

Strategy for the Organization, Development and Promotion of Health Tourism in Cyprus



PURPOSE OF THE STUDY

polisgeo@qualevita.eu TEL. +357 22 511 592
www.qualevita.eu 1 FAX +357 22 511 591
www.cyprus4health.com 10 Efessos street, Lycavittos
Nicosia 1055 CYPRUS

The purpose of this study is to investigate the factors that are necessary in allowing Cyprus to establish itself as a popular destination for Health Traveller's. The first part of this report focuses on the research and analysis surrounding the organization, development and promotion of Health Tourism, as well as the advantages that are being experienced by other countries worldwide. Following this, a complete strategy is presented for the integration of Health Tourism as an essential product of the Cypriot Market. The need to implement such a strategy is needed today more than ever due to the fact that the traditional touristic product consisting the "Sun and Sea" is experiencing a downturn. The effort surrounding the incorporation of such a strategy is not only expected to serve as a framework in which Cyprus will become a popular medical destination and therefore experience all the economic and social benefits associated with it, but will also increase the level of health services that are provided to the domestic citizens; a phenomenon that has been experienced by other countries.

Even though Cyprus is still at its early stages in terms of this industry, it does fulfill a number of important criteria that gives it the potential to succeed in capturing a segment of the market and establishing itself as a competitor. Factors such as its strategic location, Mediterranean climate, family culture, the significant and substantial investments that have been made within the public and private healthcare sector, the expertise of doctors and other healthcare professionals having studied and trained abroad, as well as the ability to speak the English language adequately are a few of these required prerequisites.

The ability of Cyprus to establish itself as a medical destination depends firstly on the structure of its healthcare system and secondly on the advantage it has over other countries that are tapping into the market. The fact that **Cyprus is an already established and worthy tourist destination, internationally recognized, provides a significant advantage for the development of health tourism.**

DEFINITION

Health Tourism is defined as the process in which patients embark on cross-border healthcare to improve or maintain their health through therapies aimed at prevention and diagnosis through the combination of vacation and health. It is the economic activity that integrates both the medical and the tourism sector as one product.

METHODOLOGY

Various sources were used to obtain information for this study in an attempt to gain an understanding of the current circumstance that is present within Cyprus, the benefits of health tourism that Cyprus can potentially experience from, as well as the challenges that are faced. Interviews were conducted and questionnaires were distributed to professionals both in the medical and tourism industry. Literature reviews and website portals were also used to fill in the gaps, especially in regards to obtaining fundamental statistics both on a European and global level.

A number of limitations of the study need to be highlighted. Firstly it is important to note that there are no solid statistics concerning health tourism in Cyprus despite efforts to collect them. However the questionnaires and interviews did offer enough data for a clear analysis to be formed. Secondly through the questionnaires it became apparent that there are diversities in the opinions concerning the value of health tourism, causing a challenge when it came to forming a strategy accepted by all stakeholders for the promotion of health tourism. There was also a lack of participation from the big private and public hospitals which can be accounted by lack of education and understanding of the value of health tourism but also because today these hospitals are presently working to a high capacity, using up all their human resources.

CURRENT GLOBAL SITUATION

The extensive methods in accessing information (especially via the internet), the ease of mobility into other countries, the rising educational levels and expectations of patients has generated new trends in the healthcare division whereby more than sixty countries have incorporated health tourism as a fundamental product of their national industry.

Countries such as India, Pakistan, Malaysia and Thailand have invested considerable amounts of money into their infrastructure to initiate projects, make improvement and upgrade their medical and travel facilities in an attempt to facilitate the arrival of health traveler's.

In countries which are regarded today as medical destinations, health tourism has proven to act as a catalyst in reforming the economy and health of the country. There has been an increase in the inflow of foreign exchange with new employment opportunities being created in the healthcare industry as well as in other domains. Specifically in the hotel industry there has been an increase in overnight stays from those individuals travelling with the patients, and there has been a marked increase in the quality of services that are provided, benefited by and in the interest of the domestic patients.

Referring to Hungary as an example, health tourism has generated more than 368,000,000 Euros from which 147,000,000 has come specifically from Dentistry (Family Choice by NHS Year Book Ltd).

CURRENT SITUATION IN CYPRUS

A wide range of conclusions about the current situation within Cyprus are summarized below, which will consequently act as the basis for the proposed strategy:

- Cyprus has in recent years experienced continuous growth and improvement of services in the healthcare sector through the creation of both the Nicosia General Hospital as well as the development of modern and well-equipped medical facilities in

the private domain. As a general observation, the public domain in regards to its public hospitals has failed to extend services to healthcare travelers. Big private hospitals have also followed this same trend whereby they have successfully enjoyed a very large percentage of the Cypriot market and as a result deplete their resources there. The experience has shown that it is the smaller private clinics and hospitals that are keener on attracting health travelers.

- Doctors are educated at advanced and reputable universities and institutions, achieving a high standard of education whilst maintaining valuable contacts with professionals abroad, thereby enhancing the trust and safety needed to attract healthcare travelers.
- The cost for treatment in comparison to other countries can act as an added incentive. Cyprus can attract healthcare travelers not only as a “cheaper destination” just as India has done for example, but can also be a destination representing ‘value for money’ whereby the money spent is proportional to the quality of the service that is received.
- Healthcare travelers have today a wide range of options in terms of the medical services that are offered within Cyprus. Cyprus has also shifted focus to alternative forms of treatment and has begun to establish anti-ageing and rehabilitation centers, facilities directed at long term care coupled with the potential for the development of preventative medical services. *This area is of great importance because in most cases it will require cooperation from the hotel industry, thus providing a significant advantage.*
- The lack of a General Healthcare Scheme has caused many challenges for Cyprus. An example is seen in the use of the EU European ID card which currently can not be used to receive healthcare from the private clinics in Cyprus. The lack of a general healthcare scheme has also resulted in a lack of competition and incentives in the healthcare industry, causing the cost of several services and treatments in Cyprus to be relatively higher in comparison to other European countries. It also acts negatively for those interested abroad due to the fact that it is assumed that a patient moving outside the border of their country will receive treatment from service providers who

EVALUATION OF INTERNATIONAL MARKET TRENDS AND THE PRIORITIES IN THE CASE FOR CYPRUS

are part of and regulated by a National Healthcare System. Being under such a system means that there is complete control regarding the quality of care that is being provided as well as ensuring that the cost of such services are determined by the State and based on specific criteria. Unfortunately this is not yet the case for Cyprus.

