



# CHARACTERISTICS OF WELLNESS TOURIST OFFER OF THE REPUBLIC OF CROATIA

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## Abstract:

The purpose of this paper is to present the relevance and characteristics of wellness tourism of the Republic of Croatia, as well as the potential of its further development. In terms of methodology, the authors presented the paper contents of relevant papers in wellness tourism in order to present the importance of wellness tourism as a specific form of tourist offer and the importance of conducting research from diverse aspects in order to determine the potential of its development, as well as the attitudes of contemporary tourists. To determine the state of Croatian wellness tourism, the authors used the selected results of a pilot research study TOMAS Health Tourism 2018 attitudes and consumption of service users of health tourism in Croatia. Findings in the paper indicate a (very) high level of tourists' satisfaction when it comes to wellness service, and the need of introduction of innovations and adaptability of the institution to the people with special needs. In order to ensure further success in the development of wellness tourist offer and higher satisfaction of wellness tourists, the authors proposed developmental guidelines.

## Keywords:

wellness tourism, Republic of Croatia, satisfaction, development, developmental guidelines.

## INTRODUCTION

The way of life of a contemporary man contributes to the development of various illnesses (cardiological, malignant, psychological, endocrinological, etc.). In contemporary life conditions people are very frequently losing their natural instincts for protection of their own health. As a result of that, they are becoming more and more aware that they are not as healthy as they used to be, and they are more actively rethinking of ways of increasing the care for the protection of their own health. Previously mentioned results in the development of a cult of health and psychophysical abilities became a synonym of a contemporary man, which implies taking care of his own body and health. In developed countries, trends that encourage people to care for and protect their own health have been present for decades (Bartoluci, 2007). It all resulted in strong and fast development of wellness industry, which has become one of the most developed industries in the world.

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Wellness became an important element of a contemporary tourist offer considering that more and more tourists show interest in travelling and improving damaged or preserving good health. This type of offer is being developed by many world destinations, and in particular the ones which already have an established tradition of development of health tourism offer. One of these destinations is the Republic of Croatia (further in the paper Croatia) which has been developing its wellness tourist offer. The purpose of this paper is to analyse the attitudes of wellness visitors and determine potential developmental guidelines based on the findings.

## WELLNESS TOURISM AS A SPECIFIC FORM OF TOURIST OFFER

Wellness holiday represents a time window which takes away tourists from the routine demands that they are experiencing in their daily lives. Their experience of time slows down, and they have the sufficient space to reflect on their lives and possibilities they can reach. Travels motivated by wellness enable formation of a greater balance and harmony on all levels of tourist's wisdom, mentally, emotionally, physically, and spiritually (Crites & Crites (2003; cited from Sheldon and Bushell, 2009, p. 3). These advantages significantly influenced wellness to become one of the most developed industries in the world. This has been confirmed by the constant evaluations and research done by the Global Wellness Institute (n.d.); according to their findings, in 2018 the value of the wellness economy reached a high value of 4.5 trillion of U.S. dollars, which amounted to more than 50% of total expenditures on health, or 7,8 trillion U.S. dollars according to the data from the World Health Organization. In the period 2015-2017 wellness industry registered a 6,4% growth annually (from 3,7 trillion to 4,2 trillion U.S. dollars) which is almost twice as fast as global economic growth (3.6 percent annually, based on the data obtained from the International Monetary Fund). Wellness industry participates in the global economic output with 5,3%. The analysis of the ten wellness markets determined that in the period 2015-2017 the highest revenue growth per year was achieved by spa industry (9,8%), wellness tourism (6,5%) and wellness real estate (6,4%). Among the key sectors in wellness industry, Personal Care, Beauty and Anti-Aging participate with the highest revenue achieved of 1,083 billion U.S. dollars, followed by Healthy Eating, Nutrition and Weight Loss (702 billion U.S. dollars), Wellness Tourism (639 billion U.S. dollars), Fitness and Mind-Body (595 billion U.S. dollars), Preventative and Personalized Medicine and Public Health (575 billion U.S. dollars), Traditional and Complementary Medicine (360 billion U.S. dollars), Wellness Lifestyle Real Estate (134 billion U.S. dollars), Spa Economy (119 billion U.S. dollars), Thermal/Mineral Springs (56 billion U.S. dollars) and Workplace Wellness (48 billion U.S. dollars). Previously presented information indicated a strong development of wellness industry.

