



# Croatian Health Travel - Take the Momentum!

**CIHT Conference**

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Welcome to  
2020

**Covid-19**

**Social Distancing**

**New Normal?**

**UNWTO: Unprecedented decrease of  
international tourism arrivals  
70% world-wide and 68% in Europe**

# Global Initiatives for Tourism Recovery

## World Tourism Organization - UNWTO:

International tourism arrivals expected to drop 70% for the whole 2020 mainly due to travel restrictions

Rebound in international demand by Q3 2021

International Code for the Protection of Tourists

## World Travel & Tourism Council - WTTC:

Croatia

„Safe Travels” global protocols and stamp for the New Normal  
Travel & Tourism - historically, one of the fastest growing sectors in the global economy



# Innovating after the pandemic



**Survival Kit  
Strategies:**

**New source  
markets**

**New consumer  
segments**

**New business  
models**

**Alternative  
revenue streams**

## THE GREAT RESET: INNOVATE - DIGITALISE - EMBRACE SUSTAINABILITY

### Travel Innovation after Coronavirus



Source: Euromonitor International

# Tourism in Europe – What's Next?



## ETC Handbook on Covid-19 Recovery Strategies for National Tourism Organizations

### Changes in travel preferences in 2020

- Concern about wellbeing, air quality and environmental impact
- Need for open spaces, fresh air and private accommodation
- Active holidays, including fitness, hiking, cycling
- Domestic travel

### Recommendations for NTOs

- Developing a new sustainable tourism ecosystem
- Partnerships with the tourism sector, academia, tech companies, and experts in sustainable business practices

**Tourism in Europe: 9.5% GDP and 22.6 million jobs**

# Health Travel & Tourism in Europe

Europe - the oldest and most developed spa region in the world, and the largest spa & wellness market (approx. 30%)

Health related revenues in EU: approx. EUR 47 billion (4.6% of all tourism)

According to Statista (2018):

- 5% European citizens receive medical care in another EU country
- 33% of them are willing to travel to receive medical care in another EU country
- 53% are willing to travel accross EU to get medical care of a better quality

EU Cross-border Healthcare Directive: 70% of patients' flow occurs in neighbouring countries → bilateral schemes avail cross-border health care between EU states

# Yet, the Good News are...



- ✓ 80% European travellers choose Europe as a destination (UNWTO)
- ✓ 40% European travellers take a car (UNWTO)
- ✓ 27% European trips are motivated by family visits, health and religion (UNWTO)
- ✓ 54% Europeans plan to travel within six months, 80% within Europe, and for 35% health & safety and piece of mind are decisive factors (ETC)
- ✓ Europe remains the most competitive region with 6 out of the top 10 performing countries (TTCI)
- ✓ For 74% travellers, destinations' health/safety certificates are the top priority (Travel Consul)

# New Paradigms in Health Travel & Tourism

**Stay Healthy!**

New	Old
Preventing sickness	Treating illness
Promoting wellbeing for all	Wellness available to certain clients
Personalized medical services	„One size fits all” medical approach
Less invasive & more preventative treatments	Invasive treatments and diagnostics
Patient-centred health care	Providers-centred health care
Digital tools as „a must have”	Digital tools as „optional”





**"Just for the record  
darling, not all positive  
change feels positive in  
the beginning."**

**—S. C. Lourie**

**Parade**

# Health Travel & Tourism in Croatia

Segments: wellness, health spas, medical

- Primary vs. secondary wellness guests

Relaxation

Physical  
therapy

Dental  
services

Rehabilitation

Promotion: CNTB + Kvarner Cluster + a few more...