- The absence of accredited facilities (based on international standards from internationally recognized bodies) hampers any attempts to view Cyprus as a medical destination. Accreditation is vital to the health tourism sector for both individual healthcare travelers who primarily search for treatments and health services via the internet, as well as for insurance companies where patient safety is their priority. In such cases, it is important that confirmation of the quality and safety of the services that are offered are done so through third party and internationally recognized independent bodies.

The market for health tourism worldwide was estimated in 2008 to be around \$20 billion, a value expected to surpass \$40 billion over the next few years. The United Kingdom is one of the largest markets in terms of patients embarking on cross-border healthcare and is a great interest to Cyprus. More specifically the number of British patients travelling abroad for health purposes had increased by 300% between 2004 and 2007 to reach 100.000. Various factors that keep pushing this number to increase include the high cost and long waiting lists of certain health services in their country, improved quality of services in other countries, the ease in which the internet can be used as a mode of communication and the ease in which patients can travel to other countries for their healthcare.

Apart from the UK, it is also essential to approach other markets from which Cyprus gains many tourists such as Germany, Sweden, Norway and Russia. It must be ensured that Cyprus approaches each market individually with a degree of priority and personalization rather than tackling health tourism as a whole unit. Each country must therefore be classified by its market, the treatments that are demanded, as well as the

factors that push patients to seek treatments elsewhere and use these factors to develop a tailored strategy.

When it comes to calculating the revenue received in regards to the Health Tourism market of Cyprus, we would like to make it clear that at this present time there are no indicators or statistics for Cyprus that help secure a sound conclusion concerning the revenue that has been experienced from health tourism. As a result it is risky to make an accurate estimation due to the high subjectivity and statistical errors that are present. However, upon following international practices and reports, and using the indicating value of 2.5% (i.e. 2.5% of the total tourists are health travelers), it can be estimated that the value of the health tourism industry is around 60-120 million Euros (the exact method for this calculation is explained in detail within the strategy)

SPECIFIC HEALTHCARE SERVICES IN GREATER DEMAND BY FOREIGNERS

Within the research it was observed that specific tests, procedures and treatments in Cyprus are demanded more by foreigners such as plastic surgery, preventative treatments, diagnostic tests, artificial insemination, IVF and dentistry. For these treatments it is important that the advantages Cyprus has in comparison to other countries are enhanced, including the high quality of medical services provided, the low cost of therapy (compared to some of the markets), the excellent Mediterranean climate and the highly trained doctors practicing within Cyprus are all enhanced. **The main competitive advantage of Cyprus in comparison to other markets however is the fact that the healthcare traveler can combine the therapy with vacation and leisure.**

TABLE OF HEALTH TOURISM MARKETS IN TERMS OF PRIORITY

HIGH PRIORITY	MEDIUM PRIORITY	LOW PRIORITY*
UK and Cypriot UK residents <ul style="list-style-type: none"> • Diagnostic tests (Check ups) • IVF • Dental • Cosmetic Surgery • Procedures with long waiting lists e.g. Hip Replacement • Elderly Care 	Israel <ul style="list-style-type: none"> • IVF • Elderly Care 	Switzerland <ul style="list-style-type: none"> • Preventative Therapies • Diagnostic Tests
Russia <ul style="list-style-type: none"> • Diagnostic Tests (Check ups) • IVF • Dental • Cosmetic Surgery 	Belgium <ul style="list-style-type: none"> • Dental • IVF • Wellness Tourism e.g. Medical Spa • Preventative Therapies 	Hungary <ul style="list-style-type: none"> • Preventative Therapies
	Austria <ul style="list-style-type: none"> • Diagnostic Tests (Check ups) • Wellness Tourism e.g. Medical Spa 	France <ul style="list-style-type: none"> • Preventative Therapies
Sweden <ul style="list-style-type: none"> • IVF • Cosmetic Surgery • Elderly Care • Phototherapy 	Italy <ul style="list-style-type: none"> • IVF • Dental 	Holland <ul style="list-style-type: none"> • Preventative Therapies
United Arab Emirates <ul style="list-style-type: none"> • Microsurgical Interventions • IVF • Gynecological Procedures 	USA and Cypriots of the USA <ul style="list-style-type: none"> • IVF • Dental • Cosmetic Surgery 	

<ul style="list-style-type: none"> • Diagnostic Tests 		
<p>Germany</p> <ul style="list-style-type: none"> • Wellness Tourism e.g. Medical SPA • Cosmetic Surgery • Elderly Care • Preventative Treatment 		

COMPETITORS FOR CYPRUS AND THEIR ASSOCIATED BEST PRACTICES

Within the strategy we have presented data for each country as well as the trends that have been formed, some of which are discussed below:

Hungary:

In terms of the English market, Hungary is a competing medical destination for Cyprus in the fields of both dentistry and cosmetic surgery. The Health Organization of Hungary has placed great emphasis on the promotion and the development of health tourism within the country, with their medical centers and intermediaries providing marketing services.

Turkey:

Over the past few years Turkey has gained itself a dynamic role in the field of health tourism through the accreditation of a number of its hospitals, the establishment of modern medicine in its scope as well as the development of new and modernized medical centers. The Statistical Institute of Turkey noted that in 2009 there were 165,000 healthcare traveler's coming into Turkey, which brought the country around 360 million dollars in revenue, a value which is projected to increase 25% per year.

Greece:

polisgeo@qualevita.eu TEL. +357 22 511 592
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The health tourism industry of Greece has enormous growth potential, especially in respect to the island of Crete. As a result Greece has restricted its promotion to wellness tourism whereby German Tour Operators specializing in health tourism, have already included Crete resorts into their programs. The legal framework in respect to thermal tourism is already being advanced, whilst procedures such as correcting myopia, cosmetic surgery, IVF, dialysis and obesity are all medical services that have started to become incorporated into Greece's medical centers (e.g. Thessaloniki and Rhodes).