In order to maintain such high position in the world economy, creators of wellness offer need to observe the attitudes of service users in order to be able to improve current and develop new and better wellness services and products aimed towards satisfying their precise wishes and desires. Such high interest for this type of offer resulted in development of wellness tourism as a specific form of tourist offer which has been researched from various points of view like determining developmental potential of wellness tourism development in a destination (Alkier et al., 2020). Heung's et al. (2013) research was focused on determining the potential of development of Chinese wellness tourism in the sense of resources as well as promotion from the point of view of wellness tourism experts. The respondents were professional employees that are working in tourism, health, and education. The research results determined that environmental resources such as fresh and clean air, clean water and natural characteristics were considered as the most relevant attributes for the development of Chinese wellness tourism. Also, the results indicated that the best way of promoting Chinese wellness tourist offer could be done through advertising in mass media, using support by the government, and organizing appropriate new regional events.

Also, observation of wellness tourist's behavioural intentions and the level of satisfaction with the wellness tourist offer are of extreme importance. Hudson et al.'s (2017) examined the direct relationships between a wellness tourist's behavioural intentions and factors that are influencing the growth of the American wellness tourism industry. They estimated and tested two models by using the Theory of Planned Behaviour, and each of them included life stress and involvement in health. Theoretical predecessors of Behavioural Intention were determined. The results of the research clearly indicated both constructs being significant predictors of behavioural intention, involvement in health being the stronger one in relation to life stress.



Based on the findings the authors presented the implications for management and marketing. Thal & Hudson (2019) analysed the characteristics of a tourist's stay in a wellness destination which contribute to their psychological well-being. They used the Self-determination theory in order to determine the necessary conditions to promote subjective well-being. Based on the findings the authors were able to propose a conceptual model with an emphasis on the external environment and ideal guest experiences which enable an improved sense of well-being as a result of staying in a wellness facility. Težak Damjanić's research (2019) focused her research on examining the concept of wellness as a form of healthy lifestyle in tourism. Her findings confirmed the connection between the healthy lifestyle and motivation to travel, and established the relevance of the social, intellectual, and spiritual dimensions on a tourist's lifestyle. Valentine's research (2016) was focused on conducting an evaluation of tourists' wellness preferences in Jamaica since there were very limited findings and knowledge about it, which would in the end make wellness tourism segmentation a lot easier. The research results indicate strong relevance of wellness. However, young people, retired people as well as people with high monthly income were not well represented. The researchers determined the presence of strong interest in natural remedies, wellness competencies and mind therapies. Low interest was determined for culinary tours, mineral baths, community involvement and nature experiences. Also, the respondents have shown strong interest in staying in hotels during their holiday motivated by wellness. All in all, the findings of this research indicate that unique wellness preferences could possibly result in formation of new forms of tourism, as well as formation of non-seasonal tourism niches for small enterprises, hotels and rural communities.

Težak et al. (2011) focused on determining the differences among the high-level wellness consumers, moderate level wellness and low-level wellness consumers considering the selection of a tourist destination, as well as a wellness tourist's personal characteristics. Research was conducted in the Istrian County. The authors determined relevant differences among the three analysed groups from the aspect of characteristics of the statistical sample, travelling with a party, use of source of information, travel motives, length of stay in a destination, overnight stay in other places, visiting other tourism destinations, priorities in life, influence of economic crisis on the perception of vacation and appropriateness of prices in restaurants. Presented findings indicate the presence of differences between the groups based on their preferences towards wellness. These findings can be used in further development of wellness tourism in Istrian County.