**Statistics?**

**Benchmarking?**

**Joint promotion?**

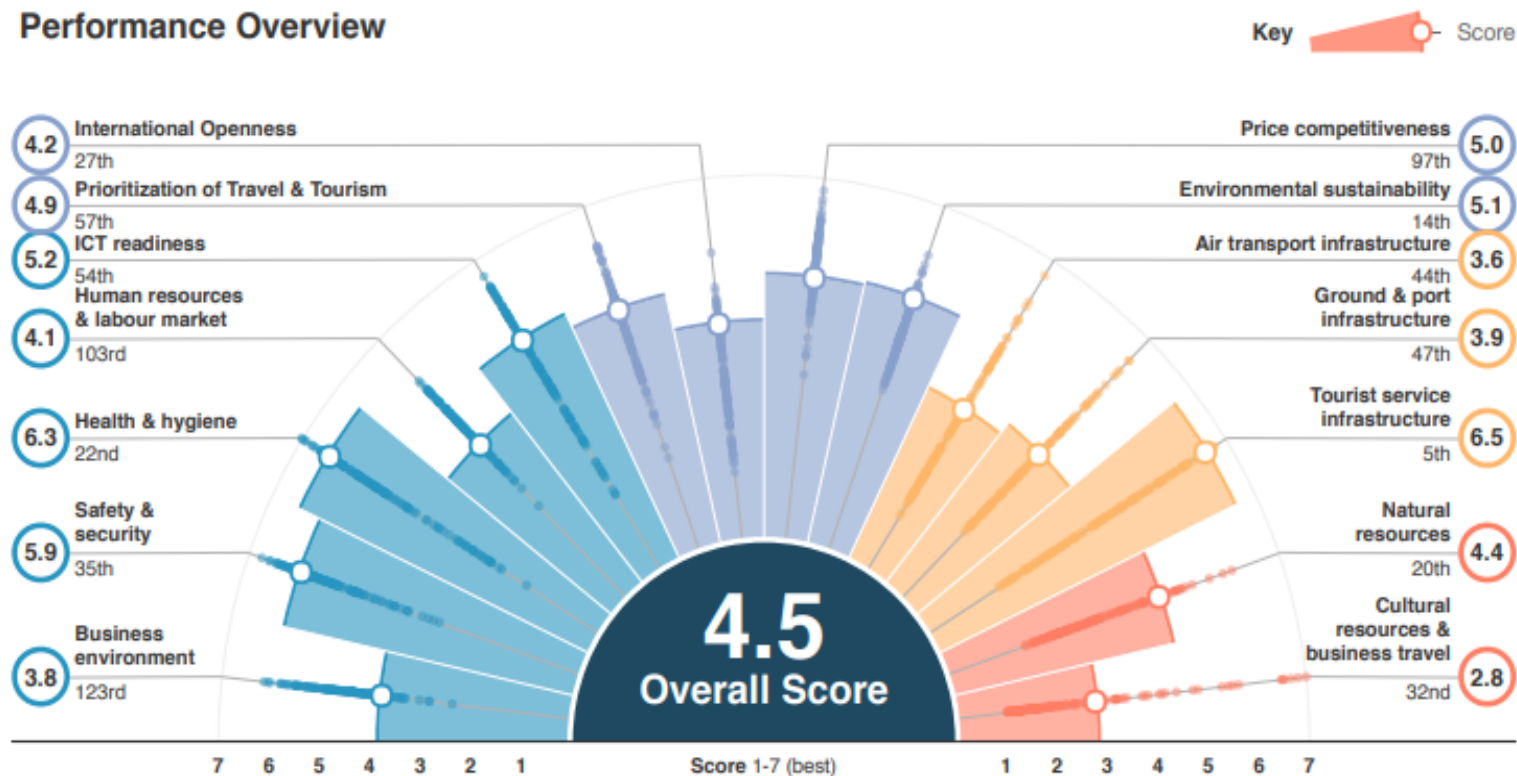
## Key Indicators

Sources: World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTC)

International tourist arrivals	15,592,900
International tourism inbound receipts	US \$10,924.2 million
Average receipts per arrival	US \$700.6
T&T industry GDP	US \$6,685.1 million
% of total	10.9%

T&T industry Share of GDP	% GDP	10.9
T&T industry employment	140,900 jobs	
% of total		10.0%
T&T industry Share of Employment	% total employment	10.0

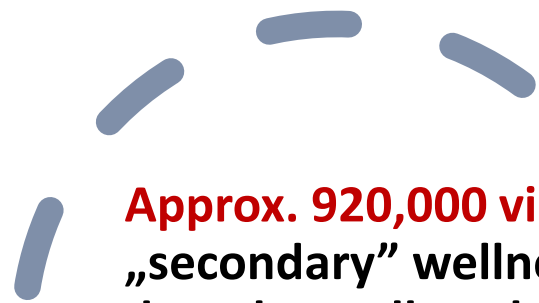
## Performance Overview



## Travel & Tourism Competitiveness Index 2019

**Overall rank:**  
**27<sup>th</sup> of 140 countries**  
**(32<sup>nd</sup> in 2017)**

5<sup>th</sup> Tourist service infrastructure  
 14<sup>th</sup> Environmental sustainability  
 20<sup>th</sup> Natural resources  
 22<sup>nd</sup> Health & hygiene

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**Approx. 920,000 visitors motivated by health** (including „secondary” wellness and spa guests, one-day visitors, dental travellers, local and international visitors)

Medical segment: approx. 275,000 arrivals

Employment  
Labour skills  
Visa regime  
Infrastructure  
Country branding  
Travel & transport  
Retail  
Agro-food sector  
Technology

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**Estimated  
overall  
turnover  
585 mil EUR**

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**Effects on the  
Croatian  
Economy**

**570,000 visitors travel exclusively for health - 400 mil EUR turnover!**

# Take the Momentum!

- Adapt to „hybrid times“ and become stronger – INNOVATE!
- Apply „smart“ initiatives & new strategies for the New Normal – DIGITALISE!
- Shape sustainable health tourism offer and find new markets - EMBRACE SUSTAINABILITY!