The first health tourism centers were developed in Crete, specializing in ophthalmology, endocrinology and renal failure. In addition, thalassotherapy has become a core aspect of the Greek National Tourism Organization's (GNTO) promotional activities. According to the GNTO, Greece has experienced 3500 British health travelers every year, who seek treatment through their insurance companies.

Spain:

Due to the tourist infrastructure present along with the high standard of medical services that are provided, Spain is an established competitor for Cyprus; especially in regards to countries of Central Europe where the German Tour operators include a large number of Spain's Vital Hotels in their programs. Spain's success is based on the adequate organization and operation of their medical centers and the way in which they successfully collaborate in respect to the field of marketing with the tour operators.

Northern Cyprus:

In the occupied regions of Northern Cyprus, alternative therapies are being promoted with artificial insemination and IVF treatments being promoted to patients through foreign websites. The Cyprus IVF Centre and the North Cyprus IVF in Nicosia where established in 2005 and 2001 and are both affiliated with the German Hospital IVF Centre in Constantinople.

DESIGNATION OF CRITICAL SUCCESS FACTORS

Affordability (Affordable): Millions of uninsured patients seek cheap and high quality treatments outside the border of their home country. America is a great example whereby in 2007 approximately 750 000 individuals travelled abroad for their medical treatments, a number expected to surpass 15 million by the year 2017. Cyprus by offering affordable medical services in comparison with other developed countries will have the ability to become competitive and attract a segment of this target group. Generally through the formation of packages to include the therapy in combination with recuperation and/or vacation in a hospital environment and Mediterranean climate can be economically attractive for millions of healthcare traveler's from Europe and outside of Europe.

Accessibility (Accessible): The long waiting list is another factor that has forced travelers to seek health abroad. The United Kingdom is a good example of this whereby it has been observed that a high proportion of the Cypriot community of Britain avoids these large waiting lists and visits Cyprus for their healthcare needs. Cyprus can benefit from this by providing easy access to the island by ensuring that there are several flights a day from the various markets that Cyprus is trying to approach such as the UK and Germany.

Availability (Available): In many instances, lack of specialization or absence of specific treatments causes patients to look elsewhere. Therefore the ability of Cyprus to provide immediate and diverse treatments would be advantageous both to foreign traveler's but also to its domestic patients.

Acceptability (Acceptable): Acceptability refers to when various religious and socio-political standings prevent certain treatments to be completed. Sweden is an example of this whereby they travel abroad for artificial insemination. Cyprus is already an acceptable destination whereby there are no religious or other discriminations that could act as a constraining factor in attracting tourists for medical purposes.

Qualitative adequacy (Additional): Patients also seek medical services due to the higher standard of services that can be found elsewhere, accompanied by more advanced technology, increased hospitality and personal care as well as luxurious hotel services. In terms of Cyprus, the island has highly qualified doctors having trained and

qualified in countries such as America and England. Over the years our facilities have also become more advanced. The highly trained doctors of Cyprus, the high level of services as well as the satisfactory infrastructure of the tourism industry have the ability to meet this criterion.

FEATURES MAKING UP A HEALTH TOURISM PROJECT

Due to the wide range of services that are present, it becomes necessary to identify from now the characteristics that make up a health tourism project and take into account all the sensitivities present within Cyprus, especially in regards to the healthcare sector. These characteristics are briefly described in the table below:

	DESCRIPTION	CHARACTERISTICS	EXAMPLES
I	New Project in new buildings specifically for the purpose of health tourism (Purpose Built Building)	<ul style="list-style-type: none"> • 75% use from healthcare traveler's • Healthcare regulations and licensing required • 100% investment for the purchase of medical equipment • 100% investment for the appropriate building infrastructure • Accreditation of its services 	<ul style="list-style-type: none"> • Holistic Care Centers • Rehabilitation Centers • Clinical hair implantation
II	Tourism accommodation buildings that are willing to provide accommodation to healthcare traveler's	<ul style="list-style-type: none"> • 100% investment for the appropriate building infrastructure (ramps, first aid etc.) 	<ul style="list-style-type: none"> • Hotels next to hospitals/clinics
III	Change of use for	<ul style="list-style-type: none"> • 75% use from 	<ul style="list-style-type: none"> • Clinics licensed to

	the hotel - converted to a place offering services associated with health tourism	<p>healthcare traveler's</p> <ul style="list-style-type: none"> Healthcare regulations and licensing required 100% investment for the appropriate building infrastructure Accreditation of its services required 	<p>nurse</p> <ul style="list-style-type: none"> Rehabilitation Centers Best Agar Centers (for the middle-aged) Phototherapy Centers
IV	Existing accommodations (e.g. hotels, hotel apartments) that remain as tourism accommodations but add services in order to attract healthcare travelers – without changing its use, methods of dealing or peak season.	<ul style="list-style-type: none"> ONLY for services that do not require nursing licenses and/or other relevant licensing e.g. physiotherapy Use of medical services especially between the months of October and April 100% investment for the appropriate building infrastructure. Restructuring of the space of offer medical services (Health Centre) Accreditation of the Health Centre to meet international standards 100% investment for the establishment of the Health Centre. 	<ul style="list-style-type: none"> Existing hotel whereby Health Center created with purpose of providing IVF services.
V	Current and/or new tourism accommodations whose services can	<ul style="list-style-type: none"> Specific characteristics due to location altitude etc (e.g. for asthma, rheumatism) 	<ul style="list-style-type: none"> Boutique Hotels, Agro tourism accommodations next to health centers.

	be offered based on current legislations (e.g. Private Nursing Act of 2001)	<ul style="list-style-type: none"> 100% investment in the medical equipment and restructuring/development of space for the provision of medical services. 	
VI	Hotels with medical SPA (New building infrastructures or conversion of existing SPA facilities to medical SPA facilities)	<ul style="list-style-type: none"> Facilities and staffing based on international standards in respect to medical spa (Accreditation) 	<ul style="list-style-type: none"> Hotels with medical spa

SUMMARY OF FINDINGS UPON CONTACT WITH STAKEHOLDERIS IN THE FIELD OF TOURISM

Establishing a strategy for the promotion of health tourism in Cyprus requires the need for all bodies/organizations to understand the value of health tourism and work collectively in its promotion as an important medical destination.

