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# STRATEGIC ANALYSIS OF MEDICAL TOURISM: A CASE STUDY OF NORTH CYPRUS

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## ABSTRACT

*Medical tourism is currently an US\$ 20 billion market and expected to grow US\$ 100 billion by the year 2012. These estimations indicate a strong potential for growth in the future. In order to understand this potential many developing countries including North Cyprus started promoting medical tourism. Since North Cyprus is relatively new on the map of medical tourism destinations, the country needs to strategically position itself in the medical tourism market by recognizing its strengths and overcoming its weaknesses. The aim of this study is to investigate and analyze the concept of medical tourism, diagnose the level of its performance to related services, provide strategic directions for North Cyprus in achieving its share of revenue from the medical tourism industry and to promote the country as a medical tourism destination. A review of the concepts of medical tourism, its benefits, and different applications has been presented. A qualitative primary research survey was carried out using 22 semi-structured personal interviews investigating a combination of PEST and SWOT analysis approach used in this study as the strategic analysis of Medical Tourism services for North Cyprus. It has been found that the medical tourism will generate positive impacts for the tourism industry, increasing revenues for North Cyprus, especially during the winter seasons. Medical tourism can be an alternative tourism product and may culminate the low seasonality problem of the country. Medical tourism is considered important for North Cyprus, as it may bring prestige to the country and contribute to its marketing and publicity. In addition, North Cyprus tourism products are found to be very suitable for medical tourism. The results are discussed in detail and practical implications are emphasized.*

**Keywords:** Medical Tourism, Strategic Analysis, Services, Performance, and North Cyprus

## Introduction

Travelling to other countries to obtain medical treatment e.g. dental, surgical etc. is commonly known as medical tourism. As the cost and waiting time for medical treatment has increased in many developed countries, many people view this service as an effective and reliable alternative to expensive private healthcare in the home country. Many combine their treatment with the holiday to their destinations hence the term “medical tourism.” In general, medical tourism takes place where tourists primarily seek medical treatment abroad (Caballero & Mugomba, 2006).

Medical Tourism is a term initially coined by travel agencies and the mass media to describe the rapidly growing practice of traveling to another country to obtain healthcare. More recently the phrase “Global Healthcare” has emerged and may replace the earlier terms. Such services typically include elective procedures as well as complex specialized surgeries such as orthopedic surgery (joint replacement, e.g. knee/hip), cardiac surgery, dental surgery and cosmetic surgeries. The provider viz. the hospital and the customer use informal channels of communication-connection-contract with less regulatory or legal oversight to assure quality and less formal recourse to reimbursement or redress. In addition, to the hospital procedures, leisure activities are also typically associated with this treatment. Thus travel and tourism aspects are also included in these medical travel trips.

The medical tourists mainly come from the rich and the developed countries like the United States, Canada, United Kingdom, Europe, Middle East, Japan etc., mainly because of the high cost of the medical treatments as well as the high waiting time (for e.g. up to one year for patients to be treated with prior appointments scheduled). Additionally, in some of these countries, certain types of treatments e.g. orthopedic surgeries are not covered by the respective health insurance schemes. In such scenarios, patients have no choice but to choose services of other medical tourist destinations. Today, popular medical tourist destinations include India, Brunei, Cuba, Columbia, Hong Kong, Hungary, Jordan, Malaysia, Singapore, Thailand etc.

Researchers within the field of medical tourism predicted more than 19 million medical tourists in 2005, and further predicted to touch the figure to approximately 40 million global medical tourists in 2010 (Jeffery, 2006). In the United States (US) there is currently a healthcare crisis in California where the privatization of the healthcare has resulted in sky rocketing of the medical costs. 7 million people are without health insurance and a reported 46 million people nationwide without adequate health cover (The Mercury News, 2006). According to findings by an independent industry analysis specialist firm, Datamonitor aging populations in the US and other western countries in general are putting a strain on healthcare systems; where in the US it is reported that an estimated 76 million baby boomers will turn 65 years old in the next 10 years. One of the implications of this is growth in outsourcing and off-shoring activities for medical tourism. Experiencing double-digit growth, medical tourism is forecasted to grow to 40 million trips or account for 4% of the global tourism volume by 2010. These statistics present potential nature of medical tourism as an opportunity for emerging destinations and developing countries like North Cyprus.

