

A STUDY OF INFLUENCING FACTORS THAT LEAD
MEDICAL TOURISTS TO CHOOSE THAILAND
HOSPITALS AS MEDICAL TOURISM DESTINATION

By

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Thesis Title : A study of influencing factors that lead medical tourists to choose Thailand hospitals as medical tourism destination.

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ABSTRACT

Travelling around the globe for medical treatment is becoming more and more prevalent these days. The fundamental premise of medical tourism is that the same care, or even better quality of care, may be available in other countries, and obtained at a more affordable cost than in the home country (Medical Tourism Association, 2008). Thailand, as one of the several major destinations in medical tourism industry that is rapidly developing, is creating worldwide trademark as “The Medical Hub of Asia”. The objective of this research study is to determine the influencing factors that lead international medical tourists to choose hospitals in Thailand as their medical tourism destination. These factors will be ranked according to importance so as to assist in determining which point the hospital should focus on. Medical tourism is largely a consumer-driven trend and in order to survive and thrive, the health-delivery industry must keep up with its consumers' demands and needs (Nakra, 2011).

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CHAPTER I

INTRODUCTION

A. General Introduction

“The Tourism Authority of Thailand (TAT) launches an E-Marketing campaign that will boost the number of medical tourist as well as increase the average time they stay in Thailand. And this will help other tourism related businesses, such as hotels, spas, and restaurants. All in all, it will benefit all the tourism industry and follow the Thai government’s strategy of promoting Thailand as the ‘Medical Hub of Asia’.” – TAT Governor Suraphon Svetasreni (March 1, 2011)

Travelling around the globe for medical treatment is becoming more and more prevalent these days. There are several motivations which drive medical travelers to seek health care treatments outside their home country such as cheaper medical procedures, more advanced technological facilities and equipments, internationally certified and qualified doctors and nurses, and excellent healthcare services. For patients from highly industrialized nations, the primary reason to have medical services in less developed countries is attractively low cost (Horowitz, Rosensweig & Jones, 2007). Currently, there are a number of medical tourist destinations worldwide which offer excellent medical treatments that cost only a fraction of the total health care expenses in many industrialized, first world countries like the United States and the United Kingdom. For instance, according to an article at Time Magazine (2010), a liver transplant procedure that cost \$300,000 USD in the United States only cost about

\$91,000 USD in Taiwan. Another article from Bloomberg Businessweek (2008) mentioned that a heart bypass operation that costs \$100,000 USD in the United States only cost \$18,500 USD in Singapore, \$11,000 USD in Thailand, and \$10,000 USD in India. Medical care in countries such as India, Thailand and Singapore can cost as little as 10 percent of the cost of comparable care in the United States (Deloitte Development LLC, 2008). These health care treatments in various emerging medical tourist destinations are remarkably inexpensive, wherein medical tourists tend to choose to “offshore” their medical needs instead and enjoy an additional benefit of a luxury vacation. The combination of a first class medical treatment and a relaxing vacation while recuperating might be one of the main attractions why a number of medical travelers decided to test a booming trend in the hospitality industry.

Medical Tourism is an inevitable emerging industry. The fundamental premise of medical tourism is that the same care, or even better quality of care, may be available in other countries, and obtained at a more affordable cost than in the home country (Medical Tourism Association, 2008). Medical tourism has become a US\$60 billion a year business and is growing by 20% a year (MacReady, 2007). Famous country destinations worldwide for medical travel includes Argentina, Brunei, Cuba, Colombia, Costa Rica, Hong Kong, Hungary, India, Jordan, Lithuania, Malaysia, The Philippines, Singapore, South Africa, Thailand, and recently, Saudi Arabia, UAE, South Korea, Tunisia, Ukraine, and New Zealand (Gahlinger, PM, 2008). From the research study report of Deloitte Development LLC (2008), an estimated 750,000 Americans traveled abroad for medical reasons. A recent article in International Medical Travel Journal (2011), mentioned that every year, there are 5,000 medical tourists from Oman who travels mostly to India and the United Kingdom for medical

treatments. The UAE in the past send 8,500 medical tourists spending \$2 billion a year, mainly in the United States, Germany, Thailand and Singapore (International Medical Travel Journal, 2011). Medical tourists believe that for a considerably lower cost and for a shorter waiting period, they can obtain treatment that are equal to, if not even better than what they would receive at home (MacReady, 2007). Several medical patients travel to foreign countries for health care procedures and treatments such as cardiac surgery, joint resurfacing or replacement, ophthalmologic care, cosmetic dentistry and oral surgery, organ and stem cell transplantation, gender reassignment surgery, in-vitro fertilization and even executive health evaluations. The idea of medical tourism is creating an impact and much attention to several tourists around the globe. The revenue from the medical tourism industry is expected to grow at a CAGR of over 20% during 2010 – 2013, which is according to the Asian Medical Tourism Analysis (2008-2012). Hence, the concept of health tourism is becoming a global phenomenon that is virtually on the rise.

Thailand is one of the leading emerging medical tourist destinations in the world. The Tourism Authority of Thailand (TAT) found that the medical tourism industry is a financially viable business for the country. Thereby in 2004, the TAT initiated a strategy to develop Thailand as a medical tourism hub. According to TAT, there are six essential factors that drive international medical travelers to visit Thailand for medical treatment purposes and these are: (1) internationally accredited hospitals, (2) professional and highly qualified doctors and nurses, (3) inexpensive medical treatment cost, (4) fast and high quality standard of services, (5) state-of-the-art medical technology, and (6) excellent hospitality services. Thailand as a medical tourism destination became popular to global health patients seeking for organ

replacement surgery, dental care, cosmetic surgery, cardiac surgery and orthopedic surgery. The majority of Thailand's medical tourists come from Middle East countries (IMTJ, 2010). Thailand's international hospitals have a reputation for having modern, high-tech equipment, excellent quality medical care, and superior hospitality services (Horowitz & Rosensweig, 2007). Based on an article from the International Medical Travel Journal (2010), TAT estimates a significant growth of 10 million in the year 2015 in the total number of international medical tourists coming to Thailand.

Tourism is a vital aspect of Thailand's economy. The top competing countries for health care travelers given the rise of medical tourism industry in Asia are India, Malaysia, Singapore and Thailand. With the emergence of the global medical tourism industry, this research study aims to examine the various factors that affect the choices and decisions of international medical tourists in choosing Thailand hospitals as their main destination in receiving medical treatments. Moreover, this research study aims to identify several motivations and preferences of medical patients as they seek for the best destination that is comparable from their home country for their health care needs.

B. Statement of the Problem

Medical tourism industry is likely to grow from an estimate of \$40 billion in 2004 to \$100 billion by the year 2012 according to McKinsey & Company and the Confederation of India. Frustrated by high costs, long waits, and red tape, a growing number of people in Europe and North America are seeking medical care in emerging

nations like Thailand, India, and Brazil (MacReady, 2007). Nowadays, people are embracing the concept of medical tourism as possible options for health care treatments done in several developed countries. A growing number of medical patients are in search for country destinations, where hospitals offer high quality health care at a more affordable price. Countries like Costa Rica, Mexico, India, Singapore, Malaysia and Thailand are some of the few popular medical tourist destinations that offer inexpensive medical procedures. Health travelers who chose Thailand for medical tourism often took advantage of arranging a vacation tour while they are visiting the country. After a medical procedure, medical travelers are more than happy to enjoy a relaxing holiday in Thailand while exploring the country's several magnificent sandy beaches. They take pleasure in trying out local cuisines and enjoy a deep fascination in learning the richness of the Thai culture.

As worldwide medical tourism progresses, this concept is becoming more and more popular by the minute but not without any risks involved. The concern about quality of care and patient safety are raising apprehensions for some international medical patients. Questions such as: (1) Do some of the medical travelers perceive cheap medical costs to mean low standard of quality? and (2) For hospitals that are located in countries such as India, Malaysia and Thailand which offers cheaper medical health care, does quality of care and patient safety comparable to developing countries such as the United States and the United Kingdom? According to McKinsey & Company (2008), most medical travelers seek for high quality and faster service instead of lower costs. The Joint Commission International or JCI is a United States-based association in which its objective is to elevate healthcare delivery standards through evaluation and accreditation of healthcare hospitals and organizations. Therefore,

accredited hospitals with state-of-the-art medical facilities and technologies as well as the availability of US-trained, board certified medical doctors and surgeons overseas have added more credibility to the medical tourism trend.

In 2010, the Tourism Authority of Thailand (TAT) launched a new website as part of their marketing strategy to boost the number of inbound medical travelers in the country. The primary objective of the new TAT website is for medical tourists' easy access in finding valuable and reliable information regarding quality of health care and safety of medical tourism in Thailand.

The demand for global medical tourism is showing a remarkable growth. Previous studies have concluded several factors that motivate patients to seek health care services in foreign countries. According to Smith and Forgione (2008), both the "Product" and "Price" are the essential factors that influence the choice of international health care facility. Meanwhile, McKinsey & Company (2008) study showed that "Product" is the sole factor that drives medical travelers to seek medical treatment overseas. On the other hand, the Deloitte Development (2008) study mentioned that medical tourists are choosing to offshore their medical needs primarily because of "Price", wherein cheaper medical treatment can be found in several emerging medical tourism destinations worldwide. Based from these previous studies, this research study aims to determine whether "Product" or "Price" is the essential factor that drives international medical tourists to choose Thailand hospitals for health care services. This research study will focus on the important factors that affect customer's preferences in choosing to come to Thailand hospitals for medical

treatment purposes by using the Marketing Mix 4P's framework, which is popularized by Borden (1964).

C. Research Question

What are the influencing factors that lead to customers' or patients' preference of hospitals in Thailand as a medical tourism destination?

D. Scope of the Study

This research study is primarily focused on foreign medical tourists, who travel outside of their home country to receive various medical treatments in Thailand hospitals. The questionnaires were distributed to international patients who came for medical treatment in the three famous JCI accredited hospitals in Thailand namely Bumrungrad International Hospital, Samitivej Sukhumvit Hospital, and Bangkok Hospital Medical Center within the duration of five days. Convenience sampling, which is a type of nonprobability sampling which involves the sample being drawn from a part of the population that is close at hand, was used in this study. This kind of sampling was appropriate for this research study as the total number of population was unknown. The sample population selected in this research was those which are readily available and convenient. The researcher focused on determining the factors of the marketing mix which includes product, price, place and promotion which then

affects the motivation of international medical travelers to come to the aforementioned three hospitals in Thailand for medical treatment purposes.

E. Objective of the Study

The objective of this research study is to determine the influencing factors that lead international medical tourists to choose hospitals in Thailand as their medical tourism destination.

F. Significance of the Study

The underlying phenomenon of global medical tourism is vastly increasing. Thailand, as one of the several major destinations in medical tourism industry that is rapidly developing, is creating worldwide trademark as “The Medical Hub of Asia”. According to an article in Bangkok Post (2010), Thailand over the past decade has developed a thriving medical tourism industry, capitalizing on high-quality, well-equipped private hospitals and skilled practitioners offering quality care at far less cost than in developed countries. Therefore, the results and findings of this research study will be useful to hospitals in Thailand wherein they can have a clear understanding on what medical tourists value the most and what they are looking for when they come to Thailand for medical check-ups and surgeries. This study will help to identify the essential key strengths and core competencies of the leading hospital providers of medical tourism in Thailand. Other non-leading hospitals can also benefit

from this research study in which they can have information on the various aspects that they might need to improve upon in order to better serve international medical travelers. Furthermore, this research study is beneficial to the Tourism Authority of Thailand (TAT), in which profound details will be unveiled regarding the core determinants that motivate international patients seeking for medical treatments to choose hospitals in Thailand as their main destination for health care. Medical tourism is largely a consumer-driven trend and in order to survive and thrive, the health-delivery industry must keep up with its consumers' demands and needs (Nakra, 2011).

G. Definition of Terms

This study used the following terminologies to create an understanding between the researcher and the readers of this research study regarding definitions and the use of such words in a different context.

- a. **Medical Tourism** is also commonly known as medical travel, health tourism or global healthcare. It is a term initially coined by travel agencies and the mass media to describe the rapidly-growing practice of traveling across international borders to obtain health care (Shaywitz, DA and Ausiello, DA, 2002). According to Deloitte Center for Health Solutions (2008), Medical Tourism is the process of “leaving home” for treatments and care abroad or elsewhere domestically. In some cases, medical tourism includes a relaxing vacation during the visit in the country destination chosen for medical treatment.

- b. **Marketing Mix** is also referred to as the 4P's, which consists of product, price, place and promotion. Marketing Mix is one of the best known of all the marketing models. These four factors are used to analyze the effects in customer preferences of choosing hospitals in Thailand for medical treatments.

- c. **Patient or Customer Preferences** refers to the degree to which the individual regards the health care service or product or the manner in which it is delivered by the provider as useful, effective, or beneficial (MedConditions.net, n.d.). In this study, this term is used in relation with customer satisfaction or dissatisfaction with the benefit or service received from the hospitals in Thailand.

- d. **Product** in this study refers to the medical treatment and services provided by the hospitals in Thailand. Furthermore, it refers to the internationally accredited hospitals in Thailand that offers fast services, superb hospital facilities, high technology medical equipment, top-notch doctors and nurses and excellent patient care services.

- e. **Price** in this study refers to the affordability of medical treatment costs along with travel tours after the medical treatment in Thailand. Price defines the cost saving opportunities that medical travelers receive when they travel to Thailand for medical treatment.

- f. **Place** represents the hospital location for medical treatment. It also means the hospital's accessibility by local transportations as well as its proximity to tourist destinations and shopping centers in Thailand. Place refers to the entire surrounding area where the hospital is situated.
- g. **Promotion** in this study refers to the additional benefit for medical travelers such as offering promotions on several medical treatment packages, airport pickups, visa extension services, and special rates for hotel accommodations and travel tours in Thailand after medical treatment.

H. Abbreviations and Symbols Used in the Study

TAT	Tourism Authority of Thailand
JCIA	Joint Commission International Accreditation
ISO	International Organization for Standardization
HA	Hospital Accreditation Thailand
MANOVA	Multivariate Analysis of Variance
N	Sample Size
f	Frequency
\bar{x}	Mean
df	Degrees of Freedom
S.D. or σ	Standard Deviation
ACCREDIT	International Accreditation
PROF	Professional and Specialized Services

EQPT	Equipment
PCARE	Patient Care
FACILITY	Facilities
TOURIST	Tourist Destination
TRANSPO	Local Transportation
CITY	Famous City
SAFE	Safe City
QUIET	Quiet Location
AFFORD	Affordable Medical Costs
DOC_FEE	Cheaper doctor and administrative fees
VALUE	Value for Money
CHEAPER	Cheaper Cost than Home Country
TOURS	Travel Tours
EX_SERV	Extra Services
HOTEL	Hotel Accommodation
INSUR	Insurance Coverage and Claims
PROMO	Package promotions on medical treatments
SPRATE	Special Rate for Tours

CHAPTER II

LITERATURE REVIEW

A. General Review of Related Field

“We are focusing our attention on developing Thailand as a medical tourism hub for high-quality, low cost health and medical services. While visiting the country for work or pleasure, you will experience our hospitality. You can even combine the visit with a medical check-up at one of our world-class hospitals. Simply put, working and visiting Thailand is obviously value for your money.” – Mr. Abhisit Vejjajiva (27th Prime Minister of Thailand from 2008 – 2011)

Medical Tourism is a concept that combines health care and leisure travel. In today’s global economy, the medical tourism concept is not anymore new but rather a growing trend to many. The primary goal of international patients engaging in medical tourism is to have access to the highest quality of health care from internationally accredited hospitals around the world at a more affordable medical treatment cost. State-of-the-art hospital facilities, excellent health care services, certified professional physicians and reasonably priced medical procedures are some of the key drivers for medical tourism. With the continuous rise of health care costs in various developing countries, particularly in the United States of America, more and more people are inclined on traveling abroad in search of less expensive medical treatment. This chapter includes discussions

of the several research studies that have been made regarding the rapidly emerging phenomenon of global medical tourism.