As a result a number of meetings were held with bodies including the Planning Bureau, The Cyprus Investment Promotion Agency (CIPA), The Ministry of Commerce Industry and Tourism, the Cyprus Hotel Association (CHA) and insurance companies etc. in order to establish their standing in terms of how they can contribute in the promotion of health tourism. Some of the findings are highlighted below:

It should be noted that there is interest from foreign investors to invest into Cyprus for its Health tourism project and as a result it is vital that it be acknowledged that cooperation between all major stakeholders is required in order to establish a more simple and efficient process to attract these investments. In addition to this it is expected that

through the development of a strategy, a system will be implemented that is properly executed, continuously monitored and undergoes quality control assessment for all stakeholders involved. It is important that all parties be in a position to distinguish their responsibilities and roles within the project. An example would be the Department of Town Planning and Housing which needs to establish specific land zones dedicated to health tourism. The hotel industry is also able to contribute to this market, by offering more specialized “products” which will be analyzed in more detail below.

THE ROLE OF THE HOTEL INDUSTRY IN THE HEALTH TOURISM INDUSTRY

The hotel industry can definitely contribute to health tourism; one way is by transforming and adapting their facilities to encompass:

- **Accommodation for patient escorts:** Collaboration between specific hotels and hospitals to offer accommodation for those individuals escorting the patients. This scenario is suitable for Resort Hotels which are located close to medical centers
- Tourism combining **Elderly Care** with medical care whereby hotels over the duration of the winter season can accept seniors into specific programs consisting of a personalized diet regime and entertainment, whilst providing basic health care needs. This in turn will solve the problem of seasonality.
- **Best Agers Center** with Health Care whereby hotel-type clubs accept people over the age of 55 who will follow specific programs consisting of activities and a Mediterranean-style diet. This scenario focuses less on medical and more on tourism aspects.
- **Holistic Center/Alternative Medicine** whereby hotels will operate as a service center.

- **Rehabilitation Centers** – Rehab Hotels with either a new or existing infrastructure will work with hospitals to provide rehabilitation services to patients.
- **Hotels incorporating Health Centers:** Part of the hotel is converted into a day care center, whereby operating license as a private clinic will not be required.
- **Collaboration with a Medical Center Referral Agency or Tour Operator:** In this case, a hotel signs a contract with either the tour operator or referral agency and becomes part of an integrated package. This is suitable for Resort Hotels, City Hotels and agro tourism resorts.
- **Medical SPA or Medical Wellness** whereby existing SPA and wellness centers become orientated towards offering medical programs complete with therapies and rehabilitation.
- **Mountain Resorts** – Hotels located in the mountains offer Health care centers as part of their infrastructure. This will require the need for new investments in mountain resorts such as Mesopotamos, the Kyperounta and Pedoulas etc which will focus specifically on people with asthma.

BEST PRACTICES FOR CYPRUS

Based on the demographic and geographical data that we know concerning Cyprus, it is vital that there not only be coordination concerning our promotion abroad but that the presence of both licensed professionals and approved tourist accommodation facilities are established. Our actions need to focus on attracting health traveler's in a targeted way whilst taking into account all parameters that maximize the satisfaction of those travelers and minimize any mistakes that can come about.

It becomes clear that there needs to be a collective attempt to achieve the recommendations that are shown below:

- **Create comparatively larger nursing units:** Priority is to provide incentives for the development of large hospitals and medical centers based on international standards with the ultimate goal of profiting from economies of scale. Through the creation of larger nursing units, it is also expected that the patient's confidence will increase as well as awareness of the services that are offered.
- **Quality Assurance in the delivery of services provided by all stakeholders in the management of health traveler's:** The ability to educate, provide information and guidance to all stakeholders concerning the way to manage the delivery of services based on international standards needs to become available. Accreditation of accommodation structures is also vital in ensuring that there is international recognition in the quality of all services that are provided.
- **Attracting potential capital investment for the health tourism industry:** In order to attract and safeguard investors willing to invest in this sector, it is necessary that all investments are done so through the state, with the state being in the position of making all suitable arrangements for this transaction to take place. Achieving this objective will require developing new residential buildings so that any proposed project will be offered with a degree of reliability and efficiency for the investment to be made.
- **Management of Hospital units by International Organizations:** Promoting international organizations to take on the responsibility of managing the health units, who implement a high level of operational management, is important in ensuring and confirming that quality is in place. This tactic has been used in many countries of the Middle East and is one of the main reasons that patients choose to carry out their therapies there.
- **Continuous monitoring of patients during and upon completion of their therapy:** The continuous monitoring of patients post treatment is an important element in allowing health traveler's to want to seek treatment outside the border of their home country. It will become vital that a process is established which promotes cooperation with doctors from abroad, thereby allowing patients to

return to their country of origin upon completion of their treatment in Cyprus for any relative post-operative check-up/examinations that may be required.

- **Medical Facilitators – ONE STOP SHOP:** The development of packages which include all the services that are needed for the delivery of the therapy has become an important aspect that needs to be integrated in holiday packages. Health Tourism facilitators play an important role in both the development and promotion of health tourism as they act as representatives for many of the health traveler's seeking treatment abroad, and therefore act as the middle man in forming contact between the patient and the hospital. As a result these medical facilitators require a degree of knowledge as to how the hospital units in Cyprus function. Creating such a group for the promotion of Cyprus as a fundamental medical destination can be ensured by offering free education and training which could potentially act as an incentive for all interested members.
- **Undergoing International Accreditation of hospitals:** The process of international accreditation has become a necessity and therefore by offering a grant that covers parts of the implementation of this process could have positive results. This incentive will cover parts of the consultation and surveying of the accreditation process.
- **Provide information to patient for the qualifications of all healthcare professionals:** Through the internet, patients want to have access to information about the qualifications of the physician in question in terms of their experience, training and expertise. This allows an idea to be formed by the patient so that the decision on choosing which medical facility to visit can be made. The Cyprus Medical Association has already established a website found at www.cyma.org.cy which has a list of all its members. Enhancing the information presented to the public could be accomplished by adding more details to this list such as the date of registration, as well as the licenses and qualifications each healthcare professional has.

