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LIMITATIONS AND DEVELOPMENT OPPORTUNITIES OF DENTAL TOURISM: THE CASE OF CROATIA

ABSTRACT

Many countries are developing dental tourism as a major segment of the growing medical tourism in the world. In Europe dental tourists represent more than 30% of all medical tourists. The objective of this paper is to understand dental tourism in Croatia from the perspective of dental providers by identifying limitation and opportunities in providing dental tourism services. In order to get an overview of the dental market in Croatia from the clinics involved, two researches were conducted. The first was conducted by a systematic review of leading private dental clinics websites and the second via an online survey in October 2018. The findings show that Croatia's market identity is based mainly on excellent price-quality ratio of products and services in dental care, staff competence, high professional standards, lower prices and quality of support services. According to the opinion of dental clinics managers, the main limitations on the development of dental tourism in Croatia are lack of EU funding and incentive measures for the development of medical tourism, inadequate promotion of dental tourism, and lack of strategic planning and development vision at the national level. For further development it is extremely important to carry out accreditation and international certification of clinics and to continuously invest in employee training, quality of services and equipment/technology. The findings also point out that Croatia must build competitive advantage on dental treatment with tourism experience as a product. The quality of Croatian supporting tourist facilities add value to the core product and help to differentiate it from the competition.

Keywords: Dental tourism, key factors of success, Croatia, limitations, opportunities, competitive advantage

1. Introduction

There is above average worldwide growth of medical tourism. Due to population aging, increasing standards of living and turning to a healthy lifestyle, demand for the use of medical tourism is expected to increase. Significant investments in the development of health tourism, especially medical tourism, are recorded by many European countries. Many

European countries are developing dental tourism as a major segment of the growing medical tourism in Europe. In Croatia, mainly private clinics / practices are involved in dental tourism.

Their competitive advantage is based on the quality of dental services, affordable prices and attractiveness of the destination. They invest in promotion to become recognizable on the market. Considering

the quality of dental services and equipment, staff expertise and favorable prices as well as a long tourist tradition, Croatia has all the prerequisites for the development of this particular form of tourism. The aim of the paper is to explore the factors of the success of dental tourism development in neighboring European countries, current business activities of Croatian dental clinics, services offered, equipment, marketing activities, etc., limitations and development possibilities and to suggest some marketing recommendations that will increase the competitive advantage of the Croatian dental tourism industry.

In order to get an overview of dental market supply in Croatia two researches were conducted. The first was conducted by a systematic review of websites of leading dental care providers, and the second via an online survey in October 2018.

2. Literature review

According to Geić (2011), increasingly pronounced contemporary mass tourism migrations influence many aspects of social life with their characteristics; among other things there is a significant interaction between the tourism phenomenon, health and health culture in the emitting and receptive tourist areas, thus creating a selective form of health tourism. Worldwide health tourism grows between 15% and 20%, making it the fastest growing tourism sector (Gregorić, Musliu, 2015). It is a product that accounts for above-average annual growth rates at this moment, and trends in aging populations and orientation to healthy lifestyle indicate that health tourism has the potential to become the leading motive for travel in the future (Ivandić et al., 2016).

Demand for health tourism in Europe is focused on several specialties. Although data on the importance of some specialist services vary depending on the source, it is undisputed that aesthetic surgery and dentistry are the most sought-after medical services, while body treatments and fitness are the most popular segments of the wellness.¹ The health tourism umbrella covers traditional resources like spas with healing waters as well as medical ones – the practice of people travelling from their own country to another to undergo surgery, dentistry and other medical procedures.²

Although the primary motive for individuals traveling to other destinations is to use medical services in medical practices, clinics / polyclinics and spe-

cial hospitals, medical tourism also encompasses a wide range of tourist facilities at the destination. The main reasons for the growth in demand and travel to other countries to have medical services, operations, dental or cosmetic treatments are good quality of medical services at a lower cost but also the ability to travel at increasingly lower prices.

The basic characteristics of medical tourists (motivated by the need to improve health and quality of life) are:³

- they are ill or don't feel well and travel for the sake of health preservation
- they seek better medical treatment than they have in their own country
- they travel to other destinations for reasons that include professional medical staff and higher quality of services than those in the home country
- many of them travel to distant destinations because of lower medical care costs.