Therefore, the aim of the current study is to investigate and analyze the concept of medical tourism, diagnose the level of its performance to related services, provide strategic directions for an island destination, North Cyprus, in achieving its share of revenue from the medical tourism industry and to promote the country as a medical tourism destination. This study is necessary and relevant as it provides strategic directions and highlights certain prerequisites for North Cyprus to emerge as a favoured medical tourist destination. It also contributes to understand the key issues and challenges that local government, hospitals and marketing intermediaries (agents

and tour operators) may face in promoting medical tourism and suggests an action plan (roadmap) for improvement and a sustained medical tourism performance in North Cyprus.

## **Medical Tourism Definitions and Popular Destinations**

In general medical tourism takes place where tourists primarily seek medical treatment abroad (Caballero & Mugomba, 2006). Goodrich and Goodrich (1987) defined medical tourism as “the attempt on the part of a tourist facility (for example a hotel) or destination (in Baden, Switzerland) to attract tourists by deliberately promoting its healthcare services and facilities, in addition to its regular tourist amenities”. Connell (2006) defines medical tourism as popular mass culture “where people travel often long distances to overseas destinations (India, Thailand, Malaysia) to obtain medical, dental and surgical care while simultaneously being holiday makers, in a more conventional sense”. Another recent definition made in the report *Medical Tourism* (2005), where medical tourism is described as any form of travel from one’s normal place of residence to a destination at which medical or surgical treatments is provided or performed. Monica (2007) defines medical tourism as it occurs when international patients travel across boundaries for their healthcare and medical needs. Medical tourism can be broadly defined as provision of ‘cost effective’ private medical care in collaboration with the tourism industry for patients needing surgical and other forms of specialized treatment (India Medical Care, 2009). From the above definitions the medical tourism can be generalized as “the pursuit of medical care abroad and simultaneous engagement in more conventional forms of tourism”. This definition is adopted from Cornell’s definition and serves the subject area of our study in a better way.

The current development is the further emergence and expansion of niche markets within medical tourism, for example Poland and Hungary known for dental care, South Africa known for plastic surgery. Many countries are using destination differentiation as a strategy to promote medical tourism. Countries like India, Malaysia, Singapore and Thailand are significant medical destinations capitalizing on this strategy. India is one of the countries that have deliberately set out to be a dominant medical tourism destination. According to Connell (2006), “India is capitalizing on its low costs and highly trained doctors to appeal to these medical tourists”. The outcome of this deliberate policy shows that in 2004 India had 1.8 million inbound medical tourists, making the industry’s contribution to the economy an estimated US\$ 333 million. Singapore’s medical tourism marketing campaign is targeted to attract one million foreign patients annually thus increasing the GDP contribution of this sector above US\$ 1.6 billion, and Malaysia expects medical tourism receipts to be approximately US\$ 590 million in five years’ time. Other well-established medical tourism markets contributing to regional Asia’s dominance are Thailand and South Korea, whose contributions are predicted to set the medical tourism industry past the US\$ 4 billion mark by 2012 (*Asia’s Growth Industry*, 2009). During the course of this research it is established that the following countries are currently promoting medical tourism: Bolivia, Brazil, Cuba, Costa Rica, Hungary, India, Israel, Jordan, Lithuania,

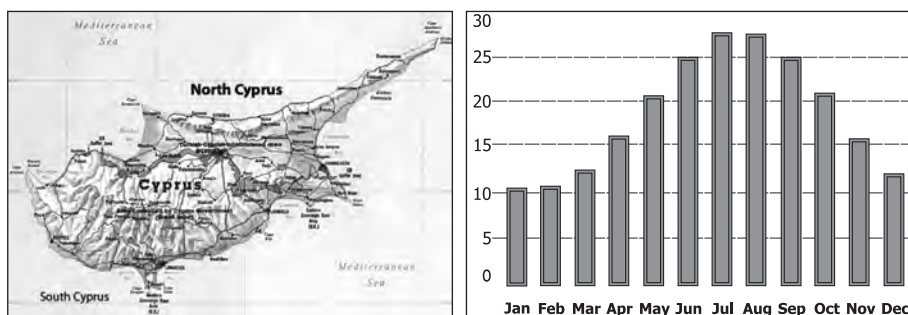
Malaysia, Thailand, Belgium, Poland, Singapore and South Korea. The continual development of medical tourism as a niche market within the tourism industry, has led to the emergence and expansion of niche markets within medical tourism as different destinations have become specialized, with some offering dentistry, cardiac surgery or other medical treatments. This is particularly evident in Eastern European countries such as Poland and Hungary which specialize in dental care or South Africa with specialization in plastic surgery. In the Caribbean and South America this type of tourism is gaining popularity (Connell, 2006).

