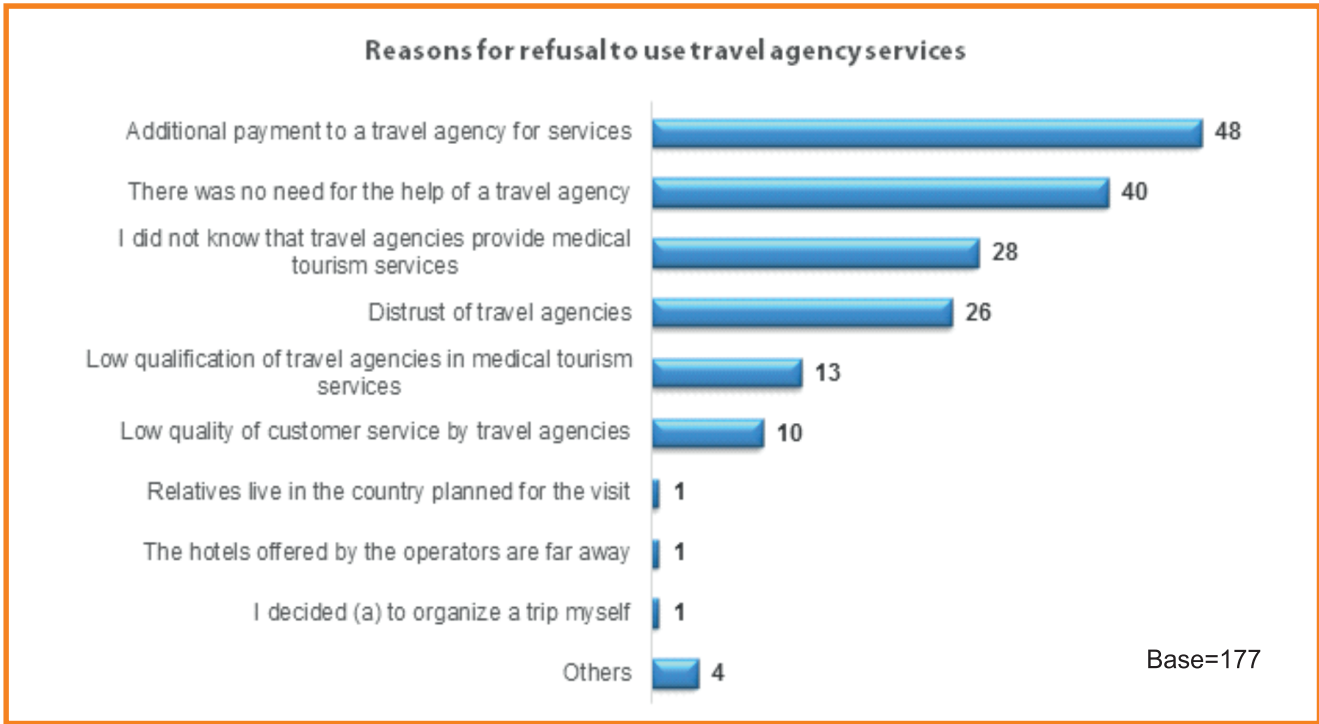


Figure 40. Reasons for refusal to use the services of travel agencies



Why you don't plan to use the services of a travel agency?

The package of services offered by the travel agencies (according to potential users) include flight booking (82%), accommodation booking (82%), preparation of documents (77%).

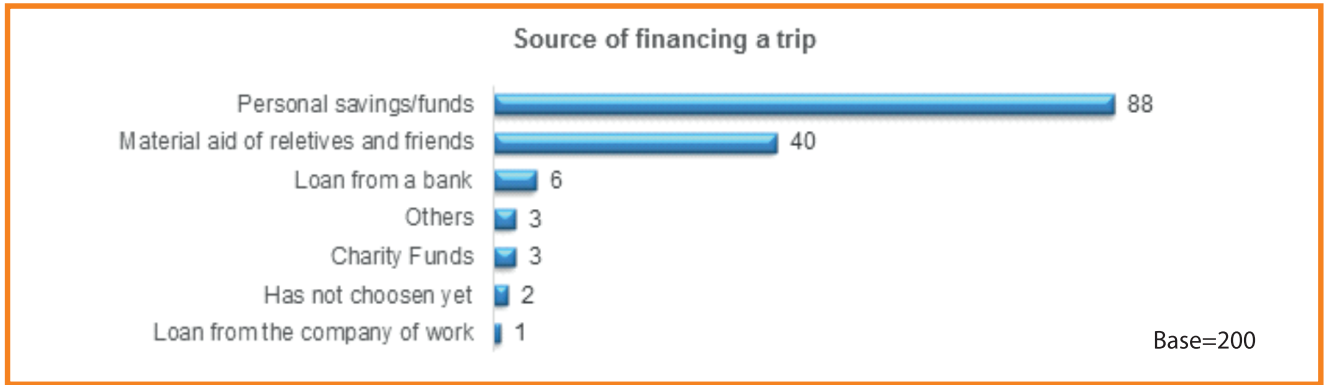
Figure 41. Services included in the package of services of travel agencies (potential user perspective)



A 18. What do you think should be included in medical tourism package of travel agency?

Potential users of medical tourism services mainly plan to use their own funds for treatment (88%).

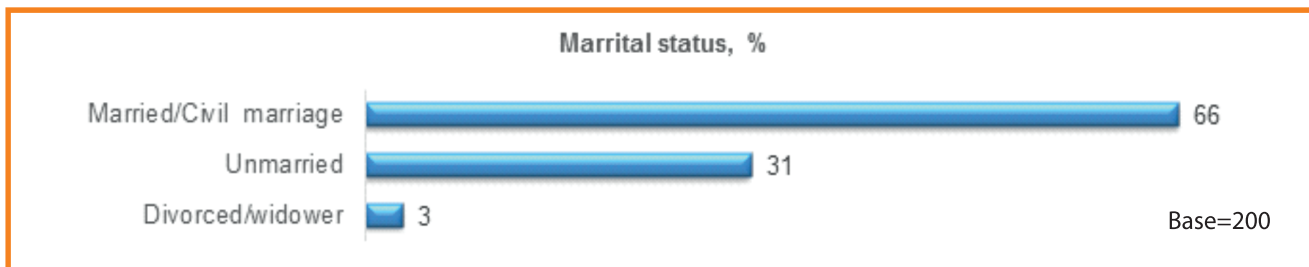
Figure 42. Sources of funding the medical tourism trip



A20.How do you plan to fund the treatment or surgery?

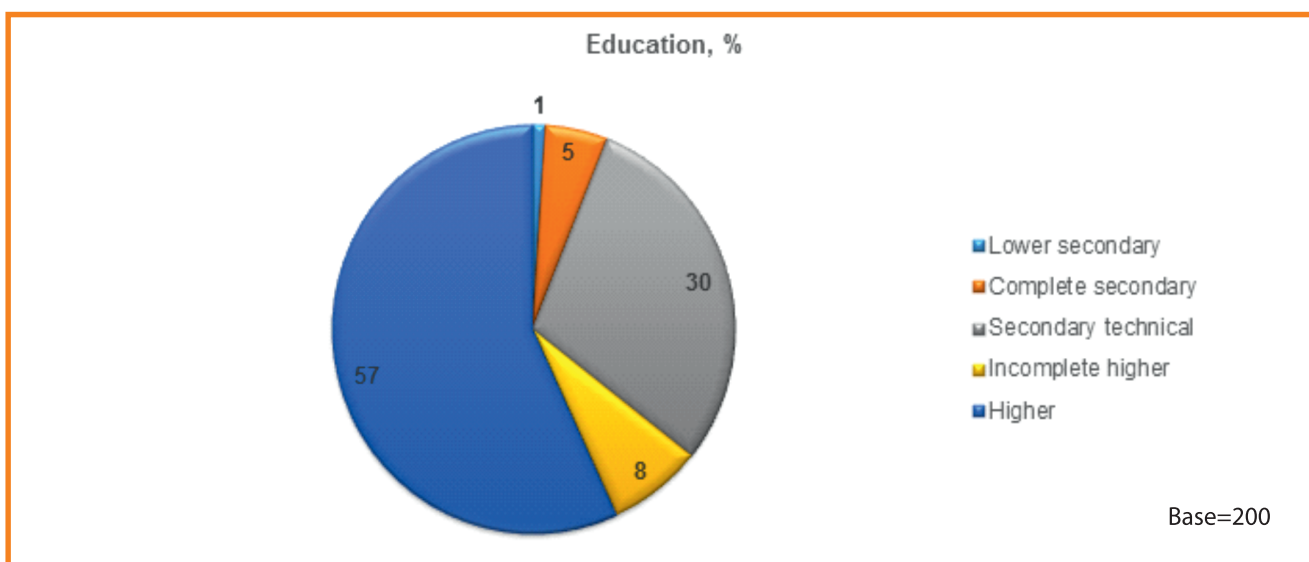
6.4. Statistics: Characteristic profile of potential users of medical tourism

