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DEVELOPMENT LEVEL OF HEALTH TOURISM IN OSIJEK-BARANJA COUNTY

RAZVOJNA RAZINA ZDRAVSTVENOG TURIZMA U OSJEČKO BARANJSKOJ ŽUPANIJI

ABSTRACT

The importance of tourism in continental Croatia is not sufficiently evaluated and has not utilized available resources. Especially model of tourism such is medical tourism. Seen in historical terms, tourism and travel in the form of vacation, as the branch began to develop in a way very similar to the spas and thermal baths as we know them today. Medical tourism can be divided into: medical tourism, prevention tourism, wellness tourism and plastic surgery.

The purpose of this research paper is to explore the level, the assumption of improvement and development of health tourism in the Osijek-Baranja County and to determine whether there is economic potential in the region.

The goal of the research is to determine the level, accommodation volume and opportunities of medical tourism in the Osijek-Baranja County.

Research results indicate that there is considerable scope for further improvement of operations for this segment of travel and we hope that this would encourage the development of the county, and the Croatian mainland region.

This original research paper is based on bibliographic literature, research of offers and potentials of the region that can be seen from the footnotes in research paper.

Keywords: *health, tourism, health tourism, development, treatment*

SAŽETAK

Značaj turizma u kontinentalnoj Hrvatskoj nije dovoljno valoriziran te nisu iskorišteni dostupni potencijali. Posebice model turizma kao što je zdravstveni turizam. Gledano u povijesnim okvirima turizam odnosno putovanja u formi odmora, kao grana se počeo razvijati upravo kroz lječilišta slična obliku toplica odnosno termalnih kupelji kakve danas poznajemo. Zdravstveni turizam možemo podijeliti na slijedeće oblike: medicinski turizam, preventivski turizam, wellness turizam i plastična kirurgija.

Svrha rada je istražiti razinu, pretpostavke unaprijeđenja i razvoja zdravstvenog turizma na području Osječko-baranjske županije te utvrditi da li postoji prepoznatljivost ovog gospodarskog potencijala u našoj regiji.

Cilj istraživanja je odrediti razinu, smještajne kapacitete i mogućnosti zdravstvenog turizma u Osječko-baranjskoj županiji.

Rezultati dobiveni istraživanjem upućuju da postoji znatan prostor za daljnje unaprijeđenje poslovanja za ovaj turistički segment te se nadamo da će se time potaknuti razvoj na županije, ali i regije kontinentalne Hrvatske.

Ovaj izvorni znanstveni rad je temeljen na bibliografskoj literaturi, istraživanju ponude i potencijala regije što se može vidjeti iz fusnota u samom znanstvenom radu.

Ključne riječi: *zdravstvo, turizam, zdravstveni turizam, razvoj, liječenje*

1. Introduction

Croatia is traditionally tourist-oriented country with an increase in tourist traffic that only confirms the potential of this industry as an active generator of economic development. With an attractive tourist potential, a unique natural and cultural-historical heritage, our country can create a distinctive identity of tourism offer that will result with increase of market competitiveness.

Travel and tourism has grown today into a major global industry in which many countries see the possibility of settlement of the growing problem of unemployment, increase exports and stimulate investment. Considering that tourism is growing almost twice as fast as the growth of world gross product many countries give priority in economic development to tourism industry.

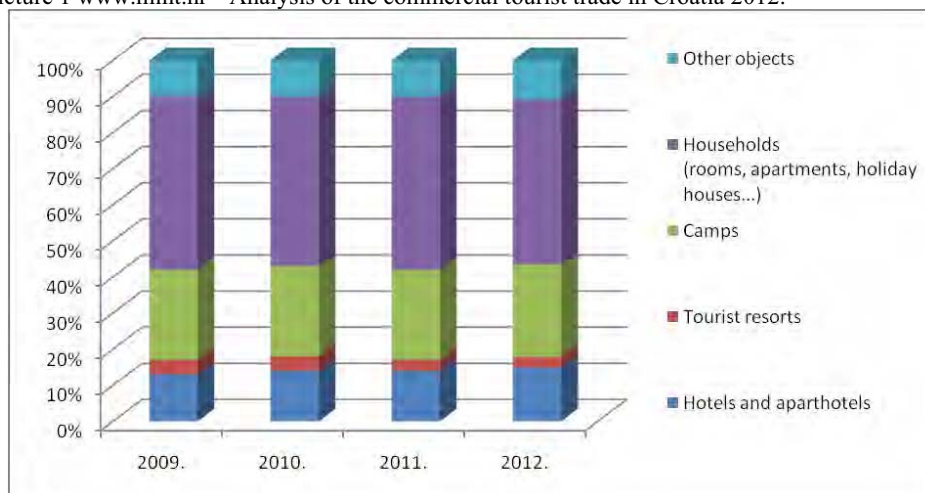
Tourism is one of the strategic goals of economic development in Croatia. The tourism industry provides significant funding - about \$ 6-7 billion a year⁶³. Notable is the fact that about three quarters of overnight stays are concentrated in a short summer season, June-August of total number that can be made over the year.