According to the study "Medical Tourism, International Trends and Perspectives", interest in the use of medical services outside of one's own country is higher in younger people (up to 35 years of age). This is not the case in all countries - compared to their younger compatriots, older Russians or Germans are, at a larger rate, ready to consider possible international travel with a "medical motive". In general, medical tourism represents a relatively small niche in the context of the global "tourism industry", a niche that has growing indicators, but is largely regionally defined, i.e. defined by numerous cultural elements as well as the element of quality and accessibility.⁴

Dental tourism is an important segment of the medical tourism trend which is developing worldwide. It has been growing at a fast rate thanks to the aging population, higher consumption of certain dental services with rising income, and supply shortages in many developed countries (Loubeau, 2009). A well-known dental tourism destination is Mexico, which is a consequence of its proximity to the United States, from where 25% of the worldwide dental tourists are coming. The second place is shared between India and Hungary. Hungary is aiding more European patients while India cares for the Asian patients and they share some of the US citizens (Kamath et al., 2015).

Chandu (2015) classified dental care tourists into two types. First, the classic dental tourists are among those who travel to a foreign country to access dental treatment, either for the sole purpose of dental treatment, or dental treatment as part of a holiday package. Second, migrant tourists are among those who return to their native country for a holiday or to visit relatives and who then access dental treatment during their visit.

The main motives for seeking dental treatment abroad are lack of availability at home, dissatisfaction with dental treatment at home, lower prices, high quality care coupled with vacation. For example, Jaapar et al. (2017) discovered that dental care quality, dental care information access and cost-savings were the most important motivation factors among dental tourists in Malaysia. In Germany, Panteli et al. (2015) found the top three dental tourists' travel motivations were cost savings followed by good previous experience with treatment abroad and trust in a certain healthcare provider in the EU. Cuamea Velazquez et al. (2017) investigated the factors by which the tourists of a border region choose the clinics of a foreign city for their dental treatments in the city of Tijuana, bordered to the north by the county of San Diego, California, United States. The results show five key factors influencing the decision: Quality-Price, Facilities and Technology, Length of Time and Price of Treatments, Credit and Urban Image. Adams et al. (2018) examine the perspectives and experiences of industry stakeholders working and living in dental tourism industry site in northern Mexico to develop a better understanding of the ways in which common discourses of the industry are taken up or resisted by various industry stakeholders and the possible implication of these practices on health equity. Interviews with a range of industry stakeholders suggest that care provision in this particular location enables international patients to access high quality dental care at more affordable prices than typically available in their home countries. One qualitative research on Canadian medical tourists show that during the decision-making process about treatment abroad a crucial factor is reliable information about the reputation of surgeons abroad and hearing testimonials from other patients who had gone to the same facility.⁵

3. The factors of European destination countries' success in dental tourism

In Europe, dental tourists represent a large proportion of medical tourists. In the 2013 *Treatment Abroad Medical Tourism Survey* involving over 1.000 participants, dental tourists represented 32% of all medical tourists.⁶ The leading dental tourism destination is Hungary. Many other European countries are developing dental tourism as a major segment of the growing medical tourism in Europe.

Hungary is a remarkable destination country in dental tourism for foreign patients. According to Kovacs et al. (2013)⁷ there are several reasons why Hungary could gain the leading position in dental tourism. First, the cost-benefit ratio is outstanding. Secondly, the high quality of dental training plays a significant role. Thirdly, the quality of materials used in dental practices is high – European-level quality. The rate of complications in dental care stays around 5% similarly to other European countries. In terms of quality a guarantee is provided. The majority of dental offices ensure quality by ISO and other European and American Quality Assurance Certificates. Also, previous treatment experiences are positive, patient satisfaction level is high. Zoltan & Maggi (2011)⁸ pointed out how Hungary can keep its leading position with respect to the eastern competitors which are sometimes cheaper, but less experienced in this sector. At the moment, Hungary can beat them by providing guarantees for its high-quality dental services and an emphasis on high professional standards with more agencies, bigger clinics, more doctors, state-of-the-art technology and language skills.