- **Use of the Internet:** Promoting services in specialized and reliable health tourism platforms has become especially important due to the fact that the internet is continuously increasing in popularity each year. The patient who seeks information about a specific treatment will also be able to use these platforms to establish communication with other patients as well in order to exchange information and opinions. An incentive to promote providers and their services on such platforms could be by offering partial coverage for the cost of registration, perhaps through the Ministry of Health.
- **Developing the appropriate infrastructure to accommodate health traveler's when in Cyprus:** The need to create the necessary accommodation infrastructure for health travelers has become essential. As a result elements such as establishing an international cuisine in hospitals and hotels is important in offering choice to guests depending on their religion, tradition and medical conditions. Moreover, it is imperative that translators are present in the hospitals and clinics in order to allow open communication to take place and prevent language from becoming a barrier.
- **Airline tickets and Fares:** High airline fares act as an obstacle in the development and promotion of health tourism. It is a known fact that the UK is the largest market in terms of passengers travelling abroad for their health needs and as a result additional incentives for attracting them to Cyprus need to be formed. One such incentive may be to lower the cost of fares thereby increasing the ease in their decision to choose Cyprus.

- **Accessibility and simplification of the process of issuing planning permits and other permits e.g. visas:** By concentrating all these services into one office (one stop shop) and establishing a connection between the one stop shop and the Ministry of Commerce Industry and Tourism, will result in simplifying the procedures underlying the licensing process. It will also act to facilitate the work of all those involved by only having to visit one place for the licensing and certification of all areas surrounding health tourism.

MARKETING PLAN

It is clear that internet searches and online databases are the most successful ways for promoting medical services in the field of health tourism. As a result it is recommended that 65% of the budget that is set aside for promotion be invested in electronic modes of marketing (hospital websites, health tourism platforms, forums) and 35% in magazine, brochures, television and radio advertisements. These methods of advertising in

association with other promotional and social actions need to be compulsory to ensure that the best outcome is achieved in respect to enhancing and protecting the image of Cyprus as a viable medical destination.

It is essential to acknowledge that all activities should be aimed at identifying the true value of the medical services that are provided and also aimed at promoting the packages that are being offered.

Undoubtedly, websites are one of the main marketing tools for any organization that wants to increase awareness of its presence, both internationally and domestically. It is important however that such websites whether it be hospital websites, health tourism platforms or the Cyprus Health Services Promotion Board internet portal, that the information presented to the public is up-to-date, reliable and relevant. It should also allow additional information to be shared to those who visit the website and request it. In addition to this, due to the nature of the internet, it is vital that these sites are safeguarded against malicious interference, and that they are designed in such a way so as to be easily visible and simple to use so that the user feels safe.

Due to the human nature of the health tourism industry, public relations has become an important component and any targeted action in conjunction with the marketing mix, needs to be developed in such a way so as to promote a positive image for the health tourism industry of Cyprus. This will have a positive impact not only on the tourists but also the general practitioners and all travelers's choosing to carry out their treatment plan in Cyprus.

Through the marketing plan, Cyprus needs to highlight all the advantages it has as a medical destination. An example of this would be to promote IVF therapies to specific target groups such as Italy where the laws and regulations prevent them from carrying such treatments out in their home country. Specific packages must also be advertised through health tourism seminars and conferences. An example could be the combination of medical SPA with preventative medicine whereby a package is formed to include

accommodation in a SPA resort, medical consultation, Mediterranean diet, medical tests patient monitoring and support upon completion of the therapy.

However the most important element of the marketing plan is the concept that all advertising and promotional actions carried out by each stakeholder, need to be done in such a way that they not only complement one another, but are consistent in the image they give Cyprus. As a result all advertisements need to be designed under one logo and slogan in order to increase international recognition.

ACTION PLAN

The strategy needs to touch on two basic principles; Acting directly to promote health tourism and upgrading the existing infrastructure to include the education of all stakeholders involved as well as implementing a system for monitoring, responding and adapting to the needs of the industry.

All the proposed recommendations are not only realistic and feasible, but are also proven to be cost-effective and common practices in the promotion of the tourism industry.

STRATEGY FOR THE PROMOTION AND INCREASE IN AWARENESS 2010-2013

The plan of action in terms of the *marketing* aspect is primarily based on destination marketing – breaking the market into segments and targeting each one individually based on the current situation present in the field of healthcare. The goal of the action plan is to serve until the year 2013 as a feasible and practical tool for all the stakeholders involved in the promotion of health tourism.

As already mentioned, marketing through the use of printed materials and websites constitutes an important element in our actions to promote Cyprus as a medical destination. Printing materials could include for example the creation of informational material for Germany, Scandinavia and the Arab market. In-flight magazines especially for the Cypriot Airlines, as well as TV advertisements like the expatriate program of C.B.C can also be tackled within the marketing mix.

Advertising through electronic websites, assessing all websites that are of interest to Cyprus and organizing workshops attracting foreign participation are all fundamental elements that need to be included within the action plan in order to increase awareness and allow Cyprus to establish itself as a chosen medical destination. In addition to this, participation of Cyprus in conferences and seminars such as the Central and Eastern Europe Health tourism and Healthcare Summit which will take place in November 2010

as well as the 2011 World Tourism Congress, acts as a powerful promotional tool which needs to be exploited.

A core concept to any marketing strategy is public relations. Creating a catalogue of contacts to include journalists, facilitators, insurance companies and tour operators to be used to send out frequent emails on the updates and developments taking place in the health tourism industry is important in creating a positive image for Cyprus. The same applies in respect to the organization of Fam trips for journalists from England, Germany, Scandinavia etc.

Print media is an important mode of advertising in not only informing healthcare traveler's, but also facilitating open communication and increased awareness for both the health tourism product and the medical services that are offered by Cyprus.

Actions directed at growing and restructuring the existing infrastructure surrounding the delivery of services and the management of healthcare travelers.

In order to promote Cyprus as a medical destination, there is a need for continuous development of the existing infrastructure to give Cyprus the ability to put forward attractive packages and offer incentives for healthcare traveler's to visit and seek treatment in Cyprus.

Actions aimed at growing and adapting the infrastructure includes researching and carrying out a study to create incentives that will ensure the establishment of larger hospitals based on the models adopted abroad, promotion of legislation to ensure that dentists can be relied on as well as the creation of land sites by the Department of Town Planning and Housing specifically for elderly long-term care (assisted living) based on international standards to attract elderly healthcare traveler's.

