

TURKEY AS A MEDICAL TOURISM DESTINATION: A STUDY OF THE EFFECTIVE MARKETING FACTORS ON PREFERENCES OF THE ARAB MEDICAL TOURISTS IN TURKEY

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ABSTRACT

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Turkey as A Medical Tourism Destination: A Study of The Effective Marketing Factors on Preferences of The Arab Medical Tourists in Turkey

The purpose of this study is the exploration of international travel experiences for the aim of medical treatment from the perspective of the patients and to develop insight and understanding of the effective factors in choosing a medical destination in the medical tourism field. Moreover, the study aims to provide critical feedback to whom may be interested in Turkey as an attractive destination for medical tourism.

The study begins by reviewing different definitions of medical tourism and shows the differences between health tourism and medical tourism. Then it reviews the history of medical tourism, noting specific medical tourism destinations, presents various reasons for this increase in medical tourism. Later it continues to mention about some successful countries in this field including Turkey, referring general consumer behavior model. Then the study refers to the influencing factors on consumer behaviors in general then on medical tourists as they choose the medical destinations. Finally it ends with the evaluation of the relative effectiveness of these factors on Arab medical tourists.

In this research, it is focused on determining the factors of the marketing mix model which includes product, price, place and promotion which affect the motivation of Arab medical travelers to come to Turkey for medical treatment purposes. The research uses in this study a quantitative research method, namely a survey questionnaire in order to assess the motivational factors that lead Arab customers to choose hospitals in Turkey for medical care services.

Improved understanding of medical tourism provides additional information about a contemporary approach to health-seeking behavior. The results of this study provide increased understanding of those who seek health care internationally from the patient perspective.

Key words: Medical Tourism, Health Tourism, Turkey, Arab Consumers, Marketing Mix, Consumer Preference.

KISA ÖZET

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Ocak 2014

Medikal Turizm Destinasyonu Olarak Türkiye: Türkiye'deki Arap Medikal Turistlerin Tercihlerinde Etkili Olan Pazarlama Faktörleri Üzerine Bir Çalışma

Bu çalışmanın amacı, tıbbi tedavi amacıyla uluslararası seyahat etme deneyimlerini hastaların bakış açısı ile araştırmak ve medikal turizm alanında medikal destinasyon seçerken etkili olan faktörlerin anlaşılmasını kavranmasını geliştirmektir. Ayrıca, çalışma Türkiye'nin medikal turizm açısından çekici bir destinasyon olarak ilgisini çekebilecek insanlara önemli bilgiler sağlamaktır.

Çalışma, medikal turizm kavramı ile ilgili farklı tanımları gözden geçirerek başlayıp sağlık turizmi ile medikal turizm arasındaki farkı göstermektedir. Daha sonra medikal turizmin tarihçesini ele almakta, önemli medikal turizm destinasyonlarını belirtmekte, medikal turizmde yaşanan artışın çeşitli sebeplerini sunmaktadır. Bu alanda başarılı bazı ülkeleri Türkiye dahil olmak üzere açıklamakta, genel tüketici davranış modelini açıklamaktadır. Çalışma önce genel olarak tüketici davranışı üzerinde ve sonra medikal destinasyon seçiminde medikal turistler üzerinde etkili olan faktörlere değinmektedir. Bu faktörlerin göreceli olarak Arap medikal turistler üzerinde etkili olduğunu değerlendirerek sonuçlanmaktadır.

Bu araştırmada, tıbbi tedavi amacıyla Türkiye'ye gelen Arap medikal turistlerin seyahat motivasyonunu etkileyen ürün, fiyat, lokasyon ve reklam gibi pazarlama karması modeli içinde yer alan bu faktörlerin belirlenmesi üzerine odaklanılmıştır. Bu çalışmada kapsamında araştırma yöntemi olarak kantitatif araştırma metodu kullanılmıştır; bir nevi anket yöntemi olan bu metodla Arap tüketicilerin tıbbi tedavi hizmeti için Türkiye'deki hastaneleri tercih etmesinde en fazla etkili olan güdüleyici Faktörler belirlenmiştir.

Medikal turizmin ileri düzeyde kavranılması, sağlık arayışı ile ilgili tüketici davranışına ilişkin çağdaş yaklaşımla ilave bilgi sağlamaktadır. Bu çalışmanın sonuçları uluslararası tıbbi tedavi alma isteğinde olanlara hastaların bakış açısından yararlanılarak önemli bilgiler vermektedir.

Anahtar kelimeler: Medikal Turizm, Sağlık Turizmi, Türkiye, Arap Tüketiciler, Pazarlama Karması, Tüketici Tercihi.

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CHAPTER I INTRODUCTION

1.1. General Introduction

Tourism is a part of the general economic plan in all the countries all over the world because of the continuous increase in the number of tourists every year and especially in the 21st century, and with this growing and flourishing in the tourism sector, new types have appeared; one of these kinds is health tourism or medical tourism.

Health tourism is one of the important types of tourism that includes travel in order to search for health treatments, or recreation in health spas, and also includes the income from health tourists through expenditures for different kinds of therapeutic or non-therapeutic things.

This type of tourism constitutes a key source of income for many countries, especially for the developing countries in the recent years. And for example, just noting the fact that approximately every single medical tourist spends about 2.500-3.000 dollars, and usually 650 dollars being spent in by a regular tourist for regular vacation purposes, is enough to realize how enormous and important effect medical tourism has on the economy of Turkey (Republic of Turkey, Ministry of Health, 2012).

Health Tourism is defined as patients movement from one country to another for the purpose of treatment that patients seek, sometimes by passing services offered in their own countries.

Nowadays, health tourists believe that for considerably lower costs and with a shorter waiting period to receive the treatment they need, they can obtain treatment that is equal to, if not even better than, what they would receive at

home. Some 20-30 years ago when the world was experiencing conflicts between blocs, no one could have talked about health tourism, but today because of the easy travel without visa requirements and the easy access through Internet to health care providers which have drastically contributed to develop health tourism worldwide, medical tourism nowadays has become a very important industry all over the world.

Turkey is one of those countries which had benefits from health tourism in the last two decades, Turkey is located between Europe and Asia and with its fast developing economy offers unequalled opportunities to those who search for treatment alternatives in its hospitals. Recently, Turkey has achieved important improvements in its health facilities, and too many private investors have invested heavily in highest quality hospitals equipped state of the technologies operated by highly skilled top medical staff that aim to treat and perform major cases in medicine. And this facilities have been attracting a lot of international patients or what it is called them medical tourism (Ansat, 2014).

1.2. Statement of the Problem & Research Question

The variety of medical tourism services, the quality of medical services, the price of medical and health services, advertising for medical and health centers, and others are the main effective factors that attract medical tourists in general.

The study attempts to identify the factors that determine how the medical tourists choose a destination for abroad medical treatment, and tries to understand how those factors affect medical tourists coming to Turkey, and which of them has a stronger effect.

The main question that the study attempts to answer is: what are the influencing factors that lead Arab medical tourists to choose hospitals in Turkey as a medical tourism destination and which of them does have greater effectiveness.

1.3. Aim of the Study

The purpose of this study is the exploration of international travel experiences for the purpose of medical care from the perspective of the patients and to develop insight and understanding of the essence of the phenomenon of medical tourism. Moreover, the study aims to provide critical feedback to whom may be interested in Turkey as an attractive destination to medical tourists.

This study is mainly focused on Arab medical tourists, who travel outside of their home country to receive various medical treatments in Turkish hospitals. The objective of this research study is to determine the influencing factors that lead Arab medical tourists to choose Turkey as their medical tourism destination. The purpose of identifying these factors is to assist decision-makers in developing policies that will be successful in promoting medical tourism in Turkey.

1.4. Limitation

The study focuses only on the Arab medical tourists, rather than the other foreign patients for reasons, first of all the increasing number of Arab patients recently coming to Turkey for different kinds of treatments like Physical Therapy and Rehabilitation, Aesthetic Plastic Surgery, Hair transplantation,

Dental, and even more complex procedures like Cardiology and Heart Surgery, Organ and tissue transfer and too many others.

Moreover, the researcher is Arab, which provides obvious advantages in terms of personal knowledge of the issues, and an ease of communication with the Arab patients by investigating them in their own language. Anyway the study will still be open for further researches on the other foreign patients.

CHAPTER II LITERATURE REVIEW

2.1. Medical Tourism Concept

2.1.1. Health Tourism and Medical Tourism

Previously, perhaps because of necessity, health tourism and medical tourism had the same meaning, where the general concept of health tourism or medical tourism is traveling from the country of residence to another country for treatment purpose and the person who is traveling is called a health tourist. However, it also could be recognized that health tourism not only the one which happens abroad but also could be in an internal way, according to Aydin, (2014) "health tourism in the general meaning could be only outside of the country of residence but also could be as the travels taken from the place of residence to another location (domestic or abroad) for the purpose of getting service for any health reason". Deloitte Center for Health Solutions also refers to this side as well in the description of medical tourism as the process of leaving home for treatments and medical care abroad or elsewhere domestically (Deloitte Development for Health Solutions, 2008).

A lot of studies, even the recent ones, consider health tourism and medical tourism as alternative names for the new phenomenon, and they refer to the same meaning, as in Reddy's study,(2013), where the terms medical tourism and health tourism have been used interchangeably.

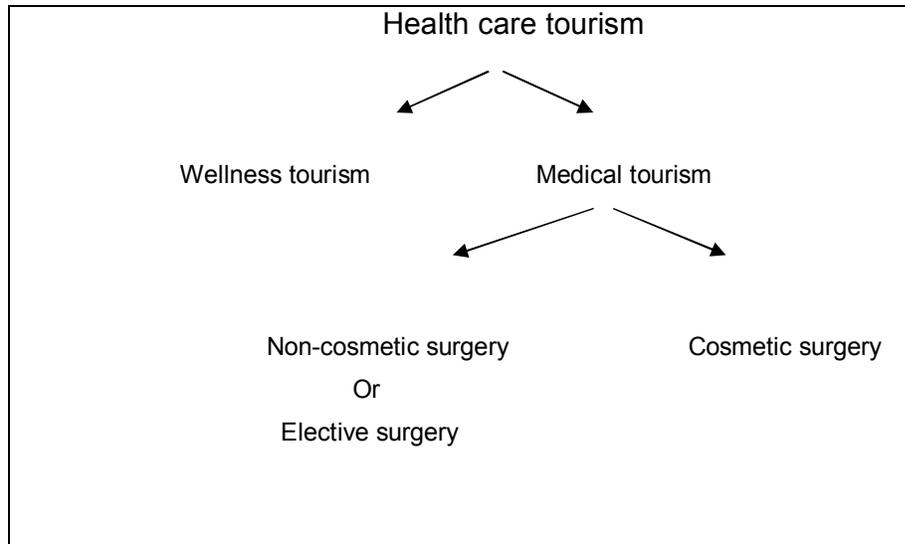
Some others even go further considering medical tourism, health tourism and wellness tourism as the same thing; that is, traveling to foreign countries to obtain medical, dental, surgical, and wellness care, as in Gatrell's study (2011).

On the other hand, it is noticed that recently there is another serious effort both in Turkey and all over the world to give a specific definition to health tourism and medical tourism separately, and many objections are increasing that the concept of medical tourism does not match exactly the true meaning of health tourism, and health tourism should be the general framework and subcategories under this concept must be defined, and these sub definitions shall be established strictly as commonly explicit by all industry players (Republic of Turkey, Ministry of Health, (2012).

Health in the definition of the World Health Organization is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity, thus, health tourism includes mental health and mental comfort as well as physical health, while the word medical refers to the physical health only, without mentioning the psychological aspect and social welfare, In other words, medical tourism is a subset of health tourism (Munro, 2012).

Caballero-Danell & Mugomba (2007) divided health tourism to two main categories: wellness tourism and medical tourism and under the medical tourism they have put another two sub-categories, cosmetic surgery and non-cosmetic surgery or elective surgery (Caballero-Danell & Mugomba, 2006).

Figure 1.2 Subcategories of Health Care Tourism 1

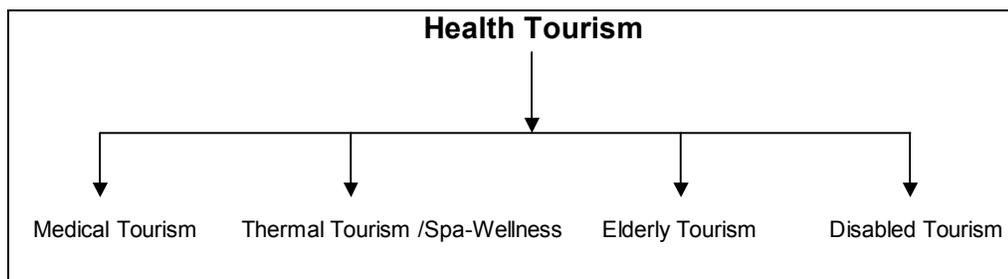


Source: Danell & Mugomba, 2006. Medical Tourism and its Entrepreneurial Opportunities - A conceptual framework for entry into the industry.

Furthermore, according to (Republic of Turkey, Ministry of Health, 2012), health tourism subcategories are:

- a. Medical Tourism
- b. Thermal Tourism/ Spa-Wellness (Rehabilitation, recreation and similar services at thermal facilities)
- c. Elderly Tourism (Geriatric treatment center or long term accommodations)
- d. and Disabled Tourism

Figure 2.2. Subcategories of Health Care Tourism 2



Source: Republic of Turkey, Ministry of Health, (2012). Definitions and descriptions regarding health tourism.

Therefore, according to this division, health tourism acts as an umbrella term that covers all forms of health-related tourism, and medical tourism is one of its sub-categories.

2.1.2. Medical Tourism Definition

This study is mainly focused on medical tourism as a sub-category of health tourism, although there is no agreement on one specific definition of this phenomenon and there are many definitions of medical tourism in the literature; here are some of these definitions:

Hall (2003) defines health tourism as : “a commercial phenomenon of industrial society which involves a person travelling overnight away from the normal home environment for the express benefit of maintaining or improving health, and the supply and promotion of facilities and destinations which seek to provide such benefits”.

Connell, (2006) says: “medical tourism as a niche has emerged from the rapid growth of what has become an industry, where people travel often long distances to overseas countries to obtain medical, dental and surgical care while simultaneously being holidaymakers, in a more conventional sense.”

Lunt et al (2011) indicated to medical tourism as when consumers elect to travel across international borders with the intention of receiving some form of medical treatment, this treatment may span the full range of medical services, but most commonly includes dental care, cosmetic surgery, elective surgery, and fertility treatment.

Another definition talks about the monetary side of medical tourism and the increasing number of health tourists around the world today, which means

more incomes to the host countries, and that medical tourism was given a big attention in the recent years especially from the developing countries after the reverse tendency which happened recently by a huge number of medical tourists traveling from developed countries to less developed countries for the purpose of treatment for many reasons. Gupta (2008) writes “medical tourism is a multi-billion dollar industry promoted by governments and the medical and tourism industries”.

Finally, the following definition can be given to medical tourism based on the previous definitions simply as: “the travel of individuals from their residences to another country for the purpose of obtaining medical treatment or services in that country”.

It could be also said that if tourism is the accumulation of travel and experience other cultures then all medical tourism can be defined as tourism, unless tourism here may involve the patients’ relatives more than themselves, but most patients are able to sample standard tourist experiences if they wish to.