In Croatia Marković and co-authors have been paying significant attention to measuring attitudes of wellness service users. Following the authors we will present some of the most relevant findings. Marković et al. (2011) focused in their work on evaluating empirically the expectations of service quality of wellness service users in Croatian hotel wellness centres, respectively, precisely determining the main factors which explain their expectations regarding the quality of wellness services. Findings indicated a high level of expectations of wellness service users, the main dimensions being quality of staff and reliability of services, empathy and assurance, and the appearance of facilities and staff. These findings enable wellness managers to get acquainted a lot better with a wellness service user's needs and make it easier for them to meet the user's expectations to enable business success (provision of top quality of services, achieving the highest possible profit and enabling a continuous and successful business performance). Marković et al. (2012) focused their research on widening both conceptual and empirical knowledge of quality of services in wellness tourism on the example of Republic of Croatia. Their primary aim was to empirically evaluate customer's expectations and perceptions of wellness tourist offer, and to evaluate the total quality of Croatian wellness services. Their results indicated that wellness service users in Croatia had high overall expectations of quality of services (most important being courteous staff and clean equipment) and perceived service quality (highest perception item being courteous staff). Regarding wellness service attributes, the main dimensions which concern the customer expectation have proven to be quality of staff and reliability of service, empathy and assurance, and appearance of facilities and staff. The authors emphasize that these perceptions can be explained in the best possible way with two service features: service performance and "appearance of facilities and staff. These findings have confirmed that evaluation of quality of wellness services combine both tangible and intangible aspects of provided service. Similar research as the one in 2011 was conducted by Marković et al. (2020) who explored the expectations and perceptions of wellness service users in Thalasso Wellness Center Opatija in Opatija with the use of modified SERVQUAL questionnaire. The results have proven the gap existence between the perception and expectation of wellness service users, because the highest average marks for perception were registered for the dimensions tangibility and reliability of quality of wellness services, and the lowest was registered for sensitivity or empathy.



The authors emphasize in their work that the management of Thalassotherapia Opatija can use these findings to justify the constant conduct of the research for measuring the quality of wellness services, satisfaction of wellness service users and satisfaction of work staff in wellness centre. Previously presented findings of selected research implicate quite clearly the relevance of wellness tourism research and necessity of diverse approaches. They are needed because of further developmental actions whose implementation will enable for destinations to remain competitive on the tourist market. In the following chapter the authors will present the present state of wellness tourism of the Republic of Croatia.

## PRESENTATION OF THE WELLNESS TOURISM OFFER OF THE REPUBLIC OF CROATIA

The Strategy of Tourism Development of the Republic of Croatia until 2020 (Ministry of Tourism of Republic of Croatia, 2013, p. 8; Alkier et al., 2018, p. 300) indicates that health tourism belongs to the group of tourist products which have an expressive developmental perspective. This form of tourist product grows globally between 15-20% per annum. Due to its vicinity to the other large tourist markets, richness of natural beauties and appropriate climate, safety in the country, very long tourism tradition, competitive prices and in general good reputation for providing health services, Croatia has strong competitive advantages for the development of health tourism. Croatian Health tourism products which are of significant relevance are spa tourism, medical tourism, and finally wellness tourism.