CONCLUSION

The research and data analysis that was carried out within this study suggest that by implementing the right strategic plan will result in enhancing and promoting Cyprus as a

medical destination. The strategy needs to touch on two basic principles; Acting directly to promote health tourism and upgrading the existing infrastructure.

As it has been analyzed, there are many criteria that give Cyprus the ability to flourish in this sector and become a leading competitor in the market. However it is important to acknowledge that for this to work it will require all stakeholders from both the tourism and health sector to understand their individual roles, and work collectively to reach this common goal.

It is our vision that Cyprus enhances its comparative advantages, promotes the necessary elements of the health sector, and exploits all the opportunities that are presented in order for the successful development of the health tourism industry. All the above leads us to the conclusion that the health tourism industry of Cyprus, despite its early stage, has the ability to become a fundamental pillar of the economy, and make Cyprus a modern and high quality health tourism destination for health traveler's.

ACTION PLAN

Actions to promote the growth and reconstruction of the existing infrastructure and the management of healthcare travelers

	ACTION	COUNTRY/REGION	ΦΟΡΕΑΣ ΕΦΑΡΜΟΓΗΣ	LEVEL OF PRIORITY	ΚΟΣΤΟΣ
	A. Development of the Infrastructure				
1	Study and research the issue of creating incentives for the establishment of bigger hospitals to mirror the models adopted abroad. The incentives need to aim at merging the small units consisting of 20-50 beds into hospitals/clinics having the capacity for 100-200 beds.	Cyprus	Cyprus Ministry of Health	2	20000
2	Roadshow – Presentation of projects and all relative investment opportunities in the healthcare sector in order to attract potential investors and funds for Cyprus and abroad	Cyprus / Europe	Cyprus Ministry of Health/ Cyprus Health Services Promotion Board /Cyprus Investment Promotion Agency	1	10000
3	Promote incentive for international accreditation of private hospitals. Announce a bonus structure for those planning to undergo the accreditation process. Promote the importance of accreditation for private hospitals.	Cyprus	Cyprus Ministry of Health, Cyprus Tourism Organization , Cyprus Health Services Promotion Board , Cyprus Medical Association	1	3,000,000
4	Enter agreements with the health systems of other countries	Target countries	Cyprus Ministry of Health	2	5000

5	Carry out annual reviews on the satisfaction of healthcare traveler's. This requires establishing assessment criteria, creating questionnaires as well as carrying out an analysis and presentation of the results to all stakeholders and interested parties. The collection of statistical data concerning health tourism and an assessment of the effectiveness of the promotional activities being undertaken are both extremely important.	Cyprus	Cyprus Health Services Promotion Board	1	5000
6	Promotion of Cyprus as a fundamental medical destination.	Europe	Cyprus Investment Promotion Agency / Cyprus Tourism Organization / Cyprus Ministry of Health		
	Roadshow – The aim is to attract international companies involved in hospital management, so that Cyprus can promote itself as a potential country for them to extend their activities in to.	Cyprus	Cyprus Tourism Organization / Cyprus Ministry of Health	1	10000
7	Creation of incentive to establish 'Medical Facilitators' who will be responsible in the health tourism industry for the promotion of specialized packages.	Cyprus	Cyprus Tourism Organization / Cyprus Health Services Promotion Board, Tour operators, Medical Facilitators-Coordiators	1	40000

8	Create criteria concerning the licensing of parties involved in the tourism sector (tourist agencies, hotels etc) who want to be involved in the health tourism sector.	Cyprus	Cyprus Tourism Organization / Cyprus Ministry of Health / Cyprus Health Services Promotion Board	1	2000
9	Study to provide incentives for the development of existing touristic accommodations (change of use, rate of construction) who wish to change and adapt their services to attract healthcare traveler's	Cyprus	Cyprus Tourism Organization / Cyprus Ministry of Interior/ Department of Town Planning and Housing	2	30000
10	Promotion of regulations targeted at dentists (individually or collectively) who want to promote their services and attract health traveler's from abroad.	Cyprus	Cyprus Ministry of Health / POD	1	
11	Create a planning permit group for elderly care (assisted living) based on international standards, in order to give potential investors the opportunity to create projects and attract senior health travelers from abroad.	Cyprus	Cyprus Tourism Organization / Department of Town Planning and Housing	2	
12	Review and accelerate the creation of policies to allow the formation of specialized boutique hotels, in order to offer health services to traveler's that are based on European standards.	Cyprus	Cyprus Tourism Organization / Cyprus Hotel Association	1	
13	Form and develop an open dialogue between the	Cyprus	Cyprus Ministry of Health /	1	

	Ministry of Health and the Planning Bureau in order to secure European funding for projects within the healthcare sector.		Planning Bureau		
14	Create a group responsible for the implementation and monitoring of the General Health Plan due to the fact that insurance companies will only be willing to cooperate with private hospital units that are regulated under the health system.	Cyprus	Cyprus Ministry of Health / Cyprus Tourism Organization	1	
15	Evaluation of the public healthcare facilities present in the coastal cities with the potential to offer services to healthcare traveler's who are insured by public European insurance organizations and who seek healthcare services only from public providers.	Cyprus	Cyprus Ministry of Health	1	20000
16	Adopt best practices (minimum standards) for the healthcare facilities in the private sector which have not as yet been accredited to attract healthcare traveler's	Cyprus	Cyprus Ministry of Health	1	30000
17	Create ambassadors responsible for making organizations abroad more aware and sensitive to the Cyprus market (insurance companies, hospitals etc)	Cyprus	Cyprus Tourism Organization	1	5000
18	Involve tourist agents in the health tourism	Cyprus	Cyprus Tourism	1	5000

	packages in collaboration with nursing units and medical facilitators.		Organization		
19	Create an electronic portal for the dissemination of information and coordination between stakeholders. Ability to be act as an observatory vehicle.	Cyprus	Cyprus Tourism Organization/ Cyprus Health Services Promotion Board	1	5000
20	Presentations for projects and investment opportunities in the healthcare sector	Cyprus	Cyprus Ministry of Health , Cyprus Tourism Organization , Cyprus Health Services Promotion Board , Ministry of Trade, Cyprus Investment Promotion Agency	1	20000
21	Exploit the climate in treating asthma (use Sanatorium in Kyperounta and other investment opportunities as such)	Cyprus	Cyprus Tourism Organization, Cyprus Ministry of Health , Community Council of Kyperountas company 'kyperis'	2	
22	Developing a specialized translating system or translating service for healthcare traveler's and their escorts.	Cyprus	Press and Information Office, Cyprus Medical Association, HSPB	2	
23	Develop and promote phototherapy health tourism	Cyprus	Cyprus Hotel Association ,	1	

