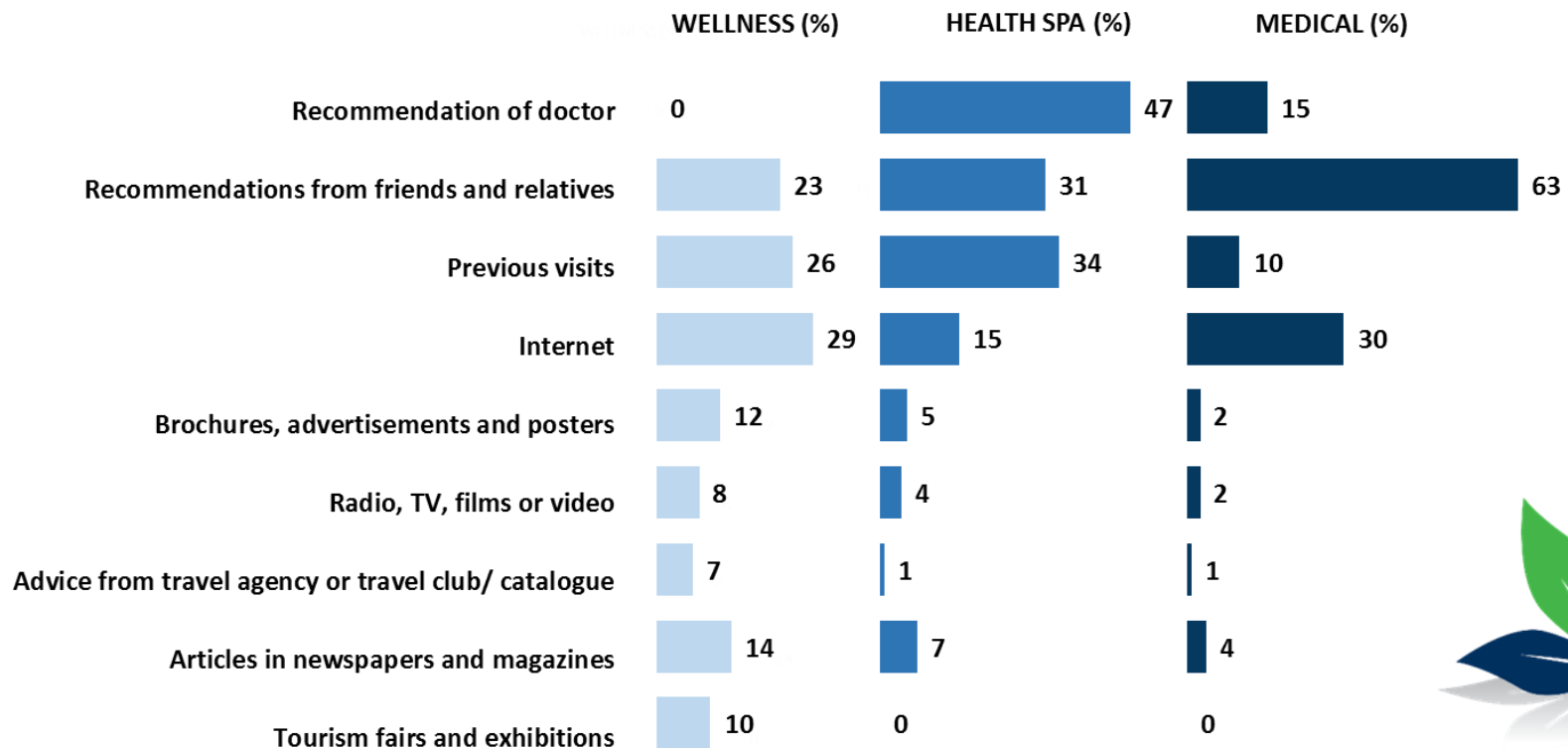
Main motives



Factors influencing choice of medical facility



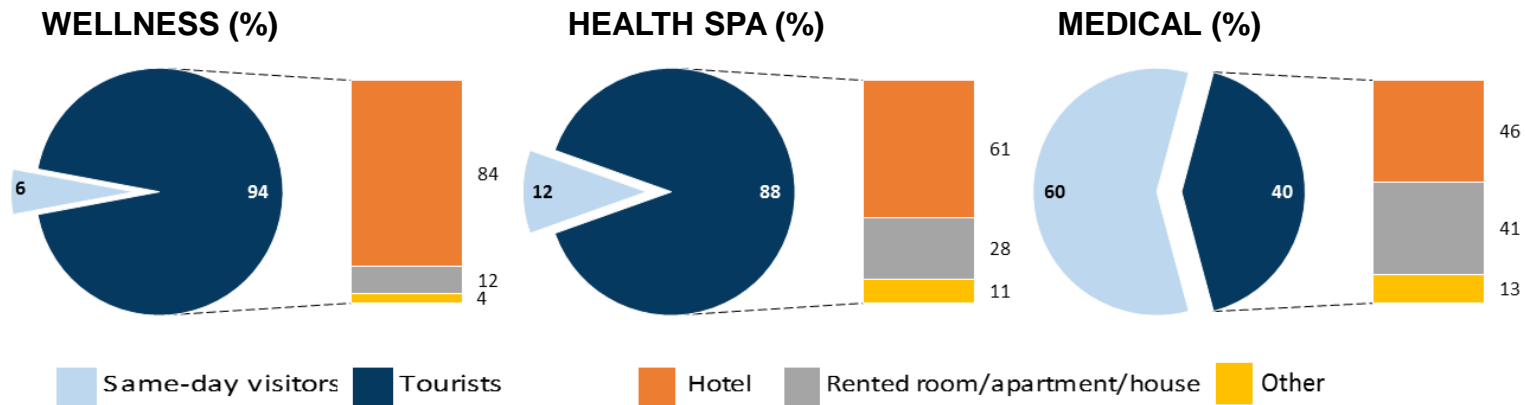
Main sources of information





Trip characteristics

Length of stay and accommodation choice



Activities in destination

WELLNESS

- Most active
- Swimming, gastronomy, sightseeing, walking and running

HEALTH SPA

- Active
- Sightseeing, walking and running, gastronomy
- Almost 20% inactive

MEDICAL

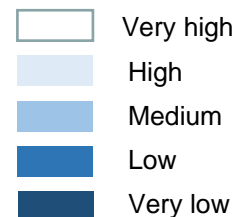
- Least active
- Gastronomy, shopping, sightseeing
- 40% inactive