2. Tourism in Croatia

The Republic of Croatia in 2012, disposed of 800 000 beds, which is 55 000 less (6%) than the year before. The reason for the fall was created with private accommodations. The average occupancy rate was 71.3 days. Tourists, on average, stayed in Croatia 5.3 days. The total number of available capacity is 46% in private accommodation, 26% in camps, and only 15% in hotels.

⁶³ Central Bureau of Statistics

Picture 1 www.mint.hr "Analysis of the commercial tourist trade in Croatia 2012."



Source: <http://www.mint.hr/UserDocsImages/2012-turist-p-analiza.pdf>, pp. 2

The global economic crisis, comparing data, has not affected Croatian tourism. So in year 2012 Croatia recorded 11.8 million tourist arrivals, which is 3.3% more than the year before. We achieved 62.7 million overnight stays or 4% more than the year before. Foreign tourists make up to 88% of the total tourist trade, so it recorded 10.4 million foreign tourist arrivals (+4.5%), which accounted for 57.5 million nights (an increase of 5% compared to 2011). Domestic tourists decreased tourist trade by 4% in arrivals and 7% in overnight.

Table 1 Tourist trade in Croatia 2009.-2012.

Year	Arrivals (in 000)	Index	Overnights (u 000)	Index	Lenght of stay (in days)
2009	10.270	-	54.988	-	5,4
2010	10.604	103,25	56.416	102,6	5,3
2011	11.456	108,03	60.354	106,98	5,3
2012	11.835	103,31	62.743	103,96	5,3
Rate of change					
2009.-2012. (in %)	+4,7		+4,5		

Source: Central Bureau of Statistics, <http://www.mint.hr/UserDocsImages/2012-turist-p-analiza.pdf>, pp. 2

According to data of WTTC⁶⁴, Croatia is ranked among the countries with the lowest daily earnings in the region. Low daily value per tourist is the result of inherited mass tourism that is inappropriate for Croatia.

Global trends indicate that the upgrading of accommodation is imperative in the global tourism market and the consequent positioning of destinations not only defines the quality of accommodation, but to build on the tourism product, and supporting facilities that destination has to offer. With the main motive such as bathing, relaxation, culture, a new motivation appears for the trip, which includes outdoor activities, the need for experiences, emotions, recreation and health. Tourists want to experience moments that are different from their everyday environment and the usual circumstances. Experience and emotions become the main motive for tourists to travel.

⁶⁴ WTTC – World Travel & Tourism Council – www.wttc.org

Consequently, this creates new market segments and niche markets, and reduces physical, cultural and passive rest in favor of spending time with active and growing need for a variety of intense pleasure (feeling, beauty, peace, happiness, joy, health ...).

3. Tourism in Osijek- Baranja County

By geographical features Osijek-Baranja county belongs to continental tourism type. In Croatia this kind of tourism has not been paid enough attention to. But lately attitude toward this type of tourism is changing under the influence of events in the global tourism market. Specifically, global trends are increasingly showing tourist interest in "eco-tourism", "rural tourism", "rustic tourism", "educational tourism", "health tourism".

Share in the overall continental Croatian tourist trade is still negligibly small. Low share is the result of disproportionate funds reallocation, poor accommodation, low share of private investment, lack of attractive content.

