

Health Tourism in the Istria County

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SVEUČILIŠTE U RIJECI
Fakultet za menadžment u turizmu i ugostiteljstvu
Sveučilišni prijediplomski studij

DORA IVANOVIĆ

**Zdravstveni Turizam u Istarskoj Županiji – Potencijali i
Perspektive**

Health Tourism in the Istria County – Potentials and Perspectives

Završni rad

Zabok, 2024.

SVEUČILIŠTE U RIJECI
Fakultet za menadžment u turizmu i ugostiteljstvu
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Poslovna ekonomija u turizmu i ugostiteljstvu
Studijski smjer: Menadžment u turizmu

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Perspektive**

Health Tourism in the Istria County – Potentials and Perspectives

Završni rad

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Zabok, kolovoz 2024.



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Health tourism in the Istria County – Potentials and Perspectives

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Sažetak

Ovaj rad istražuje potencijale i perspektive zdravstvenog turizma u Istarskoj županiji, s posebnim naglaskom na wellness turizam kao ključnu komponentu ove grane turizma. Istraživanje se fokusira na informiranost hrvatskih građana o wellness ponudi u regiji te analizira zdravstveni turizam s posebnim osvrtom na wellness usluge. Provedena anketa ispitala je svijest, percepciju i navike građana, osobito stanovnika Zagreba, u vezi s korištenjem zdravstvenih i wellness usluga u Istri. Rezultati su pokazali visok stupanj prepoznatljivosti pojma zdravstvenog turizma, ali i nedostatak informiranosti o specifičnim destinacijama i uslugama u Istri.

Iako je samo mali dio ispitanika koristio wellness usluge, što ukazuje na potrebu za dodatnom promocijom i razvojem ponude, wellness turizam u Istarskoj županiji ima značajan potencijal za daljnji rast. Ovaj razvoj je posebno važan u kontekstu smanjenja sezonalnosti i produženja turističke sezone. Zaključeno je da su potrebna dodatna ulaganja u promociju, poboljšanje infrastrukture te razvoj specijaliziranih wellness programa kako bi se u potpunosti iskoristili svi resursi koje regija nudi.

Ključne riječi: turizam; wellness; Istra.

Summary

This paper explores the potentials and perspectives of health tourism in Istria County, with a specific focus on wellness tourism as a key component of the broader health tourism sector. The research examines the awareness of Croatian citizens regarding wellness offerings in the region and analyzes health tourism with a particular emphasis on wellness services. The survey conducted assessed the awareness, perceptions, and habits of citizens, particularly those from Zagreb, concerning the use of health and wellness services in Istria. The findings revealed a high level of recognition of the term "health tourism," but a lack of awareness regarding specific destinations and services in Istria.

Although only a small portion of respondents had used wellness services, which highlights the need for enhanced promotion and development of offerings, wellness tourism in Istria County holds significant potential for further growth. This growth is particularly crucial in the context of reducing seasonality and extending the tourist season. It was concluded that additional investments in promotion, infrastructure improvement, and the development of specialized wellness programs are necessary to fully capitalize on the resources the region has to offer.

Key words: tourism; wellness; Istria.

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Introduction

Tourism is one of the most important and fastest-growing sectors of the global economy, with its significance reflected in its contribution to the social and economic development of many countries. Within the broader framework of tourism, health tourism stands out as an increasingly important segment, encompassing various forms of travel aimed at improving or maintaining health. Wellness tourism, as one of the key components of health tourism, includes activities focused on achieving physical, mental, and spiritual well-being, such as visits to spa centers, participation in detox and relaxation programs, and engagement in various holistic practices. The global growth of wellness tourism is driven by increasing awareness of the importance of a healthy lifestyle and personal well-being. Countries around the world recognize the potential of this sector and are investing in the development of infrastructure that supports wellness activities, enabling them to generate stable revenues regardless of seasonal fluctuations in traditional tourism. Wellness tourism not only attracts a growing number of visitors but also promotes sustainable development of local communities by creating new jobs and promoting healthy lifestyle habits. In Croatia, and particularly in the Istria County, wellness tourism has significant potential for further growth and development. Istria, known for its natural beauty and rich cultural heritage, is already recognized as an attractive tourist destination. However, it is necessary to further investigate to what extent potential tourists, especially domestic visitors, are informed about the wellness offerings in this region and how well they align with global trends.

1. Purpose and Objectives of the Study

This paper aims to explore the potentials and perspectives of health tourism, focusing on wellness tourism in the Istria County as its key component. The special focus of the paper will be placed on the awareness of Zagreb's citizens about this type of tourism. The research will combine primary and secondary research to obtain a comprehensive picture of the current state and development possibilities of wellness tourism in Istria. The secondary research will include a review of academic literature and existing data on global and local trends in wellness tourism, with an emphasis on the available infrastructure and successful business models in Istria County.

The primary research is based on a survey conducted among the citizens of Zagreb, aimed at assessing their awareness and knowledge of the wellness offerings in Istria and their preferences when choosing wellness destinations. The study will use a non-probabilistic convenience sampling method, targeting the adult population of Zagreb, with equal gender representation and various educational levels. Zagreb has been chosen due to its demographic diversity and geographical proximity to Istria, which increases the likelihood that its residents visit this region and participate in wellness activities.

The following hypotheses have been established for the study: H1: The majority of Zagreb residents are familiar with the concept and importance of health tourism; H2: Despite the widespread recognition of the term "health tourism," there is a lack of awareness about the overall health tourism offerings in Istria; H3: A significant majority of Zagreb citizens have used health tourism services in Istria at least once; H4: Most respondents have exclusively used the wellness offerings of Istria County. The main research question relates to the level of awareness among Zagreb residents about health tourism in Istria, while additional research questions include the use of health and wellness services and engagement in alternative forms of health tourism, such as eco-gastronomy, horseback riding, or cycling.

The results of this study will provide insights into the level of awareness of wellness tourism in Istria among Zagreb's citizens and identify potential weaknesses in the framework of health tourism, offering a clearer perspective for the development of future business strategies in this region.

1.1. Data Sources and Research Methods

The data sources and research methods used in this paper are designed to thoroughly investigate the potentials and perspectives of wellness tourism in the Istria County, with a special focus on the awareness of Zagreb's citizens about this type of tourism. Secondary data were collected from academic articles, professional publications, reports from tourism organizations, and relevant literature on health and wellness tourism. These sources will enable a deeper understanding of global and local trends, a comparison with other well-known destinations, and an analysis of existing business models and infrastructure in Croatia, with a particular emphasis on Istria County.

Primary data were collected through a survey conducted among the citizens of Zagreb. The survey investigates awareness, knowledge, and perception of wellness tourism in Istria, as well as preferences when choosing wellness destinations. The sample for the survey was selected based on a non-probabilistic convenience sampling method, targeting a diverse adult population in Zagreb. The questionnaire is structured to cover key aspects of the wellness offerings in Istria, including the types of services respondents prefer, their experiences with wellness tourism in Istria, and their plans for future visits.

By combining qualitative and quantitative analysis, this paper will provide a comprehensive overview of the state of wellness tourism in Istria County. The qualitative analysis of the literature will enable an understanding of the structure and dynamics of the wellness sector, while the quantitative analysis of the survey results will provide concrete insights into the awareness, preferences, and behavior of Zagreb's citizens as potential users of wellness services in Istria.

1.2. Structure of the Paper

The structure of this paper is designed to progressively address the topic of wellness tourism in the Istria County, starting from general theoretical frameworks to a detailed analysis of specific examples and an assessment of potential for future development.

The first chapter defines the subject and aim of the paper, explaining the data sources and research methods used for gathering and analyzing information. This chapter also provides an overview of the paper's structure, introducing the reader to the subsequent sections and laying the groundwork for understanding the topic.

The second chapter addresses the general theoretical framework of health tourism, offering relevant definitions, an analysis of the key elements of this sector, and an overview of global

trends and their impacts. This chapter also explores successful health tourism models with a case study of Thailand, serving as a comparison with the Croatian context.

The third chapter focuses on the development of health and wellness tourism within Croatia. It analyzes various health tourism models, with special emphasis on the example of Krapina-Zagorje County, which stands out as a significant destination for health tourism. This chapter lays the foundation for understanding how wellness tourism is integrated within the broader framework of health tourism in Croatia.

The fourth chapter concentrates on wellness tourism in the Istria County. It reviews the current status of tourism in Istria, analyzes the existing wellness infrastructure, and conducts an assessment of market demand and supply. This chapter also includes an analysis of the survey results regarding the awareness of Zagreb's citizens about wellness tourism in Istria, providing key insights into the perceptions and interests of potential tourists.

The fifth chapter analyzes the potentials and perspectives of wellness tourism in Istria County, identifying key opportunities and challenges, and proposing strategies to enhance the wellness offerings in the region. This analysis is based on previous research and survey data, offering guidelines for future steps. Finally, the sixth chapter presents the conclusion, summarizing the main findings and results of the research. This chapter provides a final reflection on the research questions and hypotheses posed and offers suggestions for future development initiatives and business strategies in the field of wellness tourism in Istria County.

