Planning for Change in the Health Industry

LA FONDATION POUR LA FORMATION HÔTELIÈRE
The global aspect of health-tourism development

Type of health-tourism services and facilities

- Wellness
  - Holistic
  - Spiritual
  - Yoga
  - Aromatherapy
  - Meditation
  - Beauty
  - Fitness
  - Pampering

- Medical
  - Hospital
  - Clinic
  - Medical treatment
  - Recreational therapy
  - Rehabilitation
  - Medical care
  - Surgery
  - Dentistry
  - Plastic surgery

- Therapies and Detox Programs
  - Detox
  - Spa
  - Chiropractic
  - Acupuncture

Cruises
- Health motivated travel
- Longevity
- Complementary and alternative medicine
- Specialty hospitals
- Hospital (general)
- Hospital (teaching)
- Hospital (private)
- Hospital (international)

Health-tourism development
Starting points of health tourism development
The economic effects of health tourism services

Research Framework
Research questions

1) Are the requirements for health tourism development well presented in the Croatian strategic documents, and to what extent?

- Croatian National Health Care strategy 2012-2020
- Croatian Tourism development strategy 2014-2020
- National program – Action plan for health tourism development
- Strategic documents on the counties level

2) Is the development of health tourism in Croatia, following the global trends and tourism market needs?

3) Is Croatian education framework designed to be able respond to the challenges of health tourism development, following the global trends and tourism market needs?

Are the requirements for health tourism development well presented in the Croatian strategic documents, and to what extent?
Is the development of health tourism in Croatia, following the global trends and tourism market needs?

They are not sufficiently using resources and potentials for health tourism development.

Yes / No

Tourism market needed?

Croatia, following the global trends and development of health tourism in
### Percent Participation of Some Wellness/Spa Services

<table>
<thead>
<tr>
<th>Service</th>
<th>Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average number of sports and recreation activity, based on using the swimming pools</td>
<td>83.6%</td>
</tr>
<tr>
<td>Average number of sauna beneficiaries</td>
<td>6.6%</td>
</tr>
<tr>
<td>Average number of massage beneficiaries</td>
<td>5.3%</td>
</tr>
<tr>
<td>Average number of beauty programs beneficiaries</td>
<td>3.0%</td>
</tr>
<tr>
<td>Average number of fitness beneficiaries</td>
<td>0.9%</td>
</tr>
<tr>
<td>Average number of membership cards</td>
<td>0.3%</td>
</tr>
<tr>
<td>Average number of dermatological cosmetology programs</td>
<td>0.2%</td>
</tr>
<tr>
<td>Average number of diet, healthy eating and nutrition programmes</td>
<td>0.1%</td>
</tr>
</tbody>
</table>

### Revenue

- **Revenue from sports/recreation activity in swimming pools**: 50.24%
- **Revenue from the use of saunas**: 11.31%
- **Revenue from different kind of massages**: 15.01%
- **Revenue from the beauty programmes**: 8.51%
- **Revenue from sales wellness/spa products**: 4.61%
- **Revenue from nutrition, healthy eating and diet programmes**: 0.32%
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- 1% consumption
- water
- 6% cost of energy spent
- 51% payroll and expenses related to payroll
- 7% medical supplies.
- 4% the costs of medical equipment
- 23% other costs
- 3% maintenance services for wellness/spa services
- 5% the cost of food and drinks
- 7% the costs of specific materials
- 0.01% the costs of external external costs
Is Croatian education framework so designed to be able to respond to the challenges of health tourism development?
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CONTENT OF HEALTH TOURISM CURRICULA ANALYSIS

Skills and Abilities

Subjects in Tourism and Health Industry

GAP 2

GAP 1

Academic

Tourism Industry

Tourism Survey

Skills on Industry

Skills on Educational Institutions and other sectors

Industry Leaders and Spa Businesses and Management

Seek out Industry, Education and other opportunities and support

Communicate key skills needs, offer

Support / Guidance / Training Providers

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Croatia is not globally recognised as an important health tourism (medical, wellness, spa) destination, yet employees generally provide services under the contract of the NHI, and only the 8% of employees are fully oriented to meet the needs of customers from external markets (what health tourism wants to be).

It should assess significant improvements in the existing wellness/spa services, following the best practice experiences and strategic documents. It is necessary to implement specific education programmes whose outcomes can significantly improve the quality level and market orientation in the health-tourism business.

Special emphasis should be placed on acquiring the specific knowledge, skills, and competences of those specialists which can change the assortments of current services in the field of medical wellness and spa services.

It should assess significant improvements in the existing wellness/spa services, following the best practice experiences and strategic documents. It is necessary to implement specific education programmes whose outcomes can significantly improve the quality level and market orientation in the health-tourism business.

Croatia provides a good starting point, but it is important to establish more cooperation between business and education institutions.

CONCLUSION