2.2. Medical Tourism Industry

2.2.1. Global Medical Tourism

2.2.1.1. Background and History of Health Tourism and Medical Tourism

Although some might think that health tourism is just a recent phenomenon, this is not the case, however, for thousands of years people have been traveling short-long distances for health reasons, including bettering and curing their health.

Even though the ancients were not seeking procedures like Open-heart surgery or knee replacements, many were looking for healing waters or the benevolence of the gods to cure common illnesses such as rheumatism, syphilis, gonorrhoea, blindness and paralysis which were common at that time.

Some examples of people in the early ages of the world are the ancient Greeks and Egyptians, when they have traveled for health purposes seeking cures or rejuvenation, going to mainly different kinds of water like, spas, hot springs and rivers (Bookman & Bookman, 2007; Goodrich, 1994).

Archaeological evidences from 3rd millennium B.C. suggest that ancient Mesopotamians traveled to the temple of a healing god or goddess at Tell Brak, Syria, in search of a cure for eye disorders.

A few thousand years later the Greeks and Romans traveled by foot or ships to spas and cult centers all around the Mediterranean. The Greek pilgrims specifically, traveled from the Mediterranean to the small territory in the Saronic Gulf called Epidauria. It is said that this small territory was the sanctuary of Asclepius, known as "God of Medicine. The Asclepius Temples were some of the world's first health centers, pilgrims would sometimes spend several nights in the temple, expecting Asclepius would appear in a dream and would give a diagnosis or basically be a treatment (Sharma, 2013).

Later, Since the early 1500s India was very well known of yoga practices as well as Ayurvedic healing to medical treatment seekers from all around the world.

In the 16th and 17th centuries, spa towns such as St. Moritz and Bath became prime destinations for the European upper classes who were looking forward to these as opportunities for their health and well-being.

Spa towns and sanitariums can be considered an early form of health tourism. In the modern era, in the 18th and 19th centuries, Europeans and Americans, especially the wealthy ones in Europe, flocked to health spas and centers to find kind of a solution in simplest form to many illnesses such as gout, tuberculosis, bronchitis, or liver diseases.

In summary, historical accounts abound with reports of those who have traveled to better and improve their health through previous years (Ben-Natan et al., 2009 ; Sharma, 2013).

However, as it was found in the definition of health tourism that it contains Medical Tourism as a subcategory, besides Thermal Tourism/ SPA-Wellness, Elderly Tourism, and Disabled Tourism, it can be said that health tourism in the meaning of thermal tourism/ SPA-Wellness is not new, In contrast it was known many centuries ago and it was found in many ancient cultures. On the other hand, the new phenomenon of health tourism as traveling across international borders with the purpose of receiving treatments, such as dental care, cosmetic surgery, elective surgery, and fertility treatment, which it is called today medical tourism, is recognized as a new one and the real starting of it happened in the last decades of the 20th century, and exactly in the 1980s (Horowitz & Rosensweig, 2007).

2.2.1.2. Medical Tourism Today

Health tourism in the form of medical tourism, at the end of the 20th century and the beginning of the 21st century, is something different from other types of medical tourism in the past; it does today have a way different form from the old ones.

Previously, we used to see rich people had been making trips to developed countries, and mostly from developing countries to get better treatments, where they sought for the high quality in medicine, and surely they wanted to get the benefits of the technological advancement in the medical treatments where they had no chance to have them in their own countries at that time, but it is clear that this pattern recently changed in reverse (Burkett, 2007; Herrick, 2007).

The common aspect of medical tourism today is that the middle class from developed countries started making trips to developing countries where they would like to benefit from low costs with high quality treatments there. Owing to the technological advancement, this type of change in pattern has surely big effects on the economies of many countries, however we have to admit that the old type of medical tourism still exists until now with a lot of patients go to developed countries like USA or Germany to receive complex medical procedures there (Horowitz and Rosensweig, 2007).

Today many developing countries such as India, Malaysia, Brazil, South Africa and Thailand started to receive a great deal of people going there for medical treatment.

Johnston et al. (2010) says 'Hospitals positioning themselves as leading medical tourism destinations are largely found within lower and middle income countries'. Reddy (2013) also refers to the terrific growing in medical tourism which became a phenomenon where over 5 million patients annually are traveling across international borders to obtain different forms of health care, in addition to mention that the majority of these patients travel from developed countries to developing countries, searching for medical treatments in a high quality, and by the year 2012, the medical tourism industry has made income over \$100 billion with over 50 countries making it a priority in trade for their country.

The main reason to give expansion to medical tourism from developed countries towards developing countries in this way, could be because of the recent global economic crisis which occurred in North American and European countries in general, thus, these countries started to reduce their healthcare expenditure. From this aspect, it can be naturally expected the flow of people from developed countries to developing countries after they found out that they could get treatments in lower costs and the same level of quality of their own country. Therefore, once they have realized the astonishing technological developments and lower costs in less developed countries, they started moving from their own countries to so called developing / under-developed countries for treatment (Erdoğan, & Yilmaz, 2012).

As the world economy changes, such a shift in medical treatment are becoming increasingly common as patients seek more affordable healthcare options other than those which are available in their own countries. In the last fifteen years a great deal of people from countries like United States, Canada and European Countries in general, have been seeking to get the benefits of lower costs in medical treatment, They have chosen making trips to less developed or developing countries where they cannot find these affordable medical treatments in their home countries.

Moreover, until recently the most media outlets have been focusing on patients whom would like to get plastic surgeries or dental operations which are called elective procedures. But more medical treatment inputs have to be added as it is now not only limited with such elective operations but also with more acute care procedures such as spinal procedures, hip knee replacements or open heart surgery etc.

2.2.1.2.1. The Global Health Care Marketplace

The history of old health tourism or even the early medical tourism in the 20'th century refers to the movement of patients from developing country to developed countries, and although the traditional pattern of medical tourism still continues, the recent trend of medical tourism shows the flow of medical tourism is mostly from developed countries to developing countries because of cost consideration as it is mentioned before, where several countries can be mentioned like Malaysia, Mexico, Taiwan, Brazil, Costa Rica, India, Thailand, Singapore, South Korea and Turkey as they became favorable medical destinations in the world for many reasons.

A large and increasing number of countries do promote medical tourism today, according to Gahlinger (2008), a total of countries accumulation of nearly 50 countries which many of them are developing countries from Latin America and Asia are making huge incomes from medical tourism today.

The region which attracts most patients in medical tourism is without a question Asia. There are millions of people who make their way to Asia annually, to countries like Singapore, South Korea, Thailand, India, and Malaysia, which have got enormous increase in the number of people coming for medical purposes recently. The whole medical tourism movement to these countries started in Thailand early in 1970s with transsexual operations and then showed tendency towards plastic surgeries (Republic of Turkey, Ministry of Health, 2012).

In 2008 an estimated number of 2 million people had left United States for medical treatment abroad (Bauer, 2009).

In Singh and Gill' study (2011) it is reported that USA has more travelers in the world now than ever before whom are traveling away from their country to get a good quality of medical treatments according to their budget, and the

majority of them go to Asian countries, where a survey was done by a recognized consulting firm, McKinsey and Company, In 2008 regarding medical tourism. The survey was basically done with healthcare inner and outer circle including the patients, medicine subsidiaries of medical tourism and service providers which is covering more than 20 countries, according to this survey, majority of the North American medical seekers abroad have chosen Asian countries with a percentage of 45%, and 26% of them have chosen Latin America. So that mathematically means every seven people in ten(7/10) of the patients from North America who traveled abroad, either chose Asian or Latin Countries. And among European patients, 39% who sought health care abroad have traveled to Asia, 13% to the Middle East, and 5% to Latin America, nearly six in ten(6/10) of the European patients who sought health care abroad have traveled to a developing country (Ehrbeck et al., 2008).

To become a high-class healthcare destination could be complicated. The following are couple of notions can be mentioned for a better understanding why these destinations are successful and popular in medical tourism field:

- a. Potential for cost savings on medical procedures.
- b. Stable and Transparent Social Political System.
- c. Perfect infrastructure for travelers.
- d. Stable reputation for clinical perfection.
- e. Good record of medical innovation and its feedbacks.
- f. Successful adoption of best practices of a good quality in practices and modern medical technology.
- g. Keeping an internationally-trained and already experienced medical crew.
- h. The investments and incentives in the infrastructure of medical field both from private and government sectors.
- I. Demonstrable commitment to international accreditation, quality assurance, and transparency of outcomes.
- j. The flow of patients from abroad.

(Medical Tourism Statistics & Facts, 2013)

2.2.1.2.2. Successful Countries in the Medical Tourism Industry

A lot of countries today promote medical tourism, and Some of the most successful countries which are considered leaders in this field and took advantage of the benefit of medical tourism phenomenon early and reached a high class level and still in this level could be as follows:

a. Thailand:

Without a doubt Thailand is one of the top medical tourist destinations in the world, Thailand's medical tourism is growing staggeringly over 16 percent a year where the medical services and treatments are very well know worldwide. According to Gahlinger (2008) “Thailand has become the poster-child for medical tourism” (p.287).

Thailand In 2008 generated nearly \$1.6 billion in revenues and just recently in 2012 it generated an astonishing revenue of almost \$3.6 billion, with approximately 2.5 million world-wide patients (Reddy,2013). Furthermore, medical tourism generates the equivalent of 0.4% of Thailand's gross domestic product (NaRanonga, & NaRanongb, 2011).

Thailand has become one of the first and few attractive spot in the world in gender reassignment surgery and later that moved into cosmetics surgery steadily and heavily, and until now Thailand still one of the few countries that does gender reassignment surgeries (Sharpe & Marsek, 2009; Connell, 2006).

The Tourism Authority of Thailand (TAT) recognized that it is really profitable for the economy if they dwell on to develop the medical tourism, that is why in 2004 the TAT started a strategy to boost medical tourism in the country (Ricafort , 2013).

There are many special features that distinguish Thailand as one of the most attractive spot in medical tourism. First of all the advantage of the highly experienced and qualified doctors, nurses and further health workers, where most of the doctors had education in United States, or even majority of the country's doctors have been highly and professionally trained in either the western world or Singapore, as a result, they are fluently English speaker, not only the doctors but also nurses do know English in a good level as well.

The globally reputed and internationally accredited hospitals are considered one of the main features as well, where there are numerous JCI accredited hospitals. Thailand has got around 37 hospitals with Joint Commission International (JCI) accreditation with its all affordable cost for medical treatment and the advanced medical technology. With such a number Thailand has become the highest number in Southeast Asia with JCI accreditation hospitals.

Thailand is an exceptional by popular tourists destination where the crime rates are historically low besides the outstanding hospitality of its people which are also known worldwide that makes everybody wants to experience it. Not to mention its unique and beautiful vacation sites, all that make Thailand a world-class arrival spot not only in medical tourism, but also in tourism in general, thus it could be combined between a medical treatment and inspiring holiday (Gahlinger, 2008).

b. India:

India getting the benefits of the lower cost of medical care comparing to Thailand with a health care spending 2.5% of GDP, and between 2011-2013 it achieved compound annual growth rate 26%, \$3B business, and 1.3 M medical tourists visited the country (Gross, 2012).

As much as anyone knows, IT is one of the biggest success stories in India, now many people are making strong assumptions that the next successful field will be the healthcare market which grows at an approximate level of 13 percent per annum (Kumar, 2009). Nowadays India is known as a global centre for medical tourism, where anybody seeks risky and elevated surgeries. India has become the first preferred destination for such surgeries in the world, such as coronary bypasses, alternative Ayurvedic therapy, and Cosmetic surgery, etc.

Easy to say that India is intent about getting the latest technology and the highest quality of the health care system including the employees where there are many opportunities for medical tourists to get some of the treatments that are just not available in the patients' countries with the lowest cost imaginable.

In India they are also harmonizing the western protocols with the hospitality at its best. The saving ration in India is somewhere about 75% compared to the cost in the medical seekers' home country including travel costs. Besides, English is spoken widely in India where many hospitals in different cities take care of international patients, and even there are translators easily available for the sake of non-English speakers.

Moreover, one of the reasons for India's reputation in the field is that most of the Indian doctors have their education done abroad with all the international qualifications and the western experience available there, and they were often preferring to stay in the developed countries because of the high salaries there. However, the doctors' salaries recently have significantly increased and the hospitals have received a big boost with the latest technological developments, therefore, doctors returned from overseas to serve in their country, and surely this will add a big plus when it comes to advertising (Connell, 2006;Gahlinger, 2008).

According to one of the famous international companies, McKinsey and Company, Indian's health industry is supposed to grow to an extremely figure of \$190 billion in the next 20 years, from \$25 billion in 2008 (Hansen, 2008). Finally, the intention of the Indian government to ease travel restrictions, to encourage overseas countries' citizens like USA to visit easily India for medical tourism purposes and there is even a plan to boost such citizens to travel visa-free to India. This of course would be a crucially effective mean to attract potential medical tourists to India (Top 5 Destinations for Medical Tourism, 2014).

c. Malaysia:

Malaysia essentially focused on Middle East as a lucrative and potential market taking advantage of its Islamic background, where in the hospitals and everywhere else it is very convenient to find Halal food and that is besides its Islamic practices in hospitals. (Connell, 2006).

Malaysia is one of the leading countries in Southeast Asia which its system is mix of public and private where there is increasing attention about the medical tourism in the country in general. In 2008, nearly 4.5% of its GDP was spent on healthcare, and almost 57% of the healthcare is provided by the private sector which it was 24% in 1983. Foreign patients spent \$ 90.5 million on medical services and items in Malaysia in 2008. (Leng, 2010). And the estimated figure of foreign patients generated somewhere around \$27.6 million in revenues in Malaysia in 2004. (Bookman and Bookman, 2007).

Malaysia took advantage of the financial crisis to diversify its economy by its successful health tourism with the low cost for medical care, the advanced technology in healthcare, and the medical infrastructure. Malaysia today attracts nearly Three-quarters a-million medical tourists (majority from Asia) each year (exactly 770,134 patients in 2013) (The Malaysia Healthcare Travel Council, 2014).

For just a few hundred dollars, in Malaysia it is possible to have a treatment in services particularly known there like in-vitro fertilization, urbane treatment for burn victims and total physicals with blood works.

Comparing with Singapore which is more expensive, Malaysia is taking advantage to attract people to its medical sector with its affordability and quality in the health care units and services. In addition to, Malaysia can easily compete with India when it comes to technological advancement in health care. Besides, in Malaysia English is spoken more than in India or Thailand (Top 5 Destinations for Medical Tourism, 2014).

2.2.1.2.3. Considerations of Medical Tourism Situation Today

2.2.1.2.3.1. Reasons Why Medical Tourism is Popular Today

There are several reasons that contribute in development health tourism and its fast growing to make medical tourism popular today, couples of these reasons can be underlined as follows:

- a. The high costs of medical services in the patients' countries and the low cost of treatments in the medical tourism destinations could be the first and most important reason.

- b. The wish to receive a high quality healthcare treatment, with the advancement of the medical technology which enabled medical service providers to adopt better health care services in the medical destinations, besides, sometimes the lack of these healthcare technologies and the professional human resources in one's own country.

- c. The long waiting lists in the developed countries and the fast services in destinations treatments.
- d. Desiring a vacation besides medical treatment, by traveling to countries with forests, uplands, and historical and cultural riches.
- e. The wish to keep one's surgery secret in his country for some reason in some procedures, such as aesthetic surgery, infertility treatment etc. Or even in some other surgeries like gender changes for example, some might just consolidate the new identity away from home country easier, thus, when they go back home they would be a way more comfortable while mixing with the society back home since they already released from the complications or any weakness.
- f. The wish of people with drug and other addictions to travel to different and more appropriate environments.
- g. The wish of chronic patients, elderly, and disabled to travel to different environments for more opportunities of treatment in there.
- h. The middleman between international patients and hospital networks as well as the advance of the Internet and the appearance of new companies and agents which serve as middlemen (Aydin, 2014; Suthin et al 2007; Connell, 2006).