2. Theoretical Framework

In the chapter on the general theoretical framework, the paper will provide a thorough understanding of health and wellness tourism as concepts, exploring key terms and definitions. This section of the paper will serve as a foundation for understanding how health and wellness tourism have developed and how they are applied in various contexts, with a special emphasis on global trends and influences. The study of fundamental elements and successful models in this sector will enable an understanding of how these forms of tourism have evolved and how they contribute to the sustainable development of destinations, with a particular focus on examples from around the world and their implications for Croatia.

2.1 Basic Concepts and Definitions

Tourism has historically often been equated with the act of traveling itself, where travel was understood as a basic human activity without detailed analysis of its purposes or impacts. As tourism developed into an industry, the need for more precise definitions arose to encompass all aspects of this complex activity. Various authors and organizations have developed specific definitions to better understand the nature and scope of tourism. Over time, these definitions have become crucial for understanding tourism as a social and economic phenomenon, with particular emphasis on the different types of travel and activities it involves.

The World Tourism Organization (UNWTO) particularly emphasizes the importance of distinguishing between the terms "travel" and "tourism." According to the UNWTO, travel refers to the activity of travelers, while tourism is defined as the activity of visitors. A visitor, according to this definition, is a traveler who takes a trip to a main destination outside their usual environment for a period shorter than one year, with a clearly defined purpose that can be business, recreational, or other, but which does not include employment in an entity based in the country or place being visited.¹

One important branch of tourism that has gained significant attention in recent decades is health tourism. This form of tourism involves people traveling outside their usual environment with the primary aim of improving or maintaining their health through medical treatments, spa services, or rehabilitation (Connell, 2011; Lunt, Horsfall & Hanefeld, 2015).

Within health tourism, wellness tourism stands out as a distinct segment and the focus of this paper. While health tourism primarily focuses on treatment and medical interventions, wellness tourism is aimed at enhancing personal well-being through activities that promote

¹ <https://www.unwto.org/glossary-tourism-terms> (accessed 01.08.2024)

physical, mental, or spiritual health. According to Smith and Puczko (2014) and Voigt and Pforr (2013), wellness tourism refers to travel motivated by the desire to improve overall health and quality of life through activities such as spa treatments, yoga, meditation, and other holistic practices. This form of tourism is gaining increasing importance, especially in the context of contemporary trends that emphasize the importance of maintaining a healthy lifestyle.

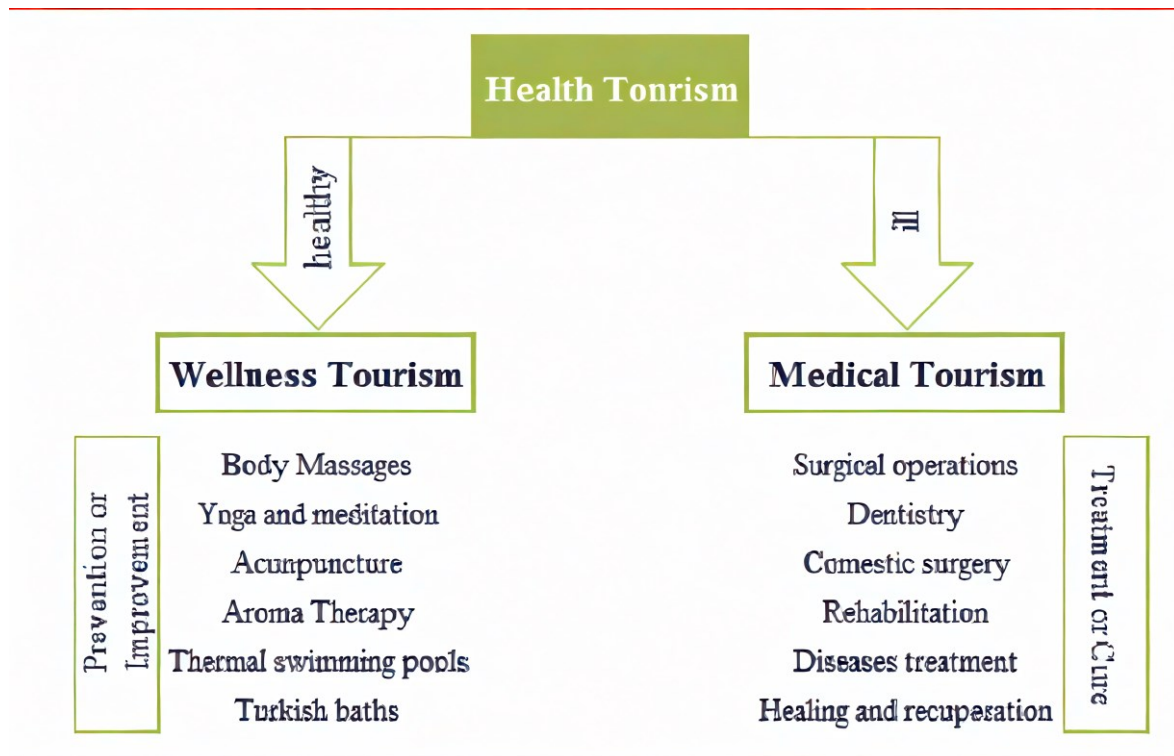
Distinguishing between health and wellness tourism is crucial for understanding their different goals and approaches. While health tourism is focused on specific medical needs and treatments, wellness tourism takes a holistic approach, aimed at prevention and the overall improvement of quality of life.

2.2. Elements of Health Tourism

Health tourism consists of several key elements that are vital for understanding the broad context and focus of this paper. These elements allow for a clear differentiation between various types of health tourism, helping to identify the specific needs and motives of tourists. Understanding these elements is crucial for analyzing how health tourism can contribute to regional development, especially in the context of destinations such as Istria County.

According to the research by Santinha, Gonçalo, Breda, Zélia, and Rodrigues, Vítor (2015), health tourism is divided into two main segments: medical tourism and wellness tourism. Medical tourism is intended for individuals with specific health issues and includes a wide range of services such as surgical operations, dental treatments, cosmetic surgeries, rehabilitation, treatment of diseases, healing, and recovery. On the other hand, wellness tourism is aimed at healthy individuals seeking ways to enhance their overall well-being and includes activities such as body massages, yoga and meditation, acupuncture, aromatherapy, thermal baths, Turkish baths, and similar practices.

Further information on these elements reveals that medical tourism often involves traveling abroad to take advantage of more affordable or specialized healthcare that may not be available in the country of origin.



Graph 1 Elements of health tourism

Source: https://www.researchgate.net/figure/The-health-tourism-system_fig1_275887240

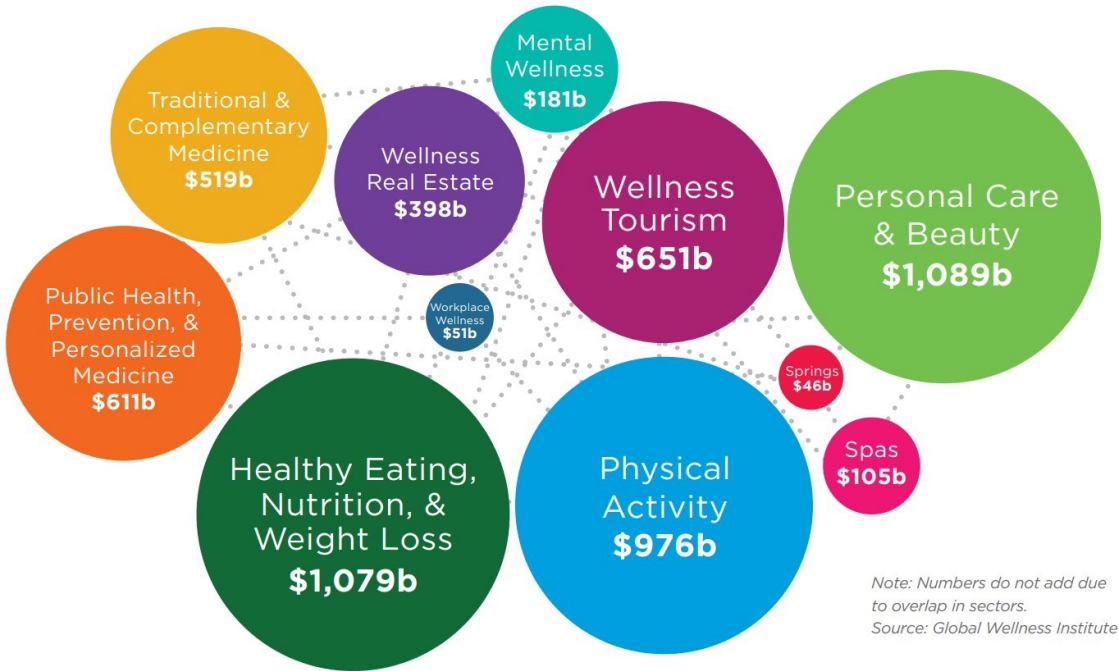
In this segment, patients often seek high-quality medical services that include the latest technologies and specialists in certain fields. On the other hand, wellness tourism, although focused on prevention and health maintenance, is increasingly attracting tourists due to the growing awareness of the importance of a holistic approach to health. Activities in wellness tourism are often associated with the natural resources of the destination, such as thermal springs and medicinal plants, which further enhance the appeal of these services. This is particularly relevant in the context of this paper, given the attractiveness of Istria County in this regard.