Figure 43. Marital status



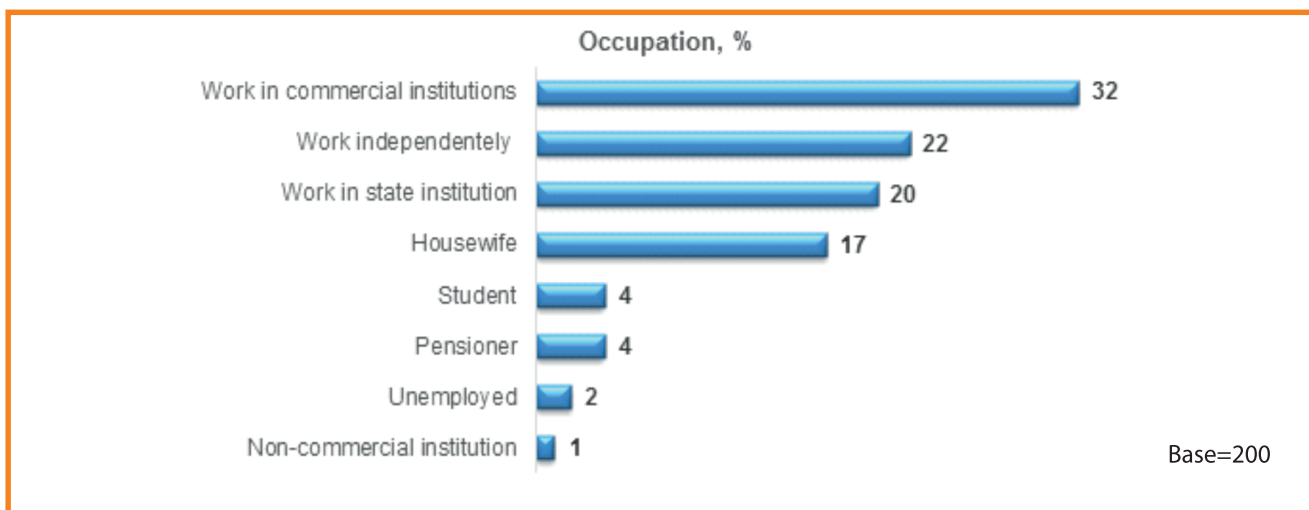
D1. Indicate your marital status.

Figure 44. Education



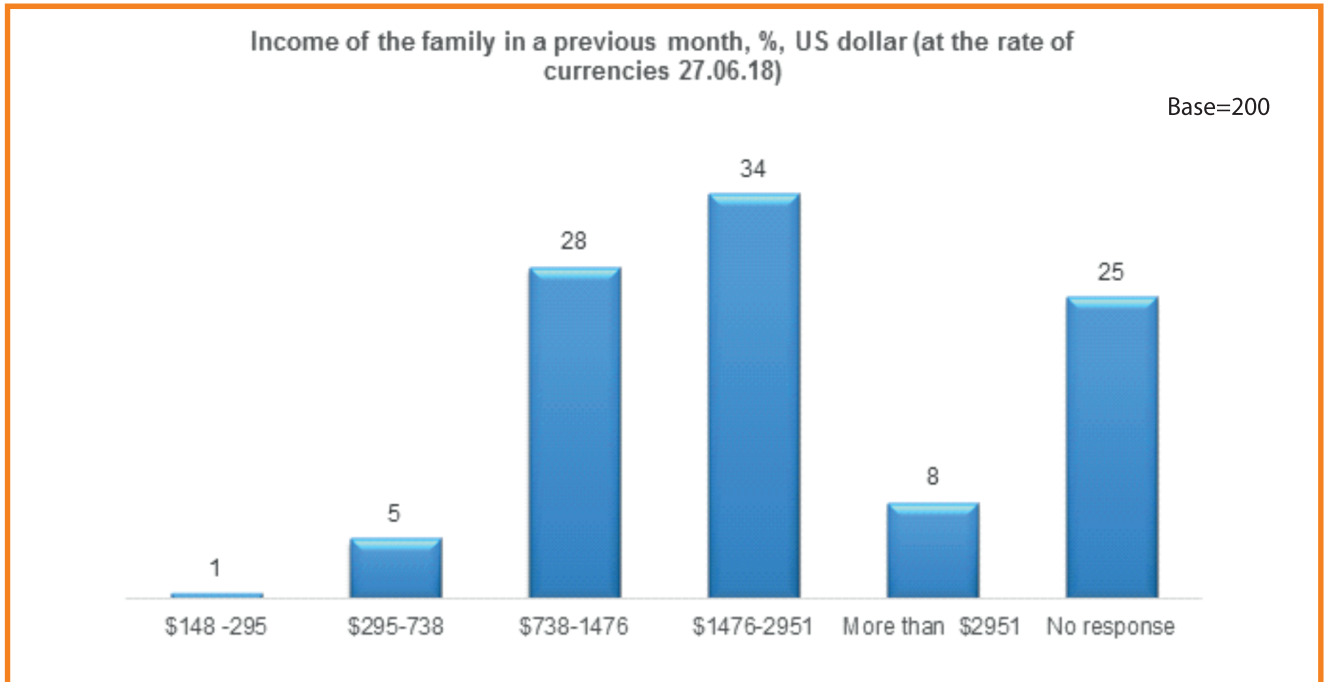
D2 Indicate your education

Figure 45. Occupation (scope of activities)



D3. What is your present occupation?

Figure 46. Household income in a previous month



D5.What was your household income in a previous month, wages, pensions and others incomes?

6.5. Conclusions from potential customers

Types of planned medical services for receiving abroad

Potential users of medical services abroad mainly plan their trip for surgery (28%), diagnosis (27%), plastic surgery (18%) and general medical treatment (16%). Among those who plan to receive plastic surgery services, most are planning to use these services in the countries of South-East Asia. Similarly, acupuncture services are also the most popular in the countries of Southeast Asia than in other countries. Among those respondents who are going to go for medical tourism with the purpose of receiving plastic surgery services, they plan plastic surgery such as rhinoplasty - 34%, mammoplasty - 29% and blepharoplasty - 20%.

Search for clinics for medical tourism

The main sources of information when searching for a hospital amongst potential users of medical tourism services are the recommendations of relatives, acquaintances or friends (59%), reviews of patients who received treatment at this hospital (58%), information on the hospital website (35%) and recommendations of local doctors (29%). When looking for hospital, respondents mainly pay attention to such criteria as high qualification of doctors (67%), acceptable cost of treatment / surgery (51%), specialization of the hospital on a particular disease (45%) and experience of successful course treatment from other patients (37%). Potential users of medical services at the time of the survey have already chosen a hospital for treatment / surgery (53%). Potential users of medical services found this hospital through the recommendations of friends, relatives or acquaintances (73%), through search requests in the Internet (31%) and through the recommendations of local doctors (26%). Potential users are planning to organize their medical tourism trip independently (58%) or together with other family members (26%). Majority of potential users do not plan to use the services of travel agencies for medical tourism because they do not want to incur additional costs for their trip (48%), they do not see reason to use travel agency services (40%) and some are unaware that travel agencies are providing medical tourism services (28%), and distrust of travel agencies (26%). In the package of services of travel agencies, according to potential users, services such as search and booking of flight tickets (82%), accommodation booking (82%), preparation of documents (77%), are included.