2.2.1.2.3.2. JCI Accreditation

Accreditation is particularly important because it can give consumers and employers a level of confidence, and the confidence in the safety and quality of care available in many offshore settings is no longer an issue since many international organizations started to accredit hospitals all over the world, like the Joint Commission International (JCI) and others, thus, It is not anymore

strange to find a safe and high quality medical care in less developed countries (Deloitte Development for Health Solutions, 2008).

The Joint Commission International (JCI) is an official organization which accredits the health care facilities, and today there are more than 680 JCI accredited hospitals around the world by about 20% expansion each year. And clearly the JCI accreditation aims to continuously improve the safety and quality of medical care in an international standard (joint commission international, 2014).

The expansion of the medical tourism market started relying on the accreditation standards with organizations like the US-based Joint Commission which it launched its international subsidiary agency in 1999, the Joint Commission International (JCI) later became the mean trustworthy accrediting in health tourism overseas, since medical tourists expect an equal or higher quality medical caring than the one that can get it in their own country, JCI evaluates health care organizations according to safety and quality in an international standard (Ricafort,2011). Therefore, once the hospital wants to be accredited, it needs to meet the certain standards were determined by Joint commission. And because JCI has one of the most educated and experienced consultants in the sector, It is essential today to have JCI accreditation which is considered a gold standard in health market.

Today many medical and health care institutions and organizations like medical centers, hospitals, and primary care providers have got the Gold Seal of Approval as JCI-accredited entities, JCI has partnered with these organizations to support their quest for excellence. Where after the Accreditation, JCI works with the high-achieving organizations to help them maintain their accreditation by extended services like informing and assisting them with the latest new standards, and being a guide all the way to achieve

the expectation of performance improvement that JCI accreditation promotes (joint commission international, 2014).

2.2.1.2.3.3. Main Risks, Problems, and Disadvantages of Medical Tourism

Besides all the factors that boost medical tourism industry to continue the fast growth, and all the general advantages, there are also some risks and problems in this field, the following could be some of them:

- a. Lack of responsible and quality information.
- b. Since the market is not really old and growing fast, there will be possibility of participation of workers who are inexperienced or less experienced. This will indeed bring errors and risks in the long run where some those mistakes might just easily cost a life.
- c. The lacking of preoperative and postoperative procedures, because of the short time of the visit to the medical destination.
- d. Combination of some laws and regulations are making it hard for a smooth development in the host countries, this brings surely negative effect to the industry.
- e. Insufficient support by government channels.
- f. In some cases foreign medical seekers are being misinformed about the whole experience abroad.
- g. Language barriers and some other misunderstandings occurring from cultural differences.
- h. Hospitals and health care units who are having hardships when it comes to submitting the international standards.
- l. Having no desire of traveling abroad for medical treatment from some patients (Republic of Turkey, Ministry of Health, (2012).

Besides the main problems and risks in the industry of medical tourism, there are also disadvantages for the receiving country of medical tourism, these disadvantages as follows:

a. Doctors in developing countries may leave public hospitals and join private clinics or hospitals or even set up their own clinics to earn a better pay or to have professional recognition. Since these doctors will dedicate themselves to foreign medical patients, the home country will have less impact to the local patients because the good service and quality go to the foreign clientele, thus it will not improve the living conditions in the local country.

b. Risk of contribution to the traffic of organs, where poor people are tempted to give away their organs in order to earn some money to maintain their subsistence.

c. Risk of facilitating forgery of medicines. Since the foreign medical seekers would look for cheaper treatment, they also might look for cheaper medicine as well, thus this could increase the production and the distribution of the fake medicines, and the foreign patients could be tempted to buy them abroad to bring them to their countries of origin, while it might put people's lives into risk.

d. Search for better prices could lead to the risk of utilization and marketing of lower-quality equipments, instruments, or even lower-quality prosthesis (Freire, 2012).

2.2.1.3. Continuous Growth in Medical Tourism

The general definition for the typical medical tourist was described as someone aged 50 years or more and in need for medical care or surgery, but

the new tendency recently is to include elective surgical procedures like dental care, fertility treatment, rhinoplasty, and breast enlargement, or even medical procedures uncovered in the typical medical insurance policies (Horowitz & Rosensweig, 2007; MacReady, 2007).

An accredited institution called Medical Tourism Association, has reported that people are being more aware than ever that they can get same or better health service and medical care abroad at affordable prices compared to what they get in their home countries. Thus, people who seek medical treatment think that if they can get the same service ,or even better, with lower cost and less waiting period, why not take the chance and leave their own countries to receive medical treatment abroad. Thus, this increasing awareness promises a further growth in medical tourism (Medical Tourism Association, 2008).

Hancock (2006) confidently mentioned that medical tourism is becoming one of the fast rapidly growing sections in the world, with almost 50 countries offering medical treatment along with vacations; the competition today among those countries is at a very high level, where each of them so keen to attract the greatest number of medical tourists. Connell (2006) related: the growth in medical tourism and privatization and estimated that privatized medical tourism will keep growing rapidly (Hancock, 2006).

Some might wonder why so many countries are so willing to attract medical tourists. According to Turkish Industrialists' and Businessmen's Association (TUSIAD), tourist who seeks medical treatment spends almost 12 times compared to regular tourist (Turkish Industry & Business Association, 2014).

Moreover, there are numerous reports regarding the international medical tourism industry currently refer that medical tourism generates a gross

income in a 20% annual increase. Just by looking at such a number it can be easily realized that the idea of medical tourism has already attracted lots of tourists around the world and the continuous increase of global medical tourism is inevitable (Horowitz, Rosensweig , & Jones, 2007 ; Ricafort, 2013).

Clearly, medical tourism today is a fast growing industry and rapidly emerging manifestation of global commercialization of health care (Hopkins et al , 2010). An international U.S. based consulting company, The Deloitte Center for Health Care Solutions, made an estimate in 2009 that 35 percent increase would be in medical treatment travel within a time frame of several years.

According to the same consulting company, in 2008 the estimated amount of money which was spent overseas by outbound American medical tourists is somewhere around \$2.1 billion , and \$15.9 billion reflects the lost revenues for U.S. health care providers, which shows the big amount of profit that the developing countries obtain and conversely the big amount of losses in the developed countries (Deloitte Development for Health Solutions, 2008).

2.2.2. Medical Tourism Industry in Turkey

2.2.2.1. General Review of Medical Tourism in Turkey

Turkey is a modern country and has a young population around 75 million, which sits on a great historical heritage antique structures all the way from medieval ages, including monuments, churches and mosques not to mention the coastlines and old historical bazaars.

After mid 1980s, Turkey started to follow important tourism improvement policies by respective governments by various encouragements provided to

the investors, several accommodation units have been constructed around the Mediterranean and Aegean shores (Köstepen & Öter, 2013).

During the last decade, Turkey also became recognized as a rising medical tourism center, where Turkey has developed its healthcare system by greatly advancing the quality and quantity of health services throughout the country. Adding the affordable cost and the access to the high quality of medical treatment and its unique culture and sightseeing areas, Turkey today is on the way to become a star in the medical treatment industry, and competes precedent countries in this industry such as India, Malaysia, Thailand, and Hungary for a share of the global medical tourism market.

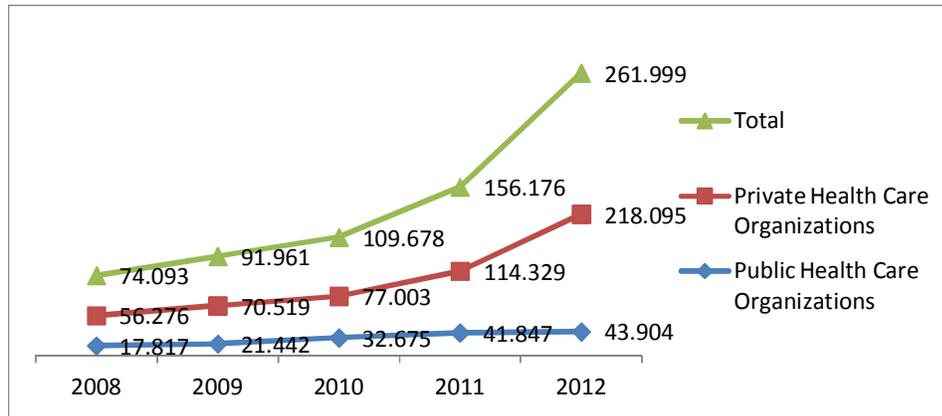
Foreign patients treated in public or private or university hospitals have to be registered with the Health Ministry in Turkey. In 2012, Turkey had 261,999 medical tourists compared to 156,176 in 2011, and 74,093 in 2008. The following table 2.1 and figure 2.3 shows the distribution of the international patients receiving health care services in Turkey by years (Republic of Turkey Ministry of Health, 2013).

Table 2.1. Distribution of International Patients Receiving Health Care Services in Turkey by Years, 2012

Years	Public Health		Private Health Care		Total	
	Number	Percentage	Number	Percentage	Number	Percentage
2008	17.817	24,1	56.276	76,0	74.093	100,0
2009	21.442	23,3	70.519	76,7	91.961	100,0
2010	32.675	29,8	77.003	70,2	109.678	100,0
2011	41.847	26,8	114.329	73,2	156.176	100,0
2012	43.904	16,8	218.095	83,2	261.999	100,0

Source: (Republic of Turkey Ministry of Health, 2013). Evaluation report on medical tourism in Turkey 2013.

Figure 2.3. Number of international patients receiving health care services in Turkey by year, 2012



Source: (Republic of Turkey Ministry of Health, 2013). Evaluation report on medical tourism in Turkey 2013.

As a result of the findings we have obtained from this table, it is found that the number of international patients receiving health care services in Turkey has been rapidly increasing by the last years with a percentage of approximately 68% annually.

Turkey has a developed and technologically advanced structure in medical tourism. Hospitals, both public and private, and other health facilities have crossed long distances in the past 10 years in their development. This progress includes human resources, meaning the quality of doctors and other personnel in health industry, in addition to technological advances in the whole system.

Nevertheless, still the private sector is the dominant in this industry in Turkey, with a massive number of hospitals compared to the public section. The majority of the international patients in 2012 went to private hospitals with a percentage of 83 %, while 11 % went to state hospitals. It is clear that the patients mostly prefer private hospitals. It can be said that the private hospitals come to the forefront because they offer higher quality and more

competitive services in addition to carrying out more advertisings, not to mention most of them have the JCI accreditation. The following table 2.2 shows the number of international patients in Turkey by type of hospital in 2012:

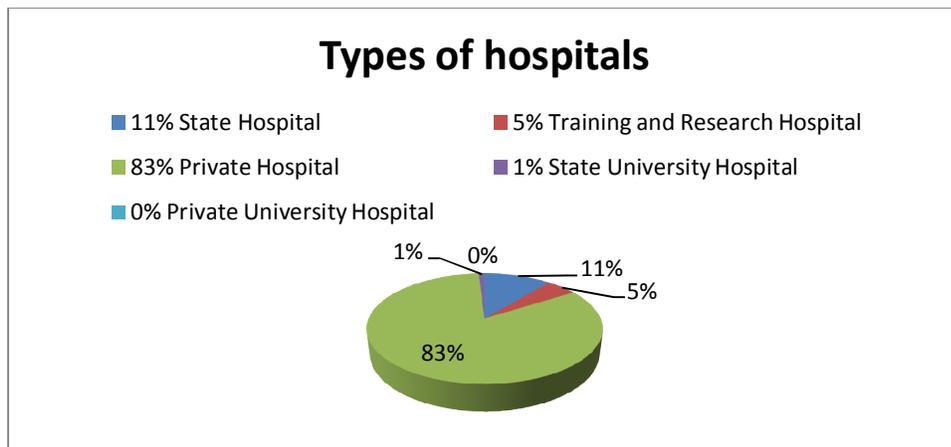
Table 2.2. Number of international patients by type of hospital, 2012

State Hospital		Training and Research Hospital		State University Hospital		Private University Hospital		Private Hospital	
Number of Hospitals	Number of patients	Number of Hospitals	Number of patients	Number of Hospitals	Number of patients	Number of Hospitals	Number of patients	Number of Hospitals	Number of patients
308	27355	66	13042	21	2755	5	752	499	218095

Source: (Republic of Turkey Ministry of Health, 2013). Evaluation report on medical tourism in Turkey 2013.

The following figure 2.4 shows the number of international patients in Turkey by type of hospital in 2012:

Figure 2.4. Types of hospital preferred by international patients, 2012



Source: (Republic of Turkey Ministry of Health, 2013). Evaluation report on medical tourism in Turkey 2013.

The following table 2.3 shows Top ten private hospitals preferred by patients the most in medical tourism in Turkey in 2012.

Table 2.3. Top 10 private hospitals preferred by patients the most in medical tourism, 2012

Name of Hospital
Private Anadolu Health Center Hospital
Private Alanya Anadolu Hospital
Private Akdeniz Hospital
Private Medical Park Bahcelievler Hospital
Private Acibadem Maslak Hospital
Private Medical Park Goztepe Hospital Complex
Private Bilgi Hospital
Private World Eye Hospital Atakoy
Private Medicana International Ankara Hospital
Private Bayindir Hospital

Source: (Republic of Turkey Ministry of Health, 2013). Evaluation report on medical tourism in turkey 2013.

Incoming foreign patients prefer Turkish health institutions on grounds of both low cost and high quality besides technology standards in almost all branches and there are a lot of procedures available in these hospitals such as plastic and aesthetic surgery, hair transplantation, eye surgeries, test-tube baby, open heart surgery, skin diseases, check-ups, cancer treatments, dialysis and cardiovascular surgery, gynecology, neurosurgery, orthopedics, dental, spa, physical therapy and rehabilitation. The following table 2.4 shows the top 10 clinics by health care organization in medical tourism:

Table 2.4. Distribution of top 10 clinics by health care organization in medical tourism in Turkey, 2012

Clinics	Health Care Organizations				Total
	State Hospital	Training and Research Hospital	Private Hospital	University Hospital	
Eye Diseases	461	208	20050	103	20822
Orthopedics and Traumatology	685	238	16433	142	17498
Internal Diseases	796	178	15941	64	16979
Ear Nose Throat Diseases	432	111	13629	128	14300
Gynecology and Obstetrics	1257	1516	11352	166	14291
General Surgery	602	179	9389	96	10266
Mouth, Dental and Maxillofacial Diseases and Surgery	1586	32	8262	28	9908
Brain and Nerve Surgery	131	89	6449	44	6713
Dermatological and Venereal Diseases	292	111	6039	103	6545
Pediatrics and Diseases	495	374	4967	167	6003
Other	1498	1550	42185	904	46137
Total	8235	4586	154696	1945	169462

Source: (Republic of Turkey Ministry of Health, 2013). Evaluation report on medical tourism in Turkey 2013.

Considering the cities in Turkey, the top destinations for foreign patients are Istanbul, Antalya, and Ankara, with the huge number of modern hospitals equipped with the latest medical technology. Regarding Istanbul and Antalya, besides high number of medical tourists there, these cities attract the highest number of tourists in general, Istanbul with the historical artifacts, and the

great cultural values, and Antalya with its beaches (Republic of Turkey Ministry of Health, 2013).