According to the National Program-Action Plan for the Development of Health Tourism (Ministry of Tourism of the Republic of Croatia, 2014, p. 12-13), Croatian wellness tourist offer has been dominated by the hotel wellness centres, and in particular in the 4- and 5-star hotels. The most significant part of hotel wellness offer is situated in the Adriatic part of Croatia (approximately 60 wellness centres). Their offer is based mostly on services such as massages, beauty treatments, saunas, pools and fitness. Also, wellness service users are being offered various wellness packages which combine wellness center services with the dietary regime, exercise, aromatherapy, etc. Besides hotels, a small number of spa complexes are also strongly oriented to offering wellness services. These complexes are situated in the continental part of Croatia, and they are outside the system of Croatian Health Insurance Fund. In these spas wellness service users are being offered massages, beauty treatments, saunas, pool facilities with the system of open and closed pools, themed pools, etc. Some of these pools are being filled with thermal or curative water. Services are usually combined and offered in a form of theme packages (i.e. antistress, detox, weight reduction, etc.). Some of these complexes cooperate with medical institutions and through that they are expanding their offer to the medical programs. The currently reached level of arrangement, quality of equipment, program content and quality of service in wellness are mostly on a high level, respectively. Croatian wellness tourism offer could be considered as competitive. However, it is necessary to point out some deficiencies: there is no regulation connected with the medical competence of wellness staff on various levels of professionalism; due to legal restrictions, the introduction of medical component (frequently in hotel wellnesses) is limited; a small number of objects are being guided by the brand standards. Also, wellness tourist turnover is almost impossible to evaluate considering that none of the hotels can provide quality data about the percentage of wellness motivated demand in the number of total arrivals and overnights. At this stage it is only possible to judge based on the movements of occupancy of Croatian hotel offer of higher categories.

Previous information, despite previously stated deficiencies, indicates a positive developmental direction of wellness tourism in Croatia, and future developmental actions need to be made in order to achieve further success. Taking this into consideration, the Institute of Tourism in Zagreb decided to undertake the first pilot study TOMAS Health Tourism 2018 in order to determine the actual state of health tourism offer of the Republic of Croatia. The analysis contains results for Spa tourism, Medical tourism and Wellness tourism. The following authors will present the findings for wellness tourism, respectively the profile and attitudes of wellness tourists towards Croatian wellness tourist offer (Institute for Tourism, 2018, p. 18-29). According to the gender, the respondents were mostly female (53%), from Germany, Slovenia, Austria, Italy, the United Kingdom, Bosnia and Herzegovina, Serbia, etc. (82%). According to the age group, the majority (29%) was in the age group 36-45, followed by 26-35 (22%), 56+ (20%), 46-55 (19%), and up to 25 (9%), average age being 43. In terms of their education, it has been determined that 53% of the wellness visitors are highly educated





(faculty and higher degrees 53%), 27% have a college degree, while 19% have finished high school or lower. They have a high purchasing power; 38% of them have a monthly income 3,501+ EUR, followed by the ones with the monthly income 2.501-3.000 (12%), 2.001-2.500 (12%), 3.001-3.500 (11%), 1.501-2.000 (10%), 1.001-1.500 (8%), 501-1.000 (7%), do 500 (1%). In terms of frequency of going on a journey motivated by wellness throughout the year, 34% of wellness tourists stated that they do not travel, 27% stated they travel once a year, 28% two to three times, and 11% travel 4 and more times a year. When observing the duration of their stay in a wellness destination, 49,2% of wellness tourists tend to stay 4-7 days, 26,2% 2-3 days, 10,1% 8-10 days, 7,3% 11-14 days, 4,5% 1 day, and only 2,7% tend to stay 15 days and more. The average number of overnights is 6 days. In terms of frequency of visits motivated by wellness, it has been determined that most wellness visitors (50%) visited Croatia 6+ times due to its wellness offer, 20% visited it for the first time, 19% visited it 3-5 times before, and 11% visited it for the second time. Regarding the sources of information on the Croatian wellness tourist offer, 29% of respondents prefer the Internet, 26% rely on previous experiences, 23% on the recommendations of friends and relatives (word of mouth marketing), 14% did not need information and 12 % used brochures, advertisements, and posters. Other sources (radio, television film or video, tourist agencies, articles in newspapers or journals, fairs and exhibitions etc.) were marked low. When it comes to primary motives for travelling/using wellness services, 79,3% of visitors stated relaxation/recharging the batteries, followed by decreasing and managing stress (27,3%), body detox (17,5%), improving physical fitness (15,9%), Beauty/face/body care (14,9%), something else (12,6%) and alleviation of chronic pain (i.e, allergies, insomnia, pain) (8,8%). The observation of wellness guests' lifestyle indicates that 44% of them are focused on maintaining the appropriate body weight, remaining in good physical condition (42%), healthy nutrition (37%), stress management in everyday life (34%), the use of natural remedice substances and regular sports recreation activities (both 26%), regular going to massages in the place of permanent residence (11%), as well as the regular use of wellness facilities in the place of permanent residence and being on special dietary regime (both 10%).