Background and History of Medical Tourism

The history of medical tourism stated that even in the early times, people have been traveling around the world for medical treatment purposes. Medical Tourism can be traced back to the ancient Greeks and Egyptians who went to hot springs and baths to improve their health. As early as 4000 BC, the Sumerians constructed the earliest known health complexes that were built around hot springs. These healthcare facilities included majestic elevated temples with flowing pools. The background of medical tourism was retrieved from the website of Understanding-medicaltourism.com, which stated that the history of medical tourism dates back to its first recorded case when Greek pilgrims traveled from the Mediterranean to Epidauria, a small territory in the Saronic Gulf. It was said that this small territory was the sanctuary of Asklepios, known as the healing God. Thus, it was recorded in medical tourism history that Epidauria is the original destination for medical tourism.

Asia also has a history of medical tourism. India and Japan are two Asian examples. Yoga and Ayurvedic medicine became popular in India as early as 5000 years ago, wherein constant streams of medical travelers and spiritual students flocked to India to seek the benefits of these alternative-healing methods. Japan's affluence of mineral springs known as onsen have also been

favorite health retreats for therapeutic properties for centuries. These springs are known for healing wounds.

During the 16th century, the rich and the elite of Europe rediscovered Roman baths and flocked to tourist towns with spas like St. Mortiz, Ville d'Eaux, Baden Baden, Aachen and Bath in England. Bath or Aquae Sulis enjoyed royal patronage and was famous throughout the known world. It became the center of fashionable wellness and became a playground for the rich and famous. And according to the website Discovermedicaltourism.com, in the 18th century, England saw a boom of dedicated spa towns and sanatoriums catering to those who could afford to make the trip. These places were almost always centered on natural hot springs, as the mineral waters were believed to treat all kinds of disease, from gout to bronchitis. With the cost of healthcare rising in the 1980s and 1990s, American patients started considering offshore options, like dental services in Central America. Whilst US doctors were appalled at the idea of seeking healthcare in foreign hospitals during these periods, Cuba started programs luring foreigners for eye surgeries, heart and cosmetic procedures.

The medical tourism industry has continued to emerge in recent years. Surgical procedures in various countries became popular as medical costs are charged at significantly cheaper price than in the patient's country of origin. Americans for instance frequently travel to Thailand and India for heart surgery, which costs only a fraction of the same medical treatment in the United States. According to Health-tourism.com, in 1997, the Joint Commission International was formed to check and investigate international healthcare facilities for conformance to

international standards due to the emergence of health providers around the world. Consequently, countries like India, Singapore and Thailand became legitimate medical tourism destinations due to JCI accreditation. Based from an article in Health-tourism.com, medical tourism continued its massive growth with as many as 150,000 US Citizens traveling to destinations in Asia and Latin America in 2006. Worldwide medical tourists continue to travel abroad to get medical treatment overseas due to the economic savings advantage. Currently, several international patients combine their medical treatment with a relaxing holiday vacation. As globalization in health care market continue to grow, the medical tourism trend is set to be a booming industry.

Medical Tourism in Various Countries Worldwide

Globalization has a great impact in the health care market industry. With the continuous increase of health care costs and long waiting periods in several developed countries in the world, the evolution of medical tourism has created opportunity for patients to seek medical treatments outside their home country. The following gives an overview of the background, growth and current trends of medical tourism in various countries around the globe.

1. United States of America

The United States of America is believed to have one of the most technologically advanced medical health care. The American healthcare system is the most costly in the world (Marlowe and Sullivan, 2007). According to the Deloitte Center for

Health Solutions Report (2008), inbound medical tourism to the United States is approximately \$5 billion or 400,000 patients annually. International patients mainly come from Latin America, the Caribbean, Europe and the Middle East. These patients are wealthy people traveling to the United States in search for high technology medical care. An article in Forbes (2008) mentioned that the availability of advanced medical technology and sophisticated training of physicians is the driving motivators for growth of foreigners traveling to the United States for health care.

The prolonged U.S. recession has had a significant impact on patients' ability to afford medical care (Deloitte Center for Health Solutions Report, 2009). Since traveling abroad for health care can be significantly less costly than health care obtained in the United States, more and more people are considering to “offshore” their medical needs. Patients Beyond Borders, a group that surveys foreign hospitals and publishes guides to medical travel, has identified 42 foreign medical sites which it believes provide value and quality for U.S. patients traveling abroad for health care (Deloitte Center for Health Solutions Report, 2009).

Table 2.1: Hospitals for Medical Travelers

Country	Medical Institution
Mexico	• Christus Muguerza Alta Especialidad Hospital, Monterrey
Costa Rica	• Clinica Biblica Hospital, San Jose
Barbados	• Barbados Fertility Centre, Christ Church
Brazil	• Hospital do Coracao, Sao Paulo • Hospital Israelita Albert Einstein, Sao Paulo • Hospital Samaritano, Sao Paulo

(continued)

Country	Medical institution
India	<ul style="list-style-type: none"> • Asian Heart Institute, Bombay • Apollo Hospitals, Chennai • Indraprastha Apollo Hospital, Delhi • Shroff Eye Hospital and LASIK Center, Bombay • Wockhardt Hospital, Bangalore • Wockhardt Hospital, Bombay
Thailand	<ul style="list-style-type: none"> • Bangkok Hospital Medical Center, Bangkok • Bumrungrad International Hospital, Bangkok • Samitivej Sukhumvit Hospital, Bangkok
Philippines	<ul style="list-style-type: none"> • St. Luke's Medical Center, Quezon City
Singapore	<ul style="list-style-type: none"> • Alexandra Hospital • Changi General Hospital • Gleneagles Hospital and Medical Centre • Johns Hopkins Singapore International Medical Centre • KK Women's and Children's Hospital • Mount Elizabeth Hospital • National Cancer Centre Singapore • National University Hospital • Singapore General Hospital • Tan Tock Seng Hospital
Taiwan	<ul style="list-style-type: none"> • Min-Shen General Hospital, Taoyuan City • Taipei Medical University
South Korea	<ul style="list-style-type: none"> • Severance Hospital, Seoul
United Arab Emirates	<ul style="list-style-type: none"> • American Hospital, Dubai • Dubai Hospital • International Modern Hospital, Dubai • Tawam Hospital, Al Ain • Zulekha Hospital, Sharjah
Czech Republic	<ul style="list-style-type: none"> • Na Homolce Hospital, Prague
Turkey	<ul style="list-style-type: none"> • Acibadem Healthcare Group, Istanbul • Anadolu Medical Center, Kocaeli • Istanbul Memorial Hospital • Kent Hospital, Izmir • Gayrettepe Florence Nightingale Hospital, Istanbul
Jordan	<ul style="list-style-type: none"> • Jordan Hospital, Amman • King Hussein Cancer Center, Amman

Source: "Hospital for Medical Travelers." U.S. News & World Report. Available at: http://www.usnews.com/usnews/multimedia_assets/080429/

Rising healthcare costs in the United States will continue to drive American patients to seek treatment on a global basis (Smith and Forgione, 2008). Deloitte Center for Health Solutions projected that U.S. outbound medical tourism could

reach upwards of 1.6 million patients by 2012, with sustainable annual growth of 35 percent. Concurrently, U.S. inbound medical tourism will see relatively slow growth of report up to 561,000 travelers by 2017. Increased access to low-cost global transportation such as major air carriers offering special off-peak pricing will enhance access to medical tourism opportunities for U.S. outbound patients (Deloitte Center for Health Solutions Report, 2009).

2. Mexico

In recent years, Mexico has been the popular medical destination for the Americans. Its proximity to the United States and the relatively low travel costs, have been attracting Americans and Canadians. Stomach surgery, eye exams and routine checkups are among the major services that Americans are seeking in Mexico (Hansen, 2008). However, orthopedic procedures are the popular treatment for U.S. health consumers. Mexican dentists often charge one-fifth to one-fourth of US prices (Roig-Franzia, 2007). According to the World Health Organization, Mexican hospitals are similar in quality and care to those in the United States. Based from an article in Health-Tourism.com, the prices of medical procedures in Mexico can be between 50 percent to 75 percent lower than that of the US average costs. With state-of-the-art facilities comparable to American hospitals, Mexico has become one of the leading destinations for US medical tourists.

3. India

Medical Tourism is a growing segment in India. It is estimated that over 180,000 patients visited India's medical centers during just the first eight months of the 2008 fiscal year (Deloitte Center for Health Solutions, 2009). The country has already established a reputation in cardiac care, cosmetic surgery, joint replacement, and dentistry, and is actively working to expand into other areas that may attract well-heeled foreigners and the 12 million Indian expatriates who can combine regular visits to India with non-emergency medical procedures (Wolfe, 2006). According to an editorial in IndianHealthcare.in, India's medical tourism sector is expected to grow at an annual rate of 30 percent to become a Rs 9,500-crore industry by 2015 as foreign arrivals will increase to avail treatment at lower costs. India is giving Thailand a stiff competition in healthcare services for overseas patients with cost of surgery lower by over 30% and the cheapest in entire Southeast Asia. A heart-valve replacement costs about 0.2 million dollar in the US, in India it can be done in 10,000 dollar, which also includes round-trip airfare and a vacation package. Indian traditional treatments like Ayurvedic Therapies and much more, practically covers every aspect of medicine combining modern treatments with traditional experience. India provides world-class medical facilities with hospitals and specialized multi-specialty health centers providing their expertise in areas such as cosmetic surgery, dental care, heart surgeries and coronary bypass.

4. Singapore

Singapore received 410,000 foreign patients in 2006 with nearly half of them coming from the Middle East (Jordan's Competitiveness Report, 2007). Patients come from neighboring countries, such as Indonesia and Malaysia, and patient numbers from Indochina, South Asia, the Middle East and Greater China are growing. Singapore is attracting patients at the high end of the market for advanced treatments like cardiovascular, neurological surgery and stem cell therapy (Pocock and Phua, 2011). The country has a dozen of JCI accredited hospitals and health centers. Hence, a wide range of medical procedure is available in Singapore which includes cardiology, ophthalmology, and oncology East (Jordan's Competitiveness Report, 2007). Due to the relatively affordable medical treatment cost, patients from United States and the United Kingdom are also starting to choose Singapore as their medical travel destination. By 2012, the Singaporean government aims to attract one million international patients annually (Jordan's Competitiveness Report, 2007).

5. Malaysia

Malaysia is one of the primary destinations of medical travelers in the ASEAN region. Based from an article on Business Wire (2009), Malaysia received around 75% of medical tourists from the ASEAN region, followed by Japan and Europe at 3% each, India at 2% and others at 17% in 2008. Most international patients come from neighboring countries with less developed medical infrastructure such as Indonesia and other developed countries from the West (Frost and Sullivan,

2009). Due to the past political instability in Thailand as well as Singapore's high exchange rate, most of the international medical tourists come from neighboring countries in Asia. The Malaysian government is focused in the continuous promotion of medical tourism in the country. It has extended the visa period for health tourists from one month to six months. Major hospitals in Malaysia are targeting new markets such as Vietnam and Cambodia (Anonymous a, 2009). According from an article on Business Wire (2009), it is expected that the revenues from medical tourism will grow at a CAGR of around 23% during the forecasted period of 2009 - 2012.

The Global Health Care Marketplace

There are several factors that lead to the continuous increase of global medical tourism which includes expensive health care cost, long waiting time for some surgical treatments, increase quality of care from foreign countries, and affordability of traveling abroad. Connell (2006) found as health care costs have increased tremendously, patients in the developed world are looking overseas for medical treatment. The medical tourism marketplace consists of a growing number of countries competing for patients by offering a wide variety of medical, surgical, and dental services (Horowitz, Rosensweig & Jones, 2007). Consumers are faced with escalating healthcare costs in the United States and are forced to comparison shop in order to seek alternative sources for treatment (Smith and Forgione, 2008). Several affluent medical travelers visit the developing countries such as the United States primarily because of high medical technology and well-renowned physicians. Middle class patients choose to travel to third world

countries for medical treatment because of the benefit of having huge savings. According to Horowitz, Rosensweig & Jones (2007), the following listed country destinations are the most frequently identified countries in literature and Internet search.

Table 2.2: Medical Tourism Destinations

Asia/Middle East	The Americas	Europe	Africa	Other
China	Argentina	Belgium	South Africa	Australia
India	Brazil	Czech Republic	Tunisia	Barbados
Israel	Canada	Germany		Cuba
Jordan	Colombia	Hungary		Jamaica
Malaysia	Costa Rica	Italy		
Singapore	Ecuador	Latvia		
South Korea	Mexico	Lithuania		
Philippines	United States	Poland		
Taiwan		Portugal		
Turkey		Romania		
United Arab Emirates		Russia		
		Spain		

Source: Horowitz, M.D., Rosensweig, & Jones (2007). Medical Tourism: Globalization of the Healthcare Marketplace. November 13, 2007

Medical tourists are presently traveling to faraway countries for cosmetic surgery, dental procedures, bariatric surgery, assisted reproductive technology, ophthalmologic care, orthopedic surgery, cardiac surgery, organ and cellular transplantation, gender reassignment procedures, and even executive health evaluations (Horowitz, Rosensweig & Jones, 2007). UK waiting times for fertility treatments may be very long, and at an important period in couples' lives, hence many "fertility tourists" have gone overseas (Graham, 2005). According to Horowitz and Rosensweig (2007), the table below depicts the most frequently identified procedures in literature and Internet search.

Table 2.3: Procedures for Which Patients Pursue Medical Tourism

Cosmetic Surgery	Breast augmentation/mastopexy/breast reduction Facelift/blepharoplasty Liposuction/body contouring
Dentistry	Cosmetic dentistry Dental reconstruction/prostodontics
Cardiology and Cardiac Surgery	Coronary artery bypass Cardiac valve replacement/reconstruction Percutaneous coronary angioplasty/stenting Stem cell therapy for heart failure
Orthopaedic Surgery and Spine Surgery	Hip replacement/resurfacing Knee replacement Arthroscopy/joint reconstruction Laminectomy/spinal decompression Disk space reconstruction/disk replacement
Bariatric Surgery	Gastric bypass Laparoscopic adjustable gastric banding (Lap-Band; Inamed/Allergan, Inc.; Irvine, California) Body contouring subsequent to massive weight loss
Reproductive System	In vitro fertilization Hysterectomy Prostatectomy/transurethral resection Gender reassignment procedures
Organ and Tissue Transplantation	Solid organ transplantation Renal Hepatic Bone marrow transplantation Stem cell therapy Heart failure Neurologic diseases
Other Services	LASIK eye surgery General medical evaluation/checkup Wide range of diagnostic studies

Source: Horowitz, M.D., Rosensweig, & Jones (2007). Medical Tourism: Globalization of the Healthcare Marketplace. November 13, 2007

A face-lift in Costa Rica costs about a third of that in the United States and rather less in South Africa (Connell, 2006). Common surgeries such as knee replacements range in cost from \$40,000 - \$550,000 in the U.S., yet can be performed in Costa Rica for about \$10,000 (Koster, 2009). Moreover, a bypass operation in India is about a sixth of the cost in Malaysia (Connell, 2006). Given by the huge medical treatment cost differential to various medical country destinations worldwide, the temptation to pursue such health care avenues is potentially great. With the rapid development of modern age technology in several emerging destinations, low-cost medical services are therefore one of the primary motivations for several international patients to seek out health care to foreign countries.