			Association of Cyprus Tourism Enterprises , Cyprus Tourism Organization , Cyprus Ministry of Health , NCCI		
24	Transform (through minor changes) hotel infrastructures so that they can be in the position to offer accommodation to healthcare traveler's who are treated for the SAD syndrome		Cyprus Hotel Association , Association of Cyprus Tourism Enterprises, Cyprus Tourism Organization , Cyprus Ministry of Health , NCCI	2	
25	Speed up procedures to ensure that the required licensing permits surrounding investment in health tourism is secured		Cyprus Ministry of Health , Department of Town Planning and Housing, Cyprus Medical Association, Cyprus Nurses and Midwives Association	1	
26	Accredit Wellness Center with focus on the development of medical SPA	Cyprus	Cyprus Tourism Organization /Cyprus Spa Association	1	25000
27	Publication of a manual (advisory/guidelines) for development and adoption of minimal standards, for the operation and promotion of a medical SPA	Cyprus	Cyprus Spa Association/ Cyprus Tourism Organization	1	8000

	in Cyprus				
28	Develop an open dialogue between the Ministry of Trade and the Planning Bureau to ensure that European funds and low interest loans are secured for projects in the healthcare and health tourism sector.	Cyprus	Cyprus Tourism Organization /Ministry of Commerce Industry and Tourism/Planning Bureau.	1	
29	Include the services offered by Cyprus Town Planning and Housing into «ONE STO SHOP» service provided by the Ministry of Commerce Also the companies dealing with Health Tourism projects should be eligible to enjoy these services Finally, the Ministry of Commerce could support the companies by contributing towards the effort Of marketing their products overseas.	Cyprus	Ministry of Commerce Industry and Tourism	1	

ACTIONS SURROUNDING STRATEGIC MARKETING AND PROMOTION

	ACTION	COUNTRY/REGION	BODY RESPONSIBLE FOR IMPLEMENTATION	LEVEL OF PRIORITY	COST
	A. Promotion of printable material				

1	Publication of information guides (English)	Cyprus / UK	Cyprus Tourism Organization / Cyprus Health Services Promotion Board	1	€5000
2	Reproduction of reviewed DVD	Cyprus /International	Cyprus Tourism Organization / Cyprus Health Services Promotion Board	1	€2000
3	Publication of informational material specifically for the German market	Germany	Cyprus Tourism Organization / Cyprus Health Services Promotion Board	1	€2000
4	Publication of informational material specifically for the Arab market	Arabic Countries	Cyprus Tourism Organization / Cyprus Health Services Promotion Board	1	€2000
5	Publication of informational material specifically for the Scandinavian market	Northern Countries	Cyprus Tourism Organization / Cyprus Health Services Promotion Board	1	€2000
6	Print posters, window displays	Targeted Markets	Cyprus Tourism Organization	1	€8000
7	Print special brochures in collaboration with medical companies e.g. plastic surgery, dental therapy	Targeted Markets	Cyprus Tourism Organization / Ιατρικές	2	€5000

			Εταιρείες		
8	Print specialized brochures for the community in the UK	UK	Cyprus Tourism Organization / Cyprus Health Services Promotion Board	3	€2000
9	Print specialized brochures to promote the tourists who are already in Cyprus	Cyprus	Cyprus Tourism Organization / Cyprus Health Services Promotion Board	1	€2000
10	Print specialized brochures to be sent to London's CTO distribution list - made up of insurance companies etc with the subject "Why to Cyprus for Health Tourism"	UK	Cyprus Tourism Organization / Cyprus Health Services Promotion Board	2	€3000

	ACTION B. Print Advertisements	COUNTRY/REGION	BODY RESPONSIBLE FOR IMPLEMENTATION	LEVEL OF PRIORITY	COST
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1	Advertisements in printed materials abroad, magazines, newspapers targeting the elderly, town house brochures (Norway), Pharmacies (Germany) etc. As indicated in section 3 of this study. The advertising companies need to take into consideration suggestions from tour operators and medical facilitators.	Targeted Countries	Cyprus Tourism Organization	2	€30000
2	In-Flight magazines mostly in regards to Cyprus Airlines as well as playing a video-clip on in-flight entertainment. In addition target the in-flight magazines of other UK airline companies	Cyprus /UK		1	€15000
3	Add presence in hotel magazines and English-speaking newspapers in Cyprus. CTO (generic) - Healthcare facilities (services)	Cyprus	Cyprus Tourism Organization /Healthcare Facilities	1	€10000
4	Registration in Cypriot newspapers of the UK to target the community	UK	Cyprus Tourism Organization /Healthcare facilities	1	€5000
5	TV advertisement in PIK in their overseas program	UK	Cyprus Tourism Organization	1	€5000

	ACTION C. Electronic promotion	COUNTRY REGION	BODY RESPONSIBLE FOR IMPLEMENTATION	LEVEL OF PRIORITY	COST
1	Advertise in specialized health tourism internet platforms	UK/ Germany/Scandinavia	Cyprus Tourism Organization /Φορέας Υγείας/Νοσηλευτήρια	1	€20000
2	Updating and maintaining the Cyprus Health Service Promotion Board electronic portal through the information and pictures made available.	Cyprus	Cyprus Health Services Promotion Board	1	€3000
3	Advertising banners in electronic magazines such as www.cosmeticsurgeryanswers.co.uk and www.elixirnews.com for anti-aging therapies. Also advertise in other websites focused on health tourism.	UK	Cyprus Tourism Organization /Ιδιωτικά Νοσηλευτήρια και Medical Facilitators της Κύπρου	1	€40000
4	Evaluation of all websites that are of interest to Cyprus	International	Cyprus Health Services Promotion Board	1	
5	Create an electronic list of all subscribers with frequent updates	Targeted Markets	Cyprus Health Services Promotion	1	