In 2012 that the top list of the countries whose citizens visit Turkey for health tourism were Germany, Libya, Russia, Iraq , the Netherlands, and Azerbaijan, In addition a significant number of visitors come from England , Romania, Norway , Bulgaria. Turkey attracts the largest health tourists from Germany as the population of people with Turkish roots is high (Republic of Turkey Ministry of Health, 2013). The top 10 countries international patients come from, as in the following table 2.5:

Table 2.5. Top 10 countries international patients come from, 2012

Country	Number
Germany	43259
Libya	38898
Russia	27604
Iraq	16926
Holland	14959
Azerbaijan	13023
England	12456
Romania	5685
Norway	5554
Bulgaria	5511

Source: (Republic of Turkey Ministry of Health, 2013). Evaluation report on medical tourism in turkey 2013.

As a result of the findings we have obtained from this table, two of the top ten countries with patients who come to Turkey for treatment are Arab countries, Libya and Iraq. Turkey attracts the largest number of medical tourists from Germany, the Netherlands and Norway, where the population of people with Turkish roots is high. Turkey has always been the hot spot in the medical tourism field for Europeans considering the low prices and the high quality

alternative. And gradually it has been getting Americans' attention as well. An increasing numbers of American medical seekers are coming to Turkey for different kinds of medical treatments.

Health tourism of Turkey has been reporting that numbers of American medical tourists is growing faster than the Europeans, and most of them are making these trips for medical treatments especially the ones without health insurance where they pay for themselves (International Medical Travel Journal, 17 sep. 2009).

Statistics show us the amount of spending of international patients in Turkey and the gross income of health tourism was close to 2.2 billion dollars in 2012. the table 2.6 below shows the spending of international people in Turkey in the public and private sectors.

Table 2.6. Medical Tourism and Tourist Health, Estimated Income of Public and Private Sectors for the Year 2012

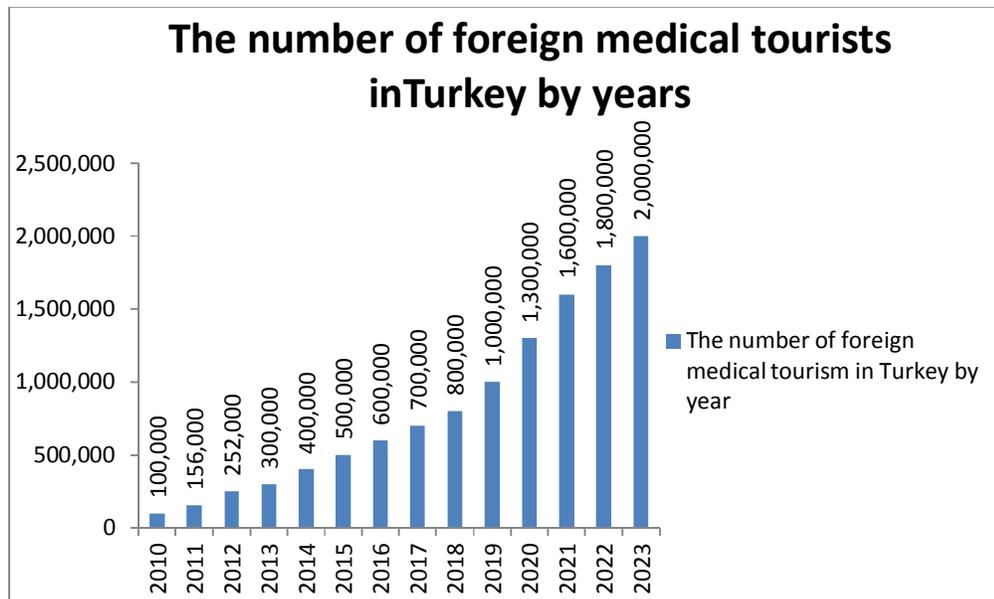
		Year 2012		
		Number of patients	Income per patients USD	Total Income USD
Medical Tourism	Public	14.766	9.000	132.894.000
	Private	154.696	12.000	1.856.352.000
Tourist Health	Public	22.491	2.000	44.982.000
	Private	47.972	4.000	191.888.000
Total		239.925		2.226.116.000

Source: (Republic of Turkey Ministry of Health, 2013). Evaluation report on medical tourism in Turkey 2013.

The government has been supporting medical tourism, and because of the fast growing in this section, Turkey has set for itself ambitious goals:

The Ministry of Development of Turkey has prepared the 10th development plan and it was published in the Official Journal in July 6, 2013, stating that by year 2018 a gross income of 5.6 billion dollars will be generated from medical tourism and It estimated a 750.000 medical tourists will visit Turkey in 2018. Moreover, The Ministry of Health plans to attract 2 million Health Tourists and 20 billion USD in gross income by the 100th year of the Turkish republic memory (2023) which will help Turkey to become the star of its region in this field. Besides, ten percent of these figures are expected to be admitted to public hospitals (Republic of Turkey, Ministry of Health, 2012).

Figure 2.5. The number of foreign medical tourists in Turkey until 2012, with the potential medical tourism for the next years



Source: (Republic of Turkey Ministry of Health, 2013). Evaluation report on medical tourism in Turkey 2013.

The Ministry of Health realizes that by boosting medical tourism will enhance Turkey's economic as social development. Thus the general goal is strengthening the health tourism in Turkey, in term of reaching this goal, the Ministry has put strategies for the years between 2013 and 2017 as follows:

- a- Improving the management of health tourism.

- b- To have a research and development for the quality of medical tourism.
 - c- Promoting and Advertising to attract health tourists.
 - d- Enlarging the circle of health tourism sector altogether.
- (Republic of Turkey Ministry of Health, 2013).

2.2.2.2. The Competitive Advantages of Turkey in Health Tourism

In recent years, Turkey has emerged with its improved infrastructures and health facilities offering affordable medical care services becoming a favorable destination for international health tourists.

Turkey has got some unique advantages, besides its advanced technology in the medical sector, which is claimed to be better than Central Europe, Balkans and Scandinavia, and some of its technology is used in some advanced hospitals in Germany and USA.

Turkey's health standards are being monitored by independent accountability watchdogs. In the medical community itself, there is independent Turkish Medical Association which boosts high quality and awareness; besides, the Ministry of Health lays out regulations which have to be complied by all the segments of health sector (Interactional medical travel journal, 7, April, 2011).

The developments in Turkey have been following the one in USA and Europe where the practices, the activities and the progresses are being watched by respected organizations and different institutions in the world.

Highly qualified doctors and recognized hospitals with their infrastructure are some of the facts that make Turkey a hot spot for medical seekers (Interactional medical travel journal, 7, April, 2011). There was research with the inventory which was done with The Health Tourism Department of the Health Ministry and Gazi University faculty of commercial and tourism education in Turkey. According to the study, foreign medical seekers have been choosing Turkey for reasons such as the quality of service, historical

artifacts and vacation opportunities with its short waiting list in health centers and hospitals. It also has got a suitable climate for people who will find themselves in medium warm temperatures.

The main advantages of medical tourism in Turkey can be determined as follows:

- a. The technologically advanced equipment and the high quality of infrastructure.
- b. Competitive advantageous prices compared to other countries.
- c. The services and standards which match the western countries' standards where the medical doctors are highly educated.
- d. Natural and historical places with its pleasant climate.
- e. Tourism facilities have high standards with highly trained multilingual staff.
- f. Merging medical and health tourism with tourism in general by offering various tour programs.
- g. When it comes to thermal resources, Turkey sits at the top in Europe and comes only seventh in the world, not to mention the potential to apply types of natural treatment methods in spas, caves, seas, medicinal plants, where these methods could be applied under the umbrella of health tourism.
- h. Many hospitals in Turkey have domestic and international certification, their services affiliated with JCI (Joint Commissions International), the JACHO (Joint Commission on Accreditation of Healthcare Organizations), ISO (International Organization for Standardization) and western medical groups. There are 686 organizations around the world have JCI Accreditation, Turkey currently has 49 facilities that have received Joint Commission International (JCI) accreditation, with approximately a percentage of 7% Turkey is ranked second in the world. The first JCI accredited facility in Turkey was the Istanbul Memorial Hospital in Istanbul which was first accredited in 29 March of 2002 and has been re-accredited

twice since then, in 2005 and 2008 (Vequist & Gursoy, 2009). Turkey with a 49 accredited hospitals has JCI accreditation that is almost as much as the accredited hospitals in medical tourism destinations like Philippines 6, Malaysia 13 India 22 Mexico 9 combined which are considered ones of the leader countries in this industry. Turkey today with such a number of hospitals have JCI accreditation, is becoming one of the highest and most promising medical tourism markets worldwide, in addition that Turkey now is leading the European medical tourism industry in this section. Moreover, accredited hospitals receive the highest quality of American medical support, such as Harvard Medical School and Johns Hopkins Medicine are some of the supporting affiliates from United States who give the highest quality. (Joint commission international, 2014; Istanbul Medical Tourism Fair, 2014).

2.2.2.3. Arab Preference for Turkey as a Medical Destination

Turkey has been a popular tourism destination before it became a medical tourism destination; thus, the opportunity for the medical travelers to have a vacation in a popular tourism country gives another advantage to choose Turkey as a medical tourism destination especially for the Arab after the remarkable increasing in the Arab tourists in the recent years in Turkey.

The common history and tradition between Turkey and the Arab countries plays a big role in attracting the Arab medical tourists and the Arab tourists in general, besides the great Islamic roots of Turkey and the majority of population are Muslims, which reflects Islamic practices in hospitals. Without a doubt this fact also attracts Arab medical tourists, and some of the favorite destination cities are Istanbul, Bodrum, Yalova, Bursa and Antalya.

27 million tourists visited Turkey In year 2009, 16.45% of them came from Gulf States such as Saudi Arabia, United Arab Emirates, Bahrain, Qatar and

Kuwait. The cultural and geographical closeness to these countries makes these Arab tourists prefer to come to a country that appreciates the Islamic culture. This is a very important increasing since the world went through a very big economic crisis. Considering these numbers, Turkish tourist authorities are running advertising and promotional campaigns in the Arab world, this will focus on introducing and marketing Turkey as a health and medical tourism destination.

Turkey has already focused on promoting and marketing itself as a health and medical tourism star of the region, and a plan was put from 2010 to 2023 that aims to sustain health and medical tourism in order to make best use of the unique natural wealth that the country has. The government wants to attract more Arab tourists, particularly as a health and medical destination (International Medical Travel Journal, 25 March 2010).

2.3. Consumer Behavior in Medical Tourism

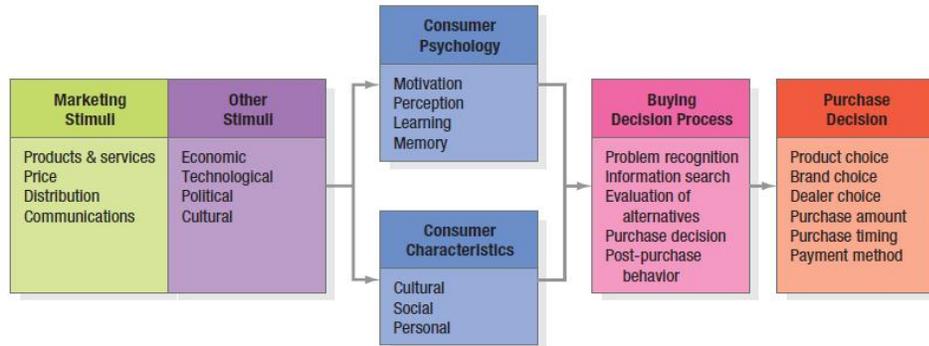
2.3.1. General Consumer Behavior Model

Consumer behavior is the study how individuals, groups, and organizations select, buy, use, and dispose of goods, services, ideas, or experiences to satisfy their needs and wants. Marketer must completely understand both the theory and reality of customer behavior.

The process of consumer buying involves three different stages, Input, process, and output stage. To understand how consumers actually make buying decisions, marketers must identify who makes and has input into the buying decision; people can be initiators, influencers, deciders, buyers, or users. Different marketing campaigns might be targeted to each type of

person. The following figure illuminate the general model of consumer behavior.

Figure 2.6. Model of consumer behavior



Source: Kotler & Keller, 2012. Marketing management 14th edition

In the input stage there are marketing stimuli which are the famous marketing mix elements or four P's, the marketer can control these factors in order to market his product.

There are also other stimuli the marketer cannot control but yet must consider them in the marketing process; these stimuli are economic, technological, political, and cultural stimuli.

Consumer behavior refers to the selection, purchase and consuming of goods and services to satisfy their needs. The consumer behavior includes various procedures. First of all the customer tries to find what merchandises he wants to consume, then he chooses only these merchandises that have greater utility for him. After choosing the merchandises, the customer evaluates the available money which he can spend. Finally, the customer makes an analysis to the common prices of merchandises and decide which merchandises he should consume. Meanwhile, there are different other

factors affecting the customer's purchases like: social, cultural, personal and psychological.

Consumer behavior is influenced in the process stage by two main categories, the first category is consumer characteristics and it contains three factors: social (reference groups, family, and social roles and statuses), cultural (culture, subculture, and social class), and personal (age, occupation, economic circumstances, lifestyle, personality, and self-concept). The second category is the psychological process and it contains four factors influencing consumer behavior and they are motivation, perception, learning, and memory. The customer decision-making procedure contains 5 steps can be used as a guideline when selling: need recognition, information search, evaluation of alternatives, purchase, and post-purchase behavior (Kotler & Keller, 2012).

2.3.2. The Role of Marketing Mix's elements on Consumer Behavior

Marketing mix is one of the top marketing models and it is also indicated as the four P's, it is the total of leadership marketing decisions which are the combination of each department in the sector which have been chosen sensitively according to market development.

Neil Borden introduced the Marketing mix concept in the 1950s, then it was developed by Kotler in (1967). The Marketing mix model has four main elements, product, price, place, and promotion, the explanation of these 4 elements according to (Kotler & Keller, 2012) is given below:

a).Product

A product refers to any tangible object or intangible service that is offered to a consumer. To preserve distinction from competitors, the different parts of

the product have to be characterized. Defining the various aspect of a product is important in order to maintain differentiation from competitors.

Tangible Object

Product is the first and most significant element of the marketing mix. Product strategy calls for making coordinated decisions on product mixes, product lines, brands, and packaging and labeling.

In planning its market offering, the marketer needs to think through the five levels of the product: the core benefit, the basic product, the expected product, the augmented product, and the potential product, which encompasses all the augmentations and transformations the product might ultimately undergo.

Products can be nondurable goods, durable goods, or services. In the consumer-goods category, products are convenience goods (staples, impulse goods, emergency goods), shopping goods (homogeneous and heterogeneous), specialty goods, or unsought goods.

The industrial-goods category has three subcategories: materials and parts (raw materials and manufactured materials and parts), capital items (installations and equipment), or supplies and business services (operating supplies, maintenance and repair items, maintenance and repair services, and business advisory services).

Brands can be differentiated on the basis of a number of various product or service dimensions: product form, features, performance, conformance, durability, reliability, reparability, style, and design, as well as such service dimensions as ordering ease, delivery, installation, customer training, customer consulting, and maintenance and repair.

Design is the totality of features that influence how a product looks, feels, and

functions. A well-designed product offers functional and aesthetic benefits to customers and can be an significant source of differentiation.

Most companies sell more than one product. A product mix can be classified according to width, length, depth, and consistency. These four dimensions are the tools for developing the company's marketing strategy and deciding which product lines to grow, maintain, harvest, and divest. To analyze a product line and decide how many resources should be invested in that line, product-line managers need to look at sales and profits and market profile.