It should not be surprising that hospitals in Asia Pacific are appealing to the American public as low-cost medical providers that offer quality care at unparalleled fees (Marlowe and Sullivan, 2007). Furthermore, European patients favor India, Thailand and Malaysia (Connell, 2006). Singapore, Malaysia, India, Thailand and the Philippines are some of the major destinations in the Asian medical tourism market industry. Thailand can offer liposuction and breast enhancement surgery for a fifth of the rate this would cost in Germany; hence it has focused on this particular European market (Connell, 2006). And so, Thailand is more popular among Western European medical travelers for cosmetic surgery. On the other hand, Singapore has sought to compete on quality rather than price and stresses its superior technology (Connell, 2006). Singapore and India specialize in complex procedures with India having a cost advantage and Singapore a technology advantage (Anonymous a, 2009).

Top Reasons Why Medical Tourism is Popular

The medical tourism trend has been made famous for the Americans, Canadians, British and other patients in developing economies who travel abroad in search for low-cost high quality medical treatments. The following are the top reasons why medical travelers choose to take advantage of this growing industry.

- **Price**

Cheaper health care cost is one of the key motivators that patients travel abroad for medical treatment. As health care costs skyrocket, patients in the developed world are looking overseas for medical treatment (Connell, 2006). Health care services include a number of countries promising “first-class services at third-world prices” (Wolfe, 2006). For example, a heart surgery in a US hospital can easily cost more than \$100,000. Hospitals in India and Thailand can offer comparable quality care for \$25,000. This cost difference can easily cover the travel expenses of the patient and immediate family and still allow for enormous savings (Baker, 2010). According to Deloitte Development LLC Report 2008 (Consumers in Search of Value), the following is the cost of medical procedures in the United States compared to the medical treatment cost in various emerging country destinations in Asia such as India, Thailand, Singapore and Malaysia.

Table 2.4: Comparing Costs of Medical Procedures

Major medical procedures w/average total medical/hospital cost in a western-level hospital

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

"Patient Beyond Border" by Josef Woodman. The table used in this book is available from ABILITY Magazine at <http://www.abilitymagazine.com/pbb.html>.

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

Costs assumptions taken for India (20%); Malaysia (25%); Thailand (30%); Singapore (35%).

Source: Deloitte Development LLC (2008). Medical Tourism: Consumers in Search of Value.

India, a major competitor of Thailand, offers the lowest priced option of sufficient quality for Westerners. The primary purpose is cost saving, with treatment in other countries running about one-tenth of typical U.S. costs due to lower expenses for wages, administration and insurance (Birschel, 2009).

- Access to the latest medical technology

The potential reasons why a citizen of one country might travel to another country are always the same: cost and access. Lack of access, either

because the technology is not available, is prohibited or illegal, or the wait is too long in the home country, can lead to medical tourism (Patsner, 2008). Stem cell-based therapies are the most common treatments that are not available to Americans, often because of restrictive government regulations (Runckel, 2007). Therefore, medical tourists also travel to offshore medical destinations to have procedures that are not widely available in their own country of origin.

- No Wait-lists

With healthcare costs rising in the United States and increased willingness to seek private care in countries with government-run systems in order to avoid waits, motivation for medical tourism is increasing (Patsner, 2008). Another primary reason in choosing to offshore health care to foreign countries is to circumvent delays associated with long waiting lists. In state-run health programs like those in Canada or the UK, waiting lists can extend to more than a year for essential surgery and past three for non-essential surgery (Runckel, 2007). Hence, patients seek medical treatments abroad for a faster response to their medical needs.

- Travel Opportunity

Medical tourism has grown in a number of countries such as India, Singapore, and Thailand, many of which have deliberately linked medical care to tourism, and thus boost the attractions of nearby beaches (Connell,

2006). A number of popular sun-sea-sand tourism destinations have, in the last decades, attempted to diversify into health tourism in order to achieve a more balanced, sustainable approach to tourism development (Ariwa and Syvertsen, 2010). The opportunity to travel to exotic destinations is an additional benefit for several medical travelers. For instance, South Africa offers safari medical tourist packages, where a family visits for treatment followed by a wildlife safari (Runckel, 2007). In Thailand, medical travelers that undergone non-major surgeries can enjoy a relaxing recovery in a beach resort.

Considerations, Risks and Opportunities of Medical Tourism

Medical tourism is not without challenges and perils. Common concerns are the quality of care, cultural and language issues, postsurgical follow-up and extended coverage for travel and accommodations (Birschel, 2009). With the growing medical tourism trend, many health care tourists who seek medical procedures abroad are faced with critical concerns regarding quality and safety. The biggest hurdle that medical tourism has had to face and continues to face, is the challenge of convincing distant potential visitors that medical care in relatively poor countries is comparable with that available at home (Connell, 2006). Therefore, a public perception of “you get what you pay for” might signify cheap medical care to be as inferior quality. In order to address the need for quality standards, a non-profit organization, Joint Commission International (JCI) certifies hospitals around the world in providing health care services. JCI may provide a useful

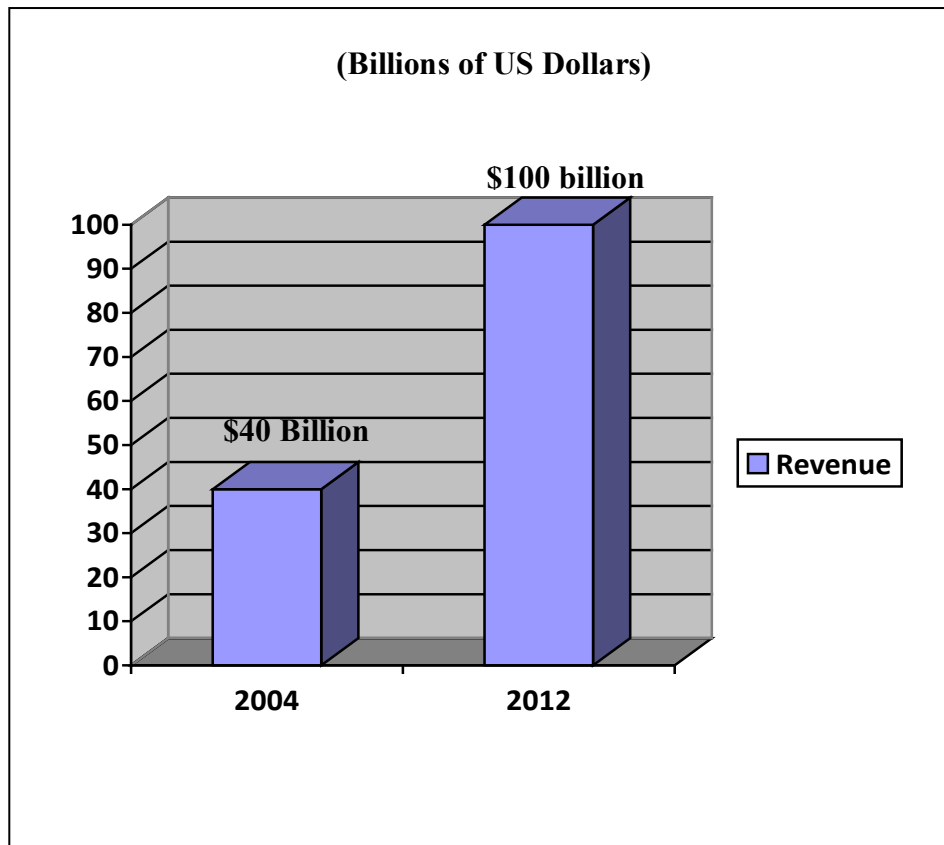
point of reference for patients selecting offshore medical facilities (Horowitz, Rosensweig & Jones, 2007). Hospitals worldwide that are accredited by the Joint Commission International (JCI) and/or the International Organization of Standardization continuously enhance patient safety by providing effective care of the highest quality and value.

Health tourism presents concerns and risks as well as opportunities. Its universal development has been facilitated by the popularity of the World Wide Web. The Internet (computers and telecommunication) makes it possible for patients to communicate globally on healthcare issues, and they are more educated about wellness, disease prevention, and medical treatments (Nash MG & Gremillion C., 2004). Nowadays, international patients search the web and read patient blogs in order to reassure health care quality and safety before traveling abroad. In some destinations, including Hungary and Mauritius, medical tourism possibilities are advertised in in-flight magazines and standard government tourist publications on the assumption that tourists might avail themselves of small-scale procedures such as dentistry during otherwise standard tourist visits (Connell, 2006). American patients are the recipients of aggressive marketing campaigns by many foreign hospitals touting their low-cost services, coupled with the opportunity for an exotic vacation (Smith and Forgione, 2008). Although the primary motivation for medical travelers is inexpensive medical treatment, taking a holiday vacation after a medical procedure is an added benefit to many individuals. Global marketing techniques are on the rise, causing many of worldwide hospitals to partner with travel agencies to further promote the benefits of a complete turnkey package of medical tourism services (Smith and Forgione, 2008).

Medical Tourism Continuous Growth

It has been estimated that the global medical tourism industry currently generates annual revenues up to \$60 billion, with 20% annual growth (Horowitz, Rosensweig & Jones, 2007). Approximations may vary, nevertheless according to McKinsey & Company and the Confederation of Indian Industry, in 2004, the gross medical tourism revenues were more than \$40 billion worldwide. McKinsey & Company predicts that the total revenues of global medical tourism will increase to \$100 billion by 2012.

Figure 2.1: Worldwide Medical Tourism Industry



Source: McKinsey & Company and the Confederation of Indian Industry

Health costs and long waiting lists at home, new technology and skills in destination countries alongside reduced transport costs and Internet marketing have all played a role in the continuous growth of medical tourism industry (Connell, 2006). Health care tourism is expanding in Europe, with German and English patients opting to pay a third or a half of what they pay at home by travelling to Warsaw or Budapest for dental work (Fred Hansen, 2008). Furthermore, it is estimated that medical tourism to Asia could generate as much as \$4.4 billion by 2012, with approximately half of this revenue going to India (Horowitz, Rosensweig & Jones, 2007). Medical tourism is likely to increase even faster in the future as medical care continues to be increasingly privatized, and cost differentials remain in place (Connell, 2006). McKinsey & Company estimates that medical tourism in India will grow to \$2.3 billion by the year 2012. Singapore, for example, though a relatively high-cost destination, is seeking to attract 1 million patients by 2012, which would generate US\$1.8 billion in revenues, create at least 13,000 jobs (Ai-Lien, 2005). Internationally-known hospitals, such as Bumrungrad International Hospital in Thailand and Apollo in India, report revenue growth of about 20 percent to 25 percent annually (Herrick, n.d). In 2008, medical tourism in Thailand generated 46 to 52 billion baht of revenue from medical services plus 12 to 13 billion baht from related tourism (NaRanong, 2011). Bumrungrad International Hospital in Bangkok attracts international patients from over 150 different countries (Wolfe, 2006). The medical tourism is projected to reach between 59 and 110 billion baht in 2012 (NaRanong, 2011).

Medical Tourism in Thailand

According to The World Health Organization's (WHO), Thailand health care system is rated 47th in the world. Thailand became known as a destination for medical tourism as early as the 1970s because it specialized in sex change operations, and later moved into cosmetic surgery (Connell, 2006). In Singapore, Malaysia and Thailand alone, an estimated 2 million medical travellers visited in 2006 - 2007, earning these countries over \$3 billion in treatment costs (Pocock and Phua, 2011). Patients that come to Thailand for medical needs mainly come from Japan, US, South Asia, UK, Middle East and ASEAN countries. According to Pocock and Phua, the following table illustrates a comparative analysis of health services between Singapore, Malaysia and Thailand.

Table 2.5: Export of Health Services

	Estimated earnings	No. foreign patients	Origin of patients (in order of volume)	Specialty
Thailand (2006)	Baht 36 billion (US\$ 1.1 billion)	1.4 million	Japan, USA, South Asia, UK, Middle East, ASEAN countries	Cosmetic and sex change surgery
Singapore (2007)	S\$ 1.7 billion (US\$ 1.2 billion)	571 000	Indonesia, Malaysia, Middle East	Cardiac and neuro surgery, joint replacements, liver transplants
Malaysia (2007)	253.84 million MYR (US\$78 million)	341 288	Indonesia, Singapore, Japan, India, Europe	Cardiac and cosmetic surgery

Source: Pocock, N. and Phua, K. (2011). Medical tourism and policy implications for health systems: a conceptual framework from a comparative study of Thailand, Singapore and Malaysia.

In 2008, Thailand welcomed an estimated 1.2 million patients from more than 190 countries for a wide variety of medical procedures (Anonymous c, 2009). The primary reasons that have aided international patients to choose Thailand for their medical needs are: (1) the low cost medical procedures, (2) the health care quality services provided by hospitals and private clinics, (3) and the highly developed tourism industry. The combination of first-class medical facilities, five-star hotels and serviced apartments, spas, wellness clinics, and myriad tourist attractions has contributed to Thailand's popularity (Anonymous c, 2009). Medical treatment in Thailand is about one third the cost of similar treatment in developing countries such as the United States or in Europe. There are about 400 hospitals in Thailand that provide high quality health care services. Thailand's leading hospital, Bumrungrad International Hospital, is the first hospital in Asia who received a JCI accreditation. Samitivej Hospitals and Bangkok Hospital Group are also gaining popularity to global medical travelers. An approximate of 30% - 50% of the total patients that come to these hospitals is from foreign countries. These hospitals provide advance medical technology that has become much the same in the western countries. Success rates, even for procedures that can have high infection rates, such as heart operations, bone marrow transplants and kidney transplants, are comparable to those at some of the world's best hospitals (Connell, 2006). Medical tourists from the Middle East are vastly increasing. However, Thailand has deliberately sought a Japanese market, since many doctors have been trained in Japan, and nurses and other staff have been taught to speak Japanese (Connell, 2006).

The Internet has played an important role that enables Thailand to compete in other emerging destinations in the global medical tourism industry. The Tourism Authority of Thailand (TAT) launched its “E-Marketing Campaign for Medical Tourism in Thailand” and a new website (www.ThailandMedTourism.com) on October 15, 2010, which provides information of medical tourism providers in Thailand, including hospitals, clinics, and spas. The current TAT Governor, Mr. Suraphon Svetasreni, believed that this marketing campaign will help increase medical travelers to Thailand. He said that “This will benefit all the tourism industry and follow the Thai government’s strategy of promoting Thailand as the ‘Medical Hub of Asia’.”

Aside from inexpensive health care cost, no waiting lists, excellent doctors and modern medical technology, Thailand also offers excellent medical packages for post-treatment rehabilitation. Thailand is a major holiday destination. The country highlights wonderful beaches, excellent shopping centers, lovely spas and massages, plus several exceptional tourist attractions such as temples and historic parks. Hence, for most international patients, an exotic travel in the country is often tempting after a medical treatment. There are several medical packages in Thailand which offer accommodation and aftercare away from the city and closer to the vibrant beaches. A tropical vacation ambiance at a superb oceanfront or mountain view resort is a perfect environment for recuperation. This low cost care which typically includes airfare and resort stay that resembles a mini-vacation leads patient’s perception for medical tourism as strong and positive (Deloitte Development LLC, 2008).

