Medical Tourism in Croatia: Update from the ACAP Medical Tourism Task Force Research Division

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In just six short years, ACAP has connected professionals to make positive changes in Croatia and our local communities. With 12 chapters and nearly 1,500 members and counting, ACAP continues to expand and link together Croatians and non-Croatians from all corners of the world to network, share ideas, grow professionally and discover solutions to today’s challenges.

https://www.croampro.com/default.aspx
ACAP Medical Tourism Task Force (MTTF)

• Founded in 2016 by Dr. Steve Pavletić and Dr. Eugene Halar
• Mission: Provide resources to assist in economic development, medical education and research, and design of health care and wellness delivery systems in Croatia

• Multi-specialty group of 144 members:
  • Business Leaders
  • Physicians
  • Consultants
  • Allied Health Care Personnel
  • Cybersecurity/Technology Industry
  • Academicians
  • Researchers
  • Lawyers
  • Administration
  • Social Workers

• Projects
  • Retirement Facilities
  • Foundation of Cancer Center
  • Education Networks
  • Croatian Connected Health Hub
  • Integrated Medical and Wellness Program
ACAP MTTF Integrated Medical and Wellness Program: Who we are

A group of volunteers designing an Integrated Medical and Wellness pilot program in partnership with Croatian professionals and organizations. The pilot will serve as a foundation for future sustainable medical and wellness programs to support Croatia’s emergence as a leading international destination for health tourism. This program will be launched on site in Croatia in the Fall of 2022.
Pilot Vision and Mission

Vision
Our vision is to further Croatia’s emergence as a premier health tourism destination for high quality medical and wellness programs.

Mission
To fulfill this vision, we will develop and implement an Integrated Medical and Wellness Program pilot to serve as a foundation for other medical and wellness programs. As members of ACAP’s professional and civic community, we will foster mutually beneficial professional relationships with Croatians and the diaspora and contribute to economic growth and development in the health tourism sector.
Initial Goal (2016): Assist in the Development and Promotion of Croatia as An International Destination For Health and Wellness

• How do we achieve that goal?
  • Designing and implementing an evidence-based integrated medical and wellness program in Croatia that will attract North American customers

• Why is this project important now?
  • Croatia’s position:
    • Medical excellence: internationally known hospitals and clinics, high bar to practice medicine in Croatia, accreditation and affiliation with prestigious hospitals
    • Unique Croatian value: geothermal spas, unmatched scenery, rich cultural heritage, enthusiastic diaspora
  • ACAP’s strategic focus in its initiatives
How do we launch an integrated medical wellness pilot program within three years that will serve as a foundation for other programs?

Answer: Obtain objective data
Tuck School of Business at Dartmouth

- Ivy League University
- First in the world to offer MBA
- MBA students have a minimum of 5 years in workforce prior to being eligible to apply
- 100% of students participate in global experience
- 25% of those participate in the Onsite Global consulting
Numerous Public, Private, Government and Individual Supporters Made This Possible

… plus many others too numerous to list!
Timeline 2019

January
- OnSite Croatian Interviews with Key Stakeholders

February
- Croatian Embassy, DC
  - MTTF
  - Cancer Center
  - Tuck Proposal
  - Education
  - Health Hub

March
- Cleveland Meeting
  - Tuck Proposal
  - Cancer Center
  - Education
  - Retirement

April
- Tuck Team Pre-Country Interviews and Deliverable

May
- Tuck Project approved Tuck Planning meetings

June
- Tuck Team In Croatia Preliminary Report

July
- Tuck Team In Croatia Preliminary Report

August
- Tuck Team In Croatia Preliminary Report

September
- Tuck Team In Croatia Preliminary Report

October
- Tuck Team In Croatia Preliminary Report

November
- Tuck Team In Croatia Preliminary Report

December
- Tuck Team In Croatia Preliminary Report
Timeline 2020

- Tuck Team Meeting
- Follow up with Key Stakeholders in Croatia
- Finalized Organizational Structure
- Created Work Plan
- Determined Offering
- Formed Working Groups
- Pilot Start date (Fall 2022)
- Working Meetings (lots of them)
- Opportunity To Fill in the Blank

Jan | Feb | Mar | Apr | May | June | July | Aug | Sept | Oct | Nov | Dec
---|---|---|----|----|-----|------|-----|------|-----|-----|-----

- Deep dive into Tuck Report
- ACAP MTTF Town Hall
- Steering Committee Launch
- Working Group Launch
- All Hands – On Meeting
Tuck Evaluated Opportunities for ACAP To Contribute To Croatia’s Health and Wellness Industries