A organization can change the product component of its marketing mix by lengthening its product via line stretching (down-market, up-market, or both) or line filling, by modernizing its products, by featuring certain products, and by pruning its products to eliminate the least profitable.

Brands are often sold or marketed jointly with other brands. Component brands and co-brands can add value supposing they have equity and are perceived as fitting suitably.

Physical products have to be packaged and labeled. Well-designed packages can create convenience value for consumers and promotional value for producers. Warranties and guarantees can offer further assurance to customers.

Intangible Service

A service is any act or performance that one party can offer to another that is basically intangible and does not result in the ownership of anything. It may or may not be tied to a physical product.

Services are intangible, inseparable, variable, and perishable. Each characteristic presents challenges and requires certain strategies. Marketers

must find ways to give tangibility to intangibles; to raise the productivity of service providers; to raise and standardize the quality of the service provided; and to match the supply of services with market demand.

Marketing of services faces new realities in the 21st Century due to consumer empowerment, consumer coproduction, and the need to satisfy employees as well as consumers.

In the past, service industries lagged behind manufacturing firms in adopting and using marketing concepts and tools, but this situation has now changed. Achieving excellence in service marketing calls not only for external marketing, but also for internal marketing to motivate employees, as well as interactive marketing to emphasize the significance of both “high tech” and “high touch”.

Top service companies excel at the following practices: a strategic concept, a history of top-administration obligation to quality, high standards, self-service technologies, systems for monitoring service performance and consumer complaints, and an emphasis on employee satisfaction.

Superior service delivery requires managing consumer expectations and incorporating self-service techniques. Consumers’ expectations play a important role in their service experiences and evaluations. Organizations must manage service quality by understanding the influences of each service encounter.

Even product-based organizations have to provide post-purchase service. To provide the best support, a manufacturer must identify the services consumers value most and their relative significance. The service mix contains both presale services (facilitating and value-augmenting services) and post-sale services (customer service departments, repair and maintenance service

b).Price

The price is what the purchaser pays for the product. In spite of the increased role of non-price factors in modern marketing, price remains an important component of the marketing mix. Price is the only component that produces revenue; the others produce costs.

In setting pricing policy, an organization follows a six-step process. It chooses its pricing aim. It estimates the demand curve, the probable quantities it will sell at each possible price. It estimates how its costs vary at various levels of output, at different levels of accumulated production experience, and for differentiated marketing offers. It examines competitors' costs, prices, and offers. It chooses a pricing procedure. It chooses the final price.

Pricing strategies are an integral part of the marketing mix. The price of a product or service must reflect the customer's desire to pay. There are 4 favored pricing strategies which are according to (Business Case Studies, 2013) as follows:

1. Cost-plus pricing

A common way to make pricing decisions is to calculate how much it costs to do a special job or activity, and then add on a given percentage as a return for the job or activity. It is occasionally called mark-up.

2. Hour-based pricing

Most of the small businesses usually try to pinpoint their hourly costs for instance, gardening, photography etc. Then the owner of the business gets an idea of what he will be charging per hour.

3. Penetration pricing

When an organization puts a new good into a new or existing market, it might look from outside that the entering organization feels the rush to generate

sales and proving itself into a market where it seek to survive then right after that to produce large quantities. The first way will be high probably start off with a remarkably low price. It will wait till it feels like the initial goal has been achieved, then the prices can be increased.

4. Skimming

Another approach of bringing out the product into the market is to put an extra margin and charging quite a high price, Some customers may would like to be seen with it first which is kind of known as prestige, or because they want to be associated with your product before anyone else.

Organizations do not usually set a single price, but rather a pricing structure that reflects variations in geographical demand and costs, market-segment requirements, purchase timing, order levels, and other factors. Several price-adaptation strategies are available: (1) geographical pricing; (2) price discounts and allowances; (3) promotional pricing; and (4) discriminatory pricing.

Organizations often need to change prices. A price reduce could be brought about by excess plant capacity, declining market share, a desire to dominate the market through lower costs, or economic recession. A price increase might be brought about by cost inflation or over demand. Organizations have to carefully manage consumer Organizations in increase prices. Organizations must expect competitor price changes and prepare a possible response. A number of responses are possible in terms of maintaining or changing price or quality.

The organization facing a competitor's price change must try to understand the competitor's plan and the probably duration of the change. Strategy often depends on whether a organization is producing homogeneous or non-homogeneous products. A market leader attacked by lower-priced competitors can aim to better differentiate itself, introduce its own low-cost

competitor, or transform itself more totally.

c).Place

Place refers to consumer's ability to access a product in the suitable time and place. The place is also referred to as distribution wherein the product or service is easily available to the consumer.

After a product is fully developed and offered at a competitive price, it must be delivered to an identified target audience. The place component of the marketing mix is where product production and distribution channels are decided and planned. The decisions made in this step directly influence the types of communication that are used to tell the aim audience about a product.

Different strategies like intensive distribution, selective distribution, exclusive distribution and franchising can be used by the marketer to complement the other aspects of the marketing mix.

d).Promotion

A promotion is a method used to communicate the characteristics and benefit of a product or service to the consumers. A marketer may use several strategies in order to raise product or service knowledge to the chosen target markets.

The key procedures involved in promotion include the following:

- 1.Branding - creating a unique image and character to an organization and or its products and services.
- 2.Advertising - to inform and persuade the public.
- 3.Packaging - presenting the product in a desirable and appropriate way.

- 4.Public relations activities and other forms of publicity
 - 5.Sponsorship
 - 6.Special Promotions - e.g. buy one get one free.
- (Business Case Studies, 2013)

2.3.3. Marketing Mix Elements' Effect on Consumer Preferences in Medical Tourism Industry

It was mentioned before the general reasons that make medical tourism popular nowadays and motivate many patients to make such a decision, and clearly these reasons could be categorized under the 4 elements of marketing mix model.

The Marketing mix is perhaps the most famous marketing model. The four elements of this marketing mix are product, price, place, and promotion. And for a better understanding what those 4 factors means in the medical tourism industry and especially in this study, the following Identifications of Terms are mentioned:

a. Product

Product in medical tourism industry is what the tourists come to see, which is the total of services accompanying medical treatment which are given by hospitals and other health centers, and also the accredited international hospitals that gives technologically advanced and fast services with all the splendid facilities and the excellence of the each worker in health centers including the doctors physicians and nurses.

And some of the most important characteristics of the product in medical tourism industry could be as follows:

Access to the latest medical technology would be the main reason for the underdeveloped countries like Nepal, Bangladesh and Pakistan, people flow from there to India for example because in their home country they don't have the quality service as they can find in the destination of treatment (Kumar, 2009).

Patsner (2008) referred that the one of the most probable reasons for a medical tourist to visit another country is usually lack of access into the latest medical technology, either because the technology is not available, prohibited or illegal.

Medical tourists generally travel foreign medical destinations to have procedures that are not widely available in their own country of origin, the lack of the latest medical technology is not only in the countries with underdeveloped facilities, but also could be in developed countries as well, for example in the USA, due to the restrictive government rules and regulations, the most common therapies such as stem cell-based therapies are just not available to Americans (Runckel, 2007).

Another important motivation for the patients to make a decision to have their medical treatments abroad is a faster response to their medical needs. Countries that operate public healthcare systems like Canada and Britain, the non-urgent medical care can takes long time, for example, the person who would like to have a hip replacement in such countries, has to wait up to a year long before the procedure starts, while in countries like Thailand, Singapore, Philippines, Colombia and India, the patients could get their treatment started within couple of days of their arrival. For instance, the number of people who were in the waiting list in 2012 in Canada was 870,462 in a Percentage of Population 2.52% (Esmail , 2013).

b. Price

The price is what the customer pays for the product or service. In medical tourism industry, the price denotes to the affordability of the amount of the money which the medical tourist spends in the medical destination during the medical treatment period which includes medical treatment costs and any tour programs or other touristic expenses. On the other hand refers to the cost saving opportunities that medical travelers receive when they travel to the medical destination for medical treatment. The price also covers the cost of an added benefit of a holiday tour in a foreign destination after a medical treatment.

As health care costs skyrocket and the cost of the medical care increasing generally every year in the developed countries, lower medical care cost is simply sitting at the top of why patients from such countries are looking to get the health care away from their country (Connell, 2006). patients from developed countries with private healthcare system such as USA, they are searching for more affordable prices (Kumar, 2009).

Ricafort (2011) pointed out that In the United States it costs three times more than to have the same medical service in Thailand including staying in the hospital. Therefore, the appeal of substantial savings will continue to fuel demand for medical services in developing countries. Herrick (2007) indicated that for example if somebody has coronary artery bypass surgery in the United States, it would cost him \$150,000, while this operation would cost him only \$10,000 including 20 days staying in India.

Talking about lower cost and the increasing awareness of the differences in prices, it is worth to take a closer look at the number of medical seekers whom might not have health insurance nowadays in the developed countries where the medical services are generally costly, and remarkably this number recently has expanded especially after the last economic crisis. In this

situation such patients might find out the treatment they need is available in another country in an affordable price, as it is expensive in own home country.

And if it is come to complex medical operations like open heart surgery, it costs \$70,000 in England and costs all the way up to \$150,000 in USA. But when this operation is carried over to India the cost goes surprisingly down to approximately between \$3000 and \$10,000 depending on the type of the complexity (Connell,2006). An example to this big differences in prices, in 2003 there was a small boy had a hole in his heart in the United States and he had an operation with a cost of \$70.000, while the same procedure was carried out only by \$4400 in Bangalore, India (Neelankantan, 2003). The following table 2.7 shows the differences in prices of some procedures between US and some popular medical destinations:

Table 2.7. Major medical procedure/ average total medical/ hospital cost in a western-level hospital

U.S.\$ Costs from “Patients Beyond Border” by Josef Woodman. Details below									
Procedure	Countries					Cost as a % to U.S.			
	U.S.	India	Thailand	Singapore	Malaysia	India	Thailand	Singapore	Malaysia
Heart Bypass	130,000	10,000	11,000	18,500	9,000	8%	8%	14%	7%
Heart Valve Replacement	160,000	9,000	10,000	12,500	9,000	6%	6%	8%	6%
Angioplasty	57,000	11,000	13,000	13,000	11,000	19%	23%	23%	19%
Hip Replacement	43,000	9,000	12,000	12,000	10,000	21%	28%	28%	23%
Hysterectomy	20,000	3,000	4,500	6,000	3,000	15%	23%	30%	15%
Knee Replacement	40,000	8,500	10,000	13,000	8,000	21%	25%	33%	20%
Spinal Fusion	62,000	5,500	7,000	9,000	6,000	9%	11%	15%	10%

Note: Costs are for surgery, including hospital stay only.

Source : Deloitte Development LLC for Health Solutions, 2008. Medical Tourism Consumers in Search of Value.

c. Place

Place in medical tourism industry represents the location of the health center or hospitals and its accessibility by local transportations. In a wider perspective, it also includes the nearness of these medical centers to where the medical tourist would like to go after or during the treatment, this could be malls, entertainment places or any other tourist areas. In medical tourism industry in Turkey, place includes the accessibility of the facility to foreign patients. It also indicates the hospital location environment as well as its closeness to tourist places and shopping centers.

d. Promotion

Promotion in medical tourism industry can be explained as the further benefits for medical travelers such as offering promotions on several medical treatment packages, airport pickups, visa extension services, hotel accommodations and tour discounts and bonuses in the medical destination, after or might during the medical treatment.

In medical tourism in Turkey, promotion includes the additional services offered by the hospital such as patient airport pickups and arrangement of visa extensions. Promotion includes the special package prices on various medical procedures as well as the promotion on hotel accommodations and travel tours in the country.

The idea of having a luxury vacation with the medical treatment in exotic places by an equal cost or even lower makes some patients may prefer to choose receiving the medical treatment abroad, although it may be the medical procedure is available in the country of residence, regardless of the long waiting time for the procedure, and here the promotion role comes.

The opportunity to travel to unusual destinations is an additional benefit for several medical travelers. For example, South Africa offers safari medical tourist packages, where families can visit the country for treatment then followed by a wildlife safari (Runckel, 2007). According to Connell (2006), countries like Thailand, India and Singapore have been growing quickly in medical tourism because they had intentionally linked medical care to tourism.

Furthermore, there are also situations that the medical seekers choose vacation places just like the regular tourists only the treatment coming as a secondary goal. And in these cases it does not really matter even if the price of the medical care is costly, they still go for it, Dentistry can be given as an example for this.

Turkey for example aims to take another advantage of medical tourists while they are receiving treatment in Turkey, by promoting for other kinds of tourism, where the patients and their families can enjoy the sightseeing as well at very affordable costs.

An example that shows that medical tourism can be integrated with other types of tourism, a private Eye Care Center in Kayseri and ICC-T Agency developed a project where they joined with some of the highly recognized tour companies from USA and Europe. With a cost of between anywhere from 4-8 thousand Euros, it offers laser eye surgeries and some other operations including 5-day tour service. The tour includes the historically very famous city Cappadocia, skiing facilities and some other sightseeing trips.

Another example from Board Chairman of an Eye Hospital Group, which had made some significant investments in 2008 with approximate patients number of 20.000. The group would like to merge the treatment with some

holiday packages varied from 7 to 15 days to the patients that arrive for the purpose of treatment (Istanbul Medical Tourism Fair).

2.3.4. Previous Studies on Customer Preferences and the Motivations in Choosing a Destinations for Medical Tourism

There are different opinions in the literature about choosing the medical tourism destination. The choice of a destination have been described by many authors that it is determined by the tourist's motivation to travel, and that motivation is to find the expected medical treatment at required quality at an affordable cost. This means that the destination is chosen to satisfy the tourist's particular motivation and the whole destination choice process in medical tourism It can be brought down to two main parameters which play a crucial role in this industry, quality of the product and the cost (Jotikasthira , 2010).

While Smith & Forgione (2008) refer that the factors which effect in choosing the medical care internationally, can be lined into four as follows: Affordable and lower costs, hospital accreditation, quality of health-care, doctors and physicians training, and experience level. According to this study none of these factors alone is enough for the whole satisfaction in the industry and they are all related each other and they all play a crucial role in choosing healthcare destination, and these key elements evolve into two main factor , "Price" and the "Product" which have the most important role in choosing global medical facility (Smith and Forgione, 2008).