JCI Accredited Hospitals

The Joint Commission International (JCI) is the health care industry's official accreditation institution. There are over 120 hospitals in the world that are accredited by the JCI. Several other organizations, such as the International Society for Quality in Health Care (ISQUA), the National Committee for Quality Assurance (NCQA), the International Organization for Standardization (ISO), and the European Society for Quality in Healthcare (ESQH), have taken steps to ensure that medical tourism facilities provide the highest-quality clinical care (Deloitte Development LLC, 2008).

Hospitals in Thailand take pride on providing high quality standard of health care services. Thailand was the first country in Asia to achieve JCI accreditation in 2002. Currently, there are 14 hospitals in Thailand that are accredited by the JCI. According to ThailandMedTourism.com, the following is the up to date list of the hospitals that are JCI accredited.

- 1) Bangkok Heart Hospital
- 2) Bangkok Hospital
- 3) Bangkok International Hospital
- 4) Bangkok Hospital Pattaya
- 5) Bangkok Hospital Phuket
- 6) BNH Hospital
- 7) Bumrungrad International
- 8) Chiangmai Ram Hospital

- 9) Praram 9 Hospital
- 10) Ramkhamhaeng Hospital
- 11) Samitivej Srinakarin Hospital
- 12) Samitivej Sriracha Hospital
- 13) Samitivej Sukhumvit Hospital
- 14) Synphaet Hospital
- 15) Vejthani Hospital
- 16) Wattanosoth Cancer Hospital
- 17) Yanhee Hospital

The JCI accreditation aims to continuously improve the safety and quality of care in an international standard. The following are the top 3 hospitals in Thailand that has been accredited by the JCI and are gaining popularity among medical travelers worldwide.

- 1) Bumrungrad International Hospital

Bumrungrad International Hospital in Bangkok was the first hospital in Asia to receive accreditation from the Joint Commission on Accreditation of Healthcare Organizations on February 2, 2002 (Wolfe, 2006). The hospital has been re-accredited on April 8, 2005, July 31, 2008, and July 2, 2011. “Bumrungrad” means “care for the people”. It is the largest private hospital in Southeast Asia, with 554 beds and over 30 specialty centers (Deloitte Development LLC, 2008). Bumrungrad treated over a million patients annually, in which over 400,000 are international patients. The hospital hosts a much larger number of international patients than any other hospital in Asia (Veerasoontorn and Beise-Zee, 2010).

According to Health-tourism.com, over half of the hospital's doctors have international training and/or board certification, including 200 who are US board certified. Bumrungrad International Hospital has a lobby said to be redolent of a 5-star hotel. The hospital is also equipped with international restaurants, shopping outlets, coffee shops, convenience stores, and fast-food outlets. Today, more and more patients are choosing Bumrungrad for its advanced technologies, certified doctors, excellent treatments and superior services (Bumrungrad International Hospital Annual Report, 2009). Bumrungrad International Hospital is a world-renown medical tourism destination.

2) Samitivej Sukhumvit Hospital

The Samitivej Hospitals are one of the leading hospital chains in Thailand. According to Health-tourism.com, Samitivej Hospitals are equipped with advanced medical equipment that compares to the leading hospitals in the North America and Europe. The Samitivej chain has a long history of innovation and excellent quality of care.

Samitivej Sukhumvit Hospital was first accredited by the JCI on January 27, 2007 and has been re-accredited in February 13, 2010. The hospital provides 270 beds with over 400 specialists. Samitivej Sukhumvit Hospital offers a comprehensive range of modern medical technology, highly qualified physicians along with a multi-lingual workforce. The Samitivej Hospital chain is committed to be the leading provider of medical healthcare in Thailand, served with world class patient care.

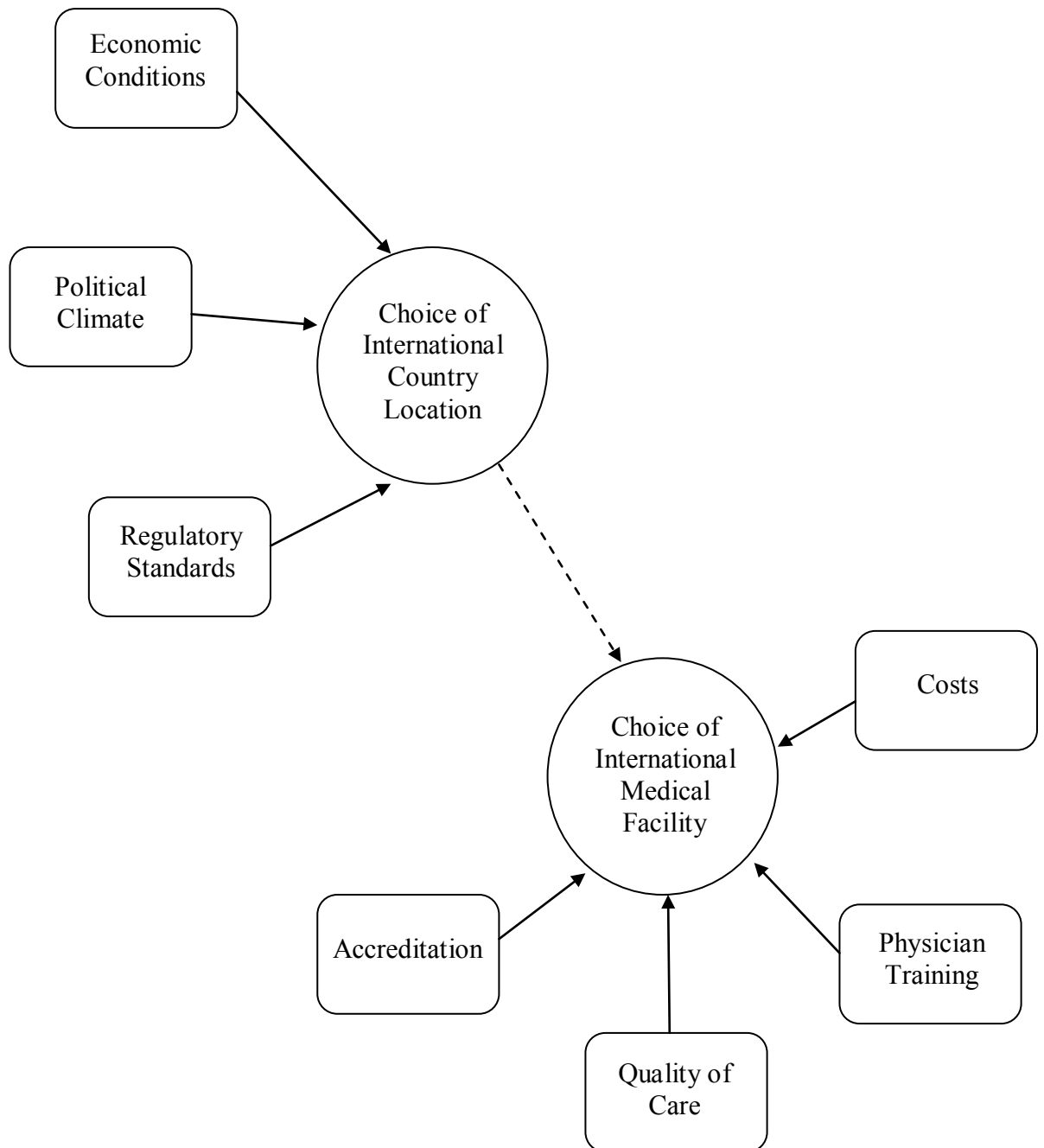
3) Bangkok Hospital Medical Center

The Bangkok Hospital group, with a network of 15 hospitals all over Thailand, is one of the recognized groups of hospitals in Thailand with specialized services attracting international patients. The Bangkok Hospital is the leading hospital in the group, where it welcomes over 3,000 patients per day. Bangkok Hospital received its first JCI accreditation on July 30, 2007 and has been re-accredited on July 17, 2010. The hospital offers 550 beds and has an International Medical Center that accommodate particularly for medical tourists. Bangkok Hospital provides multilingual interpreters and even has a Japanese Medical Centre with Japanese speaking specialists and nurses.

Characteristics of the Country of Choice

Figure 2.2 depicts an abstract of a two-stage model about factors that impacts decision making in seeking medical services worldwide. The model is based on the work of Palvia (2007) for choosing vendor and country overseas for the outsourcing of IT services. He argues that selecting a foreign country occurs first, with different factors impacting the decision which includes political system, infrastructure and legal system. Once a foreign country has been selected, then decision is made in selecting an international facility. Smith and Forgione (2008) used this conceptual model to apply in medical tourism. The model suggests that no one factor is dominant in the decision, but all play a crucial role in choosing healthcare on an international basis (Smith and Forgione, 2008).

Figure 2.2: Medical Tourism Factors Affecting Choice of Facility and Country



Source: Smith, P. and Forgione, D. (2008). Global Outsourcing of Healthcare: A Medical Tourism Decision Model.

Choice of International Country Location

1) Economic Conditions

Medical tourism is a lucrative business model for any host country. For instance, medical tourism will be the next key driving force for the Indian economy. It is estimated that medical tourism will account for 3-5 % of the India's healthcare delivery market while Singapore estimates that medical tourism will contribute 1.1% value to GDP by 2012 (Mitra, 2007). Furthermore, in Thailand, medical tourism generates the equivalent of 4% of the country's gross domestic product (NaRanong, 2011). Countries experiencing economic stability and growth have an advantage with American patients since stable economic markets can respond rapidly to stimuli and facilitate the provision of services to a broader sector of clients (Smith and Forgione, 2008).

2) Political Climate

Safety is a significant factor to any medical travelers worldwide. Medical tourists will be attracted to regions without risks of revolutions or uprisings (Smith and Forgione, 2008). Therefore, threats of terrorism and political insurgency typically undermine the medical tourism industry. A stable political environment with high degree of personal safety becomes one of the essential factors in the decision making processes for medical travelers.

3) Regulatory Standards

American patients seeking international treatment often consider the legal and regulatory environment of the host country (Smith and Forgione, 2008). The health Insurance Portability and Accountability Act of 1996 (HIPAA) was established in order to provide patient protection and safety. This Federal law was enacted to protect a patient's health information use and disclosure.

Choice of International Medical Facility

1) Cost

The huge cost differential of medical treatments from several developed countries compared to many emerging medical tourism destinations is one of the primary driving forces of the rapid growth of global medical tourism. The number-one factor cited for why Americans travel abroad for health care is cost (Smith and Forgione, 2008). Medical procedures in Thailand costs only one-third of the cost for the similar procedure performed in a hospital facility in the United States. Therefore, the appeal of substantial savings will continue to fuel demand for medical services in developing countries.

2) Hospital Accreditation / Infrastructure

Accreditation standards are a vital factor when evaluating the quality of care provided by a foreign hospital facility (Smith and Forgione, 2008). The primary

accrediting body in health care within the United States is the Joint Commission International (JCI). Medical tourists often rely on hospitals to provide a standard of care that equals or exceeds in the western country. Hence, the JCI evaluates and accredits health care organizations around the world, which aims to improve safety and quality of care in an international standard.

3) Quality of Care

Some other issues of quality of care are also important before choosing a medical facility abroad. Medical travelers take precautions on any endemic diseases such as HIV, malaria, typhoid, hepatitis, tuberculosis and etc. that they might encounter during their visit. A patient would prefer to seek treatment from a facility that contributes to reducing the likelihood of contracting a serious disease during the procedure or during follow-up treatment in the country (Smith and Forgione, 2008).

4) Physician Training

The board certified and internationally trained physicians who are able to speak in English typically appeal to several international patients. Bumrungrad International Hospital, which is the top facility for global medical tourists, advertises that over 200 of its doctors are board certified in the United States. These are the important aspects of the medical doctors that contribute to the choice of facility to several medical tourists around the globe (Smith and Forgione, 2008).

Previous Studies on Customer Preferences in Choosing a Destination for Medical Tourism

A research study was made by Deloitte Development LLC (2008) about the growth of medical tourism and the essential factors which make it engaging to patients. The report stated that there were 750,000 Americans traveled outbound for medical care in 2007. Deloitte Development LLC (2008) estimates that the number of medical travelers searching for health care to foreign countries will grow to over 14 million patients in 2017. The rising cost of health care treatments in the United States motivates patients to offshore their medical treatment needs. According to the study, countries such as India, Thailand and Singapore provide health care treatments which costs as little as 10% to the comparable treatment done in a hospital in the United States. The price is remarkably lower for a variety of services, and often includes airfare and a stay in a resort hotel (Deloitte Development LLC, 2008). The result of the study showed that 39% of the respondents said that they would consider having an elective procedure overseas if they could save 50% or more and be guaranteed that the quality was equal or better than in the United States. The following table 2.6 depicts the percentage of various categories of consumers that are interested in outbound medical tourism. The study mentioned that Generation Y respondents are likely to avail of medical travel than respondents from Generation X, Baby Boomers and Senior Citizens. In addition, male medical tourists are likely to consider medical treatment to foreign countries than female medical travelers.

Table 2.6: Consumer Interest in Outbound Medical Tourism

Category	Percentage
Gen Y	51.1%
Gen X	41.9%
Boomers	36.7%
Seniors	29.1%
Male	44.5%
Female	33.3%
Hispanic	51.4%
Non-Hispanic	36.9%
Caucasian	37.9%
African American	36.9%
Asian	56.8%
Other	43.7%
Health Status – Top 20%	40.1%
Health Status – Bottom 50%	33.6%
Commercial Insurance	40.6%
Medicare	28.0%
Medicaid	29.9%
Other Insurance	35.4%

Source: Deloitte Development LLC (2008). Medical Tourism: Consumers in Search of Value

Deloitte has mentioned in the study that safety and quality is the primary issue for consumers considering medical treatment abroad. According to Deloitte Development LLC (2008), outbound medical tourism sponsors are responding to consumer's safety and quality expectations, and typically tout these program attributes:

- U.S. trained physicians and care teams
- Use of clinical information technologies
- Use of evidence-based clinical guidelines
- Affiliations with reputable, top-tier U.S. provider organizations
- Coordination of pre- and post-discharge care

- Provision for adverse events requiring services unavailable in the facility
- Certification for safety and quality by the Joint Commission International or others.

Smith and Forgione (2008) also studied about the rising trend of medical tourism and the different factors affecting decisions of patients to seek medical services globally. The study shows an adapted conceptual framework that discussed about the two-stage model in choosing a foreign country and vendor for the outsourcing of health care treatments. Smith and Forgione mentioned in their study that there are 3 factors affecting patients' choice of international country location, which are: (1) Economic Conditions, (2) Political Climate and (3) Regulatory Standards. In addition, there are 4 main factors that impact the patients' choice of international hospital which are: (1) Costs, (2) Hospital Accreditation, (3) Quality of Care, and (4) Physician Training.

A similar study was done by the graduate students of Naresuan University Thailand in 2009. Their study aimed to identify the different factors that attract international medical travelers and their preferences in coming to receive medical treatment in Bumrungrad International Hospital, Bangkok Hospital and Bangkok Nursing Hospital in Thailand. The study has used the 4P's framework developed by Kotler (1967). The results of the study indicated that the quality of care, cheaper costs and internationally trained physicians are the main aspects that affect the decision of patients to choose Thailand for health care services.

B. Specific Theories

Demographic Factors

The perception of customers or patients may vary depending on one's demographic background. Demographic characteristics such as age, income, and gender are most often presumed to influence on one's level of product knowledge, shopping experience, and overall buying behavior in the most service or product categories, and are frequently used as the basis for market segmentation (Estelami, 1998).