### Medical Tourism Performance: The Case of North Cyprus

Cyprus is the third largest island in the Mediterranean after Sicily and Sardinia. It lays between latitudes 30.33 and 35.41 and longitudes 32.23 and 34.55. The island has two parts: North-administered by Turks, and South-administered by Greeks since 1974. North Cyprus covers an area of 3,355 square kilometers. The capital of North Cyprus is Nicosia. Kyrenia, Famagusta, Guzelyurt, Lefke and Karpaz are the major developed cities.

The climate of North Cyprus is mediterranean type with very hot dry summers and relatively cold winters. Most of the rain-fall is between December and January. Spring and autumn are short. From mid-May to mid-September, on an average, 11 hours of sun light is available daily. During this time the temperature can reach up to 40 degree celsius. The skies are cloudless with low humidity. The low humidity makes the high temperature bearable. Cyprus is green during winter. So, Cyprus is promoted as ideal for summer and winter holidays and it has a great potential in tourist attractions, therefore, medical tourism blends well with its environment.

**Figure 1: Map of North Cyprus and Mean Monthly Temperature**



The tourism industry has been one of the main sectors for North Cyprus' economy. Despite its comparative advantage of rich geographical and natural resources, North Cyprus has not been able to fully harness that potential in order to enhance its competitiveness owing to the embargoes, restrictions in transportation (direct ferries/ships and direct flights) and competition with other countries. Since the second half of the 1980s, the tourism industry in North Cyprus has grown steadily, resulting in new travel agencies and the construction of new hotels, restaurants, bars, cafes and

pubs and increasing competition between them. According to the Tourism Planning Office (2009), there are 122 tourist accommodation venues in North Cyprus, with a total capacity of 13,000+ beds. This accommodation included 13 five-star hotels, 6 four-star hotels, 19 three-star hotels, 17 two-star hotels and 19 one-star hotels. There are also 48 special-class hotels, boutique hotels, bungalows, traditional houses or guesthouses. These establishments provide employment to 10,857 people, including 17 casinos, which constituted 7% of total employment (Tourism Planning Office, 2009). Also, there are 137 travel agencies locally working with international tour operators to increase tourism revenues on the island state. The North Cyprus tourism industry hosted 791,036 tourists in 2008 (Tourism Planning Office, 2009). Moreover, the ratio of net tourism income to the trade balance was 44.1% (US\$ 303.2 million). The value added in the tourism sector in 2008 was almost US\$ 376.2 million (Tourism Planning Office, 2009). However, the annual occupancy rate for hospitality organizations was estimated to be 30% in 2007. This creates an awareness to develop alternative tourism products to boost the occupancy rate in these hospitality organizations such as medical tourism.

It is well known that tourism is widely sensitive to political instability and political environment, which has a great impact on the tourism industry in any region (Clements & Georgiou, 1998), so does Cyprus. Since 1963 tourism industry in Cyprus has been significantly influenced by political instability of the island (Altinay, Altinay & Bicak, 2002). In contrast to the South, which is a well-developed tourist destination, North Cyprus is still developing and its economy is handicapped by the international political and economic isolation of the country, as well as by the lack of private and governmental investment. The tourism industry's contribution has also not been optimal, given the political constraints of North Cyprus being an internationally unrecognized state and the imposition of political embargoes (Altinay, 1994). As Altinay et al. (2002) mention, 'in spite of its significant contribution to the North Cyprus' economy, the tourism industry is lagging behind its competitive strength when compared with its main rivals'. While South Cyprus has turned into a well-established destination, North Cyprus is struggling to achieve economic growth and to escape from its political and economic dependence on Turkey (Yasarata, Altinay, Burns, & Okumus, 2010).

Health sector in North Cyprus was ailing, traditionally, due to several factors like the lack of medical awareness, low penetration of medical insurance, and low doctor to population ratio. However, it has come a long way and has witnessed a robust growth in past few years with the support of increasing healthcare campaign, increasing medical insurance coverage, rising income levels and a rise in medical tourism. North Cyprus still lags behind in health related infrastructure in the primary health care sector, when compared to other developing nations. Currently, the healthcare industry is witnessing changes in patient demographic profile accompanied with several lifestyle diseases hitherto unknown. According to Health and Planning Office (2009), there are total 6 public hospitals and 11 private hospitals in North Cyprus, which are shown below in Table 1 with their locations.