Romania is becoming one of the most popular destination of dental tourism. Private clinics provide the same high standard treatments and procedures as any other developed country for a fraction of their cost. Dentistry in Romania is well suited both for tourists visiting the country, and for business travelers. Romanian clinics offer a wide range of services, from dental implants to cosmetic surgery. The doctors are specialized in all areas of dentistry, they are constantly attending training courses in order to always be up to date with the latest technologies. Clinics provide a completely organized trip, from accommodation, travel arrangements, to a list of places their patients might like to visit during they stay and treatment in Romania. Patients from Asia also have options to benefit from high

quality dental services at very affordable prices in partner dental clinics in Thailand or in Dubai. They also have partners in Mexico for patients living in the USA.⁹

The Czech Republic, and in particular its beautiful and historic capital, Prague, is one of the emerging dental tourism destinations offering high standards of dental treatment combined with significant savings on the costs of restorative and cosmetic dental treatment. Cosmetic dental treatment in a private clinic in the Czech Republic can cost less than 60% of the same treatment in the UK. Furthermore, the quality of the treatment is top class and with dentists qualified and experienced at an outstanding level, it makes the overall price in the Czech Republic even more attractive. In the Czech Republic, dentistry clinics and medical tourism agencies offer packages for various treatments which often include transfer to and from the airport and luxury accommodation.¹⁰

In Poland dental and aesthetic surgery are the most popular services for medical tourists. Poland highlights the availability of low-cost flights, inexpensive accommodation and attractive tourist destinations in promoting medical services. To simplify the procedure for its clients, an increasing number of clinics and hospitals offer packages that include transportation to and from an airport, as well as accommodation in apartments or hotels. The cost of treatment in Poland can be up to 40% lower than in Germany or the United Kingdom.¹¹

Many countries in Croatia's neighborhood are also developing medical tourism, especially dental tourism. Slovenia is positioned as a new destination for medical tourism, emphasizing specialization in dentistry, orthopedics and sports medicine and ophthalmology. Health tourism is the fastest growing segment of Slovenian tourism.¹² Bosnia and Herzegovina is one of the countries with low prices of dental services. The prices of porcelain crowns and prosthetic services are among the lowest in the region and the prices for dental implants are also very competitive. A great number of dentists in the Sarajevo region provide dental services mainly to Bosnia and Herzegovina citizens living outside the county during the vacation period (Tihi, Peštek, 2009). In Serbia the lower prices of medical services, compared to more developed countries in Europe, are the motive for patients' usage of medical services and various surgical treatments. Apart from the use of dental treatment, patients come for cheaper

cardiac interventions or hip and knee replacements and aesthetic surgeries (Jovanović, 2015).

4. The case of dental tourism in Croatia

In Croatia, the development of medical tourism was insufficiently encouraged, although health tourism was defined as one of the key tourism products in the past period in the Croatian Tourism Development Strategy 2012-2020.¹³ The contribution to the development of medical tourism in Croatia was provided by the Association for the medical tourism development, which brings together medical and tourist experts with the aim of promoting the medical tourism services of the members of the Association on the domestic and foreign markets¹⁴ and the Health Tourism Association at the Croatian Chamber of Commerce as a professional trade association gathering members from the medical, spa and wellness tourism (three sections) with the aim of designing, encouraging and coordinating the development and improvement of the quality of service provision, profiling of health tourism products etc. By adopting the new Act on the Provision of Tourism Services¹⁵, which came into force on 1 January 2018, health institutions are able to organize the health and tourism part of the stay for patients who come for medical treatment, dental treatments etc.

Before this Act came into force, only travel agencies were authorized to sell a complex package (including a complex health tourism product), which made it considerably more difficult to sell because there was a small number of medical tourism agencies and facilitators on the market. There was also total lack of an effective promotion at the national level. Recently the Croatian Chamber of Economy, in cooperation with the Croatian Tourist Board, has launched a project of national promotion of health tourism under the joint slogan Croatia - Full of well-being on the portal Health and Wellness - Full of well-being.¹⁶

The development of dental tourism in Croatia was based on investment of private clinics in the quality of dental care product/services, staff competence and marketing. Most dental clinics are located in Istria, Zagreb, Primorje-Gorski Kotar County and counties of Northern Croatia. Travel motivation for dental care is mainly related to lower prices, quality of dental care services and combination of dental treatment and tourist experience.