• Our Ask:
  • Evaluate Croatia’s current capabilities across medical, hospitality, and travel industries
  • Evaluate ACAP’s expectations and definitions for success

• Tuck’s response:
  • Identification of key stakeholders and target markets
  • Mapping of medical tourism ecosystem in Croatia
  • Definition of initial set of services
  • Identification of potential partners
  • External benchmarking
  • Risk assessment

Outcome: Framework for ACAP MTTF pilot program and Long-Term Strategic Considerations
Executive Summary

Project Overview

- Our methodology includes customer research, location visits, in-country research, and secondary research.
- Interview synthesis and secondary research was combined with survey data of American/American-Croatians to create pilot product offerings.
- We propose three product offerings: Rejuvenating Health Retreat, Personalized Lifestyle Medicine Program, Rehabilitation Paradise.

Product Offerings

- Rejuvenating Health Retreat for the American Croatian diaspora.
- Personalized Lifestyle Medicine Program focuses on baby boomers in Europe and European diaspora, in need of lifestyle intervention.
- Rehabilitation Paradise focuses on European customers.

Implementation Blueprint

- Implementation blueprint consists of five broad activities required for successful pilot launch.
- A separate, independent founding organization supported with an appropriate governance infrastructure should be established for pilot launch.
- Initial findings suggest this organization should be incorporated as a non-profit organization for launch.
- ACAP should partner with the government as well as with individual medical/hospitality providers.
Methodology

**Customer Research**
- Created survey to understand needs and motivations of potential customer segments
  - Surveyed ACAP members around the world
  - Current number of responses: 169
  - Survey date deadline: December 22

**Location Visits**
- Visited following locations:
  - Zagreb
  - Krapinske Toplice
  - Rijeka
  - Vukovar
  - Opatija
  - Rovinj
  - Šibenik
  - Split
  - Dubrovnik

**In-Country Interviews**
- Interviewed professionals in:
  - Public medical clinics
  - Private medical clinics
  - Therapeutic wellness centers
  - Luxury Spas
  - Hotels
  - Health tourism start-ups
  - Pharmaceutical industry
  - Leading academic institutions in medical tourism
  - Ministry of Health
  - Ministry of Tourism
  - Regional Prefects

**Secondary Research**
- Researched offerings of competitors in medical and health tourism industry both globally and near Croatia
- Gathered information on promising customer segments, including reading reviews of customers who have tried services around the world
Implementation Blueprint Consists of 5 Broad Activities Required for Pilot Launch

1. Align on initial product offering
2. Establish external founding organization
3. Continue identification, outreach, and diligence of launch partners
4. Draft commercial agreements with launch partners
5. Execute pilot kick-off with coordinated go-to-market strategy
Tuck Recommendation – ACAP Should Follow 2 Paths To Fulfill Mission

• Focused Path
  • Design an Evidence-Based Integrated Medical and Wellness Program attracting North American Customers to Croatia
    • Provide knowledge and experience of North American health care systems, patient expectations, medical and wellness expertise, market access, educational and research opportunities

• Broad Path
  • Assist in designing and implementing systems that establishes Croatia as one of the leading health and wellness destinations
    • Following a successful pilot, assist in designing additional sustainable health and wellness programs

• Current Objective: Focused Path: Developing Pilot project
Pilot Focus – Integrated Medical & Wellness

• Focus
  • Provide patients with knowledge and skills that serves as a foundation for health and wellness
  • Address determinants of health and wellbeing by utilizing advanced scientific techniques to diagnose and treat common disease processes

• Develop
  • Evidence-based medicine, diverse wellness initiatives, and resiliency training to combat stressors associated with aging, chronic disease, and morbidity

• Benefit
  • Patients at risk of developing complications associated with metabolic syndrome and those recovering from cancer
  • Promotion of health, decrease in healthcare utilization, improvement of longevity and quality of life
  • Promote Croatia!
Distinct Value of This Pilot

This pilot aims to implement an Integrated Medical and Wellness Program...

- Customer base selected for successful program and high future potential
- Services leveraging Croatia’s global reputation in medical excellence
- Medical procedures supplemented with wellness and lifestyle medicine
- Partners selected on capability across 4 dimensions: Integrated Wellness, High-touch Hospitality, Croatian Value Proposition, Resiliency Services
- Standard protocol serving patients establishes a strong brand
- Sustainable model of cohesive travel experience

Using an evidence-based approach...