Socio-demographic profile of potential users of medical tourism services

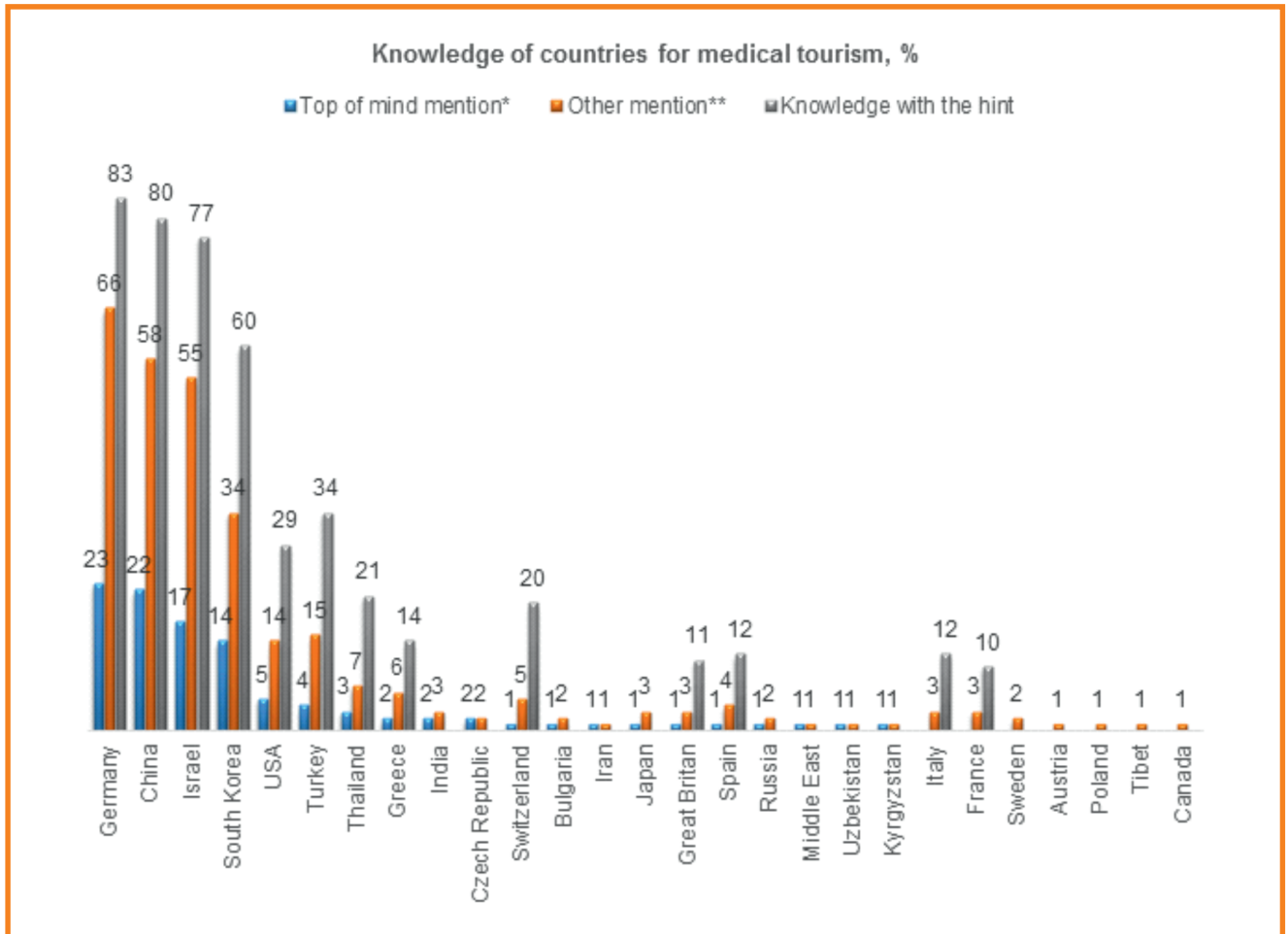
66% of respondents are married people. 57% have higher education. In the field of activity, they mainly work in private commercial organizations, independently and in public institutions. The income for the last month for 62% of respondents was from 100 thousand to 500 thousand tenge per family, while 25% refused to answer the question about incomes. Potential users of medical tourism services mainly use their own funds for treatment (88%).

7. Competitor analysis: medical tourism destinations

7.1. Statistics (existing customers): information about medical tourism destinations

Among the actual users of medical tourism services there is a high level of knowledge of medical tourism services in countries such as Germany, China, Israel and South Korea. Among these four countries, South Korea has a relatively low level of spontaneous knowledge (top of mind): 14% - the first mention and 34% - the remaining mentions.

Figure 47. Knowledge of countries for medical tourism



A1. What country comes to your mind if you think about medical treatment abroad?

A2. Which other countries do you know?

A3. Which countries from this list you consider to go for treatment/surgery?

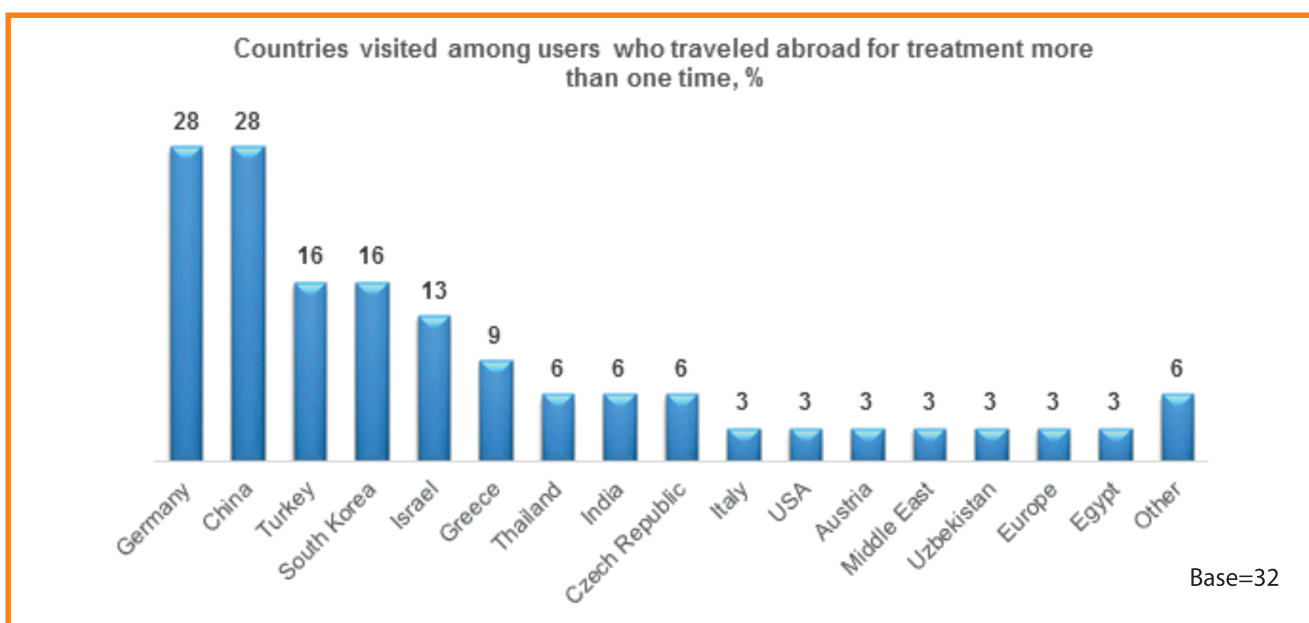
Figure 48. Frequency of traveling abroad for treatment



A4. How many times you went abroad for treatment/surgery outside of Kazakhstan?