Table 2 Tourist stay in Croatia by county

	2009	2010	2011	2012	Rate of change 2008-2012 (%)
Total Croatia	54.988,432	56.416,379	60.354,275	62.743,057	4,5
Primorsko-goranska	10.989,353	10.938,291	11.741,692	11.973,931	3,0
Ličko- senjska	1.519,841	1.618,941	1.697,107	1.824,036	6,3
Zadarska	5.831,138	6.223,824	6.481,067	6.783,072	5,2
Šibensko- kninska	3.463,655	3.783,823	3.975,122	4.139,536	6,1
Splitsko- dalmatinska	8.813,208	9.364,032	10.250,215	10.517,880	6,1
Istarska	17.887,063	17.731,881	19.095,401	19.877,368	3,6
Dubrovačko-neretvanska	4.225,474	4.538,026	4.775,161	5.188,091	7,1
Zagreb	1.047,937	1.085,597	1.183,125	1.245,669	6,0
Zagrebačka	69,804	62,198	66,502	67,703	-0,7
Krapinsko- zagorska	159,056	145,411	153,406	161,811	0,8
Sisačko- moslavačka	100,995	87,385	87,317	82,303	-6,4
Karlovačka	269,419	282,083	269,291	303,522	4,3
Varaždinska	121,017	116,601	118,597	115,008	-1,7
Koprivničko- križevačka	28,126	20,075	25,351	29,037	4,1
Bjelovarsko- bilogorska	31,835	23,981	30,468	31,924	2,4
Virovitičko- podravska	39,219	34,323	32,917	29,262	-9,2
Požeško- slavonska	19,623	18,786	23,627	19,299	1,1
Brodsko- posavska	38,901	31,951	33,127	35,585	-2,3
Osječko- baranjska	187,422	159,261	173,892	168,122	-3,1
Vukovarsko- srijemska	78,033	68,383	62,394	60,538	-8,0
Međimurska	67,313	81,526	78,856	89,360	10,4

Source: Central Bureau of Statistics, <http://www.mint.hr/UserDocsImages/2012-turist-p-analiza.pdf>, pp.4

Thanks to the natural and cultural diversity, and abundance and ecological preservation of natural resources, tourism Osijek-Baranja county occupies an increasingly important place in the economic structure of the county.

Osijek-Baranja County is continental county located in the Pannonian lowlands, in the northeast Croatian, covers part of the Podunavlje and Podravlje region. Situated on the fertile soil constitutes an attractive and distinctive tourism image through the Pannonian lowlands between the rivers Sava, Drava and Dunav, forests, gentle hills, ponds, streams and wetlands. County is located in Euroregion Dunav-Drava-Sava, bordering with Hungary and Serbia, and near the Bosnia and Herzegovina. Through the geographical location of Osijek-Baranja county is associated in euroregional cooperation with other regions that touches the Dunav. In the near future, the county

will go through the corridor "Vc" which expects a significant increase in transit guests from the fields: Polish, Czech, Slovakia, Hungary, Germany and the Ukraine.

Today County is recording about 174,000⁶⁵ overnight stays and based on these data is in the top continental counties and relevant indicators, but also the rate of growth. Existing units are mainly related capacities of the cities Osijek, Beli Manastir, Donji Miholjac, Đakovo, Našice and Belišće who in tourist centers developed primarily for the needs of business and transit tourism.

Table 3 Statistics of visits and the overnight stays number from 2005 to 2011 in the Osijek-Baranja County

	TOURISTS			OVERNIGHT STAYS		
	domestic	foreign	total	domestic	foreign	total
2005.	47.783	14.868	62.651	113.063	30.711	143.774
2006.	59.162	17.151	76.313	125.098	38.265	163.363
2007.	65.118	19.606	84.724	137.252	39.604	176.856
2008.	69.765	19.621	89.765	151.414	37.512	188.926
2009.	58.870	19.512	78.382	139.741	47.681	187.422
2010.	52.465	19.284	71.749	118.283	40.978	159.261
2011.	56.573	21.124	77.697	127.704	46.188	173.892

Source: Material for the session of Osijek-Baranja County "Status information and tourism development opportunities in the Osijek-Baranja and work of County Tourist Board" http://www.obz.hr/hr/pdf/2012/26sjednica/06_infomacija_o_stanju_i_razvojnim_mogucnostima_turizma_na_po_drucju_obz_i_radu_turisticke_zajednice_zupanije.pdf, pp. 22

4. Health tourism

Health tourism is one of the oldest forms of tourism, and its offer is based on natural and health factors which are different kinds of medical, preventive and wellness programs. In health resorts is offered a healthy diet, exercise, peace, spiritual programs, etc.