That incorporate softer sciences...

to offer flexibility and scalability.
Target Market: North American Diaspora

American diaspora will lead the way for Americans seeking medical care & build national brand in Croatian quality of medicine & care

Most private hospitals do not have accreditations (JCI or Temos) or affiliations with American institutions to ensure patient safety and earn trust of the broader US

Current medical tourists looking for medical care are predominantly European, even in private clinics/hospitals

1.2M Croats and their descendants in the United States as of today as per Croatia’s state office

Gaps In US Health Care Today:

- **Personal Touch and Continuity:** The American healthcare system lacks continuity in their healthcare ecosystem

- **Affordability:** The affordability of healthcare continues to be an important concern which prohibits patients from seeking preventative diagnostics or care

- **Digital:** Consumers expect digital tools to be a core part of healthcare delivery. The survey finds that respondents preferred digital solutions to phone/in-person solutions for many healthcare interactions

- **Engagement:** Consumers are willing to engage in solutions to reduce healthcare costs, but most believe that they cannot do so today
Determine Target Market
Interview Data and Secondary Research Was Combined with Survey Data of North Americans to Create Pilot Product Offerings

For which of the following services are you most likely to travel to another country?

- Yoga/Meditation: 64
- Stress reduction techniques: 53
- Physical medicine and rehab: 41
- Diagnostic services: 39
- Sleep assessment: 28
- Cardiovascular basic exam: 12
- Occupational mgt. education: 10
- Glucose mgt. education: 8
- Prediabetes screening: 4
- Other: 3

What research did you perform before deciding to visit Croatia?

- Family and friends: 95
- Tourism websites: 59
- Social media: 30
- Magazine: 12
- Newspaper: 8
- Other: 35

Survey Respondents: 169
50% Survey respondents who visited Croatia in past year
95% Survey respondents who were more than likely to travel for health tourism

Reasons for their visit...

- Leisure: 48%
- Culture/Heritage: 32%
- Sports: 6%
- Other: 12%

Survey respondents who were more than likely to travel for health tourism: 95%
Survey respondents who visited Croatia in past year: 50%
Pilot Implementation Team

The team structure was created to address and deliver the multi-faceted complexities of implementing this pilot.

- **Steering Committee**: 10 members
- **Advisory Council (TBD)**
- **Working Groups**: 30 members
  - Business
  - Travel & Hospitality
  - Integrated Medical and Wellness Program
  - Technology / Telemedicine
  - Legal
# Roles of Implementation Team

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<th>Group</th>
<th>Comprised Of</th>
<th>Role</th>
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<tr>
<td>Steering Committee</td>
<td>ACAP members in Croatia and US with expertise in key operational and medical areas of the pilot</td>
<td>Ultimately responsible for planning and execution of pilot launch. Provides quarterly status updates to ACAP Executive Board. Guides Working Groups in the execution of pilot planning and implementation activities</td>
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<tr>
<td>Working Groups</td>
<td>ACAP members in US and Croatia with deep expertise in:</td>
<td>Serves as key source of advice and guidance to the Steering Committee; participates in working groups as requested to accomplish tasks prioritized by Steering Committee based on establish work plan</td>
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<td>• Business</td>
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## Anticipated Timeline To Launch

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1. **Align on initial product offering**
2. **Establish external founding organization**
3. **Continue identification, outreach, and diligence of launch partners**
4. **Draft commercial agreements with launch partners**
5. **Execute pilot kick-off with coordinated go-to-market strategy**

Launch Fall 2022
Priorities for 2021

• Align on Specific Pilot Offering
  • Finalize Specifics of Pilot Program
  • Align pilot offering to operational requirements

• Commence identification, outreach, and diligence of launch partners
  • Establish Partner Selection Criteria
  • Catalog provider ecosystem
  • Benchmark competitors

• Create Purpose-Driven Organizational Entity
Closing Remarks: One year in review

Gratitude for the time and resources donated by individuals, private and public entities, and ACAP members in Croatia and the United States, to implement a best-in-class pilot program for the medical and wellness tourism industry in Croatia.

In One Year:
Multiple All-Hands meetings of ACAP MTTF
Planned and Implemented the Tuck Project
Conducted thorough analysis of information provided by Tuck
Scoped and launched the organizational structure for Pilot Implementation Teams
Created pilot work plan in integration with the Tuck Report to provide directional guidance for implementing pilot
Recruited highly accomplished individuals to design and undertake implementation of pilot
Thank you for your time

Zahvaljujem na pažnji

Photo by Nataliia Kvitovska on Unsplash