Among those actual users who have traveled abroad more than once, most went for treatment / surgery in Germany, China, Turkey, South Korea and Israel.

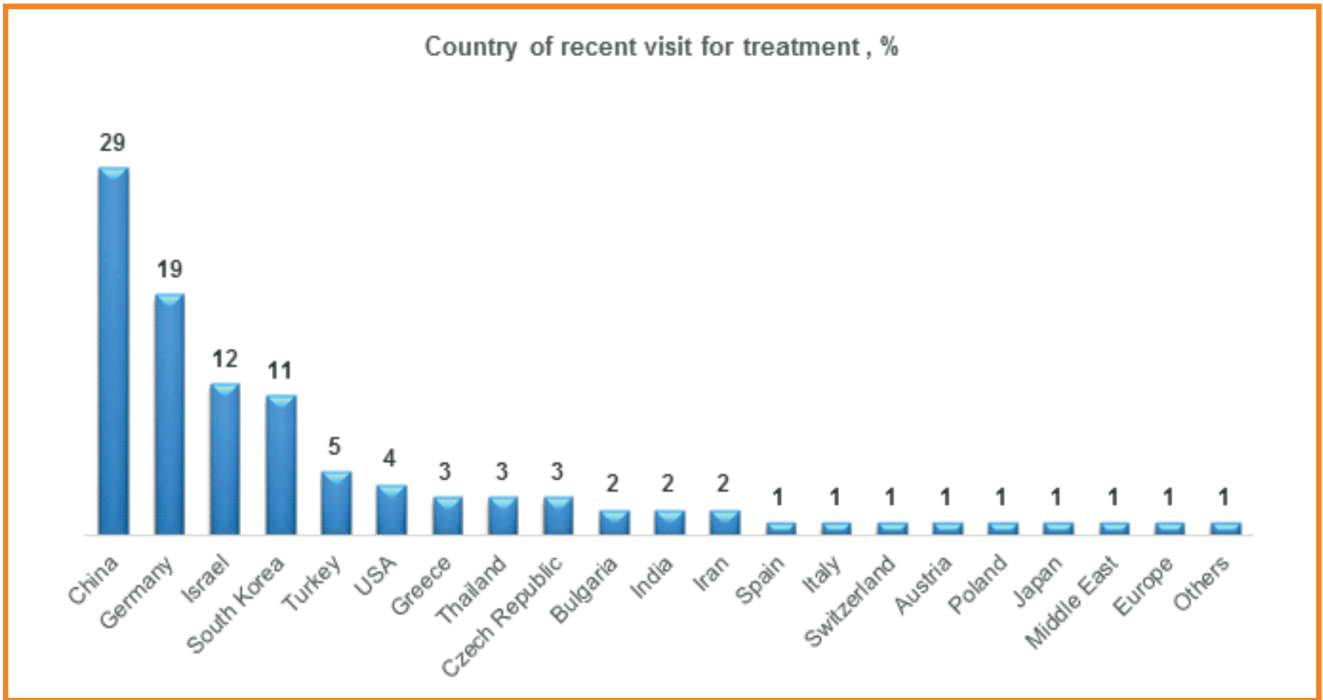
Figure 49. Countries visited among users who traveled abroad for treatment more than once



A5. In which countries you went for treatment/surgery?

Destinations, where respondents got recent treatment included China (29 %), Germany (19%), Israel (12 %), South Korea (11 %).

Figure 50. Country of recent visit for treatment



A6.What was the last country you visited for medical tourism?

China

The main sources of information that influenced the decision of users to choose China as a country for receiving medical services are recommendations of relatives, acquaintances or friends (68%) and reviews of patients who received treatment (54%).

Figure 51. Influence of information sources on the choice of China as a country for treatment



A7.What kind of sources has influenced on your choice for going to this particular country for treatment/surgery?
 A7. Indicate 3 main sources which are most important for you regarding the treatment/surgery?

The main reasons why the respondents decided to go to China for medical tourism were: high level of medicine (58%), an acceptable cost of medical services (55%), the experience of other patients (50%) and the availability of modern technologies (41%).

Figure 52. Reasons to visit China for treatment

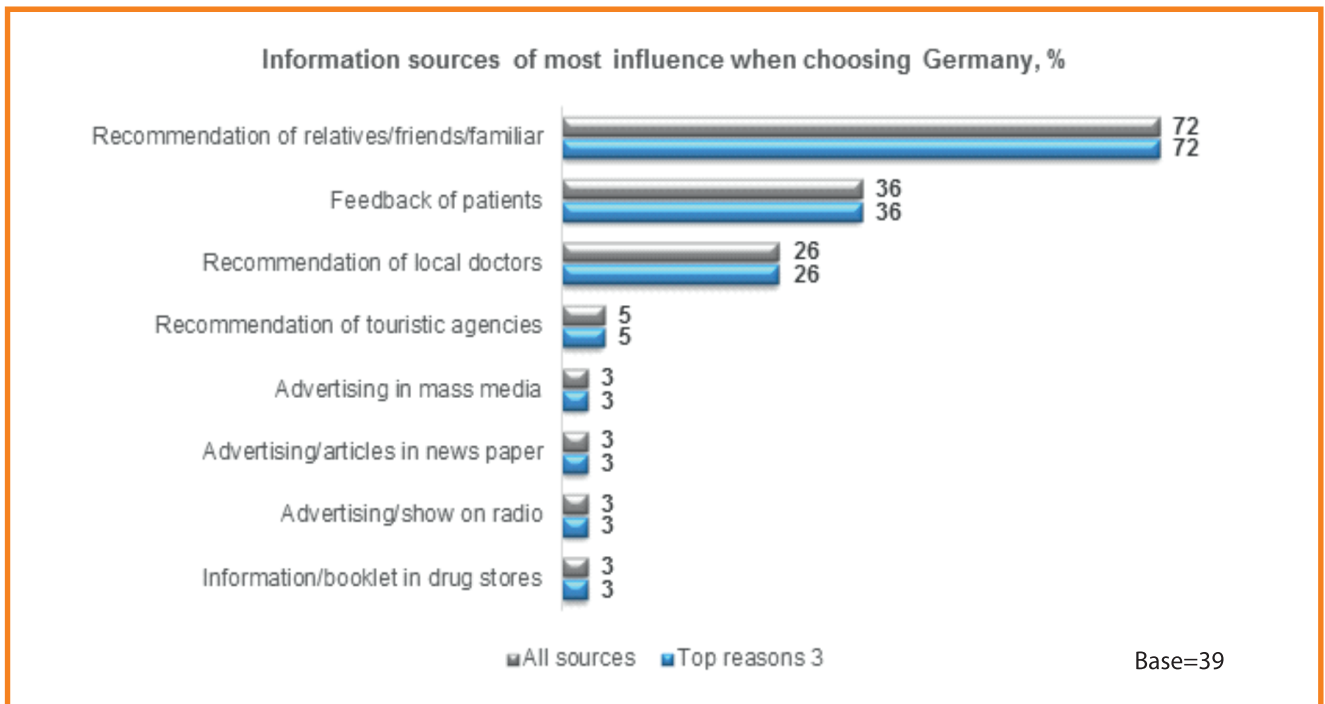


A7. What kind of sources has influenced on your choice for going to this particular country for treatment/surgery?
 A7. Indicate 3 main sources which are most important for you regarding the treatment/surgery?

Germany

The main source of information that influenced the decision to use medical services in Germany is for the majority of respondents the recommendations of relatives, acquaintances or friends (72%).

Figure 53. Influence of information sources on the choice of Germany as a country for treatment



A7. What kind of sources has influenced on your choice for going to this particular country for treatment/surgery?
 A7. Indicate 3 main sources which are most important for you regarding the treatment/surgery?

The reasons for choosing Germany as a country for medical tourism for the majority of consumers are a high level of medicine (96%) and modern technologies (72%).