Satisfaction with destination

	WELLNESS	HEALTH SPA	MEDICAL
Scenic and natural beauty	😊	😊	😊
Entire stay	😊	😊	😊
Atmosphere	😊	😊	😊
Personal safety	😊	😊	😊
Friendliness of local people	😊	😊	😊
Accessibility of destination	😊	😊	😊
Quality of information provided in destination	😊	😊	😊
Value for money	-	😊	😊
Quality of accommodation	😊	😊	😊
Quality of gastronomic offer	😊	😐	😊
Possibility for sports and recreation activities	😊	😊	😊
Quality of culture offer	😐	😐	😊
Possibility for shopping	-	😞	😊
Quality of local transport	😐	😞	😊

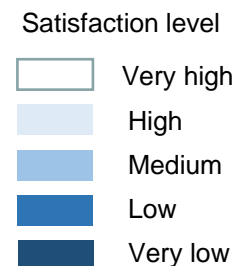


Satisfaction level



Satisfaction with health facility and services

	WELLNESS	HEALTH SPA	MEDICAL
Friendliness of the staff	😊	😊	😊
Professionalism of the staff	😊	😊	😊
Total offer of the medical / spa facility	-	😊	😊
Cleanliness of this facility / center	😊	😊	😊
Atmosphere in facility / center	😊	😊	😊
Quality of individual services and / or programs	😊	😊	😊
Clear and understandable information of treatments	😊	😊	😊
Treatments provided according to schedule	😊	😊	😊
Organization of transport and / or stay	-	😊	😊
Availability of information about offer	😊	😊	😊
Quality of equipment / facilities	😊	😊	😊
Value for money' of facilities and services	😊	😊	😊
Variety of services	😊	😐	😊
Appropriate size of the center	😊	😐	😊
Center / facility suitable for people with special needs	😐	😊	😊
Variety of equipment / facilities	😊	-	-
Innovation of offer	😐	😞	😊



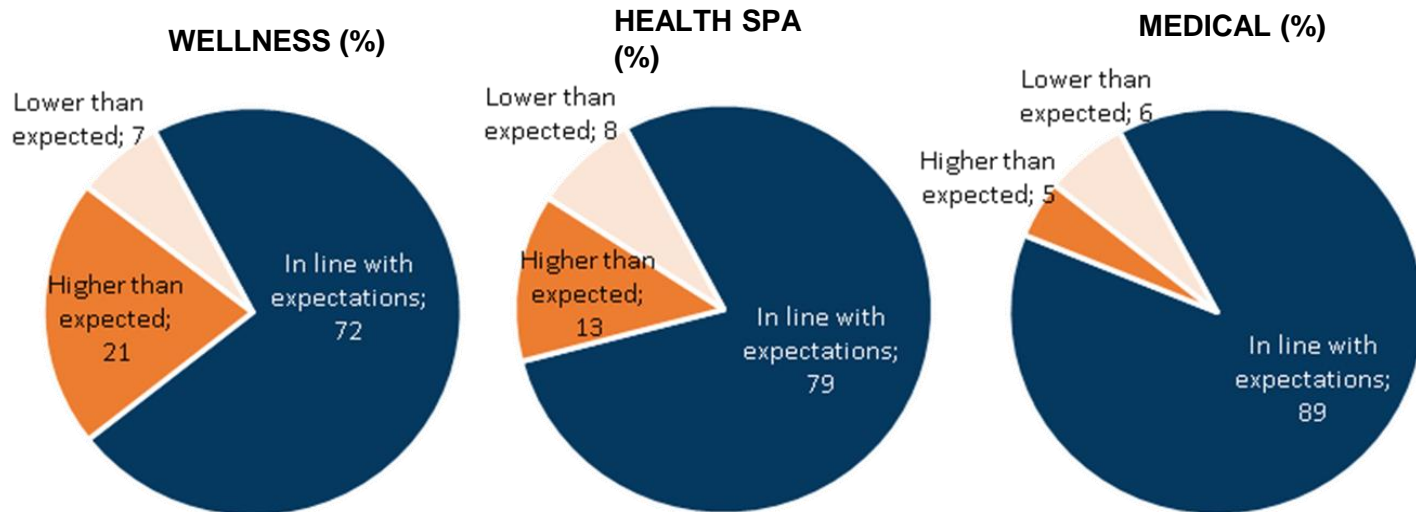
Average daily expenditures per person

OVERNIGHT VISITORS	WELLNESS (€)	SPA (€)	MEDICAL (€)
Total	149	63	292
Accommodation	82	34	31
Food and beverages in restaurants/bars	30	6	16
Shopping	12	4	16
Health facilities and services	11	16	221
Other (culture, entertainment, sports....)	15	3	8

SAME-DAY VISITORS	WELLNESS (€)	SPA (€)	MEDICAL (€)
Total	48	82	450
Food and beverages in restaurants/bars	19	11	12
Shopping	4	2	13
Health facilities and services	22	63	423
Other (culture, entertainment, sports....)	4	5	2



Expected expenditures





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Thank you for your interest!

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