2.3. Global Trends and Influences

According to the Global Wellness Institute report, the so-called wellness economy continued its growth in 2022, reaching a value of \$5.6 trillion. Forecasts indicate further expansion, with an expected increase to \$8.5 trillion by 2027, at an average annual growth rate of 8.6%. Specifically, wellness tourism reached a value of \$651 billion in 2022, with projections that this amount will grow by approximately 16% annually in the coming years.² This continuous growth

² <https://globalwellnessinstitute.org/global-wellness-institute-blog/2024/04/30/wellness-tourism-initiative-trends-for-2024/> (accessed 19.07.2024)

makes wellness tourism one of the most important segments within the broader wellness economy, and with new trends emerging, the forecasts of future rapid growth are not surprising.



Picutre 1 Global wellness economy 2022.

Source: https://globalwellnessinstitute.org/wp-content/uploads/2023/11/GWI-WE-Monitor-2023_FINAL.pdf

According to market trends, several key trends are shaping the future of this sector:

1. **Personalization:** The growing demand for services tailored to individual needs, including personalized diet plans, fitness programs, and spa treatments, is leading to a more individualized approach to wellness.
2. **Wellness Staycations:** The COVID-19 pandemic has sparked a trend in local wellness tourism, where consumers utilize wellness services within their own countries or even their homes, instead of traveling to distant destinations.
3. **Focus on Gut Health and Immune-Boosting Treatments:** Increasing awareness of the importance of gut health and a strong immune system has led to the rise in popularity of treatments aimed at improving these aspects of health, including probiotics, specialized diets, and immune-boosting treatments.
4. **Technology in Wellness:** The integration of technology into wellness services, such as health tracking apps, virtual fitness programs, and wearable technology for monitoring physical activity and health parameters, is becoming increasingly widespread.
5. **Environmental Sustainability:** Rising environmental awareness is influencing consumer preferences, with more people seeking eco-sustainable wellness services and

destinations that implement green practices, such as using renewable energy and reducing waste.

The growth of the wellness tourism industry, supported by key trends like service personalization, wellness staycations, and a focus on health, is further driven by essential factors that influence the increased consumption of wellness services. Among the most important factors are the aging population and the rising prevalence of chronic diseases, which increase the need for preventive and rehabilitative wellness treatments. The high costs of the traditional healthcare system also encourage consumers to seek alternative ways to maintain health and well-being, which includes increasingly popular wellness services that are often more affordable and integrated with natural resources. In addition to these factors, the increased awareness of a healthy lifestyle and changes in consumer preferences play a significant role. Technological advancements also play a significant role by making wellness services more widely accessible, including online and virtual options, while the growing focus on mental health and sustainability contributes to the popularity of destinations and services that offer a holistic approach to well-being.

2.4. Successful Models of Health Tourism

There are numerous successful examples of health and wellness tourism models within Croatia. Destinations across the country demonstrate how the combination of high-quality services, natural resources, and cultural heritage can attract a wide range of visitors. Local examples, including those discussed in this paper, show how Croatia is leveraging its assets to develop this form of tourism. The availability of wellness centers, thermal spas, and medical tourism facilities highlights the growing significance of health and wellness tourism as a strategic segment within the Croatian tourism industry. These domestic examples illustrate how proper infrastructure, promotion, and sustainable resource management contribute to the success of this tourism sector.

However, to gain a broader understanding and to contextualize the Croatian experience, it is essential to look at successful models outside the Republic of Croatia. International destinations have effectively integrated high-quality medical and wellness services, combined with unique natural resources and targeted marketing efforts. Examining global examples offers valuable insights into best practices, innovative approaches, and the importance of aligning with global trends. These international models, through their adaptation to the needs and preferences of global tourists, demonstrate the significance of staying competitive on the world stage while maintaining a sustainable approach to tourism development.

2.4.1. The Example of Croatia

The wellness tourism sector in Croatia, particularly in Istria, has grown significantly, positioning itself as a crucial component of the country's health tourism industry. Although wellness tourism is the most visible and widely promoted segment, other aspects such as medical and spa tourism also play a substantial role in the region's health tourism offerings. This multifaceted approach to health and wellness tourism makes Istria a prominent player in Croatia's overall tourism strategy. Istria's natural resources, such as thermal springs and the Mediterranean climate, have contributed to its reputation as a destination for relaxation and recovery, particularly in the post-pandemic era when demand for preventive and rehabilitative care has surged.

Although Istria still lags behind global leaders in health tourism, such as Thailand, which has established a world-renowned medical tourism infrastructure, the region has made significant strides in developing its health tourism sector. Istria's history of promoting health-focused travel dates back centuries, with its active vacation offerings serving as a model for healthy living. Today, this tradition continues with a wide range of options, including elite wellness hotels, medical and dental clinics, and spa facilities. As noted by Pačić, the region's thermal springs and specialized medical centers are highly popular among tourists, solidifying its place in the health tourism landscape (Pačić, 2001.)

Among the most renowned health tourism establishments is the Orthopaedic and Rehabilitation Hospital Martin Horvat in Rovinj. Established during the Austro-Hungarian period in 1888, the hospital has maintained a strong reputation for orthopedic rehabilitation, thanks to its combination of modern medical treatments and its therapeutic Mediterranean environment. The facility has adapted to modern medical needs by offering physical therapy, electrotherapy, and hydrotherapy, and in 2017, it introduced a medical-therapeutic beach for individuals with disabilities, further strengthening its role as a leading health tourism destination.

In addition to the hospital, several other institutions in Istria contribute to the region's medical tourism sector. The Morelato Dental Polyclinic in Poreč offers advanced dental care services, such as implantology, orthodontics, and oral surgery, supported by state-of-the-art diagnostic equipment. The Rident Dental Centre similarly offers comprehensive dental services in a modern facility, making dental tourism a growing market segment in Istria. With a focus on quality and affordability, these clinics attract international visitors seeking high-standard treatments at competitive prices.

The Mythos Medical Spa in Medulin is another notable example, blending wellness and medical tourism by offering services such as anti-aging therapies, weight-loss programs, and rehabilitation treatments. This facility appeals to tourists who want to combine relaxation with medical treatments in a luxurious setting, underscoring the region's versatility in meeting diverse health tourism demands.

In recent years, Istria's health tourism infrastructure has benefited from strategic investments aimed at boosting its competitiveness. The Histria Medic center in Poreč provides a wide array of medical services, from general diagnostics to specialized treatments in neurology and urology. The availability of such comprehensive medical services has helped diversify Istria's health tourism offerings beyond traditional wellness and spa services.

Despite these advancements, the National Health Development Plan 2021-2027 emphasizes the need for continued investments in infrastructure and promotion. Medical tourism in Istria accounts for a relatively small share of the region's overall tourism product, but it holds significant growth potential. The Istria Master Plan 2015-2025 highlights that with further development, the region could become a major health tourism destination in Europe, particularly in areas like dental, orthopedic, and rehabilitative care.

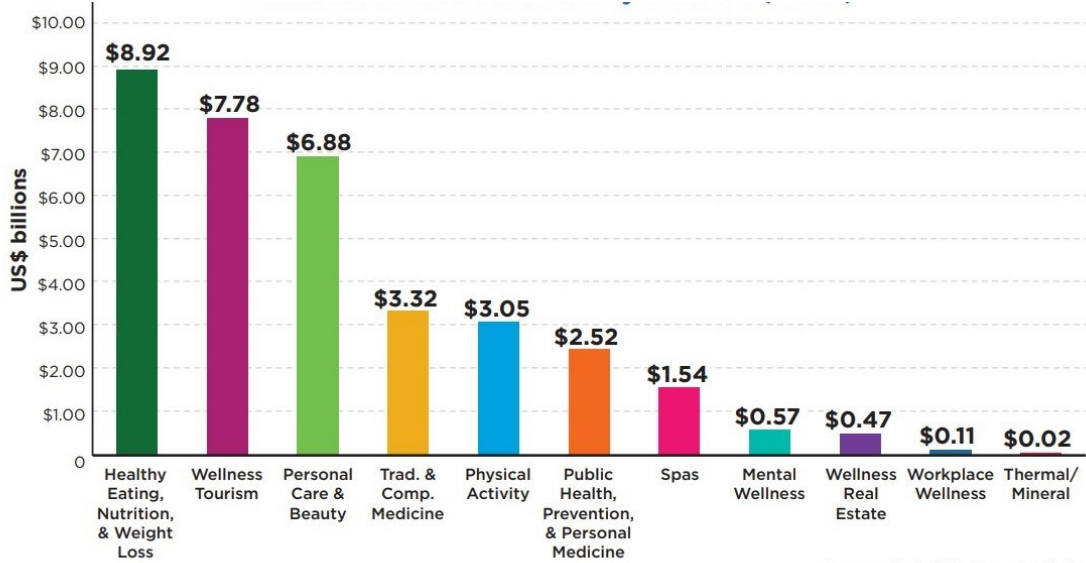
In conclusion, health tourism in Istria has grown steadily, thanks to its rich natural resources, high-quality medical services, and strategic investments. The region's health institutions - ranging from orthopedic hospitals to advanced dental clinics - are contributing to its emergence as a competitive destination for health tourism in Europe. By focusing on promoting its diverse medical offerings and continuing to invest in infrastructure, Istria is well-positioned to capitalize on the growing demand for health and wellness services

2.4.2. The Example of Thailand

Thailand is recognized as one of the world's most renowned wellness and health destinations, thanks to its long-standing tradition of providing holistic health services and its rich cultural heritage, which includes meditation, massages, and spiritual practices. The country has become synonymous with holistic health and wellness tourism, attracting visitors from around the globe with its unique approach that combines ancient traditions with modern wellness practices.