- a. Gender – Research and writing related to sex and gender have been expanding at a rapid pace since the late 1960's (Unger, 2001). Consumer perceptions are affected by materialism, gender and nationality (Kamineni, 2005).
- b. Age – Gender and age significantly affect the perceived image of tourist destinations (Baloglu & McCleary, 1999).
- c. Country of Residence – A study by Kozak (2002) captured a direct approach in examining differences in tourist motivations between nationalities and between destinations. An exploratory approach to the study of the value of nationality with regards to tourist behavior was taken by Pizam and Sussman (1995).

- d. Occupation – The different social classes demonstrate distinct preferences for a variety of products including leisure activities (Kotler and Armstrong, 1995). Occupation is one indicator of a person’s socioeconomic status.
- e. Income – Travelers at lower income levels might be expected to engage in more searches to offset their relatively greater perceived risk (Van Raaij, 1986). Higher income levels, on the other hand, have been found to be positively associated with greater levels of information search including the use of destination specific resources (Gitelson and Crompton, 1983).
- f. Frequency of Visit – The frequency of visit as consumer behavior is an important determinant of choice decisions (Bell and Lattin, 1998).

The Marketing Mix or Four P’s Framework

The model of "Marketing Mix" was created in the early 1950’s by Neil Borden in his American Marketing Association presidential address. Though, this was actually a reformulation of an earlier idea by his associate, James Culliton in 1948. The term became famous in the article written by Niel Borden called, “The Concept of the Marketing Mix,” as explained on the site netmba.com. The marketing mix model and theory of parameters was introduced by Rasmussen in 1955, developed by McCarthy in 1960, and further expanded by Kotler in 1967 (Gulid, 2011). The marketing mix model or commonly known as the 4P’s consists of Price, Product, Place and Promotion. The Marketing mix is possibly

the most famous marketing model. The following are descriptions of the 4 elements of the marketing mix.

1) Product

A product refers to any tangible object or intangible service that is offered to a customer. The product referred in this study defines the physical attributes of a medical facility in Thailand. Moreover, the product referred in this study indicates the board certified physicians, hospital's accreditation, advanced medical equipment, excellent range of medical treatments, as well as the fast and efficient health care services. Determining the various aspect of a product is important in order to maintain differentiation from competitors.

2) Price

The price is the amount what the customer pays for the product. According to an article in The Times 100 (n.d), there are 4 popular pricing strategies which are the following:

- Cost-plus pricing. A common way to make pricing decisions is to calculate how much it costs to do a particular job or activity, and then add on a given percentage as a return for the job or activity. This is sometimes known as mark-up.
- Hour-based pricing. Many small businesses are able to work out what their typical costs are for every hour of work they do, e.g. for gardening,

sign writing, photography, etc. The business owner is then able to charge a standard rate per hour.

- Penetration pricing. When a firm brings out a new product into a new or existing market, it may feel that it needs to make a lot of sales very quickly in order to establish itself and to make it possible to produce larger quantities. It may therefore start off by offering the product at quite a low price. When market penetration has been achieved, prices can be raised.
- Skimming. When you bring out a new product, you may be able to start off by charging quite a high price. Some customers may want to be the first to buy your product because of the prestige of being seen with it, or because they want to be associated with your product before anyone else.

Pricing strategies is an integral part of marketing mix. The price of a product or service must reflect the customer's willingness to pay. In medical tourism industry, the price denotes the affordability of the various medical procedures in Thailand compared to a patient's home country. This includes the cost of an added benefit of a holiday tour in an exotic destination after a medical treatment.

3) Place

The place is also referred to as distribution wherein the product or service is readily available to the customer. In medical tourism industry in Thailand, place includes the accessibility of the facility to foreign patients. It also indicates the

hospital location environment as well as its proximity to tourist attractions and shopping centers.

4) Promotion

A promotion is a method used to communicate the features and benefit of a product or service to the customers. A marketer may use various strategies in order to increase product or service awareness to the selected target markets. Based from an article in The Times 100 (n.d), the key processes involved in promotion include the following:

- Branding - creating a distinctive image and character to an organization and or its products and services.
- Advertising - to inform and persuade the public.
- Packaging - presenting the product in a desirable and appropriate way.
- Public relations activities and other forms of publicity
- Sponsorship
- Special Promotions - e.g. buy one get one free.

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

Consumer / Customer Satisfaction

Customer satisfaction is directly related to customer retention since satisfaction is the major antecedent of customer loyalty (Oliver, 1997). Excellence in quality is a means for customer satisfaction. In order for consumers of medical tourism in Thailand to experience customer satisfaction, the product that they should receive must exceed their expectations. Patients typically define satisfaction when the hospital provides high quality of services that are comparable in the United States or in western countries. Moreover, medical travelers search for easy accessibility in terms of hospital location and flight arrangements. Safety and inexpensive health care cost are also essential aspect of the overall customer satisfaction of international medical tourists.

C. Chapter Summary

Healthcare service is one of the most “rapidly growing markets in the world” (Cortez, 2007). Connell (2006) defined medical tourism as a niche industry “where people often travel long distances to foreign countries to obtain medical, dental and surgical care while simultaneously being holidaymakers, in a more conventional sense. Because of the long waiting and expensive medical care in several developed countries, people seek for faster and cheaper medical services in other countries. Some countries such as India, Brazil, the Philippines, and Thailand are actively capitalizing on the trend, offering health care / resort packages that promise the best of medicine with the attractions of tourism, all for a fraction of what equivalent health services would be in the United States

(Wolfe, 2006). A heart surgery which costs more than \$50,000 in the United States can be purchased for \$20,000 in Singapore, for \$12,000 in Thailand and between \$3,000 and \$10,000 in India (Fred Hansen, 2008). Therefore, Thailand's biggest competitor is India. India offers the cheapest medical treatment cost in Asia, while Singapore on the other hand focuses on modern technology rather than price.

One of the most important barriers of the medical tourism trend is quality of care. The number of web sites dedicated to medical tourism has burgeoned in recent years. Today, information regarding quality of care of medical tourism abroad as well as details on choices of health care destinations around the world is readily available online. Therefore, the safety and quality of care available in many offshore settings is no longer an issue (Deloitte Development LLC, 2008). JCI is one of the many organizations that are accrediting hospital facilities to be of a high quality standard. Technological advances in health care, coupled with advances in Internet marketing strategies, will continue to fuel the interest in medical tourism among patients (Smith and Forgione, 2008).

In 2007, the world market for medical tourism was estimated at \$60 billion (Deloitte Center for Health Care Solutions, 2008). By 2017, as many as 23 million Americans could be traveling internationally and spending almost \$79 billion per year for medical/surgical care, according to a 2008 report from the Deloitte Center for Health Solutions. Investing in the medical industry is a way to increase GDP, upgrade services, generate foreign exchange and create a more favorable balance-of-trade situation, and boost tourism (Wolfe, 2006).

This chapter began to talk about the history of medical tourism followed by an overview on the growing medical tourism industry in various countries worldwide. Previous studies regarding the top reasons of the popularity of medical tourism phenomenon has been discussed. The challenges and risks of medical tourism have also been discussed in this chapter. Furthermore, it includes reports about the growth of the medical tourism industry in Thailand along with the list of the top JCI hospital providers in Thailand. Similar studies and theories about customer preferences in choosing a destination for medical tourism have also been explored in this chapter. Customer preference and choice depends on one's demographic background. Based from Estelami (1998), demographic characteristics are the basis for market segmentation. According to Smith and Forgione (2008), there are four main factors that impact the choice of an international health care facility namely: (1) Costs, (2) Hospital Accreditation, (3) Quality of Care, and (4) Physician Training. These key elements evolve into two vital factors that play a crucial role in choosing an international medical facility, which are the "Price" and the "Product". McKinsey & Company Report (2008) stated that 40% of medical travelers seek for most advanced technology, 32% of medical travelers seek for better quality for medically necessary procedures, 15% of medical travelers seek for quicker access for medical treatments, and 9% of medical travelers seek for lower cost. In this study, the "Product" is the main factor that drives patients to travel abroad for medical purposes. According to Deloitte Development (2008), the primary factor that motivates patients to offshore health care services is price. The following chapters will identify the influencing factors such as "Price" or "Product" that drives medical tourists to choose Thailand hospitals for medical care.

CHAPTER III

RESEARCH METHODOLOGY

The primary purpose of this chapter is to explain the procedures conducted in determining the essential factors that motives patients to choose hospitals in Thailand as their medical tourism destination. A descriptive research has been performed to describe the relationship between factors involved and to explain why some factors are considered more important than the others.

This chapter covers the research framework of the study, research questions and hypotheses, relevant data descriptions, data collection methods, limitations and a chapter summary.

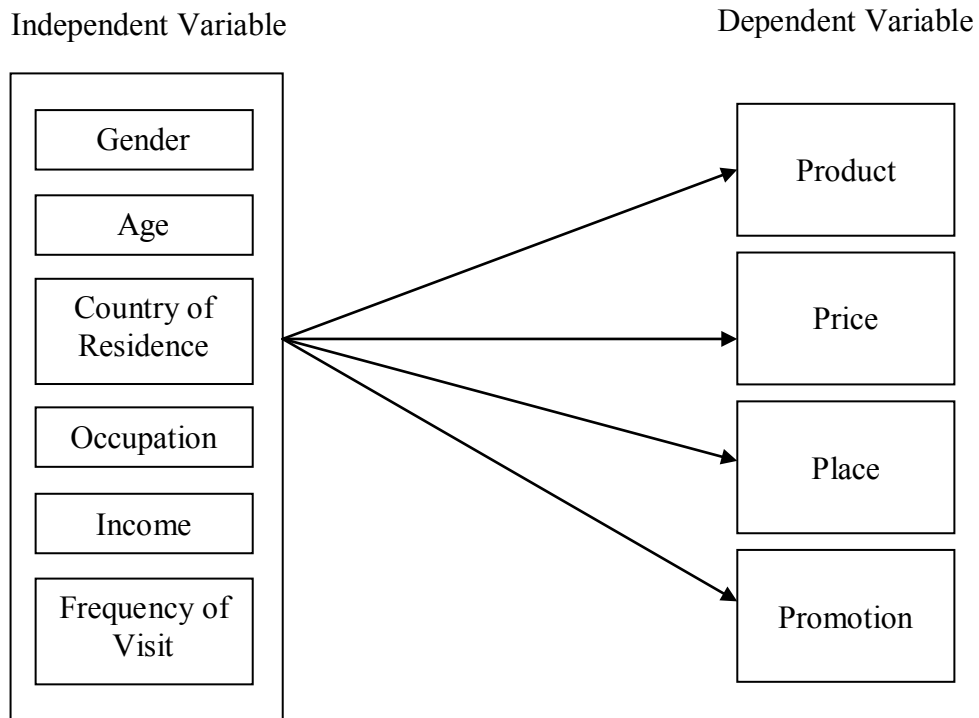
D. Research Framework

This study used quantitative marketing research techniques to thoroughly explore the factors that lead medical tourist to choose hospitals in Thailand for their medical needs. Quantitative research methods were originally developed in the natural sciences to study natural phenomena (Hohmann, 2006). To develop mathematical models, theories and/or hypotheses pertaining to the phenomena is the main objective of quantitative research. The quantitative methods can be used to validate hypotheses of a research study. In addition, the quantitative research model uses questionnaires and scales. According to Gall, Borg and Gall (1996) “the purpose of a survey is to use questionnaires or interviews to collect data

from participants in a sample about their characteristics, experiences, and opinions in order to generalize the findings to a population that the sample is intended to represent” (p. 289). Questionnaires provide the opportunity to gather large amounts of data from many respondents (Gall, Borg and Gall, 1996; Krathwohl, 1998).

In this study, an investigation and analysis of the motivational factors of patients in choosing a facility for medical treatment were identified through the use of survey questionnaires. A hypothesis were developed and analyzed through the use of Statistical Package for the Social Sciences (SPSS). There were two sets of factors: (1) Independent Variables and (2) Dependent Variables. The Independent Variables consisted of the general information of the respondents, which included Gender, Age, Country of Residence, Occupation, Income, and Frequency of Visit. On the other hand, the Dependent Variables consisted of the four parts of the Marketing Mix, which are Product, Price, Place and Promotion. Since this study included more than one independent variable and more than one dependent variable, a multivariate technique were used to analyze the data. The statistical model used in this study was the multivariate analysis of variance (MANOVA) which analyzes the combine effects of independent variables over dependent variables to determine if there were any significant relationships between the factors analyzed. Multivariate analysis of variance (MANOVA) is therefore simply an ANOVA with several dependent variables. The following figure shows the relationship between Independent Variables and Dependent Variables.

Figure 3.1: Conceptual Framework



Source: Developed by Researcher

Independent Variables

The independent variables used in this study were the demographic aspects of the respondents. These elements were divided into 6 different classifications in order for the researcher to identify clearly the key factors that influence the respondents in choosing hospitals in Thailand for their medical needs. Listed below were the independent variables as indicated on the survey questionnaire:

- g. Gender – The respondents were classified as Male or Female. In this study, we adapted the use of the term gender as it refers to the socially determined psychological and behavioral characteristics that are typical of males and females from the book “Attitudes and Opinions” by Stuart Oskamp and P.

Wesley Schultz (2005). The Nominal Scale was used in the classification of Gender.

- h. Age – The age of the respondents were divided into seven ranges namely: (1) Age under 15, (2) Age 15 - 24, (3) Age 25 - 34, (4) Age 35 - 44, (5) Age 45 - 54, (6) Age 55 - 64, and lastly (7) Age 65 and over. The measurement level used in the classification of Age was the Ordinal Scale.
- i. Country of Residence – The respondents were categorized into seven classifications based on their country of residence. This grouping was adapted from the international tourists’ arrival data collected by the Police Department, Immigration Bureau of Thailand. The Nominal Scale was used in the classification of Country of Residence.

Table 3.1: Country of Residence

Classifications	Country of Residence
East Asia	Brunei
	Cambodia
	Indonesia
	Laos
	Malaysia
	Myanmar
	Philippines
	Singapore
	Vietnam
	China
	Hong Kong
	Japan
	Korea
	Taiwan

(continued)

Classifications	Country of Residence
Europe	Austria
	Belgium
	Denmark
	Finland
	France
	Germany
	Ireland
	Italy
	Netherlands
	Norway
	Russia
	Spain
	Sweden
Switzerland	
United Kingdom	
Eastern Europe	
The Americas	Argentina
	Brazil
	Canada
	United States of America
South Asia	Bangladesh
	India
	Nepal
	Pakistan
	Sri Lanka
Oceania	Australia
	New Zealand
Middle East	Egypt
	Israel
	Kuwait
	Saudi Arabia
	United Arab Emirates
Africa	South Africa

Source: Police Department, Immigration Bureau of Thailand

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

and (10) Others. The list of occupations was also adapted from the data released by the Police Department, Immigration Bureau of Thailand, which can be retrieved from the Tourism Authority of Thailand (TAT) website. The measurement level used in the classification of Occupation was the Nominal Scale.

- k. Income – The social class typically is a multivariate construct determined by things such as occupation, sources of income, accumulated wealth, highest level of income achieved, place of residence, and family history, some have argued that income alone suffices (Boone and Kurtz, 1995). The respondents had 6 categories to choose from namely: (1) Less than 2,000 USD per month, (2) 2,001 – 4,000 USD per month, (3) 4,001 – 6,000 USD per month, (4) 6,001 – 8,000 USD per month, (5) 8,001 – 10,000 USD per month, and (6) 10,001 and over USD per month. The Ordinal Scale was used in the classification of Income.
- l. Frequency of Visit – The respondents were classified into two categories which are: (1) First Visit and (2) Revisit. Foreign medical tourists who visited Thailand for the first time was categorized as “First Visit”. On the other hand, respondents were categorized as “Revisit” if the foreign medical tourists have returned in Thailand for another medical visit. This genre of medical patients is typically called a repeat visitor of the country. The measurement level used in the classification of Frequency of Visit was the Nominal Scale.

