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Medical Tourism in Cyprus: Challenges and Prospectives

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Abstract

The main objectives of this study were the investigation of the current state of affairs and perspectives pertaining to medical tourism in Cyprus, the identification of associated problems and weaknesses and the formulation of proposals for a sustainable further development of medical tourism by experts with specialized knowledge on the subject.

The study was conducted using the Delphi method in two rounds (Goodman, 1987), which is characterised by anonymity and structured questionnaires with controlled feedback. The data are collected through repeated rounds and the results of the previous rounds are fed back by the researcher in the form of statistical outcomes until the best possible degree of consensus between the participating experts is achieved (McKenna, 1994). The group usually comprises experts that reflect the state of the art and contemporary knowledge on the subject under investigation. A total of 23 people participated in this study, coming from different areas of the health and medical tourism sectors of Cyprus.

The findings of the present study revealed a high degree of consensus ($\geq 75\%$) in most of the questions answered by the experts. The promotion of medical tourism, the accreditation of medical facilities, the quality of the associated services, the generation of incentives and the active participation of the government through public-private ventures are among the proposals put forward for the development of medical tourism in Cyprus.

Based on the results we conclude that medical tourism in Cyprus has the potential for further development and establishment as a sustainable lever for economic growth.

Introduction

Medical tourism, a subcategory of health tourism, is aimed at patients-tourists that use specialised medical services for health monitoring and associated therapy. It is apparent that this particular sector of tourism refers to people who choose to consult hospitals and clinics of a foreign country, rather than their country of residence (Matarangas, <http://www.iatropedia.gr>), in order to address a health issue and pursue a particular therapy.

Presently, the provision of comprehensive medical services constitutes a significant component of the domestic industries of more than 60 countries. The scientific and technological advancements in many countries, particularly as they pertain to the different aspects of medicine, in conjunction with the constant increase in economic competition, are also expected to significantly enhance the potential for development of medical services in Cyprus (Strategic Study on the organization, development and promotion of health tourism in Cyprus, 2009).

Proper analysis of the key aspects of medical tourism in Cyprus must entail the identification and assessment of many parameters that affect the organisation and prospects of the medical tourism product. Recent years have witnessed significant investments in the health industry. Beyond the public sector, a number of modern private hospitals and clinics as well as specialised medical centres and clinical laboratories have been established, (Cyprus Tourism Organization, 2007). The potential of Cyprus to establish itself as an important destination of medical tourism depends, in equal measure, on both the existing health infrastructure of the country as well as any economic and other advantages (in relation to its competitors) that it can offer.

Materials and Methodology

A total of 23 people (14 men and 9 women) were selected for the purposes of this study on the basis of their familiarity with and/or expertise on one or more aspects of medical tourism; the participants all came from different areas such as the public health system, private clinics, various Cyprus medical associations, private companies that collaborate with the domestic health sector as well as medical travel coordinators.

Figure 1

Data collection was implemented using structured questionnaires based on the Delphi method in two rounds. The evaluation entailed a qualitative assessment of the data of the first round and a corresponding quantitative analysis of the data pertinent to the second round. After the collection of the "A round questionnaires", the following procedure was adhered to: Initially, each "A Questionnaire" was coded to ensure anonymity of the participants. Subsequently, the participants' responses were tabulated, and then assessed qualitatively so that they could be grouped together on the basis of common and/or similar answers. This was done in order to avoid duplications and reduce the time necessary for the completion of the "B round questionnaires".

A qualitative analysis was performed on the second round data. In particular, the responses were entered in a spreadsheet, graphed and then statistically analyzed in order to achieve maximum conformity. For the purposes of the current study, a figure of 75% was set to represent the desired level of consensus.

Results

The results of the research indicated a high degree of consensus ($\geq 75\%$) on most of the responses of the experts. Pertaining to the question on why should Cyprus be interested in developing medical tourism, the findings of the study highlight a number of primarily economic motivations. These include:

- Increase of revenues of medical facilities and associated incomes of physicians and medical/paramedical staff;
- increase in the number of tourist accommodation units;
- more effective and efficient utilisation of existing health infrastructure;
- improvement of provided health services, and;
- increase of state revenues.

Among the principal advantages associated with the development of medical tourism in Cyprus are:

- the extensive use of the English language;
- the geographical position of Cyprus and the desirable climatic conditions, and;
- the competence and experience of physicians as well as medical and paramedical personnel.

On the other hand the main disadvantages include:

- the absence of an organised public health system;
- the shortage of accredited medical centres;
- the absence of a strategic plan and the limited level of cooperation between the stakeholders, and;
- the lack of an appropriate assessment study (by both the public and the private sectors) on the significance and development prospects of medical tourism in Cyprus.