# What's in It for Croatia?

Healthy lifestyle & clean environment

Social/physical distancing

Personalized health care

Digital health solutions

Digital nomads

New market segments

✓ **50% of all tourists visited Croatia 3+ times**

✓ **50% of health tourists visited Croatia 6+ times**

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## Stay Healthy & Be Safe

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Healing remedies: aerosols, thalassotherapy, thermal springs, mild climate, 250 days of sunshine

The healthiest diet in the world (by UNESCO):  
Mediterranean diet, organic food

Easy going lifestyle („fjaka”) and clean environment

Low incidence of crime, safety protocols in place

Sustainability is the „new must have” – going green

**Why not: offering packages and bundling with a certain „healing” guarantee?**

# BAGATIN

CLINIC



Sv. Katarina

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## Smart & Digital

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Personalized health care is here to stay: example of St. Catherine Special Hospital, Croatia - a pioneer and collaborating partner of Mayo Clinic

Holistic medical services available and recognized

Apply smart technologies and remote services

Tech companies and „unicorns” in Croatia – a road to innovative digital health solutions

**Why not: establishing a Croatian health travel portal offering online medical second opinion 24/7?**



## New Markets & Segments

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Targeting visitors who know well the country: 50% or 10 mil in 2019 / e-visitor registration system

Important: proximity, pricing and trust

Find strategic B2B and B2G partners on promising source markets and build up your network

Join marketing alliances (example: European Route of Historic Thermal Towns)

Why not: launching a unique health care offer for all digital nomads coming to Croatia?

## A Few Ideas to Consider

Accreditations and certifications on destinations' health & safety, quality assurance, international labels

Close collaboration with insurance companies on selected source markets

Croatian guidelines for the health travel & tourism sector and a clear value proposition for its services

Attracting international medical students to ensure medical staff and boost network on those markets

Bilateral agreements with selected destinations on well-known, easy accessible markets (Slovenia?)

Setting up Outpatient Departments/Camps

Converting low-performing hotels and resorts into medical hotels or health climate resorts

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# Why not in Croatia?

Covid-19 Information



RESORTS

RESIDENCES

WELLBEING

SUSTAINABILITY

OFFERS

MAGAZINE

INFO ENG

BOOK

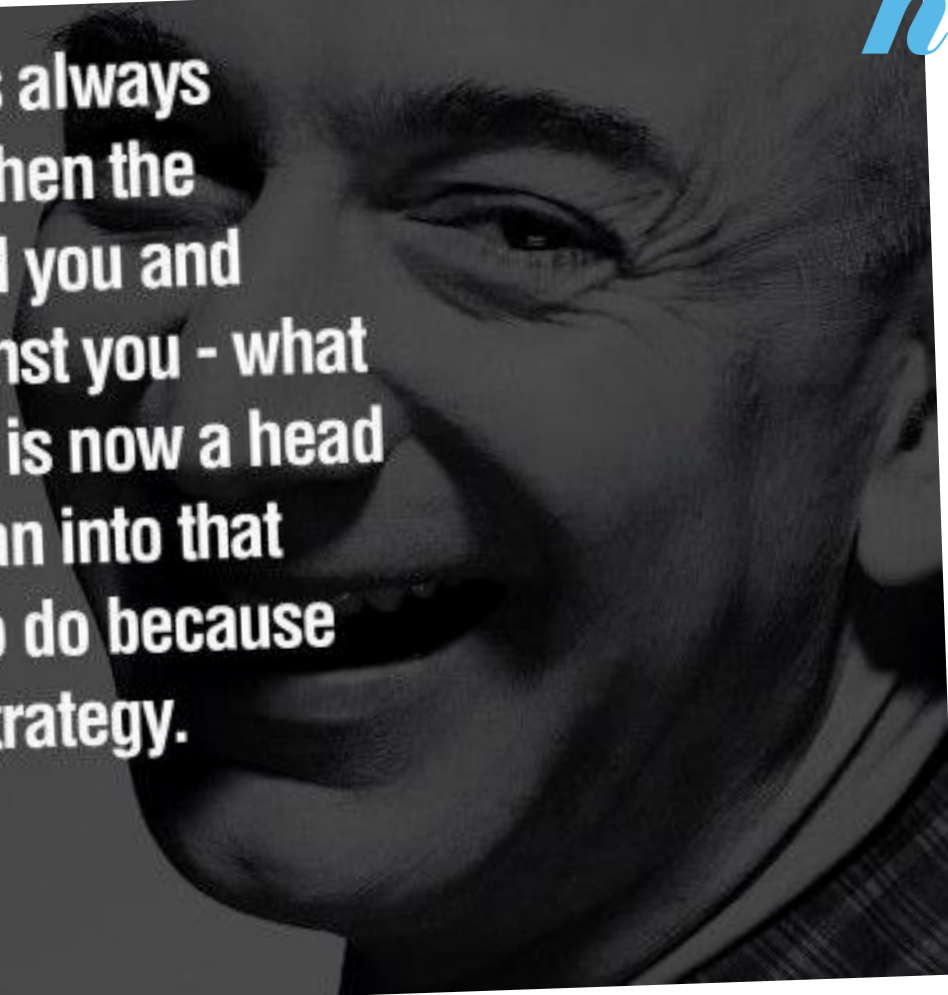
Personal wellness should  
never overlook  
environmental wellness



**What we need to do is always lean into the future; when the world changes around you and when it changes against you - what used to be a tail wind is now a head wind - you have to lean into that and figure out what to do because complaining isn't a strategy.**



*Jeff Bezos*  
*[www.geckoandfly.com](http://www.geckoandfly.com)*



**Thank you & stay healthy!**

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*hti*

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