**Table 1.** Use of wellness facilities and services during stay in a hotel

Facilities	%
Pool	86,6
Massages	64,7
Jacuzzi/whirlpool tubs	60,1
Saunas	54,2
Fitness and/or exercising	34,3
Cosmetic treatments	21,7
Manicure and/or pedicure	19,5
Advice services by therapist/doctor/a professional	11,2
Meditation/yoga	8,3
Specialist services by therapist	7,4
Services of a personal trainer	6,8
Specialist medical services	5,6
“Alternative therapies” (Acupuncture, Ayurveda and similar)	5,1
Something else	0,1

Source: Institute for Tourism (2019, p. 36)

In terms of preferences when using wellness facilities and services during stay in a hotel, the respondents mostly prefer the use of pool (86,6%) followed by the massage services (64,7%), jacuzzi/whirlpool tubs (60,1%), saunas (54,2%). Lower interest was expressed for fitness and/or exercising (34,3%), cosmetic treatments (21,7%), and manicure and/or pedicure (19,5%).



The lowest interest was expressed for the use of advice services by therapist/doctor/a professional (11,2%), meditation/yoga (8,3%), specialist services by therapist (7,4%), personal trainer services (6,8%), specialist medical services (5,6%) and “alternative therapies” (5,1%). Only 0,1% of total number of respondents stated that they used some other services. Also, 87% of the respondents stated that they did not use any theme/specialist health packages of services according to the health tourism segment.

**Table 2.** Presentation of level of satisfaction with the wellness facilities and services

Elements	%
Staff professionalism	88,3 (VH)
Staff expertise	86,6 (VH)
Space cleanliness	85,4 (VH)
Atmosphere	85,4 (VH)
Completeness of information about individual treatments/procedures	81,9 (VH)
Quality of individual treatments/procedures	81,8 (VH)
Adherence to order of the appointments	84,2 (VH)
Availability of information about the offer	78,7 (H)
Quality of equipment	77,9 (H)
Diversity of offered services	76,9 (H)
Size of space for treatments/procedures (therapeutic facilities, pools, training grounds, etc.)	75,5 (H)
Relation of price and quality of health facilities/services	75,1 (H)
Diversity of equipment/facilities	74,3 (H)
Innovativeness of offer	69,7 (M)
Adaptability of the institution to the people with special needs	66,8 (M)

Source: Institute for Tourism (2019, p. 38)

The results presenting the level of satisfaction with the wellness facilities and services can also be considered as relatively satisfactory because most of the elements were marked with a very high and high level of satisfaction. The respondents expressed a very high level of satisfaction with the following elements: staff professionalism (88,3%), staff expertise (86,6%), space cleanliness (85,4%), atmosphere (85,4%), completeness of information about individual treatments/procedures (81,9%), quality of individual treatments/procedures (81,8%) and adherence to order of the appointments (84,2%). Also, they expressed a high level of satisfaction for availability of information about the offer (78,7%), quality of equipment (77,9%), diversity of offered services (76,9%), size of space for treatments/procedures (75,5%), relation of price and quality of health facilities/services (75,1%) and diversity of equipment/facilities (74,3%). Only two, but very important elements were marked with a moderate level of satisfaction, them being innovativeness of offer (69,7%) and adaptability of the institution to the people with special needs (66,8%).