Figure 54. Reasons for traveling to Germany for treatment

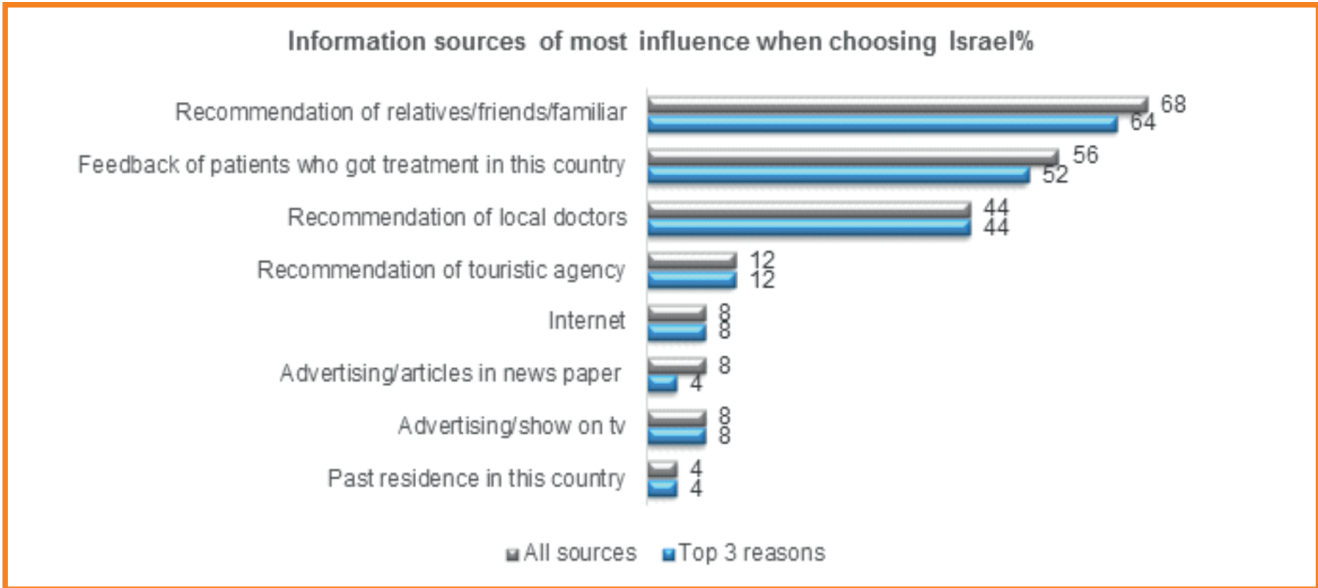


A7. What kind of sources has influenced on your choice for going to this particular country for treatment/surgery?
 A7. Indicate 3 main sources which are most important for you regarding the treatment/surgery?

Israel

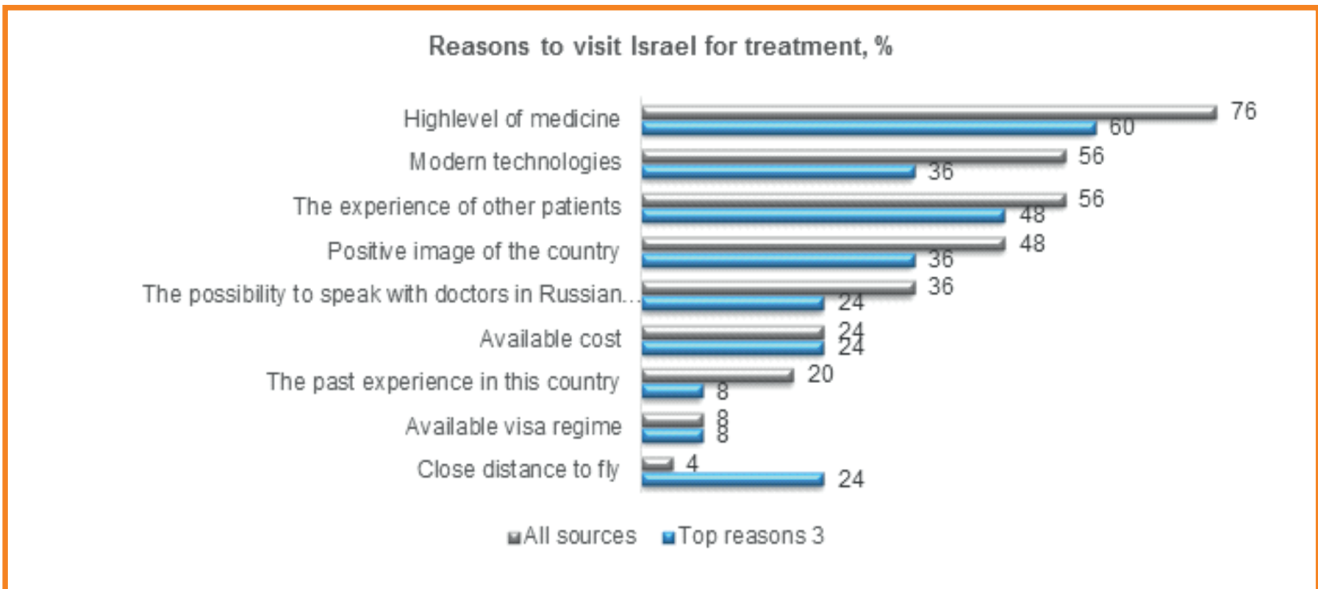
For healthcare users who chose medical tourism in Israel, such sources of information as recommendations from relatives, acquaintances or friends (68%), reviews of patients who received treatment (56%) and recommendations of local doctors (44%) were influential.

Figure 55. Influence of information sources on the choice of Israel as a country for treatment



A7.What kind of sources has influenced on your choice for going to this particular country for treatment/surgery?
 A7. Indicate 3 main sources which are most important for you regarding the treatment/surgery?