According to the Global Wellness Institute report, the wellness economy in Thailand significantly contributes to the country's economic growth and is one of the fastest-growing in the Asia-Pacific region. In 2022, Thailand's wellness economy reached a value of \$34.6 billion, placing Thailand 24th globally and 9th in the Asia-Pacific region. Despite global challenges such as the COVID-19 pandemic, Thailand's wellness economy has shown strong recovery and

continued growth. This progress can be attributed to the growing interest in preventive health services, wellness tourism, and traditional and complementary medicine.



Source: Global Wellness Institute
 Note: Figures for the eleven sectors do not sum to the country total due to overlap in sectors.

Graph 2 Thailand wellness economy sectors 2022.
 Source: <https://globalwellnessinstitute.org/geography-of-wellness/wellness-in-thailand/>

The reasons for the growth of the wellness industry in Thailand lie in the combination of several key factors. First, the country offers high-quality services at affordable prices, which attracts international tourists. Second, Thailand is known for its natural beauty and cultural heritage, making it an ideal location for wellness retreats. Third, the government and private sector actively promote wellness tourism, developing infrastructure and services that meet the increasingly sophisticated needs of wellness tourists.

Popular wellness experiences in Thailand include a wide range of activities, from traditional Thai massages, Ayurvedic treatments, and meditation retreats to holistic programs that combine modern medicine with traditional practices. The most well-known destinations for wellness tourism in Thailand are the islands of Koh Samui and Phuket, as well as the cities of Bangkok and Chiang Mai, which offer top-notch wellness centers and retreats set in natural and culturally rich environments.

3. Wellness Tourism in Croatia

Health and wellness tourism in Croatia is becoming an increasingly significant segment of the tourism offering, attracting domestic and international visitors seeking health services, relaxation, and revitalization in a natural environment. Given its natural resources, rich cultural heritage, and favorable climate, Croatia is positioning itself as an attractive destination for

health and wellness tourism. This sector plays a key role in extending the tourist season and mitigating the seasonal nature of tourism, which traditionally relies on the summer months. The development of health and wellness tourism enables a continuous flow of visitors throughout the year, contributing to a more balanced and sustainable economic development of tourist destinations in the country. As awareness of a healthy lifestyle increases, Croatia is increasingly recognizing the potential of this form of tourism for the long-term sustainable development of its tourist destinations.

3.1. Historical Development of Wellness Tourism in Croatia

The development of health and wellness tourism in Croatia has deep historical roots that go back several centuries. As early as the time of the Austro-Hungarian Empire, Croatia was recognized as a destination for spa tourism, particularly in areas rich in thermal springs, such as Varaždinske Toplice and Stubičke Toplice. These destinations became known for their healing waters, attracting the aristocracy and wealthier segments of society for rest and treatment (Andrijašević, 2005).

After World War II, health tourism in Croatia continued to develop, with spas like Daruvarske Toplice, Tuheljske Toplice, and Krapinske Toplice offering rehabilitation and therapeutic services. These destinations became popular among both domestic and foreign guests, particularly as they expanded their services to include wellness programs. In recent times, wellness tourism has experienced significant growth in Croatia, especially in regions like Istria and Kvarner. These destinations offer a wide range of wellness services, including spa treatments, wellness programs, and outdoor activities such as hiking and cycling.

Istria is particularly known for integrating natural resources, such as the sea and thermal springs, into its wellness offerings, attracting visitors from around the world. Continental Croatia, with its abundance of thermal springs, is also becoming an increasingly popular destination for health tourism. Varaždinske and Krapinske Toplice, as well as other spa destinations like Bizovac and Naftalan, provide specialized medical treatments alongside wellness services. These destinations utilize their natural resources for the treatment and prevention of diseases while simultaneously promoting sustainable tourism (Habuš, 2018).

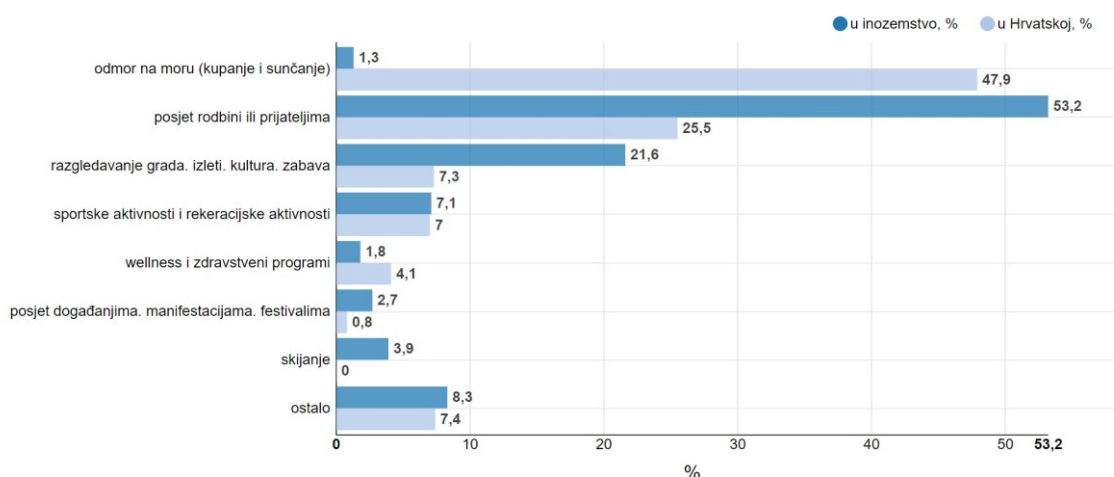
Health and wellness tourism in Croatia continues to develop, with a growing number of investments in the modernization and expansion of existing capacities. Examples like Terme Tuhelj and Terme Sveti Martin demonstrate how investments in the quality of services and infrastructure can pay off through increased visitor interest. These facilities are experiencing a

steady growth in visits, confirming the importance of health and wellness tourism as a strategic segment of Croatia's tourism industry.

3.2. Modern Wellness Tourism in Croatia

However, the full development of wellness tourism in Croatia at a level relative to or comparable with neighboring countries and beyond has only seen significant growth in the last ten years. As such, wellness tourism represents a relatively new phenomenon compared to other European countries. Although wellness services and programs appeared earlier, it is only in the last decade that they have fully developed and become integrated into the broader tourism offering of the country. This growth has been driven by the increasing demand for a holistic approach to health, as well as the need to diversify the tourism offering to attract visitors throughout the year, not just during the summer season.

Despite the progress, a large number of wellness destinations in Croatia are still closely tied to the summer season when coastal destinations are most attractive. For example, wellness centers on the Adriatic coast, such as those in Istria and Dalmatia, attract the most visitors during the summer months when the climate is most favorable for combining wellness services with beach enjoyment. In the Republic of Croatia, there is still a significant level of unawareness about the wellness-oriented tourism offering, with more attractive forms of tourism, such as seaside vacations, continuing to dominate, despite the fact that wellness tourism is available year-round. Data from the Croatian Bureau of Statistics in 2021 shows that only 5.9% of Croatians opted for multi-day trips with the primary purpose of participating in wellness or health programs, while over 50% chose trips motivated by seaside vacations, including activities such as swimming and sunbathing.



Graph 3 Multi-day trips by primary reason 2021.

Source: <https://podaci.dzs.hr/2022/hr/29530>

However, aware of the seasonal limitations, Croatia is making significant efforts to develop wellness tourism as a form of sustainable tourism that could attract visitors year-round. In this context, Croatia is increasingly looking up to neighboring Slovenia, which, despite having minimal access to the sea, has managed to build a strong wellness sector that relies on natural resources such as thermal springs and healing mud. Through significant investment in wellness tourism, Slovenia has achieved year-round attractiveness, compensating for the lack of summer tourist destinations. Croatia is now following a similar approach, utilizing its abundant natural resources and developing infrastructure to make wellness a key element of year-round tourism, with an emphasis on sustainability and balanced regional development.

According to the National Plan for Sustainable Tourism Development until 2027 and the Action Plan until 2025, Croatia has recognized the importance of developing health and wellness tourism as key segments for achieving year-round tourism offerings and reducing the seasonality of tourism. Within this plan, several measures are aimed at strengthening and expanding this branch of tourism. Croatia plans significant investments in health tourism with the goal of attracting a larger number of international patients and health tourists. Key aspects include improving medical infrastructure, promoting Croatia as a destination for medical tourism, and supporting the development of new health services that integrate traditional and modern medical practices. Special attention is given to the development of rehabilitation centers and specialized hospitals that will provide world-class services, thereby increasing Croatia's competitiveness in the global medical tourism market.

One of the goals is to create synergy between health tourism and other forms of tourism, such as wellness and spa tourism, to provide a comprehensive range of services that meet the needs of a wide spectrum of visitors. Investments in human resources are also planned, with the aim of training professionals in the health tourism sector and improving the quality of services.