Even though the price is an important parameter, it is not the top indicator; the main factors are satisfaction of medical seeker with the given advanced technology. Countries like Singapore, Thailand and India surely are some of the leaders in the industry but it cannot match them with for example USA

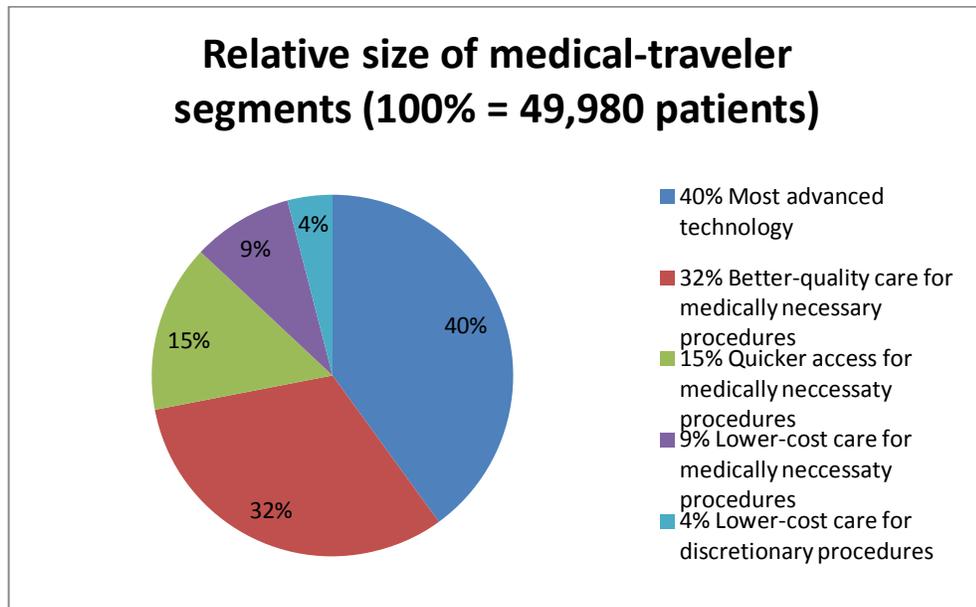
where the prices are still higher than those countries and it still receives medical tourists, that means the price is not the sole and most important factor. Medical tourism in USA is a good example for that, where lots of people still choose going there because of its technologically advanced medical equipments, in addition to the experienced and qualified workers, that means many people prefer qualified care and advanced technology regardless the cost (Republic of Turkey, Ministry of Health, (2012).

Motivation for medical tourism is a common topic in the literature when it is talked about customers preferences and the effective marketing factors on preferences of the medical tourists in choosing a specific destination for medical treatment, based on the literature the most two influential factors from the marketing mix factors are product and price, and in the second degree come the other two factors which could be less important which are place and promotion.

The price and product are the most important factors from the marketing mix in term of choosing the medical tourism destination in many studies, and to clarify which of them has more importance in the literature, some studies and their findings are stated here:

In McKinsey & Company Report (May, 2008), the study was carried out on a sample size of 49,980 patients; the product was found to be at the first place for patients in this study, the report stated that 40% of medical travelers seek for most medical advanced technology, 32% of medical travelers seek better quality for medically necessary procedures, 15% of medical travelers seek quicker access for medical treatments, 9% of medical travelers seek lower cost care for medically necessary procedures , and 4% of medical travelers seek for lower cost care for discretionary procedures.

Figure 2.7. Main drivers of medical tourism



Source: McKinsey & Company (May 2008). Mapping the market for medical travel.

Another study conducted in Thailand by Ricafort (2011) contained 104 international respondents and has used the 4P's framework with the four factors of marketing mix, the study refers that the respondents ranked providing professional and certified doctors as the most important factor, and the hospitals providing fast service and outstanding patient care ranked second, and clearly these two factors refers to the product in the marketing mix model. Ricafort wrote: Product is still the main reason why tourists would come to Thailand and avail medical treatment in the country.

Although the price was right in the second place in Reddy' study(2013) and it has an important influence, the product again is the most effective factor, Reddy stated: The three most important reasons that these medical tourists chose India for their treatments were:

- 1) the high quality of the doctors and medical facilities in India,
- 2) the affordable cost of treatments,
- and 3) the availability of specific treatments that might not have been available in their home countries.

On the other hand, in other studies the first and most important growth factor for medical tourism in developing countries was the enormous costs of treatments and therapies in the developed countries, cheaper health care cost is the key motivators that patients travel abroad for medical treatment, according to Smith and Forgione (2008) the number-one factor cited for why Americans travel abroad for health care is cost.

Again Deloitte Development (2008) says that the primary factor that motivates patients to offshore health care services is price.

Connell (2006) also talked about the importance of price as the first motivation for medical tourism as health care costs skyrocket, and patients in the developed world are looking overseas for medical treatment.

Finally, De Arellano (2007) indicated that Health care services include the both factors working together by offering "first-class services at third-world prices".

There are many studies in the literature have talked about the motivation and the effective factors for choosing a medical tourism destination, some studies have found that the price is the most effective factor to lead medical tourists to a specific destination, others have seen that still the product is the most influential factor and in some studies it is mentioned that both of them and no one factor is dominant in the decision, but all play a crucial role in choosing a healthcare destination on an international basis, as it is found in Smith & Forgione' study (2008).

In many previous studies in the medical tourism field, the main factors that influence in the decision of choosing the medical tourism destination are product, price, place promotion, and obviously, these 4 factors constitute the famous marketing mix model.

In this study we try to find out which factor from the marketing mix elements has more effective on the Arab medical tourist coming to Turkey for medical treatment, whether the product which means here the quality of the medical service offered or the price of this service, and the amount of the effect of the whole factors which are included in the four marketing mix factors.

CHAPTER III METHODOLOGY

3.1. Research Framework

This study used quantitative marketing research techniques to thoroughly explore the factors that lead medical tourist to choose hospitals in Turkey for their medical needs. Quantitative research methods were originally developed in the natural sciences to study natural phenomenon (Hohmann, 2006). To develop mathematical models, theories and/or hypotheses pertaining to the phenomena is the main objective of quantitative research. The quantitative methods can be used to validate hypotheses of a research study. In addition, the quantitative research model uses questionnaires and scales.

The questionnaire of this study consists of two parts, the first part contains questions of general information of the respondents. These elements were divided into 8 different classifications in order for the researcher to identify clearly the key factors that influence the respondents in choosing hospitals in Turkey for their medical needs. The grouping and classification this study was adapted from a study was conducted in Thailand by Ricafort (2011). Listed below were the questions of general information and the variables as indicated on the survey questionnaire:

Gender – The respondents were classified as Male or Female. (1) Male, (2) Female.

Age – The age of the respondents were divided into seven ranges namely: (1) Age under 15, (2) Age 15 - 24, (3) Age 25 - 34, (4) Age 35 - 44, (5) Age

45 - 54, (6) Age 55 - 64, and lastly (7) Age 65 and over. The Ordinal Scale was used in the classification of Income.

Country of Residence – The respondents have chosen from 20 listed choices namely:

(1) Algeria (2) Bahrain (3) Egypt (4) Iraq (5) Jordan (6) Kuwait (7) Lebanon (8) Libya (9) Mauritania (10) Morocco (11) Saudi Arabia (12) Somalia (13) Sudan (14) Syria (15) Tunisia (16) Oman (17) Palestine (18) Qatar (19) Yemen (20) United Arab Emirates

Occupation – The respondents have chosen from the 10 listed choices namely: (1) Professionals, (2) Administrative, (3) Commercial, (4) Laborers, (5) Agricultural, (6) Government, (7) Housewife, (8) Students, (9) Retired and (10) Others.

Income – The respondents had 6 categories to choose from namely: (1) Less than 2,000 USD per month, (2) 2,001 – 4,000 USD per month, (3) 4,001 – 6,000 USD per month, (4) 6,001 – 8,000 USD per month, (5) 8,001 – 10,000 USD per month, and (6) 10,001 and over USD per month. The Ordinal Scale was used in the classification of Income.

Frequency of Visit – The respondents were classified into two categories which are: (1) First Visit and (2) Revisit. Arab medical tourists who visited Turkey for medical treatment purpose for the first time was categorized as “First Visit”. On the other hand, respondents were categorized as “Revisit” if the Arab medical tourists have returned in Turkey for another medical visit.

Alternative Destination – The following question was asked to the respondents: Have you searched about other countries or compared between Turkey and other countries before choosing Turkey?. The respondents had 2 chosen: (1) No, (2) Yes. If the answer was yes, the

respondents were asked to mention the countries they have searched about, in order to determine the competitors of Turkey in medical tourism in this region.

Information Resource – The respondents were asked to determine how did they get information about the hospital they chose for their medical treatment?. The respondents had 5 chosen to choose from namely: (1) Internet, (2) Newspaper, (3) Magazine, (4) Magazine, (5) Relative or Friends.

The variables used in this study in the second part consisted of the 4P's of the marketing mix model which are: (1) Product, (2) Price, (3) Place and (4) Promotion. These variables refer to the influencing factors in the decision of the respondents to avail medical treatment in Turkey, The questionnaire used a 5-point Importance Scale to measure the importance or preference of each influencing factor of the respondents.

Listed below were the variables used in this study. This method is adopted from a Ricafort's study (2011) which was conducted in Thailand.

a. Product – In this study, the product referred to the hospital's international accreditation, first rate and certified doctors, nurses and staff, high technology medical equipment, fast service, excellent patient care, superb facilities, as well as the hospital's range of excellent medical treatments.

b. Price – In this study, the price referred to the affordable medical treatment cost, cheaper doctor and administrative fees, value for money, cost of medical treatment plus travel is cheaper than in home country, cost of medical treatment plus travel cheaper than other alternative countries and affordable travel tours after medical treatment.

c. Place – In this study, the place referred to the hospital's location near tourist attraction, the hospital's location near shopping centers, accessibility to local transportation, situated in a famous city, sited in a safe and secured environment, set in a quiet location, and located in the central of the city.

d. Promotion – In this study, the promotion referred to the extra services such as airport pickups and visa extensions, special rates for hotel accommodation with its partner hotels, insurance plan coverage and claims, special price on various medical treatment packages, and special rates for travel tours after medical treatment.

3.2. Research Question and Hypothesis

The study attempts to identify the factors that determine how the Arab medical tourists choose a destination for abroad medical treatment.

The main question that the study attempts to answer is: "What are the influencing factors that lead Arab medical tourists to choose hospitals in Turkey as a medical tourism destination? And which of them does have more effectiveness?"

The variety of medical tourism services, the quality of medical services, the price of medical and health services, advertising for medical and health centers in Turkey, and many others are the effective factors for attracting Arab medical tourists in Turkey. All the influence factors can be classified under four main factors which are: product, price, place, and promotion, which constitute the marketing mix model.

In this study we try to understand how these factors affect Arab medical tourists coming to Turkey, and which of them has a stronger effect.

According to the International Monetary Fund (2013), 6 of the top 20 countries with the highest GDP per capita are Arab countries, that fact tell us that most of the Arab countries have a luxurious life with high rate per capita GDP (ww.wikipedia.org), therefore the main motivation that make Arab patients choose to become medical tourists and have treatment abroad in the first place would not be searching for a better price but searching for the advanced medical technology and the high quality of the medical service they need, where we refer to these as the product in the marketing mix model, therefore the hypothesis of this study would be as follows: “The product has the greatest effect among the marketing mix factors on the Arab medical tourists preferences in choosing hospitals in Turkey for medical treatment”.

3.3. Data Collection and analyses Method

In order to answer the research question and prove the validity of the hypothesis, the research uses in this study a quantitative research method, namely, a survey in form of questionnaire in order to assess the motivational factors that lead Arab customer preference the most to choose hospitals in Turkey for medical care services. In quantitative data we are probably measuring variables and verifying existing theories or hypotheses or questioning them. Data is often used to generate new hypotheses based on the results of data collected about different variables. The quantitative methods can be used to validate hypotheses of a research study. In addition, the quantitative research model uses questionnaires and scales.

The research instrument used in the research is questionnaire. The questionnaire was distributed to Arab patients who came for medical treatment in hospitals in Turkey. The questionnaire which was distributed to the respondents was carried out in Arabic and using a 5-Points Importance Scale. The respondents selected the amount of importance on a scale from 1

to 5 as follows: (1).Unimportant, (2).Somewhat Important, (3).Moderately Important, (4). Important, (5).Very Important.

The identified rate of scale shows the importance of each influencing factor as viewed by the respondents. The factors will be used in this study are variables include the 4P's factors of the marketing mix model, which are the Product, Price, Place and Promotion. This was adapted from Ricafort' study (2011).

The questionnaire was only distributed to Arab medical tourists who chose Turkey for medical treatments. The questionnaire consisted of two sections. The first part of the questionnaire was the demographics of the respondents. The second part of the questionnaire was the Marketing Mix factors or 4P's, which includes the Product, Price, Place ,and Promotion. This research study used the Statistical Program for the Social Science (SPSS) tool to analyze the data.

3.4. Sample and Sample Size

The general target population of this study was the Arab medical tourists travelling to Turkey seeking medical services in the Turkish hospitals. The population scope of the research study is the Arab medical tourists receiving medical treatment in Turkey, but because of the time limitation and place limitation, the questionnaire was distributed to convenience sample consisting some of the Arab patients coming to private hospitals in Istanbul for medical treatment.

The sample is a subset containing the characteristics of a larger population. Samples are used in statistical testing when population sizes are too large for the test to include all possible members or observations (Investopedia, 2014).

The number of respondents is 102, the questionnaire was carried out in some private hospitals in Istanbul, and the respondents are from different Arab countries.

CHAPTER IV RESEARCH FINDINGS

The findings we got from the data analyzed in the Statistical Program for the Social Science (SPSS) were as follows:

4.1. Findings Related to the Demographic Question

The demographic information was included in the first section of the questionnaire. The intended respondents, Arab medical tourists, were requested to identify their demographic categories which included: (1) Gender, (2) Age, (3) Country of Residence, (4) Occupation, (5) Income, and (6) Frequency of Visit. In order to understand the sample population based on demographics, Tables 4.1 through 4.8 summarize these data by the respondents' general information.

Respondents (N = 102) stated their gender and Table 4.1 clarifies this data. A majority of the respondents, 65 (63.7%) respondents were male, while 37 (36.3%) of the respondents were female.

Table 4.1: Descriptive Statistics of Gender

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid male	65	63.7	63.7	63.7
female	37	36.3	36.3	100.0
Total	102	100.0	100.0	

The following Table 4.2 shows the age of respondents of survey. Two of the respondents with a percentage of (2%) were under 15, 6 of them with a percentage of (5.9%) were from age brackets of 15 - 24 , 21 (20.6%)

respondents were from age brackets of 25- 34, 25 (24.5%) respondents were from age brackets of 35 – 44, 23 (22.5) respondents were from age brackets of 45 – 54, 12 (11.8%) respondents were from age brackets of 55 – 64 , 13 (12.7%) respondents were 65 and over.

Table 4.2: Descriptive Statistics of Age

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid under 15	2	2.0	2.0	2.0
15-24	6	5.9	5.9	7.8
25-34	21	20.6	20.6	28.4
35-44	25	24.5	24.5	52.9
45-54	23	22.5	22.5	75.5
55-64	12	11.8	11.8	87.3
65 and over	13	12.7	12.7	100.0
Total	102	100.0	100.0	

Table 4.3 illustrates the country of residence or nationality of the respondents. The study aimed the Arab patients only. There were 20 Arab countries in the questionnaire as choices. There were no patients from three of the twenty countries, Morocco, Mauritania, Somalia. The highest number of respondents were from Libya with a number of 17 respondents and a percentage of (16.7%), Iraq came in the second rank with 15 (14.7%) rank, Saudi Arabia was third with 14 (13.7%) respondents, 10 (9.8%) respondents were from Kuwait, 9 (8.8%) of the respondents came from United Arab Emirates, Algeria, Bahrain, Egypt, and Qatar had the same number of respondents with 5 (4.9%) patients, Syria and Oman had the same number of respondents with 4 (3.9%) patients, 2 (2.0%) respondents came from each of the following countries Lebanon, Palestine, and Yemen, and 1 (1.0%) respondent came from each of the following countries: Jordan, Sudan, and Tunisia.