Figure 56. Reasons to visit Israel for treatment

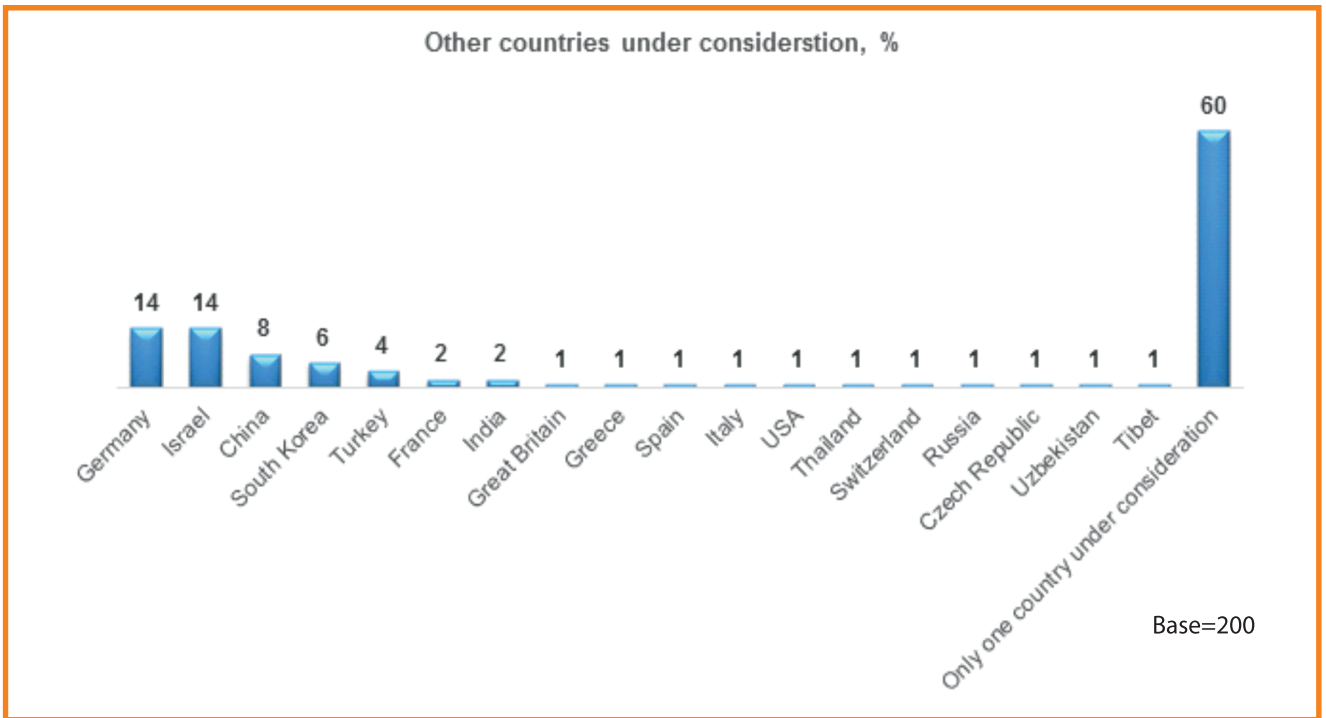


A9.Which sources of information influence on your choice of country for treatment and surgery?
 A10. Arrange the 3 main sources in order of importance, starting with the most important

Other destinations which are considered by customers

It is worth noting that 60% of respondents did not consider different countries as options for treatment, there is a tendency that respondents initially choose only one particular country for treatment. However, those who do consider various medical tourism destinations have stated Germany (14%), Israel (14%), China (8%), South Korea (6%).

Figure 57. Other countries under consideration for medical tourism

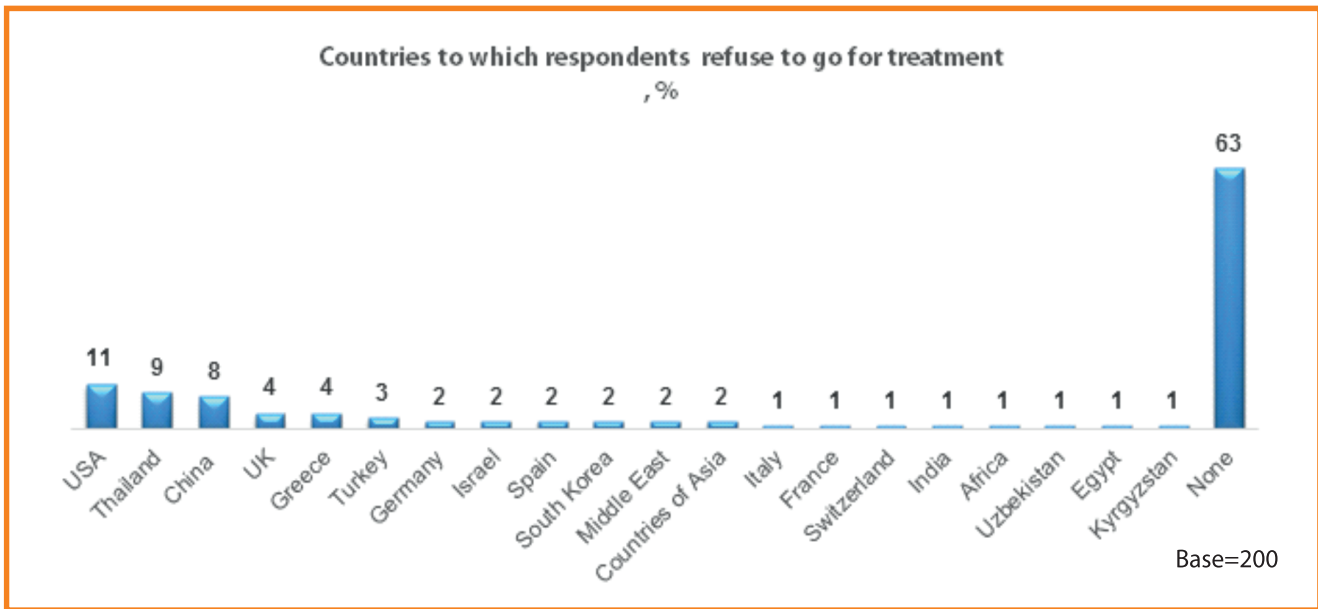


A11. Which other countries do you consider for treatment /surgery?

7.2. Statistics (existing customers): negative attitude on medical tourism destinations

Most users do not reject any particular country for a trip to medical tourism (63%), however, among the particular countries where respondents did not want to be treated, were the United States (11%), Thailand (9%), China (8%), Greece (4%), Turkey (3%), Germany (2%), Israel (2%), Spain (2%), South Korea (2%), Middle East (2%), Countries of Asia (2%), Italy (1%), France (1%), Switzerland (1%), India (1%), Africa (1%), Uzbekistan (1%), Egypt (1%), Kyrgyzstan (1%).

Figure 58. Countries to which respondents refuse to go for treatment

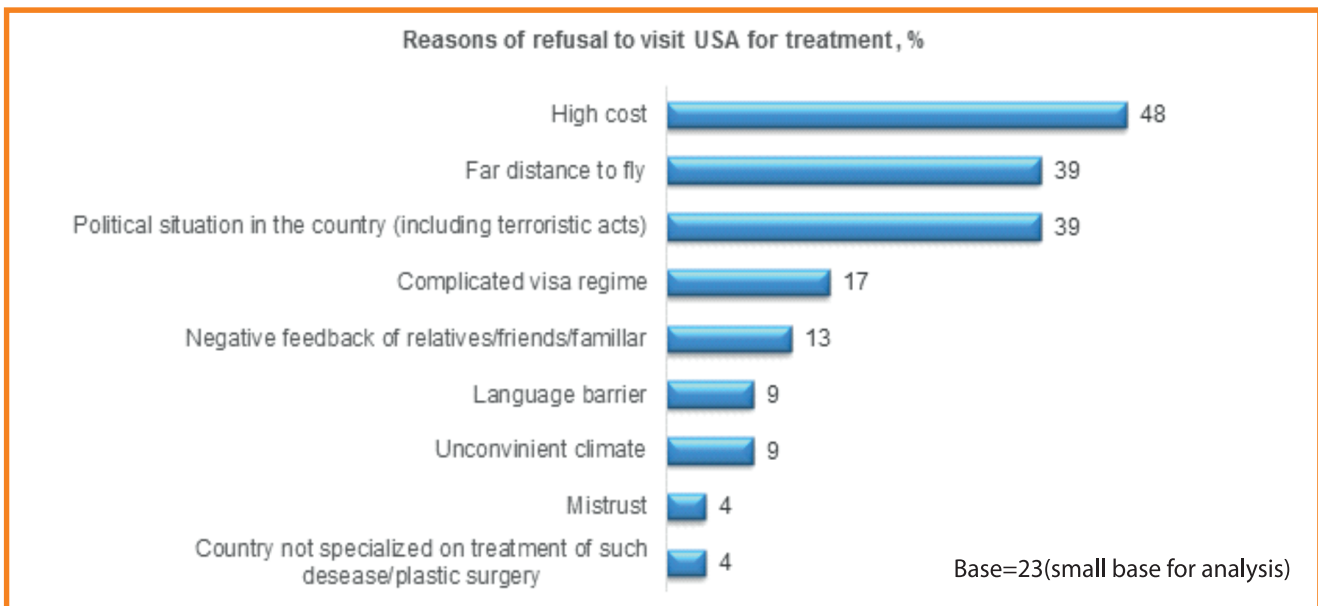


A14. In which country you will not go for treatment?

USA

The main reasons why respondents do not consider the US for medical services are the high cost of treatment or surgery (48%), the long distance for the flight (39%) and the political situation in the country (39%).

Figure 59. Reasons for refusal to visit USA for treatment



A15. Why you will not go for treatment in this country?

Thailand

The reasons for refusing to consider Thailand as a country for medical tourism are: low specialization of hospitals (22%), negative feedback from relatives, friends or acquaintances (22%), unsanitary conditions (17%) and low skilled doctors (17%).