In terms of wellness tourism, the plan emphasizes the need for further development and diversification of wellness service offerings so that Croatia can become an attractive destination year-round. The importance of integrating wellness services with the country's natural resources, such as thermal springs, the sea, and mountains, is particularly highlighted. The plan envisions investments in the construction and modernization of wellness centers, especially in the continental parts of Croatia, which would reduce the seasonality of tourism and more evenly distribute tourist traffic.

One of the main goals is to reposition Croatia as a destination that offers high-quality wellness services in an authentic and natural environment. In this context, the promotion of Croatia in source markets as a wellness destination is planned. Additionally, the establishment

of certification standards for wellness centers is anticipated to ensure high-quality services and increase user trust.

3.2.1 The Example of Krapina-Zagorje County

Wellness tourism in Krapina-Zagorje County stands out as one of the most successful examples of health and wellness tourism in Croatia, thanks to its abundance of natural resources, a long tradition of spa tourism, and strategic investments in modern wellness infrastructure. This county, located in the northwestern part of Croatia, has been attracting visitors for decades with its thermal springs, healing mud, and beneficial climate, which form the foundation upon which successful wellness tourism is built.

One of the key reasons for the success of wellness tourism in Krapina-Zagorje County is the richness of its thermal springs, utilized in numerous spas and wellness centers. The most well-known destinations are Tuheljske Toplice, Krapinske Toplice, and Stubičke Toplice, which offer a wide range of wellness services, including thermal pools, saunas, massages, and various therapeutic programs. These destinations have developed a comprehensive wellness product that attracts visitors from all over Croatia and abroad.

Krapinske Toplice bases its spa offerings on ancient thermal mineral water sources, known since Roman times as *Aquae Vivae*, meaning "water of life." The thermal water in Krapinske Toplice has a temperature of 39 to 41°C and is rich in calcium, magnesium, and bicarbonates, giving it significant therapeutic properties. In addition to thermal springs, Krapinske Toplice also has a fango mud deposit, which is used in specialized therapeutic treatments, providing additional benefits for recovery and healing.

The modern hospital in Krapinske Toplice is specialized in the rehabilitation of patients with cardiological, neurological, rheumatic, and orthopedic conditions, as well as in pediatric rehabilitation. Besides medical services, Krapinske Toplice also offers a well-equipped wellness center with a water park, providing programs for recreation, disease prevention, and overall health and wellness improvement.

The spa offerings of Stubičke Toplice are based on the healing properties of thermal water, with a source temperature ranging between 43 and 69.5°C. The medicinal properties of these waters have been recognized since the 19th century, and since then, Stubičke Toplice has been developing its health tourism offerings. The thermal water of Stubičke Toplice is particularly suitable for treating rheumatic joint and muscle conditions, sciatica, discopathy, and post-traumatic conditions. In addition to medical treatments, Stubičke Toplice also offers various wellness facilities that complement their offerings.

Terme Tuhelj, located directly at the source of thermal water and healing peloid mud, represents a top wellness destination. This tourist-recreational center includes numerous pools, an attractive water park, and a well-equipped wellness center, as well as accommodation facilities that meet the needs for rest and relaxation. Terme Tuhelj attracts not only recreational visitors but also athletes who come there for sports training under expert supervision.

According to data from the Croatian National Tourist Board, Krapina-Zagorje County has seen a steady increase in the number of visitors to its wellness destinations. In 2019, over 200,000 overnight stays were recorded, representing a significant increase compared to previous years (HTZ, 2020). However, what is particularly impressive is that in 2022, the county achieved more than 400,000 overnight stays for the first time, further solidifying its position as a leading wellness destination in Croatia. This growth is the result of strategic investments in infrastructure, improvements in the quality of accommodation facilities, and strong promotion of wellness tourism.

In addition to existing capacities, Krapina-Zagorje County continuously invests in the expansion and modernization of its wellness infrastructure. Plans include the construction of new wellness centers, the expansion of accommodation capacities, and the development of additional amenities that would attract visitors year-round. These investments are aimed at increasing the county's competitiveness in the national and international tourism markets.

Moreover, Krapina-Zagorje County leverages its rich cultural heritage and natural beauty as added value in promoting wellness tourism. The combination of historical sites, such as castles and museums, with wellness facilities offers visitors a unique experience that combines relaxation, rejuvenation, and cultural enrichment (HTZ, 2020).

4. Tourism in the Istria County

Istria County, located in the northwestern part of Croatia, is one of the most important tourist regions in the country. This largest peninsula of the Adriatic Sea occupies a strategic geographical position, connecting Central Europe with the Mediterranean. Due to its favorable location and abundance of natural resources, Istria has become one of the most attractive tourist destinations in Croatia, attracting millions of visitors every year.

Istria is known for its diverse natural beauty. Its coastline is adorned with crystal-clear sea, numerous beaches, and bays, while the inland region offers rich vineyards, olive groves, and green hills. This region also provides stunning natural reserves, such as the Učka Nature Park, which is ideal for hiking and exploring nature. Additionally, the Motovun Forest, famous for truffles, offers a unique gastronomic and eco-tourism attraction.

The cultural and historical heritage of Istria further enhances its appeal. Cities such as Rovinj, Poreč, and Pula are rich in historical monuments that testify to the region's rich history. Rovinj, with its old town, Poreč with the Euphrasian Basilica, and Pula with the Roman amphitheater, known as the Arena, attract visitors from all over the world. These cultural landmarks, along with numerous events, festivals, and local traditions, make Istria a unique destination for cultural tourism.

Istria is the leading tourist region in Croatia in terms of the number of visitors and overnight stays. Intensive tourism development began in the 1960s, when destinations on the western, southern, and partly eastern coasts experienced rapid growth. During the 1980s, Rovinj, Poreč, and Pula became the most visited tourist destinations, thanks to the construction of numerous hotels, camps, and tourist resorts.

According to Vojnović, the development of tourism in Istria slowed during the Croatian War of Independence, but by the early 2000s, the region had repositioned itself as the leading tourist destination in Croatia. This success is based on continuous investments in tourism infrastructure, including the modernization of accommodation capacities and the development of new tourist attractions (Vojnović, 2012). The development of tourism in Istria has also been supported by strong promotion, which has helped restore the region to the map of leading European destinations.

The Tourist Board of Istria County plays a key role in promoting the region. Through various activities, including online communication, PR campaigns, the publication of brochures, and the organization of promotional events, the board works to strengthen the image of Istria as an attractive tourist destination. In collaboration with the private sector, the Tourist Board conducts numerous marketing campaigns aimed at both domestic and international markets.

In addition to promotion, significant investments in infrastructure contribute to Istria's attractiveness. The modernization of transportation links, the construction of new hotels, resorts, and tourist complexes, as well as the development of sports and recreational infrastructure, are just some of the factors that make Istria a desirable destination for tourists. According to data from the Croatian Bureau of Statistics, in the first half of 2024, Istria County recorded 7.9 million overnight stays, accounting for nearly one-third of the total overnight stays in Croatia.³

4.1. Wellness Tourism in Istria County

³ Dolasci i noćenja turista u komercijalnom smještaju u lipnju 2024. dostupno na: <https://podaci.dzs.hr/2024/hr/76925> (accessed 02.08.2024)

Istria is also emerging as a destination for selective forms of tourism, including wellness tourism. This segment of tourism has significant potential thanks to natural healing springs and wellness centers located within luxury hotels and resorts. One of the most attractive wellness destinations in Istria is Istarske Toplice. Located in the northwestern part of the peninsula, these thermal spas are renowned for the healing waters of St. Stephen, whose sulfur-rich, optimally radioactive warm water, abundant in minerals, springs from the Motovun forests and flows into the Mirna River. The first analysis of the water's healing properties was confirmed back in 1858, and today it is used in the treatment of chronic rheumatic, dermatological diseases, respiratory issues, gynecological problems, and post-operative recovery.

In addition to Istarske Toplice, other destinations such as Rovinj, Poreč, and Umag stand out. Rovinj is known for its luxury hotels with developed wellness offerings. Hotels such as Hotel Lone and Hotel Monte Mulini offer top-notch wellness facilities, including spa centers, fitness programs, saunas, and various therapies, making them popular choices for tourists seeking relaxation and revitalization.

Poreč, another leading destination, offers a wealth of wellness facilities, with Hotel Valamar Diamant standing out for its wellness services. This hotel features a modern wellness center with various treatments, indoor and outdoor pools, and a fitness center, attracting visitors looking for comprehensive care for body and mind. In Umag, wellness tourism is also flourishing, with hotels such as Hotel Sol Garden Istra and Hotel Melia Coral offering various wellness programs, from spa treatments to fitness activities, contributing to the destination's year-round appeal.

However, according to the Istria County Tourism Master Plan 2015-2025⁴, wellness tourism in Istria is recognized as important but still an underdeveloped segment of the tourism offering. Istria has significant potential for the development of wellness tourism, but this potential has not yet been fully realized. The document highlights that wellness tourism accounts for only 1% of the total physical product of tourism in Istria, indicating a need for additional investments and development. One of the key challenges in the development of wellness tourism is the lack of appropriate infrastructure, particularly wellness hotels and specialized medical facilities, which are necessary to attract a larger number of visitors interested in this form of tourism.