Table 4.3: Descriptive Statistics of Country of Residence

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid				
Algeria	5	4.9	4.9	4.9
Bahrain	5	4.9	4.9	9.8
Egypt	5	4.9	4.9	14.7
Iraq	15	14.7	14.7	29.4
Jordan	1	1.0	1.0	30.4
Kuwait	10	9.8	9.8	40.2
Lebanon	2	2.0	2.0	42.2
Libya	17	16.7	16.7	58.8
Saudi Arabia	14	13.7	13.7	72.5
Sudan	1	1.0	1.0	73.5
Syria	4	3.9	3.9	77.5
Tunisia	1	1.0	1.0	78.4
Oman	4	3.9	3.9	82.4
Palestine	2	2.0	2.0	84.3
Qatar	5	4.9	4.9	89.2
Yemen	2	2.0	2.0	91.2
United Arab Emirates	9	8.8	8.8	100.0
Total	102	100.0	100.0	

Table 4.4 illustrates the occupation of the respondents, The largest respondents were housewife with a total of 24 (23.5%) respondents. In the second rank there are 19 (18.6%) respondents in the commercial industry. 17 (16.7%) respondents work in government sector and it comes in the third rank. 14 (13.7%) respondents have administrative jobs. There are 8 (7.8%) respondents who are professionals. 7 (6.9%) respondents said that they are retired. 6 (5.9%) respondents chose "other" as their response. There were 4 (3.9%) respondents who are students, while 3 (2.9%) respondents were laborers.

Table 4.4: Descriptive Statistics of Occupation

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Professionals	8	7.8	7.8	7.8
	Administrative	14	13.7	13.7	21.6
	Commercial	19	18.6	18.6	40.2
	Laborers	3	2.9	2.9	43.1
	Government	17	16.7	16.7	59.8
	Housewife	24	23.5	23.5	83.3
	Students	4	3.9	3.9	87.3
	Retired	7	6.9	6.9	94.1
	Others	6	5.9	5.9	100.0
	Total	102	100.0	100.0	

The following table 4.5 shows the respondents' income in USA dollars per month. In the first rank were 35 (34.3%) respondents who stated that their income was more than 2000 \$ but less than 4000 \$. There are 21 (20.6%) respondents who said that their income was more than 4000 \$ but less than 6000 \$. A total of 18 (17.6%) respondents stated that their income was more than 6000 \$ but less than 8000 \$. 16 (15.7%) respondents said that they are earning less than 2000 \$. And 4 (3.9%) respondents stated that they are earning over 10000 \$.

Table 4.5: Descriptive Statistics of Income (Per Month)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	2000 \$ and less	16	15.7	15.7	15.7
	2001- 4000 \$	35	34.3	34.3	50.0
	4001- 6000 \$	21	20.6	20.6	70.6
	6001- 8000 \$	18	17.6	17.6	88.2
	8001- 10000 \$	8	7.8	7.8	96.1
	10000 \$ and over	4	3.9	3.9	100.0
	Total	102	100.0	100.0	

Table 4.6 shows the frequency of visit of Arab medical tourists to Turkey. 83 (81.4%) respondents declared that it is their first time visiting the country for medical treatment purposes, while 19 respondents (18.6%) stated that they have been to Turkey before for health care services.

Table 4.6: Descriptive Statistics of Frequency of Visit

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	First Visit	83	81.4	81.4	81.4
	Revisit	19	18.6	18.6	100.0
	Total	102	100.0	100.0	

Table 4.7 shows percentage of patients who searched about other countries or compared between Turkey and other countries before choosing Turkey for medical tourism. A majority of respondents, 60 (58.8%) stated that they have not searched about other countries. 42 (41.2%) respondents said that they have searched about other countries, 12 of them said that they searched about Jordan before choosing Turkey as their destination, 5 respondents said that Iran was the country they searched about, 5 respondents mentioned Lebanon, 4 Emirates, 3 respondents mentioned both of Jordan and Lebanon, 2 Germany, 1 European Countries, and 10 respondents stated that they searched about other countries or compared between Turkey and other countries before choosing Turkey without mentioning any specific country.

Table 4.7: Descriptive Statistics of Alternative Destinations

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No	60	58.8	58.8	58.8
	Yes	42	41.2	41.2	100.0
	Total	102	100.0	100.0	

Table 4.8 illustrates how the respondents got information about the hospital they chose for their medical treatment. 37 (36.3%) respondents stated that Internet was the resource of their information about the hospital. 35 (34.3%) respondents said that their relative or friends recommended them the hospitals they choose in Turkey. 28 (27.5%) respondents said that Middleman was the resource of their information about the hospital, and 2 (2.0%) respondents said that their information resource was magazines.

Table 4.8: Descriptive Statistics of Information Resource

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Internet	37	36.3	36.3	36.3
	Magazine	2	2.0	2.0	38.2
	Middleman	28	27.5	27.5	65.7
	Relative or Friends	35	34.3	34.3	100.0
	Total	102	100.0	100.0	

4.2. Findings Related to the Research Question

Research Question: What are the influencing factors that lead Arab patients preference to choose hospitals in Turkey as a medical tourism destination? And which of them does have more effectiveness?

In answering this question, means and standard deviations were calculated to rank the influencing factors according to respondents' perception of importance with respect to their decision in receiving medical treatment in the hospitals in Turkey.

The respondents ranked first rate and certified doctors (Mean= 4.46) as the top most important factor in choosing hospitals in Turkey. High technology medical equipment ranked second in the importance. High technology

medical equipment (Mean = 4.32) ranked second in importance. Sited in a safe and secured environment (Mean = 4.29) ranked the third in importance. Excellent patient care (Mean = 4.25) ranked the fourth in importance. The respondents ranked both of Range of excellent medical treatments and Affordable medical treatment cost (Mean = 4.16) ranked the fifth in importance. Value for money (Mean = 4.14) ranked the sixth in importance. Fast service (Mean = 4.08) ranked in importance. Cheaper doctor and administrative fees (Mean = 4.08) ranked the seventh in importance. International accreditation (Mean = 4.05) ranked the eighth in importance. Cheaper doctor and administrative fees (Mean = 3.85) ranked the ninth in importance. Cost of medical treatment plus travel cheaper than other alternative countries (Mean = 3.80) ranked the tenth in importance. Set in a quiet location (Mean = 3.78) ranked eleventh in importance. Superb facilities location (Mean = 3.77) ranked the twelfth in importance. Hospital's location near tourist (Mean = 3.72) ranked thirteenth in importance. Cost of medical treatment plus travel is cheaper than in home country (Mean = 3.67) ranked the fourteenth in importance. Situated in a famous city (Mean = 3.64) ranked the fifteenth in importance. respondents ranked both of Hospital's location near shopping centers and affordable travel tours after medical treatment (Mean = 3.63) ranked the sixteenth in importance. Accessibility to local transportation (Mean = 3.56) ranked the seventeenth in importance. Extra services such as airport pickups and visa extensions (Mean = 3.40) ranked the eighteenth in importance. Rates for travel tours after medical treatment (Mean = 3.38) ranked the nineteenth in importance. Special rates for hotel accommodation with its partner hotels (Mean = 3.36) ranked the twentieth in importance. Located in the central of the city (Mean = 3.32) ranked the twenty first in importance. Insurance plan coverage and claims (mean = 3.27) ranked the twenty second in importance. Finally, Rates for travel tours after medical treatment (Mean = 3.15) ranked in importance.

Table 4.9: Influencing Factors Ranked by Importance according to Respondents (1)

Name of Factor	Mean	Std. Deviation	N	Rank
International accreditation	4.058824	0.97314	102	8
First rate and certified doctors nurses and staff	4.460784	0.779332	102	1
High technology medical equipments	4.323529	0.733387	102	2
Fast service	4.088235	0.809632	102	7
Excellent patient care	4.254902	0.80452	102	4
Superb facilities	3.77451	1.04272	102	12
Range of excellent medical treatments	4.166667	0.912871	102	5
Affordable medical treatment cost	4.166667	0.845294	102	5
Cheaper doctor and administrative fees	3.852941	1.07535	102	9
Value for money	4.147059	0.978957	102	6
Cost of medical treatment plus travel is cheaper than in home country	3.676471	1.100511	102	14
Cost of medical treatment plus travel cheaper than other alternative countries	3.803922	1.090365	102	10
Affordable travel tours after medical treatment	3.637255	1.051065	102	16
Hospital's location near tourist attraction	3.72549	1.24405	102	13
Hospital's location near shopping centers	3.637255	1.115056	102	16
Accessibility to local transportation	3.568627	1.198264	102	17
Situated in a famous city	3.647059	1.086798	102	15
Sited in a safe and secured environment	4.294118	0.896508	102	3
Set in a quiet location	3.784314	1.011101	102	11
Located in the central of the city	3.323529	1.26774	102	21
Extra services such as airport pickups and visa extensions	3.401961	1.260676	102	18
Special rates for hotel accommodation with its partner hotels	3.362745	1.241121	102	20

Name of Factor	Mean	Std. Deviation	N	Rank
Insurance plan coverage and claims	3.27451	1.170232	102	22
Special price on various medical treatment packages	3.382353	1.169278	102	19
Rates for travel tours after medical treatment	3.156863	1.224705	102	23

Table 4.10: Influencing Factors Ranked by Importance according to Respondents (2)

Name of Factor	Category	Mean	Rank
First rate and certified doctors nurses and staff	Product	4.460784	1
High technology medical equipments	Product	4.323529	2
Sited in a safe and secured environment	Place	4.294118	3
Excellent patient care	Product	4.254902	4
Range of excellent medical treatments	Product	4.166667	5
Affordable medical treatment cost	Price	4.166667	5
Value for money	Price	4.147059	6
Fast service	Product	4.088235	7
International accreditation	Product	4.058824	8
Cheaper doctor and administrative fees	Price	3.852941	9
Cost of medical treatment plus travel cheaper than other alternative countries	Price	3.803922	10
Set in a quiet location	Place	3.784314	11
Superb facilities	Product	3.77451	12
Hospital's location near tourist attraction	Place	3.72549	13
Cost of medical treatment plus travel is cheaper than in home country	Price	3.676471	14
Situated in a famous city	Place	3.647059	15
Affordable travel tours after medical treatment	Price	3.637255	16

Name of Factor	Category	Mean	Rank
Hospital's location near shopping centers	Place	3.637255	16
Accessibility to local transportation	Place	3.568627	17
Extra services such as airport pickups and visa extensions	Promotion	3.401961	18
Special price on various medical treatment packages	Promotion	3.382353	19
Special rates for hotel accommodation with its partner hotels	Promotion	3.362745	20
Located in the central of the city	Place	3.323529	21
Insurance plan coverage and claims	Promotion	3.27451	22
Rates for travel tours after medical treatment	Promotion	3.156863	23

4.3. Findings Related to the Hypotheses

The hypothesis of this study is as follows: “The product has the greatest effect among the marketing mix factors on the Arab medical tourists preferences in choosing hospitals in Turkey for medical treatment”.

Paired Samples T-Test

The Paired Samples t Test is used to detect the difference between the means of two dependent variables. A paired-samples t-test was conducted to compare mean of all the marketing mix factors to see which of them has the greatest mean, thus which one of them has the greatest effect among the marketing mix factors on the Arab medical tourists preferences in choosing hospitals in Turkey for medical treatment.

Table 4.11: Paired Samples Statistics

		Mean	N	Std. Deviation	Std. Error Mean
Pair 1	Mean of product factor	4,1611	102	,54228	,05369
	Mean of price factor	3,8807	102	,63166	,06254
Pair 2	Mean of product factor	4,1611	102	,54228	,05369
	Mean of place factor	3,7115	102	,61469	,06086
Pair 3	Mean of product factor	4,1611	102	,54228	,05369
	Mean of promotion factor	3,3157	102	,80121	,07933
Pair 4	Mean of price factor	3,8807	102	,63166	,06254
	Mean of place factor	3,7115	102	,61469	,06086
Pair 5	Mean of price factor	3,8807	102	,63166	,06254
	Mean of promotion factor	3,3157	102	,80121	,07933
Pair 6	Mean of place factor	3,7115	102	,61469	,06086
	Mean of promotion factor	3,3157	102	,80121	,07933

Six pairs were needed to complete the comparison between the all factors, noticing that a low significance value for the t test (typically less than 0.05) indicates that there is a significant difference between the two variables. In the first pair (product – price) there was a significant difference in the scores for product (M=4.16, SD=0.54) and price (M=3.88, SD=0.63) conditions; $t(3.82)=101$, $p = 0.000$. In the second pair (product – place) there was a significant difference in the scores for product (M=4.16, SD=0.54) and place (M=3.71, SD=0.61) conditions; $t(5.89)=101$, $p = 0.000$. In the third pair (product – promotion) there was a significant difference in the scores for product (M=4.16, SD=0.54) and promotion (M=3.31, SD= 0.80) conditions; $t(9.77)=101$, $p = 0.000$. In the fourth pair (price – place) there was a significant difference in the scores for price (M=3.88, SD=0.63) and place (M=3.71, SD=0.61) conditions; $t(2.17)=101$, $p = 0.032$. In the fifth pair (price – promotion) there was a significant difference in the scores for price (M=3.88, SD=0.63) and promotion (M=3.31, SD= 0.80) conditions; $t(7.10)=101$, $p = 0.000$. In the sixth pair (place – promotion) there was a significant difference in the scores for place (M=3.71, SD=0.61) and promotion (M=3.31, SD= 0.80) conditions; $t(5.14)=101$, $p = 0.000$.

Table 4.12: Paired Samples Test

		Paired Differences					t	df	Sig. (2-tailed)
		Mean	Std. Deviation	Std. Error Mean	95% Confidence Interval of the Difference				
					Lower	Upper			
Pair 1	Mean of product factor - Mean of price factor	,28035	,73975	,07325	,13504	,42565	3,827	101	,000
Pair 2	Mean of product factor - Mean of place factor	,44958	,77033	,07627	,29827	,60089	5,894	101	,000
Pair 3	Mean of product factor - Mean of promotion factor	,84538	,87327	,08647	,67385	1,01690	9,777	101	,000
Pair 4	Mean of price factor - Mean of place factor	,16923	,78593	,07782	,01486	,32361	2,175	101	,032
Pair 5	Mean of price factor - Mean of promotion factor	,56503	,80296	,07950	,40732	,72275	7,107	101	,000
Pair 6	Mean of place factor - Mean of promotion factor	,39580	,77744	,07698	,24309	,54850	5,142	101	,000

From the finding we got from the data analyzed in the Statistical Program for the Social Science (SPSS), the product (Mean = 4.16) factor was the first and has the greatest mean among the marketing mix factors. Price factor (Mean = 3.88) came second. Place (Mean = 3.71) came third with a little difference behind price. Finally, promotion (Mean = 3.31) came last. These results suggest that product really does have the greatest effect among the marketing mix factors on the Arab medical tourists preferences in choosing hospitals in Turkey for medical treatment, thus, research hypothesis is accepted, the price came second in importance, place was in the third rank in importance with a little difference behind price, and the promotion was last in importance with the smallest effect among the marketing mix factors on the Arab medical tourists preferences in choosing hospitals in Turkey for medical treatment.

Table 4.13: Mean of Marketing Mix Factors

	N	Mean	Std. Deviation	Std. Error Mean
Mean of product factor	102	4.1611	.54228	.05369
Mean of price factor	102	3.8807	.63166	.06254
Mean of place factor	102	3.7115	.61469	.06086
Mean of promotion factor	102	3.3157	.80121	.07933

4.4. Reliability Analysis

Cronbach's alpha is a function of the number of items in a test, the average covariance between item-pairs, and the variance of the total score. The reliability of the scales was tested by calculating the coefficient alphas (Cronbach's alphas). It was first named alpha by Lee Cronbach in 1951, as he had intended to continue with further coefficients. Cooper and Schindler (2003) mentioned that a score of 0.7 is the acceptable reliability coefficient. The result of the reliability test is presented in the following table. The below table 4.14 indicates the Cronbach's alpha is above the acceptable reliability coefficient. Table 4.14. shows the rate of Cronbach's Alpha in this study (0.784%), this rate is considered acceptable.