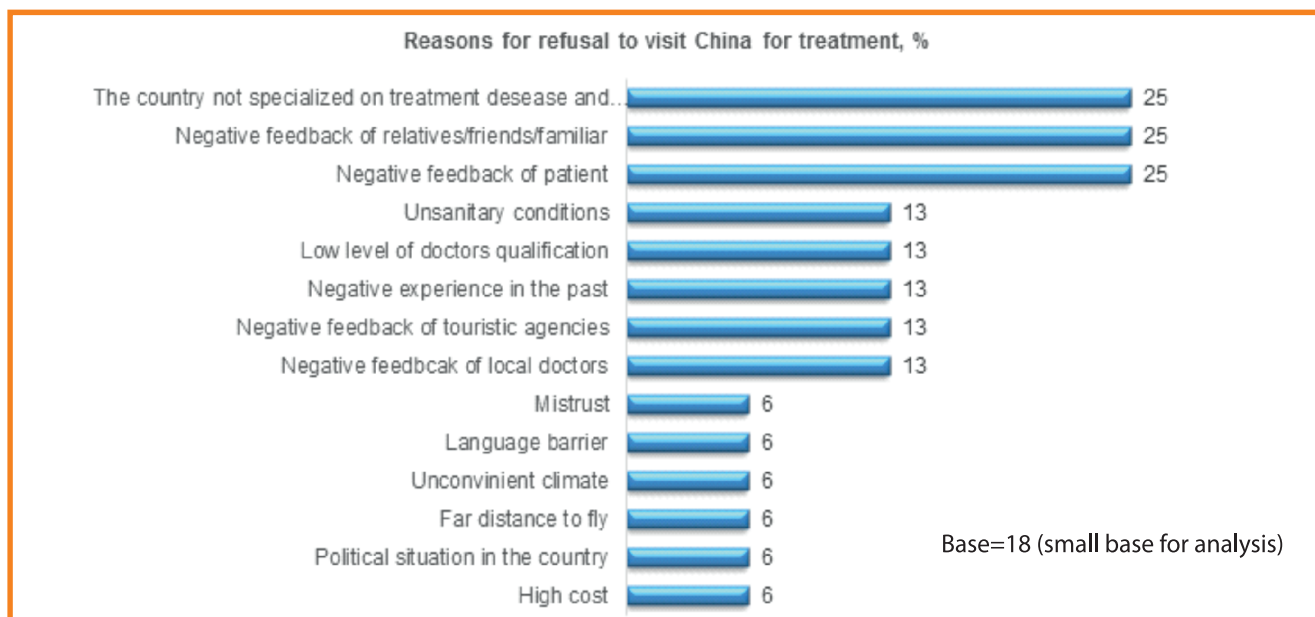


A15. Why you will not go for treatment in to this country?

China

Amongst the reasons to refuse to visit China for medical services, respondents named the following factors: this country does not specialize in the treatment of diseases / plastic surgery, respondents' interest (25%), negative feedback from relatives, friends or acquaintances (25%) and negative reviews patients who underwent treatment or surgery (25%).

Figure 61. Reasons for refusal to visit China for treatment

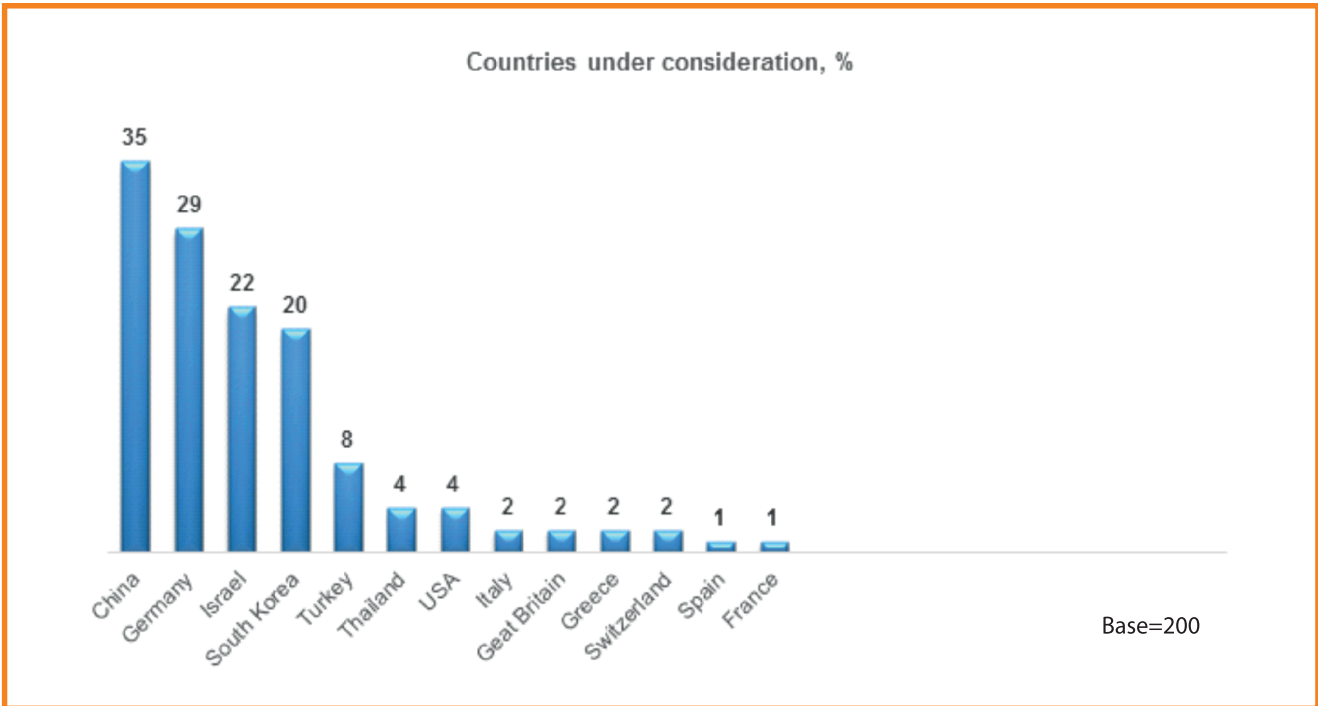


A15. Why you will not go for treatment in this country?

7.3. Statistics (potential customers): countries considered as medical tourism destinations

Potential users are considering to visit China (35%), Germany (29%), Israel (22%) and South Korea (20%) for medical tourism.