			Board	
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	ACTIONS	COUNTRY/REGION	BODY IN CHARGE OF IMPLEMENTATION	LEVEL OF PRIORITY	COST
	D. Supporting actions for Marketing				
1	Establish a marketing committee. Prepare a marketing Plan	Cyprus	Cyprus Health Services Promotion Board	1	
2	Create a Data Bank. Collect and evaluate data from the Cyprus Health Services Promotion Board	Cyprus	Cyprus Tourism Organization / Cyprus Health Services Promotion Board	1	
3	Develop a mailing list for direct marketing - internationally.	All Countries	Cyprus Tourism Organization	1	
4	Incentives for tour operators and facilitators, as occurs in other types of tourism, for the creation and promotion of health tourism packages	All Countries	Cyprus Tourism Organization	1	€40000
5	Setting up of educational workshops for the members of the Cyprus Health Services Promotion Board, employees of CTO offices abroad and representatives of embassies regarding promotional activities.	Cyprus and all CTO offices abroad	Cyprus Tourism Organization / Cyprus Health Services Promotion Board /Υπ. Εμπορίου/ Cyprus Ministry of Health ,	2	€12000

			Professional Associations		
6	Organization of workshops – promotion of Cyprus with foreign participants	Cyprus	Cyprus Tourism Organization / Cyprus Health Services Promotion Board	1	€20000
7	Direct Marketing – Direct contact and open communication with all stakeholders so that they can be informed and take a role in the decision making process. Communication via internet, telephone and direct mailing.	Targeted Markets	Facilitators/Members of the Cyprus Health Services Promotion Board	1	
8	Relationship Marketing via brochures, advertisements and direct contact with foreigners who either reside or have a second home in Cyprus.	Cyprus	Cyprus Tourism Organization / Cyprus Health Services Promotion Board	1	€5000
9	Collection of data and desk research to enhance the Data Bank from CTO offices abroad.	Targeted Markets	Cyprus Tourism Organization	1	

	ACTION	COUNTRY/REGION	BODY RESPONSIBLE FOR IMPLEMENTATION	LEVEL OF PRIORITY	COST
	E. Exhibitions, Seminars, Workshops, Conferences, Fam trips				

1	Organization of the first annual workshop with foreign participants CYMEDITOUR (tour operators, facilitators, journalists) November 2010	Cyprus	Cyprus Tourism Organization / Cyprus Health Services Promotion Board / Cyprus Ministry of Health	1	€8000
2	Central and Eastern Europe Health Tourism and Healthcare Summit, www.globalengage.co.uk	Zagreb Croatia	Cyprus Tourism Organization / Cyprus Health Services Promotion Board	1	€1000
3	Participation in the exhibition Destination Health – April -2011 (UK Health tourism Exhibition)	London	Cyprus Tourism Organization / Cyprus Health Services Promotion Board / Cyprus Ministry of Health	1	€5000
4	Manchester Roadshow April-2011	Manchester	Cyprus Tourism Organization / Cyprus Health Services Promotion Board / Cyprus Ministry of Health / Facilitators/Insurers/Tour operators/UK Cypriots	2	€10000
5	WTM – 8-11-11-2010	UK	Cyprus Health Services Promotion Board /Kiosk KOT	3	€750
6	ITB Berlin March-2011	Germany	Cyprus Health Services Promotion Board /Kiosk KOT	3	€750

7	2nd Moscow Medical and Health Tourism Congress March 2011	Moscow	Cyprus Health Services Promotion Board / Cyprus Tourism Organization / Cyprus Ministry of Health	1	€1000
8	Dubai Tourism Exhibition and Cyprus Road Show - May 2011	Emirates	Cyprus Tourism Organization / Cyprus Health Services Promotion Board	3	€5000
9	World Health Tourism Congress 2011	To be determined	Cyprus Tourism Organization / Cyprus Health Services Promotion Board /Επίσημη Αποστολή/ Cyprus Ministry of Health	3	€2000
10	Exhibition for elderly care Senior – 20-22-10 2010 Stockholm	Stockholm	Cyprus Health Services Promotion Board / Cyprus Tourism Organization Kiosk KOT	1	€2000
11	Exhibition for elderly care Seniorit 20-21-11 2010 – Helsinki	Finland	Cyprus Tourism Organization / Cyprus Health Services Promotion Board	1	€2000
12	Presentations in Norway to Municipalities, Social Insurance Companies, Tour operators – October 2010 (Best Agers)	Norway	Cyprus Tourism Organization /Cyprus Health Services Promotion Board	1	€2000
13	European Medical Travel Conference and Exhibition Breakfast Presentation – Venice 5-8-	Italy	Cyprus Tourism Organization / Cyprus Health	1	€11000

	5-2010 (20 people)		Services Promotion Board /Medical Facilitators/ Cyprus Ministry of Health		
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	ACTIONS	COUNTRY/REGION	BODY RESPONSIBLE FOR IMPLEMENTATION	LEVEL OF PRIORITY	COST
	F. Public relations, communication, travel journalists, facilitators, insurers, tour operators				
1	Publish newsletters in English, German and Swedish. Distribute abroad and to the English speaking Cypriot press in the UK; both in a printed and electronic version.	Cyprus /UK/Germany/ Scandinavia	Cyprus Tourism Organization	1	€2000
2	Organize annual FAM trips for journalists in the UK, Scandinavia, Germany and Arab countries, in conjunction with annual workshops for health tourism in Cyprus	Cyprus	Cyprus Tourism Organization / Cyprus Health Services Promotion Board / Cyprus Ministry of Health	1	€12000
3	Promote health tourism through specialized channels (infomercials) in thematic satellite channels	Cyprus	Cyprus Tourism Organization / Cyprus Health Services Promotion Board	2	€10000
4	Create a distribution list of journalists, facilitators, insurance companies and tour operators –email frequent updates to on the advances being made in health tourism.	Cyprus	Cyprus Tourism Organization / Cyprus Health Services Promotion Board	1	

	ACTIONS G. Branding	COUNTRY/REGION	BODY RESPONSIBLE FOR IMPLEMENTATION	LEVEL OF PRIORITY	COST
1	Create a corporate identity (branding health tourism)	Cyprus	Cyprus Tourism Organization/ Cyprus Health Services Promotion Board	2	€40000