Istria County has natural resources that are extremely suitable for the development of wellness tourism, such as thermal springs, a beneficial climate, and unspoiled nature. Despite this, underdeveloped infrastructure and a lack of recognition as a wellness destination limit its

⁴ Master Plan Turizma Istarske Županije dostupno na: <https://www.istra.hr/hr/business-information/tzi/master-plan-turizma-istre> (accessed 02.08.2024)

growth. To better develop this segment of tourism, it is necessary to invest in the construction of new wellness facilities and to promote Istria as a wellness tourism destination.

One of the goals of the Master Plan is to encourage the development of wellness tourism through the construction of new hotels and specialized facilities, as well as to increase the offering of wellness services in existing accommodations. Furthermore, despite relatively better local marketing compared to the rest of Croatia, there is a recognized need for even better marketing and positioning of Istria as a wellness destination in both domestic and international markets.

Although Istria already has several prominent wellness destinations, such as Istarske Toplice, Rovinj, Poreč, and Umag, the potential for further development is significant. Investments in the modernization of existing facilities, the construction of new wellness centers, and more targeted promotion could significantly contribute to increasing the number of visitors interested in wellness tourism. Through strategic investments and smart resource management, Istria has the potential to become one of the leading wellness destinations in the region, offering visitors a unique combination of natural beauty, cultural landmarks, and top-quality wellness services.

Accordingly, the Master Plan document foresees further development and improvement of the tourism infrastructure, including the planning of new projects and the use of EU funds to finance the development of wellness capacities.

4.2. Awareness of Croatian Citizens About Health Tourism in Istria County

Previous research has indicated that, despite the exceptional potential for the development of wellness and health tourism in Istria County, this region is still not sufficiently recognized as a leading destination in that segment. Insufficient investment in promotion and infrastructure has resulted in wellness tourism comprising only a small part of the county's overall tourism product, with most of the offerings remaining relatively unknown to both domestic and international tourists. In light of these findings, it is crucial to understand how well health and wellness tourism in Istria County is known among the local population, as their perception and awareness of this offering can play a key role in the future development and promotion of the region.

The survey titled "Awareness of Croatian Citizens About Health Tourism in Istria County" was designed to assess the level of awareness and knowledge of Croatian citizens about the health tourism opportunities offered by Istria County. The survey also aims to explore the

patterns of use of health services in Istria, including spa, wellness, and medical tourism, as well as respondents' preferences and experiences in this context. The research is structured to confirm or refute several key hypotheses, including hypotheses about the recognition of the concept of health tourism, the level of awareness about the specific offerings in Istria, and the frequency of use of these services among citizens of Zagreb.

The survey is divided into several segments that allow for a detailed analysis of various aspects of health tourism in Istria. In the first part of the survey, respondents are asked about basic demographic data, including gender, age, place of residence, level of education, and employment status. This data is crucial for segmenting the results and understanding how demographic factors influence the level of awareness and use of health tourism.

The second part of the survey focuses on respondents' general awareness of the term "health tourism" and their personal experiences with this form of tourism in Istria County. The questions in this section are of the "Yes/No" type, allowing for quick data collection on how aware respondents are of the health tourism opportunities in Istria and how frequently they have used them.

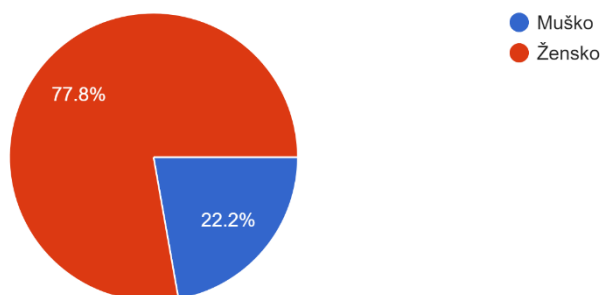
The third segment of the survey addresses specific forms of health tourism in Istria, including spa, wellness, and medical tourism. Respondents are asked whether they are familiar with certain destinations and services within each of these categories. This part of the survey uses multiple-choice questions, where respondents can select whether they are familiar with the mentioned services or destinations.

The fourth part of the survey focuses on respondents' experiences with different forms of health tourism, including alternative forms such as therapeutic horseback riding and cycling. Here, respondents can indicate which services they have used and how often, allowing for a more detailed analysis of preferences and habits in the use of health services.

The final segment of the survey includes questions about how respondents learned about certain destinations and services, as well as their opinions on the richness of the health tourism offerings in Istria. These questions are crucial for understanding how information about health tourism is disseminated among citizens and how they perceive the current offerings in Istria.

The survey is structured in a way that encompasses a wide range of information relevant to assessing citizens' awareness and their experiences with health tourism in Istria County. The use of different types of questions, including multiple-choice questions, "Yes/No" questions, and open-ended questions, allows for the collection of detailed data that will be used to analyze and draw conclusions about citizens' awareness and behavior related to this form of tourism.

Spol:
81 responses

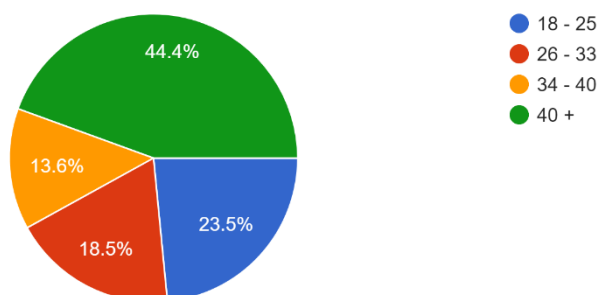


Graph 4 Structure of respondents by gender

Source: compiled by the author

In response to the question about the gender of the respondents, the survey results show a significant difference in gender representation. Of the total 81 respondents, 77.8% are women, while men make up only 22.2% of the sample.

Dob:
81 responses



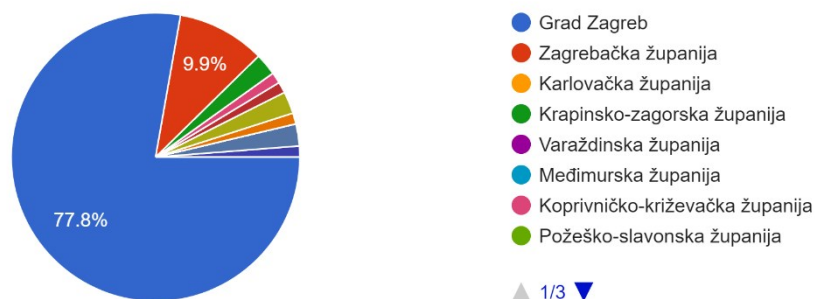
Graph 5 Structure of respondents by age

Source: compiled by the author

In response to the question about the age of the respondents, the age structure shows that the largest percentage of participants are over 40 years old (44.4%), while the group aged 18 to 25 is represented by 23.5%. Respondents aged 26 to 33 make up 18.5% of the sample, and the smallest group is those aged 34 to 40 (13.6%). These data suggest that older individuals were more active in participating in the survey, which may reflect their greater interest in health tourism.

Mjesto stanovanja

81 responses



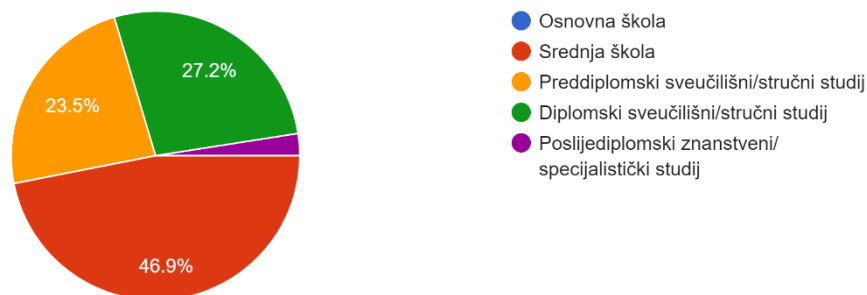
Graph 6 Structure of respondents by county of residence

Source: compiled by the author

In response to the question about the county of residence, the majority of respondents are from the City of Zagreb, accounting for 77.8% of the sample, while 9.9% are from Zagreb County. This significant proportion of participants from Zagreb may be related to the greater availability of information and services related to tourism in the capital city, as well as to the hypotheses that focus on the awareness of Zagreb's citizens about health tourism in Istria.

Završena razina obrazovanja:

81 responses



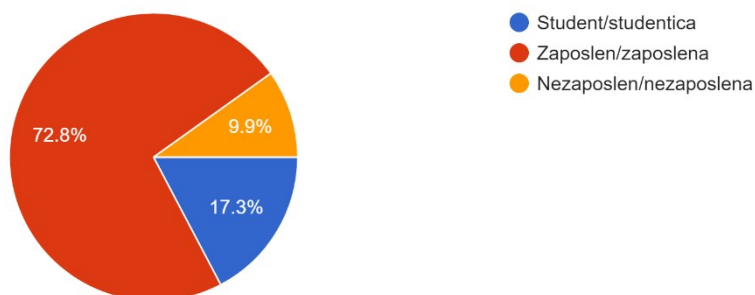
Graph 7 Structure of respondents by level of education

Source: compiled by the author

In response to the question about the level of education of the respondents, the majority (46.9%) have completed secondary school, while 27.2% of respondents have completed a graduate university or professional study program. An undergraduate degree has been completed by 23.5% of respondents, and only 2.5% have completed postgraduate studies. These data suggest that the majority of respondents have a secondary or higher education, which may influence their awareness of specific aspects of health tourism.