**Table 1: Hospitals in North Cyprus**

Public Hospitals		Private Hospitals	
1)	Dr. Burhan Naibantoglu Government Hospital, Nicosia	1)	Health Complex Near East University Hospital, Nicosia
2)	Gazimagusa Government Hospital, Famagusta	2)	Cyprus Life Hospital, Nicosia
3)	Dr. Akcicek Hospital, Kyrenia	3)	Etik Hospital, Nicosia
4)	Cengiz Topel Hospital, Lefke	4)	Baskent Hospital, Nicosia
5)	Baris, Ruh ve Sinir Hospital, Nicosia	5)	Dogus Kadin Hastalari ve Dogum Hospital, Nicosia
6)	Bulent Ecevit Rehabilitation Hospital, Gonyeli	6)	Ozel Girne Hospital, Kyrenia
		7)	Tunccelik Kadin ve Dogum Hospital, Kyrenia
		8)	Kamiloglu Kyrenia Medical Center, Kyrenia
		9)	Kunter Guven Hospital, Famagusta
		10)	Magusa Tip Merkez, Famagusta
		11)	Magusa Yasam Hospital, Famagusta

According to Health and Planning Office (2009), there are total 473 doctors who are specialists in several fields of medicine, serving these hospitals. In 2008, the doctors have provided general/surgery cure/treatment to 45,966 patients and dental cure/treatment to 22,912 patients. These hospitals are equipped with highly modern technological operating medical devices with 1,582 bed capacity and 1,732 employees (administrative staff, nurses and other workers). Currently few private hospitals in North Cyprus are targeting to enter the developed economies to offer them several distinguished healthcare services with their special and attractive packages including cosmetic and dental services. A successful example of medical tourism in North Cyprus is cosmetic tourism offered by BFN Cosmetic Tourism (BFN, 2009), a local private company based in Kyrenia, working with a private hospital in Nicosia which has designed its distinguished packages to enter European tourist market since 2007. Another successful example of medical tourism in North Cyprus is dental tourism offered by Near East Travel and Tourism Enterprises (2009), a local private company based in Nicosia, which has set up dental care program open to foreign tourists since 2008 offering all kinds of dental care treatments. Table 2 shows various services provided by the BFN cosmetic tourism and Near East Travel and Tourism Enterprises.

**Table 2: Ancillary Services Provided under Medical Tourism Package**

BFN Cosmetic Tourism		Near East Travel and Tourism Enterprises	
1)	Rhinoplasty – surgery to reshape nose.	11)	Surgery for the overweight (Lap or Gastric Banding)
2)	Otoplasty – Cosmetic ear surgery	12)	Gynaecomastia - Male Breast Removal
3)	Face lift	13)	Eye sight correction and eye lid surgery (Blepharoplasty)
4)	Botox – to reduce the wrinkles on face	14)	In-Vitro Fertilization and related services
5)	Breast augmentation	15)	Oral Cancer screening with VizLite Plus
6)	Abdominoplasty commonly known as tummy tuck	16)	Neuromuscular dentistry
7)	Labiaplasty – to improve the appearance of labia minora	17)	Orthodontics
8)	Neck lift surgery – to improve or tighten the skin and muscle of the neck	18)	Implants/ Reconstructive dentistry
9)	Dental surgery	19)	Cosmetic dentistry
10)	Arm lift	20)	Root canal treatment
		21)	Gum disease treatment
		22)	Tooth whitening

**Generally, medical tourism packages offered by the above mentioned companies include:**

- Flight
- Hotel
- Airport Transfers
- Pre and Post operation consultation
- Full Health Tests
- Surgery
- Post Operative checks
- 24 hour nursing
- All medication whilst in hospital
- Partner or friend stay in hospital
- Full medical team
- Collection to and from the hospital and or hotel

## **Methodology**

The qualitative research considered to be undertaken in this study is deemed an appropriate approach (Goffee, 1996). According to Veal (1997), the qualitative research approach normally does not relate to numbers. It concerns with collecting large amount of information about a small number of people rather than a limited amount of information about a large number of people. The data collected is generally not presentable in numerical form. Saunders, Lewis and Thornhill (2003), state

that qualitative approach allows the researcher to comprehend and manage the data collected. Also, with the help of the qualitative research approach, the researcher can combine the related data obtained from different transcripts and notes, and identify key themes or patterns from them for further exploration. Qualitative research is the best research method for discovering underlying motivations, feelings, values, attitudes and perceptions. Moreover, qualitative research approach would allow the researchers to spend extensive time in the field and collect extensive data.