As expected, the participating experts indicated that the government (Cyprus Tourism Organisation, Ministry of Health, Ministry of Commerce, etc.) will play a pivotal role since medical tourism is not an issue for private initiatives alone but depends critically on the active participation, collaborations and general endeavours of the public sector and associated services. The experts suggested that the government should provide incentives to interested scientists, technocrats and entrepreneurs, and strive to promote Cyprus (through a targeted advertisement campaign) as an attractive destination for medical tourists with state-of-the-art infrastructure that offer high calibre medical services. Furthermore, they all agree that the relevant procedures for the issuance of licences should be rendered more expedient, planning and organisation issues should be made more flexible and the coordination activities and matters concerning the pertinent stakeholders should all fall under a common umbrella.

The private sector has an important role to play in increasing the degree of investment in medical tourism, promoting Cyprus as an important destination, and drafting of agreements with foreign organisations in order to attract medical travelers. Furthermore, the private sector should target a significant improvement of the quality of the provided services, the upgrading of the existing infrastructure, and the development of a final "product", in the form of attractive packages at affordable prices, by taking advantage of what Cyprus has to offer in the particular area and via the collaboration of all relevant stakeholders (medical coordinators, airports, hotels, hospitals and clinics, facilitators/escorts, etc.).

Concerning the question on "Which markets should Cyprus target for the development of medical tourism?" the participating experts agreed to a significant degree of consensus. In particular, Cyprus should target medical tourists who reside in countries with long waiting lists, countries in which the associated medical fees are higher than in Cyprus and, finally, countries that have easy access to the island through direct short flights. These include, primarily, developed European countries since Cyprus has established itself as a well-known destination for their citizens. In addition, Cyprus could prove an attractive destination for medical tourists from many countries of the Middle East both due to their proximity to Cyprus and because the quality of the provided medical services in many of these countries is not particularly high.

Furthermore, another important and interesting finding of the current research study pertains to the issue of the accreditation of the private medical facilities. The experts consider this a significant prerequisite for the development of medical tourism, because it will contribute to the upgrading of the quality of the provided medical services. In addition, accredited hospitals and clinics will naturally gain the trust and attract the interest of not only health insurance providers but also organised groups and individual health travelers. Quality assurance through accreditation is an element that will undoubtedly facilitate the promotion of Cyprus as a safe destination for health tourists, and will encourage the various insurance funds and private insurance companies to establish agreements with private healthcare facilities.

The present study also highlights the importance and significant role of medical travel coordinators in the creation of attractive packages offering at the same time a sense of security and promoting targeted specialised services. These services will handle all administrative details of a health trip, from the beginning to the end, thus allowing a patient to focus on his/her therapy, recuperation or, simply, relaxation.

With a high degree of consensus the participating experts agreed on the pillars pertaining to a medium-to long-term strategic development plan most important for the development of medical tourism in Cyprus. They consider that a successful implementation plan should entail the following:

- (1) Advertisement and promotion of the “product” termed “medical tourism in Cyprus”,
- (2) Accreditation of healthcare facilities,
- (3) Quality of the associated services (targeted endorsement and sustained upgrading of the provided services in the health and tourism industries), and finally
- (4) Hosting of medical experts from abroad to collaborate with their domestic counterparts.

Cyprus Statistics

Total population	865,900
Gross national income per capita (PPP international \$)	26,110
Life expectancy at birth m/f (years)	79/84
Probability of dying under five (per 1000 live births)	3.5
Probability of dying between 15 and 60 years m/f (per 1000 population)	79/38
Total expenditure on health per capita (Intl \$, 2011)	2,221
Total expenditure on health as % of GDP (2011)	7.3
Number of hospital beds (public sector General Hospitals)	2,988
Number of doctors	2,553
Persons per hospital bed	284

Conclusions

The results of the current study represent an initial approach with the objective of establishing Cyprus as a modern and quality destination able to command a share of the ever-increasing market of medical tourism. Thus, focusing on the proposals pertaining to a medium- to long-term strategic plan for the development of medical tourism in Cyprus as highlighted in this report the following conclusions may be formulated:

- Promotion and advertisement of medical tourism. This may be achieved via the internet;
- Accreditation of the healthcare facilities;
- Quality of the associated services (targeted endorsement and sustained upgrading of the provided services in the health and tourism industries);
- Provision of incentives;
- Active participation of the government through private-public ventures.

Based on the findings of the study, it can be concluded that Cyprus, due to its significant comparative advantages, can increase its market share and be established as a modern and quality destination of medical tourism in the area through coordinated and targeted activities that should be implemented under the umbrella of a strategic plan.

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