**Table 3.** Average daily consumption of users of wellness services on multiple-day/one-day trips (in EURO)

	Multiple day	One-day
Total	149	48
Accommodation	82	-
Transportation (gas, pay-toll, bus ticket, rent-a-car, taxi, and similar	6	0
Food in restaurants and bars	30	19
Services in stores	12	4
Health services	11	22
Culture, entertainment, sport, recreation, one-day trips and rest	9	4

Source: Institute for Tourism (2019, p. 40)

The data in the previous table present the average daily consumption of users of wellness services both on multiple-day and one-day trips in Euro. The respondents who stay multiple days in a destination spend approximately 149€ per day, of which 82€ is spent on accommodation, followed by eating in restaurants and bars (30€), shopping in stores (12€), health services (11€), culture, entertainment, sport, recreation, one-day trips and rest (9€), and finally transportation (6€). One-day visitor's average consumption amounts to 48€, of which 22€ is spent on health services, 19€ on food services in restaurants and bars, as well as services in stores (4€) and culture, entertainment, sport, recreation, one-day trips and the rest (4€). Previously presented indicates quite clearly that wellness service users are showing a (very) high level of satisfaction with the wellness services. However, improvements need to be made in terms of innovation of the offer as well as the adaptability to the needs of people who have special needs. Also, it is necessary to emphasize that the innovation of the offer could be connected in a way with lower results when observing the use of wellness facilities and services during stay in a hotel, respectively. The introduction of more innovative, diverse and high-quality wellness offer would stimulate wellness users to use some of the offer elements which they have been neglecting so far. This would most certainly also reflect on higher wellness tourist consumption. Bearing in mind the necessity of achieving even better business results, the authors will propose developmental directions for Croatian wellness tourism in the following chapter.

## CROATIAN WELLNESS TOURISM OFFER – WHERE TO GO NOW?

Based on the previously presented findings, and at the same time taking into consideration the necessity of further development of Croatian wellness tourism, the authors suggest the following guidelines for its development (authors' adaptation according to the Institute for Tourism, 2004; Alkier et al., 2018):

- Staff professionalism: high quality wellness tourism offer can be provided only by the staff who possess top quality knowledge and invest their efforts in participating in lifelong learning programs. Individual approach for each wellness service user is also relevant;
- Continuous wellness tourist product development and introduction of innovation according to the good practices of competitive wellness destinations;
- Quality of equipment: it is necessary to monitor the development of technological innovations and invest in their introduction when possible, to provide high quality wellness services in a much quicker and more successful way;
- monitoring the needs and preferences of wellness tourists and adapting the current wellness tourist offer whenever possible;
- ambience in wellness facility needs to be appropriate and enable the users of wellness services to relax and reduce stress as much as possible. This significantly influences their satisfaction;
- quality and diversity of wellness tourism offer must be consistent all the time;



- it is important for marketing activities to be planned and carried out appropriately so they can reach wellness tourists fast and in a simple way and to present the wellness tourism offer in a way to intrigue wellness tourists and stimulate them to visit Croatia.

It is the authors' opinion that application of previously stated recommendations will contribute to further improvement of Croatian wellness tourism.

## CONCLUSION

In this paper, the authors have presented the relevance and characteristics of wellness tourism as a part of a contemporary tourist offer, as well as the state of the Croatian wellness tourism. The findings presented indicate a (very) high level of satisfaction of users with wellness services. However, it has been pointed out that the respondents have shown a moderate level of satisfaction with the innovativeness of offer and adaptability of the institution to the people with special needs. In the future Croatia needs to exploit even more its rich tradition in provision of health tourism services and focus even more on wellness tourism development considering that precisely wellness industry is one of the most developed industries in the world. Its further development will bring numerous advantages for Croatia. In order to achieve that, the authors have proposed the developmental guidelines.

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