The sample of the study consists of interviews (Int.) from tourism and medical industry experts like top administrators of the concerned public and private offices, representatives of related non-governmental organizations (NGO), and local administrators working in North Cyprus at various organizations, which are as follows:

- Tourism Ministry (Int. 1)
- Health Ministry (Int. 2)
- Head of Tourism Planning Department (Int. 3)
- Head of the Health and Planning Department (Int. 4)
- Director of Hoteliers Association (Int. 5)
- Director of Travel Association (Int. 6)
- Director of Public Hospitals (Int. 7)
- Director of Private Hospitals (Int. 8)
- Director of Turkish Cypriot Chamber of Commerce (Int. 9)
- Representative of the Management Center (10)
- Academic Staff from the Universities (Int. 11, 12, 13)
- Hotel Owners and Managers (Int. 14, 15, 16)
- Travel and Tourism Agency Owners and Managers (Int. 17, 18, 19)
- Pharmacy (Medical Store) Owners and Managers (Int. 20, 21, 22)

In this study, a qualitative primary research survey was carried out using 22 semi-structured personal interviews investigating a combination of PEST and SWOT analysis approach used in this study as the strategic analysis of Medical Tourism services for North Cyprus. Strategic analysis approach in this study is performed in light and guidance of the suggested procedures by Jhonson and Scholes (2002) and Lynch (2002). In order to facilitate completion of this study, all experts were targeted with non-probability convenience sampling technique (Aaker, Kumar & Day, 1995), the most practical method in order to gather primary data. Initially, the experts were identified and approached to seek their permission and availability for personal interviews to establish a base to conduct the fieldwork. Later, the fieldwork was carried out with those tourism industry experts based on semi-structured personal interviews.

## Findings

Findings of this study are based on the PEST and SWOT analysis. Therefore the strategic analysis of medical tourism services in North Cyprus follows the following

analysis. The results of these analyses are presented in the tables below:

## Pest Analysis

Pest analysis explores political, economic, socio-cultural and technological influences on the organizations. It is a very general technique to explore the industry's environment. Following table 3 shows the pest factors, which influence medical tourism industry in North Cyprus.

**Table 3: PEST Analysis**

Political Factors		Economic Factors	
•	Government	•	Inflation, although the medical tourism fees are in Euros, pounds or dollars
•	Ministry of health	•	Inflation influence on wages, salaries of doctors, administrative staff, nurses and other workers
•	Ministry of tourism	•	No direct flights, high transportation costs for medical tourists
•	Unrecognised country	•	Also dependent on financial support from Turkey
•	Cyprus resolution		
•	Politics in Turkey		
•	Political situation influence over medical tourism		
•	Medical tourism industry is not independent to make decision		
Socio-Cultural Factors		Technological Factors	
•	Differences in social class of tourists	•	Use of technology in hospitals
•	Multi-cultural vehicle for the local society	•	Adopting level – upgrading stage
•	Well being of local society		
•	People have awareness of the medical tourism's importance		
•	Degree of conservatism – openness		

Respondents' views on the PEST analysis in regard to political factors highlight that political stability of the country is an important factor behind any type of tourism development. Recognition of the country and Cyprus' peace solution is of the utmost importance in the development of tourism on the island state and this will enable direct flights to the country and medical tourism is likely to flourish well. Government and ministries (tourism & health) need to work closely with public and private sectors for policy building and in decision making for the development of medical tourism. The socio-cultural factors emphasize that people are aware of the importance of medical tourism and appreciate such developments for the State. The local population of North Cyprus is very hospitable, betokened warmth and generosity toward tourists. Although there are differences in the social class of the tourists but the host population

accepts these differences as multi-cultural vehicle for the society. Economic factors highlight the inflation rates in foreign currencies. Although hospitality organizations and medical institutions deal with international counterparts in Euros, Pounds or Dollars, such inflations influence the salaries of the people associated with the medical tourism viz. doctors, administrative staff, nurses and other workers. As North Cyprus is politically unstable and unrecognized country on the world map, Turkey has been bearing the states' financial needs. Technological factors emphasize on the use of technology in hospitals; currently North Cyprus is adopting and/or upgrading technologies in the field of medical tourism.