Table 1 Average treatment costs in Croatia and other countries

Treatment	Croatia	Italy	Germany	UK	USA
DENTISTRY					
Implant	720 €	1,500 €	1,550 €	2,000 €	3,100 €
Sinus lift	650 €	820 €	800 €	1,770 €	3,500 €
Prostheses	580 €	1,250 €	1,600 €	1,200 €	3,100 €
Whitening	280 €	450 €	598 €	650 €	775 €
Crowns	275 €	550 €	518 €	570 €	1,150 €
Veneers	300 €	570 €	572 €	450 €	1,150 €
Fillings	40 €	130 €	110 €	100 €	155 €

Source: Split-Dalmatia County Tourist Board, available at: https://www.dalmatia.hr/hr/zdravstveni_turizam (Accessed on: April, 15, 2018)

Jurišić & Cegur Radović (2017) pointed out that foreign patients mostly visit dental clinics in Primorje – Gorski Kotar County, which has a long tradition in health tourism, due to an excellent price-quality ratio, in 67% of clinics, and due to cheaper dental service when compared to their domicile country, in 33% of the cases. The core market for incoming patients is Italy (89%) and the significantly lower percent (11%) come from Slovenia. The extent to which marketing activities affect the decision of patients on the use of dental service clinics is 67%, and a marked influence was recorded in 11% of the cases. According to the survey findings in selected dental clinics located in Zagreb (Kesar, Mikulić, 2017), the two most important attributes that influence dental tourist satisfaction are the quality of dental care product/services and staff professionalism and competence, while the price of the service and honoring the appointment schedule have a relatively weak influence on patients' overall experience related to the provision of dental care service (according to the place of residence of international patients covered in this case study, 48.2% come from Italy, 44.0% from the UK market, and 7.9% from Slovenia).

4.1 Research methodology

The researches have been conducted on the supply side of the dental providers in Croatia. The aim is to understand dental tourism from the perspective of dental providers by identifying limitations, opportunities and strengths in providing dental care: current business activities in dental providers practice, services offered, equipment, dental care

quality, marketing activities, dental care information access, supporting services, actors involved, how they co-operate with different partners, their satisfaction with national promotion, specialized travel agencies, available tourist attractions and the limitations and opportunities of dental tourism development in Croatia. In order to get an overview of dental market supply in Croatia two researches were conducted.

The first research was conducted by a systematic review of websites of ten leading dental care providers. The websites of leading dental care providers were examined using eleven key dimensions: dental facilities, types of treatment, dentist's professionalism, technology offered, guarantee, quality assurance, dental fee, supporting services and available tourist attractions and marketing activities.

The second research was conducted using an anonymous online survey in October 2018. Invitations to participate in the research were sent to electronic addresses of the managers of dental care providers who in 2017 were ranked as the largest ones according to the criterion of more than 15 employees and the total income realized higher than HRK 4 million (ca. 540 000 €) with the purpose of collecting quantitative information about their business activities, limitations and opportunities in providing dental care services. The research according to the mentioned criteria included 33 clinics.

The questionnaire consisted of 11 questions and it was divided into three parts. The first part deals with determining the limitations on the development of dental tourism in Croatia. The second part

of the questionnaire includes questions about elements that can stimulate the development of dental tourism. The first and the second part of the questionnaire included multiple choice questions using a five-point Likert scale, where respondents expressed their level of satisfaction. The third part refers to general information about the dental institution. The questionnaire was developed using the Qualtrics Survey software. From 35% of the dental institutions that responded, 54.5% of them operate in the City of Zagreb, 36.4% in Primorje-Gorski Kotar County and 9% in Istria County.

4.2 Results and discussion of findings

Findings on websites survey

All of the providers' websites contain information such as dental facilities and types of treatment. Clinics offer a wide range of services, from dental implants to cosmetic surgery. On all providers' websites there is a clear statement that dental consultative service is available. The contact and consultations are available via email, SMS, free call, modern mobile apps (WhatsApp, Viber etc.). Free first visit includes a consultation and examination by a dentist; in one case it includes some additional benefits: free transportation to the clinic, possibility of free accommodation, the restaurant with tailor-made offer within the clinic and free parking for patients who decide to arrive by their own means of transport.

80% of the providers' sites contain details of dentists' experience and how long they had been practicing. Internationally recognized qualifications and competences are also frequently listed, as well as full CVs, copies of certification, attended professional training courses, international conferences and languages they speak fluently.