Dependent Variables

The dependent variables used in this study consisted of the 4P's of the marketing mix model which are: (1) Product, (2) Price, (3) Place and (4) Promotion. These dependent variables refer to the influencing factors in the decision of the respondents to avail medical treatment in Bumrungrad International Hospital, Samitivej Sukhumvit Hospital, and Bangkok Hospital Medical Center. The questionnaire used a 5-point Likert Scale to measure the importance or preference of each influencing factor of the respondents. Listed below were the dependent variables used in this study.

- a. Product – In this study, the product referred to the hospital's international accreditation, top-notch and certified doctors, high technology medical equipments, fast service and outstanding patient care, as well as the hospital's range of excellent medical treatments. The measurement level used was the Interval Scale.
- b. Place – In this study, the place referred to the hospital's location near tourist attraction and shopping centers, accessibility to local transportation, situated in a famous city, sited in a safe and secured environment, and set in a quiet location. The measurement level used was the Interval Scale.
- c. Price – In this study, the price referred to the affordable medical treatment cost, cheaper doctor fees, value for money, cost of medical treatment plus travel is cheaper than in home country, and affordable travel tours after medical treatment. The measurement level used was the Interval Scale.

- d. Promotion – In this study, the promotion referred to the extra services such as airport pickups and visa extensions, special rates for hotel accommodation, insurance plan coverage and claims, special price on various medical treatment packages, and special rates for travel tours after medical treatment. The measurement level used was the Interval Scale.

E. Research Question and Hypotheses

Research Question: What are the influencing factors that lead medical tourists to choose Thailand hospitals as medical tourism destination?

The following hypotheses were addressed in this study.

H₀₁: The demographic aspects of the respondents such as gender, age, country of residence, occupation, income, and frequency of visit have an effect on the marketing mix factors (4P's) that influence customer preference in choosing hospitals in Thailand for medical treatment.

H₀₂: The demographic aspects of the respondents such as gender, age, country of residence, occupation, income, and frequency of visit have combined effects on the marketing mix factors (4P's) that influence customer preference in choosing hospitals in Thailand for medical treatment.

F. Relevant Data Description

Target Population

A population is a complete collection of data that includes all subjects of interests in which properties that are relevant to the research study are studied and analyzed. According to Patients Beyond Borders (2009), Thailand welcomed an estimated 1.2 million patients from more than 190 countries for a wide variety of medical procedures in 2008. The target population of this study was the international medical tourists travelling to Thailand seeking medical services in Bumrungrad International Hospital, Samitivej Sukhumvit Hospital, and Bangkok Hospital Medical Center. This study excluded foreign respondents who already live in Thailand.

Sample and Sample Size

A sample is a part of the population of interest, a sub-collection selected from a population. Since the exact number of the total population is unknown, samples of this study were selected through the convenience sampling method. According to Roberts-Lombard (2002:109) convenience sampling is a non-probability sampling technique where subjects are selected because of their convenient accessibility and accessibility to the researcher. Under convenience sampling, the sample collection depends on the researcher's personal judgment. The sample size should depend on the target population size and the significance of the study. However, there are general rules, thirty cases are sufficient for studies in which statistical analysis is to be done (Cooper and Schindler, 2006). Nevertheless, the researcher distributed one hundred

and four questionnaires. The questionnaires were distributed to international tourists who were traveling to Thailand for medical purposes to receive medical treatments at Bumrungrad International Hospital, Samitivej Sukhumvit Hospital, and Bangkok Hospital Medical Center. The summary of the sample collected to each hospitals are given in the following table.

Table 3.2: Sample Collected

No.	Hospitals	Number of Respondents
1	Bumrungrad International Hospital	42
2	Samitivej Sukhumvit Hospital	34
3	Bangkok Hospital Medical Center	28
Total:		104

G. Data Collection Methods

Research Instrument

The research instrument used by the researcher was the questionnaire. The data for this research study was gathered through self-administered questionnaires. Self-administered questionnaires are research questionnaires personally delivered to the respondent by the interviewer but completed by a respondent with no interviewer involvement (Chigamba and Fatoki, 2011). A questionnaire was developed to evaluate the importance of each influencing factor to the respondents. A screening question was asked to the respondents orally if they have come to Thailand for medical treatment purposes. If so, these patients were requested to answer the survey.

The questionnaire was only given to medical tourists that choose Thailand for medical purposes. The questionnaire consisted of two sections. The first part of the questionnaire was the demographics of the respondents. This was adapted from the data gathered by the Police Department, Immigration Bureau of Thailand. The second part of the questionnaire was the Marketing Mix or 4P's, which includes the Product, Price, Place and Promotion. The Marketing Mix framework was developed by Kotler (1967) and it is used in this study to assess the four major factors that motivates patients in choosing hospitals in Thailand for their medical treatment needs. This was adapted from three different sources namely: (1) An independent study on customers' preference of Bumrungrad International Hospital, Bangkok Hospital, and Bangkok Nursing Hospital by Puklum, Thamtrachai and Patsalid (2009), (2) A study on medical tourism by Deloitte Center for Health Solutions (2008), and (3) A study on medical tourism decision model for global outsourcing of health care by Smith and Forgione (2008). The questionnaire distributed to the respondents was carried out using the 5-Point Likert Scale. The identified rate of scale shows the importance of each influencing factor as viewed by the respondents.

Table 3.3: Identified Rate of Scale

5	Very Important
4	Important
3	Moderately Important
2	Of Little Importance
1	Unimportant

Source: Del Siegle, Ph.D. Retrieved from <http://www.gifted.uconn.edu/siegle/research/instrument%20Reliability%20and%20Validity/Likert.html>

Data Collection and Gathering Procedure

The primary and secondary data was used by the researcher in this study. The researcher used questionnaire to collect the primary data from the international medical tourists that received medical treatment at Bumrungrad International Hospital, Samitivej Sukhumvit Hospital, and Bangkok Hospital Medical Center. On the other hand, the secondary data used in this study by the researcher includes textbooks, articles and journals, dictionary and websites.

The questionnaires were distributed over a five day period during September 5 – 9, 2011 at Bumrungrad International Hospital, Samitivej Sukhumvit Hospital, and Bangkok Hospital Medical Center. The distribution of the questionnaires was not allowed to be conducted inside the hospitals. Therefore, this research survey was conducted outside premises of the hospitals. The respondents were given approximately 15 minutes to complete the questionnaire. There were a total of 104 completed questionnaires were collected by means of convenient sampling.

Pilot Testing

A pilot study was conducted by the researcher to examine the validity and reliability of the instrument. A pilot survey is a preliminary research conducted before a complete survey to test the efficiency of the research methodology. The researcher conducted the pilot study with 18 conveniently selected respondents at the 3 hospitals. The respondents were selected on the basis that they travel to Thailand for medical

purposes. Reliability is the extent to which a variable or set of variables is consistent in what it is intended to measure (Hair, Back, Babin, Anderson, & Tatham 2006). The reliability of the scales was tested by calculating the coefficient alphas (Cronbach's alphas). Cooper and Schindler (2003) mentioned that a score of 0.7 is the acceptable reliability coefficient. The result of the reliability test is presented in the following table. The below table indicates the cronbach's alpha is above the acceptable reliability coefficient.

Table 3.4: Reliability Testing: Cronbach's Alpha

Factors	Cronbach's Alpha
International Accreditation	0.8427
Professional and Specialized Services	0.8522
Equipment	0.8437
Patient Care	0.8434
Facility	0.8429
Tourist Destination	0.8407
Local Transportation	0.8579
Famous City	0.8405
Safe City	0.8553
Quiet Location	0.8424
Affordable Medical Costs	0.8582
Cheaper doctor and administrative fees	0.8615
Value for Money	0.8526
Cheaper Cost than Home Country	0.8518
Travel Tours	0.8299
Extra Services	0.8325
Hotel Accommodation	0.8376
Insurance Coverage and Claims	0.8495
Package promotions on medical treatments	0.8455
Special Rate for Tours	0.8369

Statistical Treatment of Data

This research study used the Statistical Program for the Social Science (SPSS) tool Version 17.0 for Windows in analyzing the data. To know distinctions between independent and dependent variables in the research, dependence techniques are employed. Since this research study comprises of several dependent variables, the Multivariate Analysis of Variance is the method that best fit the model of this research study for analyzing the data. Confidence intervals for statistical significance were set at the .05 level *a priori*. Descriptive statistics generated by SPSS were used to describe the population of the study by gender, age, country of residence, occupation, income, and frequency of visit. Descriptive statistics such as frequencies, means and standard deviations were used in relation to the research question which is to identify the influencing factors that leads medical tourists to choose Thailand hospitals as their medical tourism destination. To test the hypotheses, MANOVA was conducted simultaneously on the six independent variables. One-way and two-way tests were done to assess any combine effects from the independent variables. The following were the statistical tools used in analyzing and interpreting the data collected. The usage and meaning of each tool was taken from the book entitled Essentials of Marketing Research by Zikmund and Babin (2009), Business Research Methods (2011) by Zikmund and SPSS 17.0 for Windows by Coakes, Steed and Ong (2010).

- Frequency Distribution Distribution is a set of data organized by summarizing the number of times a particular value of a variable occurs.

- Standard Deviation is a quantitative index of a distribution's spread, or variability; the square root of the variance for a distribution.
- Mean is a measure of central tendency; the arithmetic average.
- Multivariate Analysis of Variance (MANOVA) is an extension of univariate analysis of variance (ANOVA) to the involvement of multiple dependent variables. MANOVA is a multivariate technique that predicts multiple continuous dependent variables with multiple independent variables. The hypotheses tested with MANOVA are similar to those tested with ANOVA except that sets of means replace the individual means specified in ANOVA. The first layer of testing involves the multivariate F-test, which is based on a statistic called Wilke's Lambda. This test examines whether or not an independent variable explains significant variation among the dependent variables within the model. If this test is significant, then the F-test results from individual univariate regression models nested within the MANOVA model are interpreted. The rest follows the interpretation for ANOVA.

H. Limitations

This research study was conducted by means of retrieving completed questionnaires from international medical patients of Bumrungrad International Hospital, Samitivej Sukhumvit Hospital, and Bangkok Hospital Medical Center. These aforementioned hospitals value their patients' privacy. Hence, research surveys are not allowed to be conducted inside the hospitals. Furthermore, due to time limitation, the respondents were only restricted to international medical patients that have adequate English

proficiency that allowed them to answer the questionnaire with clear understanding. There were only 104 completed questionnaires were collected. A more sufficient outcome should have been explored from this study if more respondents were allowed to answer the questionnaire.

I. Chapter Summary

The main purpose of this research study is to identify the influencing factors that lead medical tourists to choose Thailand hospitals as their medical tourism destination. This study used a quantitative research method and therefore have used survey questionnaire in order to assess the motivational factors that lead customer preference to choose hospitals in Thailand for health care services. The factors used in this study were divided into two categories of variables which are the independent and dependent variables. The independent variables comprise of the demographic factors of the respondents and were indicated in the first part of the questionnaire. On the other hand, the dependent variables include the 4P's of the marketing mix, which are the Product, Price, Place and Promotion. These factors were specified in the second part of the questionnaire. The population scope of the research study was the international tourists receiving medical treatment in Thailand. The questionnaires were distributed at the premises of Bumrungrad International Hospital, Samitivej Sukhumvit Hospital, and Bangkok Hospital Medical Center. There were 104 completed questionnaires were collected by the researcher. Consequently, the data collected was analyzed and interpreted by the use of SPSS tool. The frequency tables, weighted means, standard deviations and MANOVA were the statistical tools used to analyze the data collected and to assess effects and relations between variables.

CHAPTER IV

RESEARCH FINDINGS

This chapter describes the results obtained from the survey of international medical tourists that chose hospitals in Thailand for medical check-up and treatments. This chapter is presented into four main sections. The first section includes the descriptions of the demographic factors of the respondents. Descriptive statistics generated by SPSS were used in order to describe the population of the study by the respondents' general information. Frequencies and percentages were used to describe the respondents based on characteristics such as gender, age, country of residence, occupation, income and frequency of visit. Section two defines the answers to the research question. The descriptive statistics such as frequencies, means, and standard deviations that were used to determine the ranking of the influencing factors that lead medical tourist to choose hospitals in Thailand for medical treatment were discussed in this section. The third section addresses the hypotheses of the study. To test the hypotheses one and two, a multivariate analysis of variance (MANOVA) was used in order to determine if there are any effects on the perceived importance of the influencing factors in relation to the six independent variables. The last section of this chapter concludes a discussion of the summary of findings.

A. Demographic Factors

The demographic information was included in the first section of the questionnaire. The intended respondents, international medical tourists, were

requested to identify their demographic categories which included: (1) Gender, (2) Age, (3) Country of Residence, (4) Occupation, (5) Income, and (6) Frequency of Visit. In order to understand the sample population based on demographics, Tables 4.1 through 4.6 summarizes these data by the respondents' general information.

Respondents ($N = 104$) stated their gender and Table 4.1 illustrates this data. A majority of the respondents, 59 (56.7%) respondents were male, while 45 (43.3%) of the respondents were female.

Table 4.1: Descriptive Statistics of Gender

<i>Gender</i>	Frequency	Percent
Male	59	56.7
Female	45	43.3
TOTAL	104	100.0

The following Table 4.2 depicts the age of respondents of the survey. There was none of the 104 respondents came from the 0 - 15 age bracket. There were 6 (5.8%) respondents came from the age bracket of 15 – 24, 10 (9.6%) respondents came from the 25 - 34 age bracket, 20 (19.2%) respondents came from 35 – 44 age bracket, 22 (21.2%) respondents came from 45 - 54 age brackets, 18 (17.3%) respondents came from 55 - 64 age bracket. The largest number of respondents came from the age bracket from 65 and older with 28 (26.9%) respondents.

Table 4.2: Descriptive Statistics of Age

<i>Age</i>	Frequency	Percent
Under 15 years old	0	0.0
15 – 24 years old	6	5.8
25 – 34 years old	10	9.6
35 – 44 years old	20	19.2
45 – 54 years old	22	21.2
55 – 64 years old	18	17.3
65 years old and over	28	26.9
TOTAL	104	100.0

Table 4.3 shows a snapshot of the country of residence or nationality of the respondents. Out of the 104 respondents, none came from Africa. The highest number of respondents came from East Asia with a total number of 37 (35.6%), then Europe with 35 respondents (33.7%), then South Asia with 16 respondents (15.4%) and then the Middle East with 10 respondents (9.6%). There were 3 (2.9%) respondents came from both The Americas and the Oceania.

Table 4.3: Descriptive Statistics of Country of Residence

<i>Country of Residence</i>	Frequency	Percent
East Asia	37	35.6
Europe	35	33.7
The Americas	3	2.9
South Asia	16	15.4
Oceania	3	2.9
Middle East	10	9.6
Africa	0	0.0
TOTAL	104	100.0

Table 4.4 shows the occupation of the respondents. The largest respondents answered they were retired with a total of 32 (30.8%) respondents. This is followed by the second largest respondents, which are professionals with 28 (26.9%) respondents. There were 17 (16.3%) respondents that have administrative jobs while 13 (12.5%) respondents are in the commercial industry. There were 5 (4.8%) respondents of both laborers and students while 4 (3.8%) respondents said they are housewives. There was none of the respondents say they were from the agricultural and government sector. Also, none of the respondents say that their occupation is not in the list.