Radni status:

81 responses



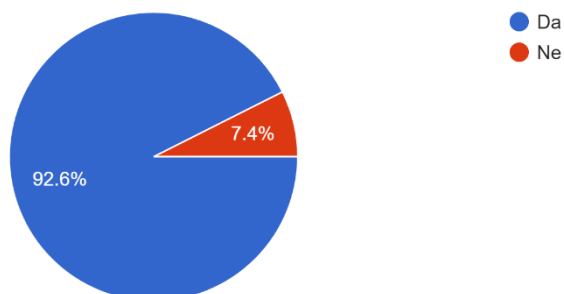
Graph 8 Structure of respondents by employment status

Source: compiled by the author

In response to the question about employment status, the majority of respondents are employed (72.8%), while 17.3% are students. The unemployed make up 9.9% of the sample. These data indicate that most respondents have a stable source of income, which may influence their ability and willingness to use health and wellness services.

Jeste li upoznati s pojmom „zdravstveni turizam“?

81 responses



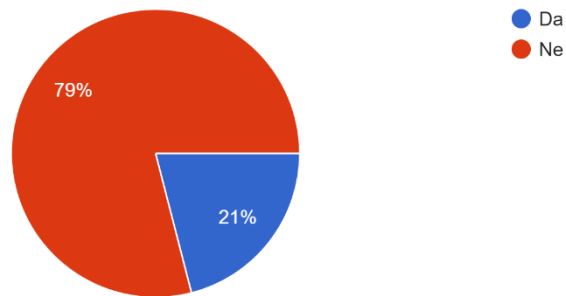
Graph 9 Familiarity of respondents with the concept of health tourism

Source: compiled by the author

In response to the question about familiarity with the term "health tourism," as many as 92.6% of respondents stated that they are familiar with the term, while 7.4% are not. This high level of awareness suggests that health tourism is a widely recognized concept among the respondents, though it does not necessarily indicate detailed knowledge of specific services and destinations within Istria County.

Jeste li ikada posjetili Istarsku županiju u svrhu zdravstvenog turizma (lječilišni turizam, wellness turizam, medicinski turizam)?

81 responses



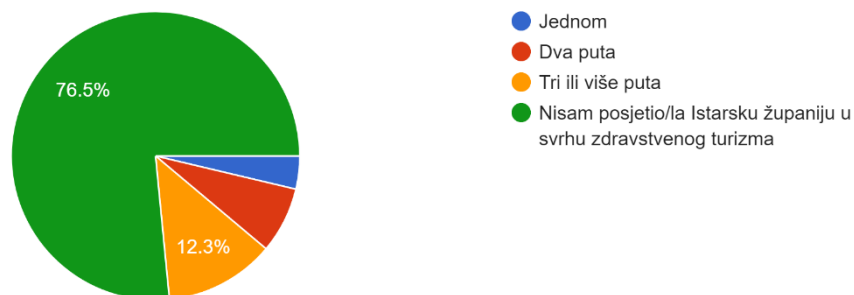
Graph 10 Purpose of visiting Istria County

Source: compiled by the author

In response to the question about visiting Istria County for the purpose of health tourism, only 21% of respondents confirmed that they have visited Istria for this reason. This data suggests that, although respondents are aware of health tourism, a small percentage actually utilize these services in Istria.

Ako je odgovor na prethodno pitanje bio "da", koliko puta ste posjetili Istarsku županiju u svrhu zdravstvenog turizma?

81 responses



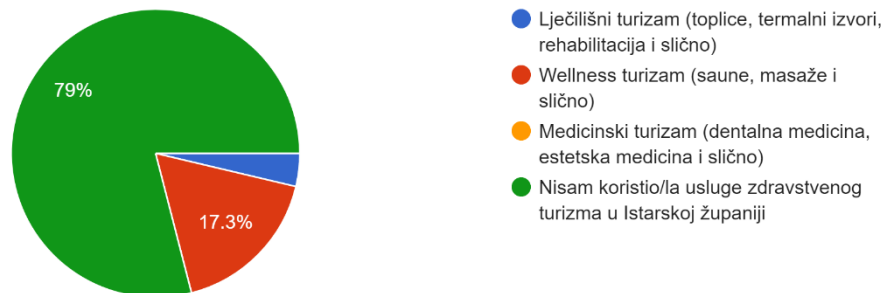
Graph 11 Frequency of visits to Istria County for health tourism

Source: compiled by the author

In response to the question about how many times they have visited Istria County for the purpose of health tourism, among those who have done so, 12.3% of respondents repeated the visit three or more times, 7.4% visited twice, and only 3.7% visited once. This indicates that those who have used health tourism services in Istria tend to repeat their visits, suggesting satisfaction with the services.

Prilikom posjeta Istarskoj županiji, ponudu kojeg od navedenih oblika zdravstvenog turizma ste koristili?

81 responses



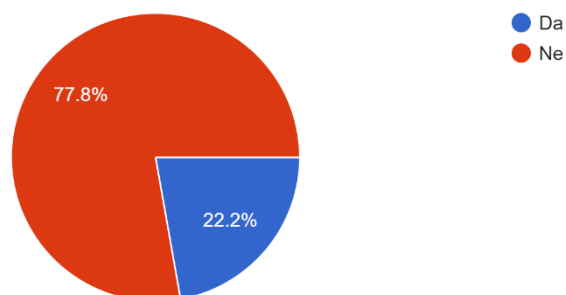
Graph 12 Structure of used forms of health tourism

Source: compiled by the author

In response to the question about the use of different forms of health tourism, wellness tourism is the most popular form, with 17.3% of respondents having used it, while only 3.7% have used spa tourism services. A significant number of respondents (79%) have not used any health tourism services in Istria, which further highlights the need for greater promotion of these services.

Jeste li se ikada bavili alternativnim oblicima zdravstvenog turizma kao što je terapijsko jahanje ili bicikliranje?

81 responses

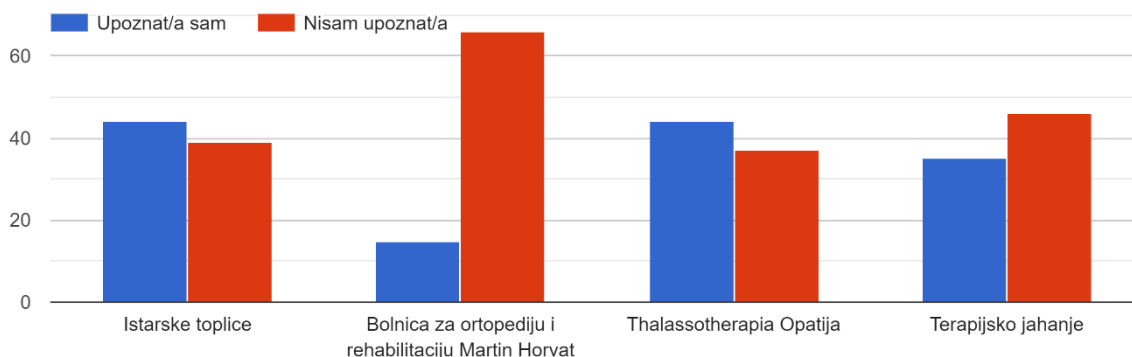


Graph 13 Structure of respondents who engaged in alternative forms of health tourism

Source: compiled by the author

In response to the question about alternative forms of health tourism, the majority of respondents (77.8%) have never engaged in these activities, while 22.2% have. This result indicates a relatively low level of interest or awareness regarding alternative health activities in Istria.

Sljedeće pitanje vezano je uz ponudu lječilišnog turizma u Istarskoj županiji. Za svaki pojam označite jeste li upoznat/a s istim:

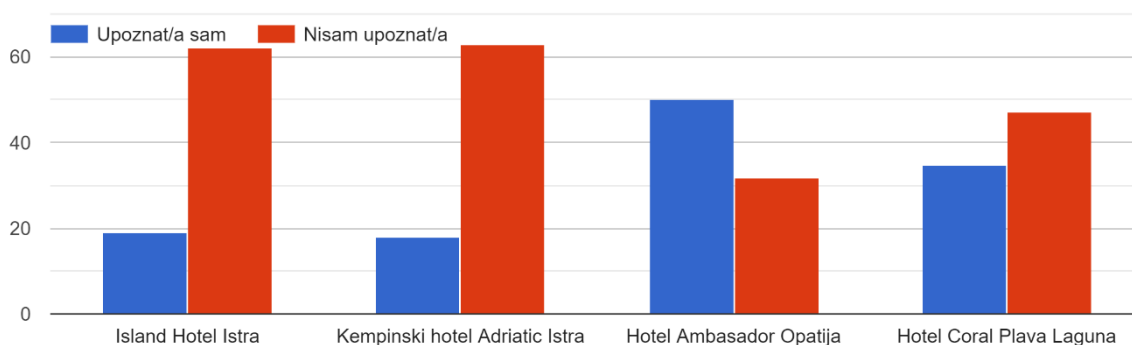


Graph 14 Respondents' familiarity with spa tourism offerings in Istria County

Source: compiled by the author

In response to the question about awareness of spa tourism, the results show that the largest number of respondents are familiar with Istarske Toplice (44), while the Orthopedic and Rehabilitation Hospital Martin Horvat is the least known (15). This data suggests that there is uneven awareness of different spa destinations within the county.