On the 90% of the providers' websites there is a clear statement of technology offered, the name of certified manufacturers of equipment and materials used in their practices to ensure a high level of quality and safety for patients. Some providers have their own laboratory that simplifies the communication between the patient, the dental technician and the doctor. All the procedures are carried out with international certificate standards and the materials of the highest quality, provided by renowned manufacturers. The patients can access online photos of the interior of the clinic; on one website, for example, they can make a virtual tour of the clinic.

All of the providers' sites contain details of a guarantee. The guarantee applies to quality of work/dentures delivered to the patients. More than 50% clinics give lifetime warranty for implants; the others give 5 to 10 years. For all prosthetic works the warranty is usually from 2 to 5 years.

The majority of the providers' sites contain (more than 50%) the information on quality assurance by ISO and other European and American Quality Assurance Certificates. The relevant international certification represents the confirmation of quality of services and it is an important factor for successful positioning in the dental tourism market.

On 80% of the providers' websites the prices of dental services and terms of payment are presented (credit card payment, consumer credit, possible discounts, special offers etc.). One provider presents a comparison of dental fees in Croatia, Great Britain and Germany, the other in Great Britain and Croatia with a clear statement that a complete treatment in the clinic is saving up to 70% on the UK cost. Some clinics offer a variety of payment benefits and discounts on dental services (family discounts, members of various associations, etc.).

The majority (90%) of providers' websites contain the information about offered packages for various treatments which often include accommodation and transfer to and from the airport, ferry ports and bus stations as well. The clinics co-operate with different partners and provide assistance regarding the travel organization, transfer and accommodation of patients. 70% of providers offer free accommodation during therapy in their own facilities that are situated only a short walk away from the clinic, and free transportation. For example, to make the arrival and stay more enjoyable, and recovery more efficient and less painful, one clinic offers accommodation in their own suites, and another in single or double rooms in a facility inside the clinic with 0-24 assistance or, for patients who want to stay at a hotel, they provide a 25% discount for the 4-star hotel and transportation from the accommodation to the clinic. Another provider offers free accommodation during treatment not only for the patients but also for their companions in fully equipped suites situated within a walking distance from the clinic and in case all the suites are taken, free accommodation in a hotel, free transport from airport, railway station and bus station to the suites and/or clinic etc.

On the 90% of sites there are other useful information for potential dental travelers – details about travelling to Croatia by plane, car, boat, train or by bus, list of places they might like to visit, details about Croatia's natural beauties, climate, beaches, untouched nature, rich history, cultural heritage, national parks, excellent cuisine and wines, events, friendly people etc. By promoting supporting services and available tourist attractions they emphasize the benefits of dental care and leisure in Croatia.

All dental care providers use the internet and their websites as the main source of information and advertising. Websites are the key link between the potential foreign dental tourists and treatment providers. Innovative communications with e-marketing, Twitter, Instagram, blog, Facebook and reviews of satisfied patients are the key factors of advertised information. In one case the clinic has created its own Facebook campaign based on statistical data of foreign patients who visited the clinic in the past five years (Krajnović et al., 2013). Dental tourists are using the likes of Facebook and Twitter to read and post comments about their experiences.

Many of the sites (80%) contain a rewards program for recommendations from patients to their friends and family, dental gift cards for people who want to give a unique and special gift to their family members, friends, colleagues etc. as well as a gallery with photos of patients showing their oral cavity before and after therapy, presenting the difference in the condition before and after a dental treatment in the clinic etc. All the providers' sites contain patients' testimonials. The reviews help dental tourist to compare patient satisfaction and quality of dental care. Word-of-mouth is a very important marketing tool.

Findings of online survey

The findings indicate that the main limitations to the development of dental tourism in Croatia are the following: lack of EU funding and lack of incentive measures for the development of medical tourism. They are followed by inadequate promotion of dental tourism at the national level, lack of strategic planning and development vision at the national level, small number of specialized medical tourism agencies and insufficient cooperation of clinics with other service providers and travel agencies.