Table 4.4: Descriptive Statistics of Occupation

<i>Occupation</i>	Frequency	Percent
Professionals	28	26.9
Administrative	17	16.3
Commercial	13	12.5
Laborers	5	4.8
Agricultural	0	0.0
Government	0	0.0
Housewife	4	3.8
Students	5	4.8
Retired	32	30.8
Others	0	0.0
TOTAL	104	100.0

Table 4.5 illustrates the respondents' income in US dollars per month. There were 46 (44.2%) respondents said that their income is less than 2,000 USD per

month. A total of 18 (17.3%) respondents stated that they are earning more than 2,000 USD but less than 4,000 USD per month, 17 (16.3%) respondents said that their salary is more than 4,000 USD but less than 6,000 USD per month, and 4 (3.8%) respondents stated that they are earning more than 6,000 USD but less than 8,000 USD per month. There was none of the respondents answered that their income is more than 8,000 USD but less than 10,000 USD per month. Lastly, there were 19 (18.3%) respondents stated they are earning over 10,000 USD per month.

Table 4.5: Descriptive Statistics of Income (Per Month)

<i>Income</i>	Frequency	Percent
Less than 2,000 USD	46	44.2
2,001 – 4,000 USD	18	17.3
4,001 – 6,000 USD	17	16.3
6,001 – 8,000 USD	4	3.8
8,001 – 10,000 USD	0	0.0
10,001 and over USD	19	18.3
TOTAL	104	100.0

The frequency of visit of international medical tourists to Thailand is shown in Table 4.6 below. There were 62 respondents (59.6%) disclosed that it is their first time visiting the country for medical treatment purposes while 42 respondents (40.4%) declared that they have been to Thailand before for health care services, therefore is considered as a revisit.

Table 4.6: Descriptive Statistics of Frequency of Visit

<i>Frequency of Visit</i>	Frequency	Percent
First Visit	62	59.6%
Revisit	42	40.4%
TOTAL	104	100.0

B. Findings Related to the Research Question

Research Question: What are the essential factors that lead to customers' or patients' preference of hospitals in Thailand as a medical tourism destination?

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

The respondents ($N = 104$) ranked providing professional and certified doctors (Mean = 4.69, Standard Deviation = 0.464) as the top most important factor in choosing hospitals in Thailand. The hospitals providing fast service and outstanding patient care (Mean = 4.54, Standard Deviation = 0.723) ranked second in importance, the hospitals with superb facilities and excellent medical treatments (Mean = 4.46, Standard Deviation = 0.800) ranked the third in importance, and the hospitals that provides high technology medical equipments (Mean = 4.41, Standard Deviation = 0.719) ranked the fourth in importance.

These four top most important factors come from the category of Product. This means that respondents value the product they are availing more than the other factors in the three categories of price, place and promotion. The respondents ranked the hospitals that accepts insurance plan coverage and claims (Mean = 4.38, Standard Deviation = 0.792) ranked the fifth in importance. The hospitals that provide value for money was ranked by the respondents as sixth in importance (Mean = 4.35, Standard Deviation = 0.679), affordable medical treatment costs ranked seventh in importance (Mean = 4.33, Standard Deviation = 0.875), and hospitals with international accreditation ranked eighth in importance (Mean = 4.26, Standard Deviation = 0.903). The respondents ranked hospitals that have accessibility by local transportation as the ninth in importance (Mean = 4.16, Standard Deviation = 0.946), cheaper cost of medical treatment plus travel than at home country was ranked as the tenth in importance (Mean = 4.01, Standard Deviation = 0.970), hospitals that offer cheaper doctor and administrative fees ranked eleventh in importance (Mean = 3.96, Standard Deviation = 0.994), and hospitals that are situated in safe and secured location was ranked by the respondents as the twelfth in importance (Mean = 3.89, Standard Deviation = 1.238). The hospitals that provides promotion offer on various medical treatments was ranked as the thirteenth in importance by the respondents (Mean = 3.82, Standard Deviation = 1.164). The hospitals that are located in a quiet place that is conducive for recuperation was ranked as the fourteenth in importance (Mean = 3.69, Standard Deviation = 1.199). The hospitals that provides extra services such as airport pickup and visa services was ranked as the fifteenth in importance by the respondents (Mean = 3.58, Standard Deviation = 1.267). Special rates for hotel accommodation was the factor that

was ranked by the respondents as the sixteenth in importance (Mean = 3.42, Standard Deviation = 1.267) and the hospitals that are situated in famous city was ranked as the seventeenth in importance (Mean = 3.36, Standard Deviation = 1.299). The respondents ranked hospitals that are nearby to tourist attractions and shopping centers ranked as the eighteenth in importance (Mean = 3.27, Standard Deviation = 1.248). The hospitals that provides special rates for travel tours after medical treatment was ranked as the nineteenth in importance (Mean = 3.20, Standard Deviation = 1.270) and the last factor of importance to the respondents is that the hospitals offer affordable travel tours after medical treatment (Mean = 2.90, Standard Deviation = 1.369).

Table 4.7: Influencing Factors Ranked by Importance according to Respondents

	<i>N</i>	\bar{x}	<i>S.D.</i>	RANK
International accreditation	104	4.26	0.903	8
Professional and certified doctors	104	4.69	0.464	1
High technology medical equipments	104	4.41	0.719	4
Fast service and outstanding patient care	104	4.54	0.723	2
Superb facilities and excellent medical treatments	104	4.46	0.800	3
Nearby to tourist attractions	104	3.27	1.248	18
Accessibility by local transportation	104	4.16	0.946	9
Situated in famous city	104	3.36	1.299	17
Situated in safe and secured location	104	3.89	1.238	12
Located in a quiet place	104	3.69	1.199	14
Affordable medical treatment costs	104	4.33	0.875	7

(continued)

	<i>N</i>	\bar{x}	<i>S.D.</i>	RANK
Cheaper doctor and administrative fees	104	3.96	0.994	11
Value for money	104	4.35	0.679	6
Cheaper cost of medical treatment plus travel than at home country	104	4.01	0.970	10
Affordable travel tours after medical treatment	104	2.90	1.369	20
Extra services offered	104	3.58	1.267	15
Special rates for hotel accommodation	104	3.42	1.267	16
Accepts insurance plan coverage and claims	104	4.38	0.792	5
Promotion offer on various medical treatments	104	3.82	1.164	13
Special rates for travel tours after medical treatment	104	3.20	1.270	19

*Scale of 1 = Unimportant, 2 = Of Little Importance, 3 = Moderately Important, 4 = Important, and 5 = Very Important

C. Findings Related to the Hypotheses

The following hypotheses were addressed in this study.

H₀₁: The demographic aspects of the respondents such as gender, age, country of residence, occupation, income, and frequency of visit have an effect on the marketing mix factors (4P's) that influence customer preference in choosing hospitals in Thailand for medical treatment.

H₀₂: The demographic aspects of the respondents such as gender, age, country of residence, occupation, income, and frequency of visit have combined effects on the marketing mix factors (4P's) that influence customer preference in choosing hospitals in Thailand for medical treatment.

In order to test these two hypotheses, the multivariate analysis of variance (MANOVA) was used to analyze the data. Two layers of testing were done to determine any significant effect from one-way tests and any combined effects from two-way tests.

The first layer of testing which is called the multivariate F-test based on Wilke's Lambda (Zikmund et al., 2010) was conducted to reveal any effects in the two testing procedures, one-way and two-way tests. The one-way multivariate F-test revealed significant effects with Age & Influencing Factors (Significance = 0.045), Country of Residence & Influencing Factors (Significance = 0.002), and Income & Influencing Factors (Significance = 0.001). The two-way multivariate F-test also have showed combined significant effects with Age and Occupation & Influencing Factors (Significance = 0.017), Age and Income & Influencing Factors (Significance = 0.025), Age and Frequency of Visit & Influencing Factors (Significance = 0.006), and Occupation and Frequency of Visit & Influencing Factors (Significance = 0.020). Results of the first layer of testing or the multivariate F-test based on Wilkes' Lambda are shown on Table 4.8 below.

Table 4.8: Multivariate F-test

	<i>f</i>	<i>Sig.</i>
Gender	5.018	0.106
Age	2.279	0.045
Country of Residence	7.239	0.002
Occupation	1.710	0.112
Income	5.810	0.001
Frequency of Visit	6.512	0.076
Gender * Age	-	-
Gender * Country of Residence	-	-
Gender * Occupation	-	-
Age * Country of Residence	-	-
Age * Occupation	6.185	0.017
Country of Residence * Occupation	-	-
Gender * Income	-	-
Age * Income	14.732	0.025
Country of Residence * Income	-	-
Occupation * Income	-	-
Gender * Frequency of Visit	-	-
Age * Frequency of Visit	38.742	0.006
Occupation * Frequency of Visit	16.875	0.020

The second layer of testing involves the F-test results from individual univariate regression models nested within the MANOVA model. The results of one-way F-tests with Gender as the independent variable are shown on Table 4.9, with Country of Residence as the independent variable are shown on Table 4.10 and lastly, with Income as the independent variable are shown on Table 4.11. The results of two-way F-tests with Age and Frequency of Visit as the independent variables are shown on Table 4.12.

Table 4.9: One-way Univariate F-test - Gender

<i>Independent Variable</i>	<i>Dependent Variable</i>	<i>f</i>	<i>Sig.</i>
Gender	International accreditation	0.540	0.481
	Professional and certified doctors	1.125	0.316
	High technology medical equipments	1.459	0.258
	Fast service and outstanding patient care	2.571	0.143
	Superb facilities and excellent medical treatments	0.435	0.526
	Nearby to tourist attractions	0.659	0.438
	Accessibility by local transportation	0.000	1.000
	Situated in famous city	0.148	0.709
	Situated in safe and secured location	0.862	0.377
	Located in a quiet place	1.805	0.212
	Affordable medical treatment costs	0.000	1.000
	Cheaper doctor and administrative fees	1.350	0.275
	Value for money	1.929	0.198
	Cheaper cost of medical treatment plus travel than at home country	0.165	0.694
	Affordable travel tours after medical treatment	2.482	0.150
	Extra services offered	4.718	0.058
	Special rates for hotel accommodation	5.273	0.047
	Accepts insurance plan coverage and claims	3.375	0.099
	Promotion offer on various medical treatments	1.180	0.306
	Special rates for travel tours after medical treatment	4.500	0.063

Table 4.9 shows the results of the one-way univariate F-test revealing significant effects between the gender of respondents and the influencing factors affecting the preference of customers in choosing hospitals in Thailand. It can be inferred from the above table that the gender of the respondents have a significant effect of the one particular factor which is the hospitals offering special rates for hotel accommodation (Significance = 0.047).

Table 4.10: One-way Univariate F-test – Country of Residence

<i>Independent Variable</i>	<i>Dependent Variable</i>	<i>f</i>	<i>Sig.</i>
Country of Residence	International accreditation	3.960	0.047
	Professional and certified doctors	2.250	0.152
	High technology medical equipments	0.486	0.700
	Fast service and outstanding patient care	2.143	0.165
	Superb facilities and excellent medical treatments	0.581	0.642
	Nearby to tourist attractions	0.988	0.441
	Accessibility by local transportation	12.600	0.001
	Situated in famous city	1.780	0.221
	Situated in safe and secured location	1.021	0.428
	Located in a quiet place	0.433	0.734
	Affordable medical treatment costs	0.225	0.877
	Cheaper doctor and administrative fees	1.800	0.217
	Value for money	1.929	0.196
	Cheaper cost of medical treatment plus travel than at home country	0.549	0.661

(continued)

<i>Independent Variable</i>	<i>Dependent Variable</i>	<i>f</i>	<i>Sig.</i>
	Affordable travel tours after medical treatment	0.926	0.467
	Extra services offered	0.524	0.676
	Special rates for hotel accommodation	1.266	0.343
	Accepts insurance plan coverage and claims	0.500	0.692
	Promotion offer on various medical treatments	0.437	0.732
	Special rates for travel tours after medical treatment	3.938	0.048

Table 4.10 shows the results of the one-way univariate F-test revealing significant effects between the country of residence where respondents are from and three influencing factors which are hospitals that have international accreditation (Significance = 0.047), hospitals that have accessibility by local transportation (Significance = 0.001), and lastly, hospitals that offer special rates for travel tours after medical treatment (Significance = 0.048).

Table 4.11: One-way Univariate F-test – Income

<i>Independent Variable</i>	<i>Dependent Variable</i>	<i>f</i>	<i>Sig.</i>
Income	International accreditation	1.831	0.207
	Professional and certified doctors	0.303	0.869
	High technology medical equipments	0.549	0.705
	Fast service and outstanding patient care	1.298	0.341

(continued)

<i>Independent Variable</i>	<i>Dependent Variable</i>	<i>f</i>	<i>Sig.</i>
	Superb facilities and excellent medical treatments	0.778	0.566
	Nearby to tourist attractions	1.452	0.294
	Accessibility by local transportation	4.791	0.024
	Situated in famous city	0.636	0.650
	Situated in safe and secured location	0.880	0.513
	Located in a quiet place	0.292	0.876
	Affordable medical treatment costs	0.294	0.875
	Cheaper doctor and administrative fees	1.992	0.179
	Value for money	1.170	0.386
	Cheaper cost of medical treatment plus travel than at home country	0.282	0.882
	Affordable travel tours after medical treatment	0.726	0.596
	Extra services offered	0.219	0.921
	Special rates for hotel accommodation	0.719	0.600
	Accepts insurance plan coverage and claims	1.063	0.428
	Promotion offer on various medical treatments	0.817	0.546
	Special rates for travel tours after medical treatment	1.550	0.268

Table 4.11 shows the results of the one-way univariate F-test revealing significant effects between the income of the respondents and one particular influencing factor that leads medical tourists to choose hospitals in Thailand, which is the accessibility by local transportation (Significance = 0.024).

Table 4.12: Two-way Univariate F-test – Age * Frequency of Visit

<i>Independent Variable</i>	<i>Dependent Variable</i>	<i>f</i>	<i>Sig.</i>
Age *			
Frequency of Visit	International accreditation	0.000	1.000
	Professional and certified doctors	4.500	0.063
	High technology medical equipments	1.459	0.258
	Fast service and outstanding patient care	10.286	0.011
	Superb facilities and excellent medical treatments	1.742	0.219
	Nearby to tourist attractions	1.482	0.254
	Accessibility by local transportation	0.900	0.368
	Situated in famous city	1.335	0.278
	Situated in safe and secured location	0.383	0.551
	Located in a quiet place	0.289	0.604
	Affordable medical treatment costs	1.350	0.275
	Cheaper doctor and administrative fees	0.338	0.576
	Value for money	1.929	0.198
	Cheaper cost of medical treatment plus travel than at home country	0.659	0.438
	Affordable travel tours after medical treatment	0.397	0.544
	Extra services offered	3.277	0.104
	Special rates for hotel accommodation	0.211	0.657
	Accepts insurance plan coverage and claims	0.000	1.000
	Promotion offer on various medical treatments	0.524	0.487
	Special rates for travel tours after medical treatment	0.281	0.609

Table 4.12 shows the results of the two-way univariate F-test revealing significant combined effects between the age and the frequency of visit of the respondents and one primary influencing factor, which is hospitals that offer fast service and outstanding patient care (Significance = 0.011).