Table 4.14: Reliability Testing: Cronbach's Alpha

Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
.784	.786	25

4.5. Discussion and Summary

The main result of the findings of this study was the answer of research question in determining the influencing factors that lead Arab medical tourists to choose Turkish hospitals for their medical treatment. The answer was that the quality of the medical service was in the first rank in importance including the hospital provides professional, top-notch, and certified doctors as well as hospitable nurses and staffs, and the hospital provides high technology medical equipments was in the second rank, which both of them refer to the product in the marketing mix model as it is the most influencing factor. The third factor in importance was the location of the hospital should be sited in a safe and secured environment, this shows that the lack of secured in some of these countries reverberated clearly in choosing the hospital. Libya, Iraq, and Saudi Arabia were the top three countries from the Arab countries with patients come to Turkey for medical treatment, hospitals in Turkey which seek to increase their share in the market from the medical tourists could pay more attention to those countries by special promotions and intensify advertisements in those countries. The most frequency occupation after housewife, was the commercial, then government sector came second, hospitals also could take advantage of these finding by trying to contract with some government organizations in these countries to receive employees from these organizations who are in need of medical treatment. Since the Internet has become the first resource of all kinds of information, in the medical tourism field the Internet is not exception, and the majority of respondents referred that the Internet was their resource to get information about the hospital they chose, that is why it should be given more attention to the Internet advertisements and the official websites of the hospitals, furthermore, the Arabic language can be added to these websites for an easier way of reaching the information to the Arab patients who are interested in medical tourism and searching for information about it, also customer service system in the websites could be activated to answer to the customers' enquiries and communicate with them easily, this also could be a

recommendation to the hospitals which are searching for a better Ad system, relative and friends was in the second rank in the resource information question, that refers to the importance of the recommendations and positive word of mouth from the Arab medical tourists when they go back to their countries, middleman was in the third rank as an information resource, enhancing the relationship with middlemen in the Arab countries could be another idea to increase the position of Turkey as a destination for medical tourism. Jordan, Lebanon, and Iran were mentioned the most in the answer of the respondents about the other countries they searched about before choosing Turkey, hospitals in Turkey with the support of the Turkish government can conduct some kinds of researches and special studies to indicate the advantages and disadvantages of these competitor countries with Turkey in medical tourism in the area.

Finally, we can say that the phenomenon of receiving medical treatment abroad has grown over the past several years, and many developing countries which took advantage of medical tourism have achieved high levels in this field and started to receive a great number of international patients with a profit of billions of dollars annually. Turkey one of those countries which developed rapidly in the last years in the medical tourism sector, and today too many hospitals in different cities in Turkey receive thousands of international patients every year, and with the increasing attention from the Turkish government, Turkey in the next few years could be one of the most important countries in this field not only in Asia but also all over the world.

4.6. Recommendations for Further Research:

To the extent that time and monetary limitations are overcome, this study should be replicated with a larger sample including international patients from many different perspectives and enrich findings.

Also, the level of satisfaction with the 25 different factors ought to be measured. Such a measurement may enable policy makers to learn which factors should be improved more urgently. This is important because satisfied outpatients will provide word-of-mouth advertising.

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Appendix A. Questionnaire of the Study in English

Master of Business Administration Program Survey Questionnaire

“Turkey as a medical Tourism Destination: A study of the effective marketing factors on Preferences of the Arab medical tourists in Turkey”

In completion of the requirements of the study in Master of Business Administration at Fatih university, Istanbul, Turkey.

I am conducting this survey for the purpose of identifying factors that leads Arab medical tourists to choose Turkey hospitals as Medical Tourism destination. The importance of this study will support the development of medical tourism in Turkey. All your answers will be kept confidential and your assistance in completing this survey is greatly appreciated.

Please read each question thoroughly and answer as best as possible. This questionnaire is divided into two parts:

Part 1: Question of General Information

Part 2: Influencing factors that lead Arab medical tourists to choose Turkey as a Medical Tourism destination.

Part 1: Question of General Information

1. Gender Male Female

2. Age

<input type="checkbox"/> Under 15	<input type="checkbox"/> 45-54
<input type="checkbox"/> 15-24	<input type="checkbox"/> 55-64
<input type="checkbox"/> 25-34	<input type="checkbox"/> 65 and over
<input type="checkbox"/> 35-44	

3. Country of Residence

<input type="checkbox"/> Algeria	<input type="checkbox"/> Saudi Arabia KSA
<input type="checkbox"/> Bahrain	<input type="checkbox"/> Somalia
<input type="checkbox"/> Egypt	<input type="checkbox"/> Sudan
<input type="checkbox"/> Iraq	<input type="checkbox"/> Syria
<input type="checkbox"/> Jordan	<input type="checkbox"/> Tunisia
<input type="checkbox"/> Kuwait	<input type="checkbox"/> Oman
<input type="checkbox"/> Lebanon	<input type="checkbox"/> Palestine
<input type="checkbox"/> Libya	<input type="checkbox"/> Qatar
<input type="checkbox"/> Mauritania	<input type="checkbox"/> Yemen
<input type="checkbox"/> Morocco	<input type="checkbox"/> United Arab Emirates UAE

4. Occupation

- | | |
|---|-------------------------------------|
| <input type="checkbox"/> Professionals | <input type="checkbox"/> Government |
| <input type="checkbox"/> Administrative | <input type="checkbox"/> Housewife |
| <input type="checkbox"/> Commercial | <input type="checkbox"/> Students |
| <input type="checkbox"/> Laborers | <input type="checkbox"/> Retired |
| <input type="checkbox"/> Agricultural | <input type="checkbox"/> Others |

5. Income (in USD per month)

- | | |
|---|--|
| <input type="checkbox"/> 2,000 and less | <input type="checkbox"/> 8,001 – 11,000 |
| <input type="checkbox"/> 2,001 – 5,000 | <input type="checkbox"/> 11,001 – 15,000 |
| <input type="checkbox"/> 5,001 – 8,000 | <input type="checkbox"/> 15,001 and over |

6. Frequency of Visit to Turkey for Medical Treatment

- | | |
|--------------------------------------|----------------------------------|
| <input type="checkbox"/> First Visit | <input type="checkbox"/> Revisit |
|--------------------------------------|----------------------------------|

7. Have you searched about other countries or compared between Turkey and other countries before choosing Turkey?

- No.
 Yes, (Please mention the countries you have searched about).....

8. How did you get information about this hospital?

- | | |
|------------------------------------|--|
| <input type="checkbox"/> Internet | <input type="checkbox"/> Middleman |
| <input type="checkbox"/> Newspaper | <input type="checkbox"/> Relative or Friends |
| <input type="checkbox"/> Magazine | |

Part 2: Influencing Factors Leading to Customers' Preference

The purpose of this part of the questionnaire is to assess the factors which influence Arab customers in preferring Turkey hospital as medical tourism destination. Please indicate how important the following factors in choosing a hospital from the following importance scale: (1) Unimportant, (2) Somewhat Important, (3) Moderately Important, (4) Important, (5) Very Important.

		Very Important	Important	Moderately Important	Somewhat Important	Unimportant
		5	4	3	2	1
A. product						
	1.International accreditation					
	2.First rate and certified doctors nurses and staff					
	3.High technology medical equipments					
	4.Fast service					
	5.Excellent patient care					
	6.Superb facilities					
	7.Range of excellent medical treatments					
B. Price						
	1.Affordable medical treatment cost					
	2.Cheaper doctor and administrative fees					
	3.Value for money					
	4.Cost of medical treatment plus travel is cheaper than in home country					
	5.Cost of medical treatment plus travel cheaper than other alternative countries					
	6.Affordable travel tours after medical treatment					

C. Place		Very Important	Important	Moderately Important	Somewhat Important	Unimportant
	1.Hospital's location near tourist attractions					
	2.Hospital's location near shopping centers					
	3.Accessibility to local transportation					
	4.Situated in a famous city					
	5.Sited in a safe and secured environment					
	6.Set in a quiet location					
	7.Located in the central of the city					
D. Promotion						
	1.Extra services such as airport pickups and visa extensions					
	2.Special rates for hotel accommodation with its partner hotels					
	3.Insurance plan coverage and claims					
	4.Special price on various medical treatment packages					
	5.Rates for travel tours after medical treatment					

Thank you very much for your assistance in completing this questionnaire.

Abdulrahman Alili

Appendix B. Questionnaire of the Study in Arabic

رسالة ماجستير في إدارة الأعمال
دراسة استطلاعية (استبيان)

"تركيا كوجهة للسياحة الطبية : دراسة للعوامل التسويقية المؤثرة على تفضيلات السياح الطبيين العرب القادمين إلى تركيا للعلاج"

يُجرى هذا الاستطلاع لإتمام رسالة ماجستير في إدارة الأعمال في جامعة الفاتح في اسطنبول, تركيا. نقوم بإجراء هذا الاستطلاع لغرض تحديد العوامل التي تقود السياح الطبيين العرب في اختيار المستشفيات في تركيا كوجهة للسياحة الطبية. لهذه الدراسة أهمية كبيرة في دعم وتطوير السياحة الطبية في تركيا. ستبقى كل إجاباتكم سرية كما أننا نقدر مساعدتكم في انجاز هذه الدراسة.

يرجى قراءة كل سؤال بدقة والإجابة على أفضل وجه ممكن. وينقسم هذا الاستبيان إلى قسمين:

القسم الأول : أسئلة ومعلومات عامة.
القسم الثاني : العوامل المؤثرة التي تقود السياح الطبيين العرب لاختيار تركيا كوجهة للسياحة الطبية.

القسم الأول : أسئلة ومعلومات عامة.

1. الجنس أنثى ذكر

2. العمر

أقل من 15 45-54
 15-24 55-64
 25-34 65 أو أكثر
 35-44

3. بلد الإقامة

الجزائر السعودية
 البحرين الصومال
 مصر السودان
 العراق سوريا
 الأردن تونس
 الكويت سلطنة عمان
 لبنان فلسطين
 ليبيا قطر
 موريتانيا اليمن
 المغرب الإمارات العربية المتحدة

4. الوظيفة

- | | |
|---|-------------------------------------|
| <input type="checkbox"/> مهني , حُرْفِي | <input type="checkbox"/> موظف حكومي |
| <input type="checkbox"/> إداري | <input type="checkbox"/> ربة منزل |
| <input type="checkbox"/> تاجر | <input type="checkbox"/> طالب |
| <input type="checkbox"/> عامل | <input type="checkbox"/> متقاعد |
| <input type="checkbox"/> زراعي | <input type="checkbox"/> عمل آخر |

5. الدخل (بالدولار شهريا)

- | | |
|--|---|
| <input type="checkbox"/> 2,000 أو أقل | <input type="checkbox"/> 6,001 – 8,000 |
| <input type="checkbox"/> 2,001 – 4,000 | <input type="checkbox"/> 8,001 – 10,000 |
| <input type="checkbox"/> 4,001 – 6,000 | <input type="checkbox"/> أكثر من 10,001 |

6. تكرار الزيارة إلى تركيا بغرض العلاج الطبي

- | | |
|------------------------------------|--|
| <input type="checkbox"/> أول زيارة | <input type="checkbox"/> ليست الزيارة الأولى |
|------------------------------------|--|

7. هل بحثت عن دول أخرى أو قمت بالمقارنة بين تركيا ودول أخرى قبل اختيارك المجيء إلى تركيا للعلاج

- لا .
 نعم , (الرجاء ذكر الدول التي بحثت عنها).....

8. كيف حصلت على معلومات عن هذه المستشفى

- | | |
|--------------------------------------|---|
| <input type="checkbox"/> من الانترنت | <input type="checkbox"/> عن طريق وسيط أو سمسار |
| <input type="checkbox"/> من الصحف | <input type="checkbox"/> من الأقارب أو الأصدقاء |
| <input type="checkbox"/> من المجلات | |

القسم الثاني: العوامل المؤثرة التي تقود السياح الطبيين العرب لاختيار تركيا كوجهة للسياحة الطبية.

الغرض من هذا الجزء من الاستطلاع هو تقييم العوامل التي تؤثر في تفضيل العملاء العرب للمستشفيات التركية كوجهة للسياحة الطبية. يرجى الإشارة إلى مدى أهمية العوامل التالية في اختيار المستشفى حسب مقدار الأهمية التالي: (1) غير مهم، (2) مهم قليلا، (3) متوسط الأهمية، (4) مهم، (5) مهم جدا.

		مهم جدا	مهم	متوسط الأهمية	مهم قليلا	غير مهم
		5	4	3	2	1
أ. المنتج						
	1. تمتلك المستشفى اعتماد أو تصديق دولي.					
	2. توفر المستشفى أطباء خبيرين ومعتمدين من الدرجة الأولى بالإضافة الى الطاقم الطبي والتمريضي.					
	3. توفر المستشفى معدات طبية عالية التكنولوجيا.					
	4. تقدم المستشفى خدمة سريعة.					
	5. تقدم المستشفى عناية متميزة بالمريض.					
	6. تقدم المستشفى مرافق وتسهيلات ممتازة.					
	7. تقدم المستشفى علاجات طبية ممتازة.					
ب. السعر						
	1. تقدم المستشفى تكاليف العلاجات الطبية بأسعار معقولة ومتنوعة.					
	2. تقدم المستشفى رسوم طبية وإدارية رخيصة نسبيا.					
	3. القيمة الاجمالية للعلاج الطبي يساوي مقدار النقود المدفوعة في المستشفى.					
	4. إجمالي تكلفة العلاج الطبي بالإضافة لتكاليف السفر أرخص من تكلفة العلاج في بلد الإقامة.					
	5. إجمالي العلاج الطبي بالإضافة لتكاليف السفر أرخص من التكلفة الإجمالية في بلدان أخرى بديلة.					
	6. بعد العلاج الطبي ، هناك فرصة للذهاب في رحلات وجولات سياحية بأسعار معقولة في جميع أنحاء تركيا.					

ج. المكان	مهم جدا	مهم	متوسط الاهمية	مهم قليلا	غير مهم
1. تقع المستشفى بجانب الأماكن السياحية.					
2. تقع المستشفى بجانب مراكز التسوق.					
3. يمكن الوصول الى المستشفى بسهولة بطرق المواصلات المختلفة كالحافلات وسيارات الأجرة وقطارات الأنفاق.					
4. تقع المستشفى في مدينة مشهورة في تركيا.					
5. تقع المستشفى في مدينة آمنة في تركيا.					
6. تقع المستشفى في مكان هادئ وصالح للاستجمام.					
7. تقع المستشفى في مركز المدينة.					
د. الترويج					
1. تقدم المستشفى عروض ترويجية تغطي خدمات إضافية مثل الاستقبال من المطار وخدمات تمديد مدة التأشيرة.					
2. تقدم المستشفى عروض ترويجية تعطي أسعار خاصة للإقامة في فنادق شريكة للمستشفى.					
3. تقبل المستشفى تغطية التأمينات الصحية.					
4. تقدم المستشفى عروض ترويجية على مختلف العلاجات الطبية.					
5. بعد العلاج الطبي ، المستشفى تقدم حزم من العروض الترويج التي تغطي رحلات وجولات سياحية بأسعار خاصة.					

شكرا جزيلاً على مساعدتكم في استكمال هذا الاستبيان.

عبدالرحمن علي