## SWOT analysis

A SWOT analysis involves an assessment of an industry's environments from which internal strengths and weaknesses, and external opportunities and threats can be identified. A SWOT analysis provides a mechanism for systematically thinking through the extent which the firm can cope with its environment. It is a summary of internal and external factors, which has an impact over the medical tourism industry, now as well as in the future. Table 4 shows results of SWOT analysis of the medical tourism industry in North Cyprus.

**Table 4: SWOT Analysis**

<b>Strengths</b>		<b>Opportunities</b>	
<b>o</b>	<b>Finance</b>	<b>o</b>	<b>Finance</b>
•	Suitable hospitals for medical tourism	•	Economic facts – inflation
•	Tourism is still developing in North Cyprus	•	The role of government in developing medical tourism
•	Works on determinations of medical tourism carrying capacity	•	Lack of medical tourism education
•	Cheaper treatments	•	High transportation costs - package tours prices are high
		•	Disability of fiscal plans
<b>o</b>	<b>Marketing</b>	<b>o</b>	<b>Marketing</b>
•	Educated/specialist doctors	•	Lack of coordination between government and private sector in medical tourism promotion
•	Suitable climate for 12 month medical tourism	•	Complexity in laws and regulations for investments
•	Beautiful hotels and its locations	•	No direct flights
•	Wellness and spa activities in hotels	•	Tourism is not divided from politics
•	Hospitality of local people	•	Disability in product image
•	Richness of culture and history	•	Disability of tourists health and security
•	Short distances especially, from European countries	•	Division in markets, different markets, no focused target market

• Rich flora and fauna	• Lack of standards/health certifications/ international accreditations
• Nice beaches availability	
• Water sports availability	
• Rich Cyprus cuisine and kitchen experiences	
• Hand made arts	
• Yachts/harbours	
• Cheaper treatments than European countries	
<b>o Human resource management</b>	<b>o Human resource management</b>
• Organization of health ministry	• More educated/specialist doctors required
• Organization of tourism ministry	• Disability of consciousness of medical tourism in the society
• Organization of NGOs	• Lack of plans on human resources
• Job oppoutinties for locals	• Disability of education of employees working in medical tourism sector and also in the tourism industry
<b>o Operations</b>	<b>o Operations</b>
• Hospitals infrastructure	• More hospitals required
• Hospitals technological equipments	• Disability in infrastructure
• Efforts made by health and tourism organizations and NGOs	• Disability in local transportation system
• Land, sea and air ports	• Changes in demographic structure
• Efforts to influence medical tourism in the industry	• Disability in sources
	• Disability in traditional people craft, and disability in local production
<b>Weakness</b>	
<b>Threats</b>	
• Available hospitals and their infrastructure	• Politics of the country
• Educated/specialist doctors	• Political recognition of the island
• Available technology	• Indistinctness of politics in North Cyprus
• From the point of economy and environment suitable to create a medical tourism product	• Continue in economic embargoes
• High potential in tourism in east Mediterranean	• No direct flights
• Cyprus resolution is an opportunity	• Indistinctness in Middle east and political conflicts
• Direct flights to the island will increase	• Intense competition in tourism market globally

• Gaining international identity – improvements	• Increase of the pollution in Mediterranean
• The Cyprus resolution might bring venture in area of medical tourism industry	
• Demand for medical tourism will increase	
• Market research needed to figure out what is the market potential in european countries	
• Initiatives should be set forth for Middle-east, Far-east, developing countries etc. can be targeted for marketing	
o Demand will increase in the world for special interest tourism, which is medical tourism	

SWOT analysis of North Cyprus' medical tourism outlines possible conditions for future tourism development. Creating differentiated medical tourism products based on comparative advantage over similar destinations may help to develop proper goals and strategies for North Cyprus' medical tourism industry. The North Cyprus tourism industry should focus on developing medical tourism based on regional differentiation in the Mediterranean. A review of strengths and opportunities suggests that North Cyprus tourism industry should develop medical tourism in coordination with NGOs, local authorities, private sector and hospitals. Tourism administrators should focus on a medical tourism development model that is in harmony with other sectors, such as transportation and hospitals. They should adopt appropriate models to meet the social, economic and physical transport facilities (especially to deal with direct flights). Finally, administrators should work towards structuring the medical tourism sector and policies free from political influence. Currently, North Cyprus is unable to offer differentiated tourism products in comparison to neighboring Mediterranean states. Consequently, demand for medical tourism is not effectively increasing. For the North, there is a need to revise its rules and regulations, and focus on medical tourism product, which will generate competitive advantage and differentiated tourism product.