Although there is no universal definition that could describe the term „Medical Tourism“ this description can help us to understand our tourism segment: „*Medical tourism should be seen as the 'healing treatment' segment of the overall health tourism market, while fitness and wellness holidays should be seen as the 'prevention' segment*“⁶⁶

Croatia has the potential to become an important destination for health tourism, which could be raised to a higher level through the use of European funds, primarily in the continental part of the country and especially the Osijek-Baranja County that is known for the leading role when talking about financing projects with money from EU funds.

Health tourism is recognized worldwide as a very important form of tourism that entails rapid development and placement of supporting activities while in Croatia is only wellness tourism significantly developed. 10 years ago, this service is offered only in five hotels while today it is hard to find a four-star hotel that does not offer wellness (today there are about 90).

Croatia has natural resources that should be used for investing and further developing this kind of tourism as a major tourism product of continental Croatia. If we take into consideration that our country possesses healing resources such as thermal water, optimum climate, air, herbs - it is evident that our resources are unexploited. For comparison, in Germany, is generated from health tourism over 100 million overnight stays in total income €30 billion. Neighbour Slovenia reaches 3

⁶⁵ Source: Central Bureau of Statistics

⁶⁶ Wachowiak H. (2012.): *ITB World Travel Trends Report 2012/2013*, pp 23

million overnight stays and about €200 million total income. With 12 million stays and around 7 billion euros Croatian Tourism in revenues overnight stays participates only with 200 000 nights and less than one million euros.

Initiator of medical tourism is today's way of life. Rapid and stressful pace of life, environmental pollution and unhealthy diet - every day in the each of us. Osijek-Baranja County has the potential of health tourism development through ecotourism. Kopački Rit Nature Park with its unspoiled nature and the environment is a great potential for the development of ecotourism, rural, hunting, fishing, picnic and health tourism. Tourists want to know and experience different worlds from their everyday environment, and for the urban guests, Osijek-Baranja County is a real discovery. Specifically, in order to activate the rural area and its autochthony is necessary to link tourism and ecological agriculture through the production of healthy food. Development of rural tourism contributes selfemployment and development of domestic entrepreneurship and marketing of local, healthy agricultural products whose quality is far above the industry produced food. Health tourism in a rural environment requires the active participation of the whole family, walks through unspoiled nature and direct contact with domestic animals.

In addition to the intact nature and the homemade health food Osijek-Baranja County can emphasize its quality medical services and professional staff. Add to that affordability of prices relative to European destinations, a large number of tourists would exactly satisfy specific medical needs in our county.

In the evaluation of thermal sources and the development of health and recreational excursion tourism developed Bizovac spa. Located at the sources of termomineral salt hyperthermia, where the water temperature is almost 96 degrees Celsius - which makes it one of its kind hyperthermia in Europe. Old complex of Bizovac spa, swimming pools, accommodation capacity, and a new hotel Termia, have a total of 300 accommodation units. With a newly built complex, "Aquapolis" with 8 pools represent spa and recreation tourist capacity, which could be a strong basis in the future for the further development of health tourism.

But, unfortunately, for many years the spa fails to privatize the course of 2011 and recorded 135 416 swimmers which is a significant reduction compared to the previous year due to permanent disinvestment in the complex. Bizovac community decreased by 6% overnight stays.

Table 4 Bizovac spa

Year	number of bathers
2007	Cca 190 000
2008	Cca 180 000
2009	Cca 160 000
2010	Cca 158 000
2011	Cca 135 416

Source: Bizovačke toplice d.d., Internal materials Bizovačke toplice d.d.

Reliable facts and figures about the market are rare, especially in our country, but the latest estimates put the worldwide medical tourism market at anywhere between \$40 billion and \$60 billion at present⁶⁷, and with annual growth rates of about 20% a year.

5. Conclusion

Research results indicate that there is considerable scope for further improvement of operations for this segment of travel and we hope that this would encourage the development of the county, and the Croatian mainland region.

⁶⁷ Wachowiak H. (2012.): ITB World Travel Trends Report 2012/2013, pp 23

Position of the county and its natural resources provide an opportunity for transformation of the economy towards tourism branches and hiring larger numbers of people. If we include in this story organic food production and additional tourist contents we get a complete picture of high quality tourist offer, which does not necessarily contain a common form of Croatian tourism - the sun and the sea through the three summer months.

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