Table 2 Evaluation of the influence of limitation factors on the development of dental tourism in Croatia

	Mean	Std Deviation	Variance
Inadequate promotion of dental tourism at the national level	4.45	1.16	1.34
Lack of strategic planning and development vision at the national level	4.36	1.15	1.32
Small number of specialized agencies for medical tourism	4.18	1.11	1.24
Uncoordinated legal acts in medicine and tourism	3.64	0.98	0.96
Insufficient strength of clusters and associations for the development of medical tourism	3.45	0.89	0.79
Insufficient number of qualified medical staff	3.73	1.05	1.11
Insufficient cooperation of clinics with other service providers at the destination	3.73	1.05	1.11
Lack of tenders for EU funds	4.64	1.15	1.32
Lack of incentives for the development of medical tourism	4.64	1.15	1.32

Source: Author's research

For further development of dental tourism it is extremely important to carry out accreditation and international certification of clinics, as well as to continuously invest in employee training, quality of service and equipment/technology. It is followed by the call for tenders for EU grants, branding Croatia as a destination for medical tourism,

increased investment of the Croatian National Tourist Board in advertising, possibility of using the incentives of the Agency for Investments and Competitiveness, connecting to insurance companies, and better public and private sector co-operation and systematic promotion of dental tourism at the national level.

Table 3 Evaluation of the importance of certain activities for further development of dental tourism in Croatia

	Mean	Std Deviation	Variance
Branding Croatia as a medical tourism destination	4.82	0.39	0.15
Systematic promotion of dental tourism at the national level	4.55	0.66	0.43
Increased investment in advertising by the Croatian National Tourist Board	4.82	0.39	0.15
Better cooperation of clinics with other tourism service providers	4.27	0.45	0.20
Partnerships and strategic alliances of service providers	4.27	0.45	0.20
Accreditation and international certification	5.00	0.00	0.00
Continued investment in employee education and quality of service	5.00	0.00	0.00
Continued investment in equipment/technology	5.00	0.00	0.00
Stronger connection with the Croatian diaspora	3.64	0.88	0.78
Adjustment of visa regime	3.73	0.96	0.93
Connecting to insurance companies	4.55	0.66	0.43
Better public and private sector cooperation	4.55	0.66	0.43
Tenders for EU grants	4.91	0.29	0.08
Incentives of the Agency for Investments and Competitiveness	4.64	0.48	0.23

Source: Author's research

Research findings suggest that the investment of dental institutions in marketing, employees/ equipment/ technology has been recognized by foreign patients. In 66.6% of the dental clinics surveyed, more than half are foreign patients. Most patients come from Italy, Slovenia, Austria and Germany, and a smaller number from the UK, the Netherlands, Scandinavia, USA, Switzerland and Bosnia and Herzegovina. In most of the surveyed dental clinics (80%), patients from abroad are coming throughout the year.

According to the respondents, the most effective forms of promotion are websites (average value

4.91), word of mouth (4.91) and social networks (4.63). It is followed by ads on search engines, while emails, blogs, YouTube, banners, and mobile marketing are rated as less effective in communicating with patients.

All the respondents consider that the priority is to improve the accessibility of the destination (direct flights, etc.). Following are the wealth of eno-gastronomic offer, quality of the accommodation offer, wealth of cultural and entertainment facilities and shopping opportunities.

Table 4 Evaluation of the importance of improving the supporting services in the destination for further development of dental tourism

	Mean	Std Deviation	Variance
Improve the accessibility of the destination (direct flights, low cost carriers etc.)	5.00	0.00	0.00
Better quality of the accommodation offer	4.00	0.43	0.18
Wealth of cultural and entertainment facilities	4.00	0.74	0.55
Wealth of eno-gastronomic offer	4.18	0.57	0.33
Shopping opportunities	3.91	0.67	0.45

Source: Author's research

In addition, the research sought to identify the elements for building Croatia's distinctiveness on the market as a country of dental tourism. The views of most surveyed dental clinics managers (64%) are that competitiveness needs to be built on the high quality of the dental tourism product (tourism experience and quality of dental services/clinics), while others consider competitiveness to be built on top quality dental services/clinics.

5. Conclusion

In this study the attention was given to understanding dental tourism in Croatia from the perspective of dental care providers by identifying their current business activities, as well as limitations and opportunities in providing dental care services.

Despite the limitations of the research with a small sample size, the key findings are very indicative given the state and enormous potential of dental tourism in Croatia. Great opportunities for development have not been exploited.