Sljedeće pitanje vezano je uz ponudu wellness turizma u Istarskoj županiji. Za svaki pojam označite jeste li upoznat/a s istim:



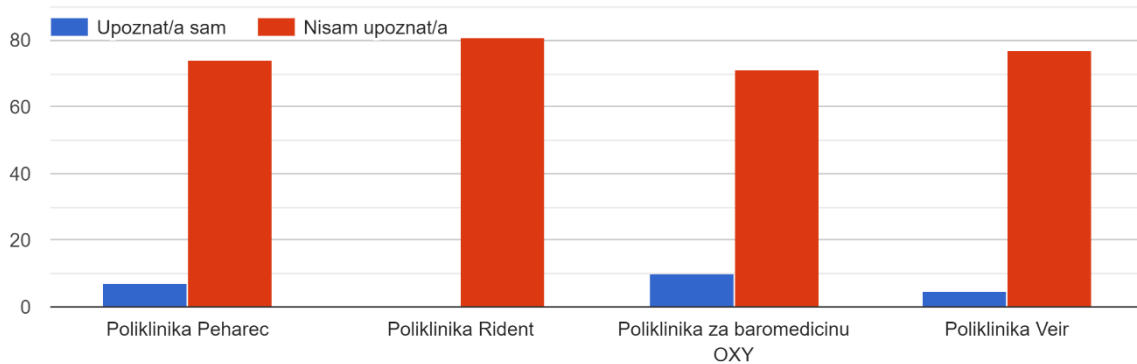
Graph 15 Respondents' familiarity with wellness tourism offerings in Istria County

Source: compiled by the author

In response to the question about awareness of wellness tourism, the largest number of respondents are familiar with the Hotel Ambasador Opatija (50), while other destinations, such

as Island Hotel Istra and Kempinski Hotel Adriatic, are less known. This indicates potential for further promotion of less-known wellness destinations in Istria.

Sljedeće pitanje vezano je uz ponudu medicinskog turizma u Istarskoj županiji. Za svaki pojam označite jeste li upoznati s istim:



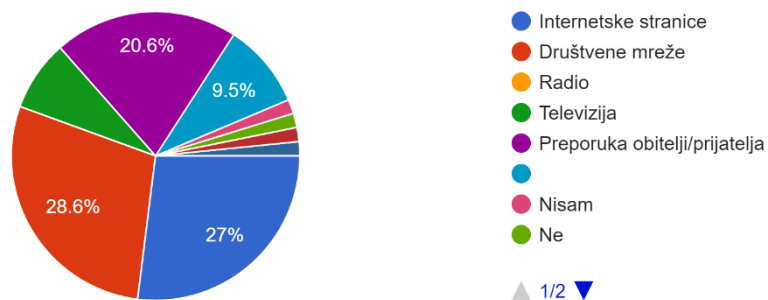
Graph 16 Respondents' familiarity with medical tourism offerings in Istria county

Source: compiled by the author

In response to the question about awareness of medical tourism, Polyclinic Peharec and the OXY Baromedicine Clinic are relatively unknown destinations, with 7 and 10 respondents familiar with them, while Polyclinic Rident is not known to any respondent. This indicates significant room for improvement in awareness and promotion of medical tourism in Istria.

Ako ste za neku od prethodnih destinacija označili da ste upoznati s istom, putem kojeg komunikacijskog kanala ste čuli za nju?

63 responses



Graph 17 Structure of communication channels through which respondents learn about destinations

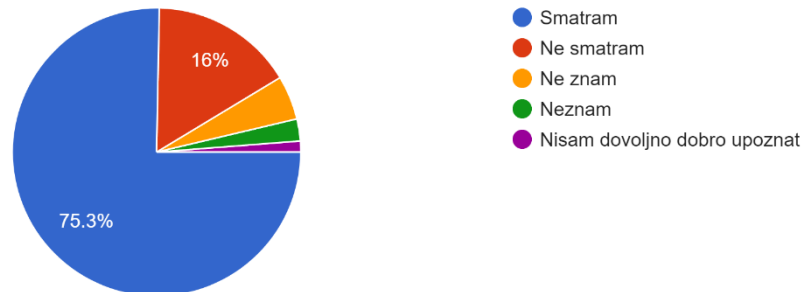
Source: compiled by the author

In response to the question about the communication channels through which respondents heard about destinations, the most frequently mentioned channels are social media (28.6%) and

websites (27%), while traditional media such as radio and television are less represented. Recommendations from family and friends also play an important role (20.6%).

Smatrate li da Istarska županija ima dovoljno bogatu ponudu zdravstvenog turizma?

81 responses



Graph 18 Perception of health tourism offerings in Istria County

Source: compiled by the author

In response to the question about the perception of health tourism offerings in Istria, the majority of respondents (75.3%) believe that Istria has a sufficiently rich offering, while 16% feel that the offering is not sufficiently developed. This result indicates a positive perception of the offerings, but also highlights the potential for further improvement.

The responses to the open-ended question "What would you like to see added to the health tourism offerings in Istria County?" reveal various suggestions for improving the health tourism offerings in Istria County, as well as some indecision and lack of information among a portion of the respondents. Some respondents expressed satisfaction with the current offerings, stating that they believe it is sufficiently rich or that there is no need for additional services. Meanwhile, other respondents suggested specific enhancements, including a greater emphasis on spas, therapeutic horseback riding, and cycling, as well as medical therapies focused on specialized procedures like dental tourism or plastic surgery.

Several respondents highlighted the need for better marketing and promotion of existing services, indicating insufficient awareness and presence of health tourism in the public's consciousness. Additionally, some respondents suggested the introduction of innovative therapies, such as those related to menopause or psychotherapy workshops, as well as the expansion of luxury hotels and five-star wellness centers.

There is also a group of respondents who were unable to answer this question or were not sufficiently familiar with the current offerings to provide a specific suggestion. This may

suggest the need for greater education and public awareness about the existing services and opportunities in Istria's health tourism sector.

Overall, the responses indicate diverse preferences and suggestions for improving the offerings, with an emphasis on enhancing infrastructure and services that could attract a broader spectrum of visitors, as well as improving communication and advertising to increase the visibility and recognition of Istria County as a health tourism destination.

Based on these findings, we can draw relevant conclusions for the research hypotheses. The analysis of the survey results shows that Hypothesis H1 is confirmed; the majority of Zagreb residents are indeed familiar with the concept and importance of health tourism. This is evident from the fact that 92.6% of respondents state that they are familiar with the term "health tourism," indicating widespread recognition of this tourism segment among respondents.

Hypothesis H2 is also confirmed; although there is a high level of recognition of the term, awareness of the overall health tourism offerings in Istria remains limited. Only 21% of respondents have visited Istria County for the purpose of health tourism, while most have not used any services in this segment. Furthermore, detailed questions about specific destinations and services revealed a significant lack of information about particular destinations within Istria.

Hypothesis H3 is refuted, as the majority of respondents have not used any health tourism services in Istria even once. In fact, 79% of respondents have never visited Istria for health tourism, indicating that despite high awareness of the term, actual use of these services remains limited.

Finally, Hypothesis H4 is confirmed; the majority of respondents who visited Istria for health tourism exclusively used wellness services. The largest number of respondents (17.3%) used wellness services, while a very small number used spa tourism (3.7%), and none used medical tourism, confirming that wellness tourism is the most popular form of health tourism in Istria.

Conclusion

Wellness tourism in Istria County has significant potential for further development, particularly in the context of diversifying the tourism offering and extending the tourist season. Although Istria is already recognized for its natural resources, such as thermal springs and healing waters, there is still much room for improvement and expansion of the wellness offerings. Given the growing demand for holistic approaches to health, there is an opportunity to develop specialized wellness programs that would attract different segments of tourists, including those interested in detox programs, meditation, or therapies related to mental health.

Existing wellness centers, such as Istarske Toplice, already attract visitors, but the lack of awareness and promotion suggests that this sector can be further developed. Investments in better promotion and visibility of wellness destinations, both in the domestic and international markets, could significantly increase the number of visitors coming to Istria for wellness services. Surveys indicate a need for improved marketing, which would ensure that potential tourists are better informed about the offerings and motivated to use these services.

Additionally, there is an opportunity to develop new wellness hotels and resorts that could attract guests year-round. The development of luxury wellness hotels offering specialized treatments and programs tailored to individual needs could further elevate Istria's profile as a wellness destination. Such facilities could attract not only clients from Croatia but also a broader international audience, especially from Europe.

Given the favorable climate and natural resources, Istria has all the prerequisites to become a leading destination for wellness tourism in the region. Further investments in infrastructure and promotion, as well as the development of specialized wellness programs, would enable Istria to position itself as a destination offering a comprehensive approach to health and well-being, thereby attracting an increasing number of tourists seeking more than just a traditional vacation.

In conclusion, the prospects for the development of wellness tourism in Istria County are very promising but require continuous investment and a strategic approach. Increasing awareness and recognition of destinations, along with the development of new and innovative wellness services, could significantly contribute to Istria's tourism offering and ensure long-term growth and sustainability of this tourism segment.

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