Medical tourism has shown consistent growth worldwide during the last two decades, and it is expected to be a growing industry globally in the coming future. This development has made it necessary for North Cyprus, Turkey and some of the countries of the Middle East to come to the terms with a medical tourism sector which has changed from a relatively minor economic activity into a vigorous and exciting new area.

## Discussion

In order to North Cyprus' medical tourism to succeed, a consortium of tour operators, hospitals and hotels is a must. The purpose of these tour operators/agents is

to liaise with the insurance companies and the private/public medical practitioners in the European and/or American markets, so as to ensure a steady stream of patients. It is fairly spoken that North Cyprus medical tourism industry growth is directly related to the participation and involvement of the local authorities, especially, government and NGOs.

Marketing communication plays a very major role, especially word-of-mouth communication. Many of the identified medical tourism destinations' "creative" marketing strategies predominantly use the internet as an electronic marketing tool to transcend national borders. Results show that so far, as a marketing tool both for business-to-business marketing and business-to-consumer marketing use of the internet (websites) has enabled enterprises to cater to regional target markets without the need for a physical presence. This propensity to use the internet as a communication and promotional platform is proving to be quite successful for numerous reasons. It is very cost-effective in that it can be used to simultaneously cater to many market segments, for example through multiple website interface language settings. Hence enterprises that enter the niche market as providers of non-cosmetic medical care can forgo investment and costs involved in establishing a physical presence in the target market. North Cyprus should continue to successfully exploit their respective nations' competencies as well marketed tourism destinations to leverage their medical tourism development.

From the Hospital's point of view, medical tourism is an area, where greater profits can be made. This profit can be utilized for making their service affordable to the poorer segments of the society or otherwise. For the hospital, profits can be made in two areas: (1) In the treatment offered to the medical tourist; and (2) in the areas outside the treatment e.g. the room offered, the food offered, the laundry services offered etc. In the areas where treatment is offered, the presence of operations theatres, equipment etc., which are comparable to those available in the developed world, are a definite advantage. This area however does not yield great profits. North Cyprus hospitals should ensure that their equipment are up-to-date and staff is qualified enough to offer medical tourism to the world.

## **Practical Implications**

The core of the strategic marketing planning process is that of market segmentation, targeting and positioning. As a strategy, North Cyprus should investigate the European market and use differentiation strategy to target its position for medical tourism. Medical tourism in North Cyprus can be successful as it is a famous tourist attraction among Europeans. For a successful implementation of a medical tourism product following implications are given:

- North Cyprus should have more agents internationally in different European countries working with local agents
- A good monitoring in its marketing tasks is required
- It should start the process of applying for international accreditations

- It should get international standard certification
- It should get connected with many charities and government organizations
- High investments in hospital technology and equipment is required
- Good educational support for its staff is required
- Professionals in various kinds of treatments are required
- High commitment in medical tourism service is required
- Better pricing strategies are required
- Convenience of visa/immigration system is required
- Great distance from far away countries should be used as a good image strategy and impression
- High expectations in quality of treatment should be set forth
- Sufficient support from local government is required

In conclusion, medical tourism is a primary pull factor for international tourism. Medical tourism has potential for sustainable tourism and provides economic benefits to whole country. Medical tourism provides improvement in health opportunities, which may differ among countries. The current study served its purpose to investigate and analyze medical tourism in the light of prosperities and inadequacies, strengths and weaknesses, opportunities and threats, and/or benefits for North Cyprus tourism industry. It helps practitioners and policy makers by providing strategic direction for the medical tourism industry. The findings of the study are limited to North Cyprus context. This means, the findings of the study are limited to the current situations of medical tourism in North Cyprus since the factors that affect the concept might differ in other countries. Future studies on medical tourism services in North Cyprus may look into exploring the marketing opportunities, design of effective communication programmes and identification of potential target markets and segments for North Cyprus sustainable medical tourism growth.

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