The findings show that dental tourism in Croatia, as well as in the neighboring countries, has competitive advantage based mainly on excellent price-quality product/services ratio of dental care, highly educated and experienced medical and professional staff, high professional standard, solutions for dental problems in a short time at lower cost, communication with patients in foreign languages, quality of supporting services and tourist facilities, good geographical position and easy accessibility of the country.

According to the opinion of dental clinics managers, the main limitations to the development of dental tourism in Croatia are lack of EU funding tenders and incentive measures for the development of medical tourism, inadequate promotion of dental tourism, and lack of strategic planning and development vision at national level. The following factors are considered to be particularly important for further development of dental tourism in Croatia: accreditation and international certification of clin-

ics, continuous investment in employee training, quality of services and equipment/technology, tenders for EU funds, branding Croatia as a destination for medical tourism and higher Croatian National Tourist Board investments in advertising. The findings also emphasize that Croatia, as a country with a long tradition in tourism, must build competitive advantage on the basis of high quality dental tourism products (dental treatment with tourism experience as a product). Integration of dental care and leisure, the quality of supporting tourism services/facilities/attractions built around the dental treatment as a core product will enable Croatia to create a recognizable identity. This requires a multidisciplinary approach to the development of dental tourism and higher degree of cooperation between dental providers, the public sector and all stakeholders in the supply chain.

Marketing communication should focus on the industry strengths, which is the dental tourism product. Quality of Croatian supporting tourist facilities add value to the core product and help to differentiate it from competition. The Ministry of Tourism and Tourist Boards should be more strongly involved in promoting the advantages of dental tourism products in Croatia compared to other countries, using modern forms of communication (e-marketing, social media, Facebook, Twitter etc.).

The survey findings provide information that can be used for taking action to stimulate the development of dental tourism in Croatia. This study is a foundation for further research. The interviews with dental clinics managers should be conducted to gain a better insight into their opinions and needs. It is also necessary to systematically conduct research to better understand dental tourists' profiles, travel motivations, what patients take into account when they choose their dentists, the level of satisfaction with dental care services, supporting services and tourist facilities in order to make appropriate management and marketing recommendations.

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Doris Peručić

OGRANIČENJA I PERSPEKTIVE RAZVOJA DENTALNOG TURIZMA, PRIMJER HRVATSKE

SAŽETAK

Mnoge zemlje razvijaju dentalni turizam kao značajan segment rastućeg medicinskog turizma u svijetu. U Europi dentalni turisti čine više od 30% ukupnog broja medicinskih turista. Cilj rada je analizirati razvijenost dentalnog turizma u Hrvatskoj sa stajališta pružatelja stomatoloških usluga identificiranjem ograničenja i mogućnosti za pružanje usluga dentalnog turizma. Kako bi se dobio uvid u razvijenost tržišta dentalnog turizma u Hrvatskoj provedena su dva istraživanja. Prvo istraživanje provedeno je sustavnim pregledom internetskih stranica vodećih privatnih dentalnih klinika, a drugo putem online ankete provedene u listopadu 2018. godine. Nalazi istraživanja ukazuju da se tržišna prepoznatljivost Hrvatske uglavnom temelji na izvrsnom odnosu cijene i kvalitete dentalnih usluga/proizvoda, stručnom osoblju, visokim standardima, nižim cijenama i kvaliteti dodatnih usluga. Prema mišljenju menadžera dentalnih klinika glavna ograničenja razvoja dentalnog turizma u Hrvatskoj su: nedostatak natječaja za dodjelu bespovratnih sredstava iz EU fondova i izostanak poticajnih mjera za razvoj medicinskog turizma, zatim nedostatna promocija dentalnog turizma i nedostatak strateškog planiranja i razvojne vizije na nacionalnoj razini. Za razvoj dentalnog turizma izuzetno je važno provesti akreditaciju i međunarodno certificiranje klinika i kontinuirano ulagati u usavršavanje zaposlenika, kvalitetu usluge i opremu/tehnologiju. Nalazi također ukazuju da Hrvatska svoju konkurentsku prednost treba graditi na kvaliteti dentalno turističkog proizvoda. Kvaliteta usluga/sadržaja uključenih u turistički dio boravka daje dodanu vrijednost osnovnom proizvodu i omogućuje da se diferencira od konkurencije.

Gljučne riječi: dentalni turizam, ključni čimbenici uspjeha, Hrvatska, ograničenja, mogućnosti, konkurentna prednost