There are significant effects on the perceived importance of factors influencing customers' preference of choosing hospitals in Thailand as medical tourism destination with the demographics of the respondents such as age, country of residence, and income. Thus, research hypothesis one is accepted with regards to age, country of residence, and income but is rejected based on the perceived effects on importance of influencing factors in relation to gender, occupation and frequency of visit. In addition, since there are significant combined effects between the demographic elements such as gender and occupation, age and income, age and frequency of visit, occupation and frequency of visit to the perceived importance of influencing factors affecting medical tourists to choose hospitals in Thailand as their medical tourism destination, research hypothesis two is accepted.

D. Discussion and Summary of Findings

This chapter included an examination of the study findings data analysis and a summary of those findings. Respondents ($N = 104$) engaged in answering the questionnaire rated their perceived level of importance of the factors influencing their preference in choosing hospitals in Thailand as their medical tourism

destination. The 20 influencing factors in the study were divided into four constructs namely: Product, Price, Place, and Promotion. Although all of the factors being considered are deemed important by the respondents, hospitals which provide professional and certified doctors, fast service and outstanding patient care, superb facilities & excellent medical treatments and high technology medical equipments are the top four important factors in their list. All of these four important factors which influence the preference of the international medical patients in choosing hospitals in Thailand as their medical tourism destination can be found in the first construct: Product. A similar study made by Deloitte Development (2008) that has been mention earlier in this research paper concluded that the main factor that motivates medical tourists to avail medical treatment abroad is the “Price”. Patients are driven to offshore their health care services because of the affordable medical treatment that can be found overseas compared to their home country. However, this research study showed that “Product” is still the main reason why tourists would come to Thailand and avail medical treatment in the country.

The following were the results of the MANOVA test in relation to the affirmation of the research hypotheses:

1. Statistical significance has been found between the demographic factors such as age, country of residence, and income of the respondents in relation to the perceived importance of factors influencing the preference of customers in choosing Thailand hospitals for medical treatment through the use of the Multivariate F-Test. Accordingly, the research hypothesis one has been

accepted in light of the results of the analysis between age, country of residence, and income and the influencing factors affecting the preference of customers in their choosing hospitals in Thailand as medical tourism destination.

2. Statistical significance has been found on the combined effects between the demographic factors such as age and occupation, age and income, age and frequency of visit and occupation and frequency of visit to the perceived importance of factors influencing the preference of customers in choosing Thailand hospitals for medical treatment through the use of the Multivariate F-Test. For this reason, research hypothesis two has been accepted.

CHAPTER V

CONCLUSIONS AND RECOMMENDATIONS

“Thailand is at the world forefront of new approaches to medical care, healthcare technology, and preventive and continuing care, often ahead of its Western counterparts. Medical travelers will find Thailand a unique destination for quality, savings, and comfort.” – Josef Woodman, CEO of Healthy Travel Media (Patients Beyond Borders), November 10, 2009

Consumers increasingly are trying alternatives to their local hospitals and doctors, from going abroad for less-costly surgery to seeking quick, basic care at new clinics in drugstores and discounters, experts say. The number of people heading abroad for "medical tourism" could jump tenfold in the next decade, to nearly 16 million Americans a year seeking cheaper knee and hip replacements, nose jobs, prostate and shoulder surgery, and even heart bypasses, according to a forecast by health care consultants at the Deloitte Center for Health Solutions. A growing number of travelers have been lured by the combination of affordable medical care with attentive room service to pack a suitcase and board a plane. For many medical tourists, the real attraction is the price. Bumrungrad International Hospital, Samitivej Sukhumvit Hospital, and Bangkok Hospital Medical Center are the hospitals in Thailand that have an international accreditation and it provides quality health care at affordable prices. These hospitals are staffed by physicians trained at major medical centers in the U.S. and Europe. Although price is an obvious factor which influences medical tourists in availing treatments abroad, the objective of this study is to identify the

factors which influence medical tourists in choosing hospitals in Thailand as medical tourism destination. The outcome of this research will benefit the various hospitals in Thailand wherein they can have a clear understanding on what medical tourists value the most and what they are looking for when they come to Thailand for health care services. In addition, the Tourism Authority of Thailand will also gain advantage by understanding the customers' preference in seeking medical treatment in Thailand. This will aid other hospitals in their development to become a medical hub for tourists.

Similar studies have been made to understand the emergence of the medical tourism industry. Josef Woodman, the author of "Patients Beyond Borders: Everybody's Guide to Affordable, World-class Medical Tourism", estimated that approximately 150,000 people received medical treatment abroad in 2007. For ages, people have been traveling abroad to search for medical care that would satisfy their needs. Studies have shown that price is the main attraction of medical tourism. Foreign patients would agree to avail medical treatment abroad if the price of treatment is much lesser than the price in their home country. While most would think that medical travelers only seek cheap and fast medical attention, some facts in a May 2008 McKinsey and Company report regarding medical tourism indicated otherwise. The report states that 40% of medical travelers seek advanced technology, while 32% seek better healthcare. Another 15% seek faster medical services while only 9% of travelers seek lower costs as their primary consideration. This is also true with this study. The findings of this paper reiterate the findings of the McKinsey and Company report. Price is not the main factor which influences tourists to avail the medical services of the hospitals in Thailand. Rather they prefer the hospitals in Thailand

because of the professional and certified doctors, fast service and outstanding patient care, superb facilities & excellent medical treatments and high technology medical equipments.

This study was conducted to determine the influencing factors preferred by customers in choosing hospitals in Thailand for health care services. A descriptive research has been performed to describe the relationship between factors involved and to explain why some factors are deemed more important than the others. Chapter III talks about the research framework which includes the independent and dependent variables of the study, it also reported the population scope of the study which lies with the international tourists receiving medical treatment in Thailand. A total of 104 respondents completed the questionnaire. The multivariate analysis of variance (MANOVA) was used in order to test relationships between variables.

Chapter IV presented frequency tables and descriptive analysis of factors included in the questionnaire. The research study used multivariate analysis of variance to examine whether or not an independent variable explains significant variation among the dependent variables within the model. The ranking of the influencing factors determining the preference of customers in choosing hospitals in Thailand has been revealed. This chapter also included comparison and contrasts of results between studies from other countries. A significant number of similarities were found and differences suggest that in-depth studies should be conducted to get more informative results.

The last chapter in this study includes the conclusion from the analysis done in the previous chapter. It will answer the research questions stated in the study and will try to respond to the objectives of the study. It will also discuss some future research studies which can be conducted to deeply analyze the factors which influence the preference of customers in selecting Thailand hospitals as medical tourism destination.

A. Conclusions

The objective of this study was to examine the factors affecting the customers' preference in choosing hospitals in Thailand for medical treatment. The study sought to evaluate the respondents' perceptions with regard to the level of importance of factors affecting their decision in opting for health care treatment in Thailand. A descriptive analysis was used to rank the factors according to their importance for consumers of medical care of Bumrungrad International Hospital, Samitivej Sukhumvit Hospital, and Bangkok Hospital Medical Center. This section will revisit the research question and hypotheses, and report a summation of the findings and conclusions.

Research Question: What are the influencing factors that lead to customers' or patients' preference of hospitals in Thailand as a medical tourism destination?

Descriptive analysis targeted at the research question reported the ranking of the factors involved in customers' preference in selecting hospitals in Thailand for medical treatment purposes. The factors according to rank are the following: (1) The

hospital provides professional and certified doctors, (2) the hospital offers fast service and outstanding patient care, (3) the hospital provides superb facilities and excellent medical treatments, (4) the hospital offers high technology medical equipments, (5) the hospital accepts insurance plan coverage and claims, (6) the hospitals' medical costs offers value for money, (7), the hospital offers affordable medical treatment costs, (8) the hospital has an international accreditation, (9) the hospital provides accessibility by local transportation, (10) the hospital offers cheaper cost of medical treatment plus travel than at home country, (11) the hospital provides cheaper doctor and administrative fees, (12) the hospital is situated in a safe and secured location, (13) the hospital provides promotion offer on various medical treatments, (14) the hospital is located in a quiet place that is conducive for recuperation, (15) the hospital provides extra services such as airport pickup transfer and visa services, (16) the hospital offers special rates for hotel accommodation, (17) the hospital is situated in a famous city, (18) the hospital is nearby to tourist attractions and shopping centers, (19) the hospital offers special rates for travel tours after medical treatment, (20) the hospital provides affordable travel tours after medical treatment.

Interestingly, the outcome of this study showed that consumers of medical tourism relies more on the product or the service that hospitals provide rather than the price in deciding to avail medical treatments abroad. As previous researches have stated, a great motivator why medical tourists are in search for options abroad is that costs of getting medical treatment in their home country is rising and is getting too expensive for most people. Now the real challenge for hospitals in Thailand is how to attract these medical tourists in considering them as a possible provider of medical treatment and eventually choosing them as their hospital of choice. Competition among

developing nations are now getting more intense. As the influx of medical tourists demanding for quality health care is increasing, suppliers of quality health care should also be more accessible and flexible to their demand.

The following hypotheses were addressed in this study.

H₀₁: The demographic aspects of the respondents such as gender, age, country of residence, occupation, income, and frequency of visit have an effect on the marketing mix factors (4P's) that influence customer preference in choosing hospitals in Thailand for medical treatment.

H₀₂: The demographic aspects of the respondents such as gender, age, country of residence, occupation, income, and frequency of visit have combined effects on the marketing mix factors (4P's) that influence customer preference in choosing hospitals in Thailand for medical treatment.

In order to affirm or negate the hypotheses of this study, MANOVA has been applied in the analysis of the data. Statistical significance has been found between age, country of residence, and income of the respondents in relation to the perceived importance of factors influencing the preference of customers in selecting hospitals in Thailand for medical treatment purposes. However, there were no statistical significance between the demographic element such as gender, occupation and frequency of visit and the influencing factors affecting the preference of customers in choosing Thailand hospitals as medical tourism destination. Accordingly, research hypothesis one has been accepted in light of the results of the analysis between age,

country of residence, and income of the respondents and the influencing factors that motivates customer preference in selecting hospitals in Thailand for health care services but is rejected based on the insignificant results of the analysis of between subjects effects of gender, occupation, frequency of visit and the influencing factors to customer preference stated in the study. Additionally, the statistical significance has been found on combine effects between independent variables and dependent variables of the study. The combined effects found was the age and frequency of visit of the respondents and the influencing factors that motivates international medical tourists to select hospitals in Thailand for health care treatments. For this reason, the research hypothesis two has been accepted.

B. Recommendations and Future Research Recommendations

Recommendations

Although the most obvious reason that price is the key dominant factor in the decision of international medical tourists to travel abroad for medical treatment, the most influential factor that attracts customers or patients to come to Thailand turned out to be the hospital product. Tourists would want professional and certified doctors, fast service and outstanding patient care, superb facilities and excellent medical treatments, and high technology medical equipments. This study only shows that second rate health care wouldn't get a cut of the medical tourism share of the market. With emerging medical hubs such as India, Singapore and Malaysia, competition is getting fiercer. Hospitals in Thailand

should emphasize on improving and developing the quality of doctors and staff and the quality of health care services and medical procedures offered. International hospital accreditations should be regularly renewed as this inspires confidence and trust from consumers of medical tourism. Also, dissemination of information is also vital in attracting customers abroad. Information about liabilities such as negligence and malpractice should be stated clearly in proper contracts. Safety issues should also be addressed in each hospital's website so that customers will have an idea as to the measures the hospital is doing to provide for a safe, secure and hygienic environment for their patients. Staffs that are fluent in English should also be present in the premises otherwise interpreters should be present to prevent any miscommunications.

Future Research Recommendations

This research study is focused on the influencing factors affecting customers' preference in choosing hospitals in Thailand as medical tourism destination. As a recommendation on future researches, a qualitative method of research study of international medical tourists' satisfaction and customer loyalty of medical tourists receiving medical treatments in Thailand would allow deeper understanding for the reasons why medical tourists return or revisit to Thailand for health care services. Personal interviews would result on lengthy and comprehensive findings on the research objective.

Another recommendation is a study of customer perception on the overall service quality of the various hospitals in Thailand. This study could determine the hotels and airline providers that cater to medical tourists. Different package deals that hotels and airline providers typically offer to medical travelers could also be explored in this study.

A future research study on customer perception of Thailand's brand image as a medical tourism hub in Asia would allow an in depth knowledge of Thailand's competitive strengths and core competencies which could be used as an advantage for the country to compete in the emerging global medical tourism industry.

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APPENDIX



**Master of Business Administration Program
Survey Questionnaire**

“A study of influencing factors that lead medical tourists to choose Thailand hospitals as Medical Tourism destination.”

In completion of the requirements of the study in Master of Business Administration at Webster University, Thailand, I am conducting this survey for the purpose of identifying factors that leads medical tourists to choose Thailand hospitals as Medical Tourism destination. The importance of this study will support the development of medical tourism in Thailand. All your answers will be kept confidential and your assistance in completing this survey is greatly appreciated.

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

Part 1: Question of General Information

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

Part 1: Question of General Information

1. Gender Male Female

2. Age
 Under 15 35-44 65 and over
 15-24 45-54
 25-34 55-64

3. Country of Residence
 East Asia Oceania
 Europe Middle East
 The Americas Africa
 South Asia

4. Occupation
 Professionals Government
 Administrative Housewife
 Commercial Students
 Laborers Retired
 Agricultural Others

5. Income (in USD per month)

- | | | | |
|--------------------------|-----------------|--------------------------|-----------------|
| <input type="checkbox"/> | Less than 2,000 | <input type="checkbox"/> | 6,001 – 8,000 |
| <input type="checkbox"/> | 2,001 – 4,000 | <input type="checkbox"/> | 8,001 – 10,000 |
| <input type="checkbox"/> | 4,001 – 6,000 | <input type="checkbox"/> | 10,001 and over |

6. Frequency of Visit

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

Part 2: Influencing Factors Leading to Customers' Preference

The purpose of this part of the questionnaire is to assess the factors which influence customers in preferring Thailand hospital as medical tourism destination. Please mark (✓) in the answer column for each statement that best indicate your reasons by using the scale below.

		Very Important	Important	Moderately Important	Of Little Importance	Unimportant
		5	4	3	2	1
A. Product						
	1. The hospital has an international accreditation.					
	2. The hospital provides professional, top-notch, and certified doctors as well as hospitable nurses and staffs.					
	3. The hospital provides high technology medical equipments.					
	4. The hospital provides fast service and outstanding patient care.					
	5. The hospital offers superb facilities and a range of excellent medical treatments.					
B. Place						
	1. The hospital is located near tourist attractions and shopping centers.					
	2. The hospital is easily accessible by local transportations like bus, sky train, subway, taxi and trains.					
	3. The hospital is situated in a famous city in Thailand.					
	4. The hospital is situated in a safe & secured city in Thailand.					
	5. The hospital is located in a quiet place that is conducive for recuperation.					
C. Price						
	1. The hospital offers reasonable and affordable medical treatment costs.					
	2. The hospital offers cheaper doctor & administrative fees.					
	3. The total cost of medical treatment in the hospital gives value for money.					

	4. The total cost of medical treatment plus travel is cheaper than the cost of medical treatment at your country of residence.					
	5. After medical treatment, the hospital offers affordable travel tours around Thailand.					
D. Promotion						
	1. The hospital offers promotions that cover extra services such as airport pickups and visa extension services.					
	2. The hospital offers promotions that cover special rates for accommodation with its partner hotels.					
	3. The hospital accepts insurance plan coverage and claims.					
	4. The hospital offers package promotions on various medical treatments.					
	5. After medical treatment, the hospital offers medical promotion packages that cover travel tours at special rates.					

Thank you very much for your assistance in completing this questionnaire. Ms. Kristine Mae F. Ricafort

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