Figure 62. Countries under consideration

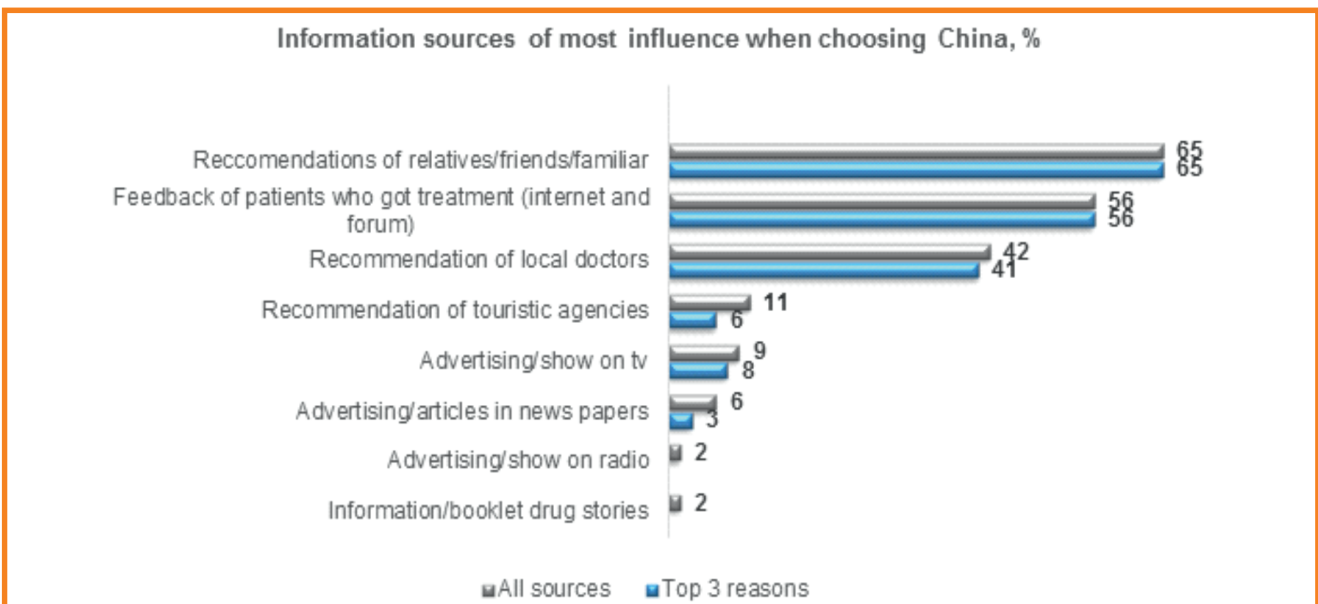


A4. Which countries do you consider for treatment/surgery?

China

The main sources of information influencing the consideration of China as a country for receiving medical services are the recommendations of relatives, acquaintances or friends (65%), reviews of patients who received treatment (56%) and recommendations of local doctors (42%).

Figure 63. The influence of information sources on China as a country for treatment

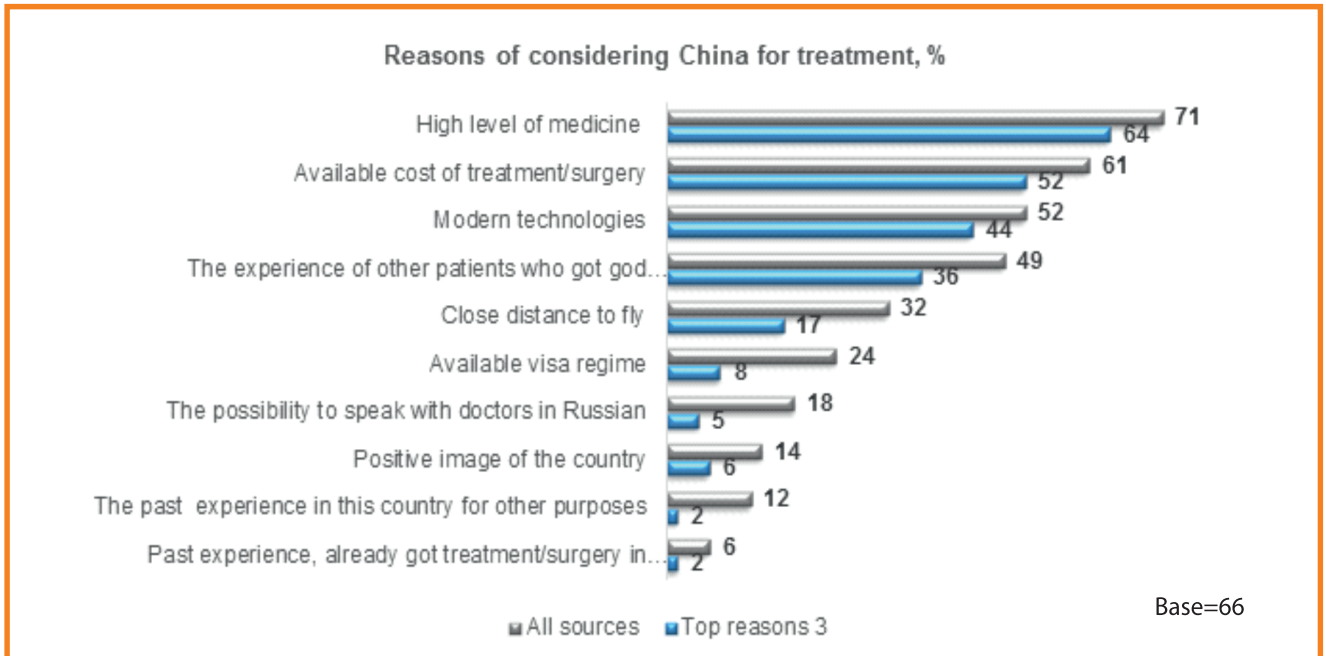


A7. What kind of sources has influenced on your choice for going to this particular country for treatment/surgery?

A7. Indicate 3 main sources which are most important for you regarding the treatment/surgery?

The main reasons for considering a trip to China for medical tourism from potential customers are: high level of medicine (71%), an acceptable cost of medical services (61%), the availability of modern technologies (52%) and the experience of other patients (49%).

Figure 64. Reasons of considering China for treatment

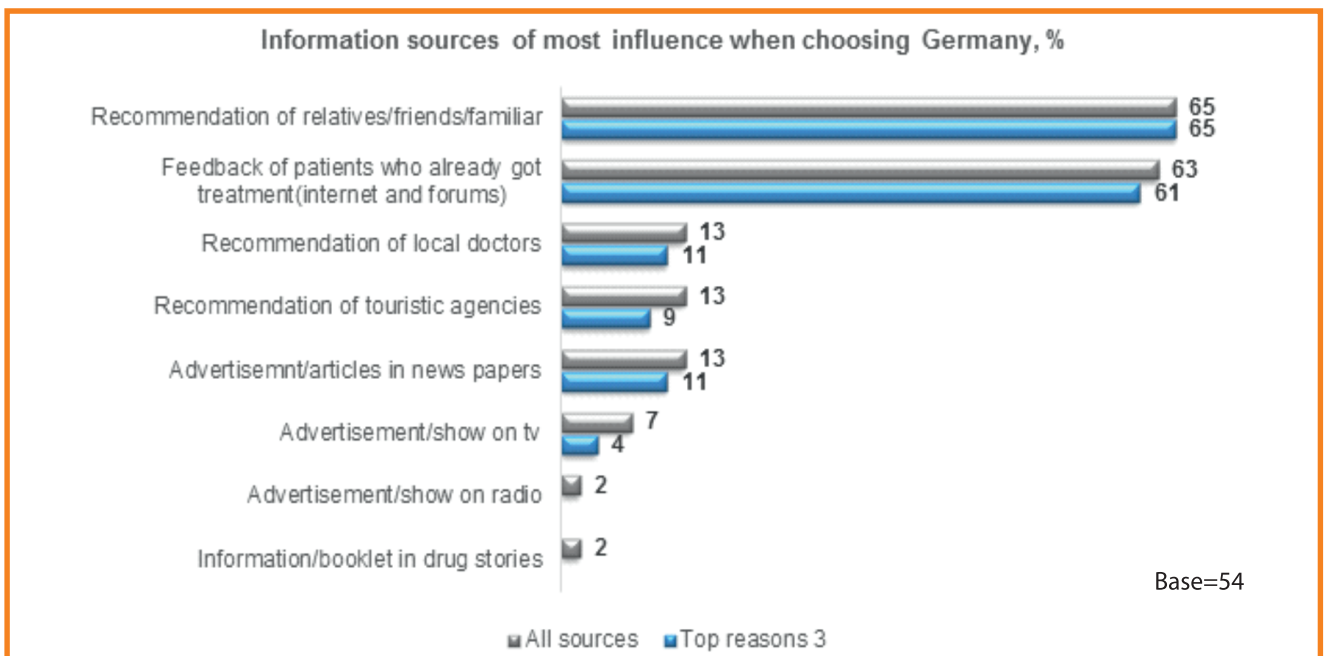


A7. What kind of sources has influenced on your choice for going to this particular country for treatment/surgery?
 A7. Indicate 3 main sources which are most important for you regarding the treatment/surgery?

Germany

The main sources of information that influenced the consideration of the use of medical services in Germany is for the majority of respondents the recommendations of relatives, acquaintances or friends (65%) and reviews of patients treated in this country (63%).

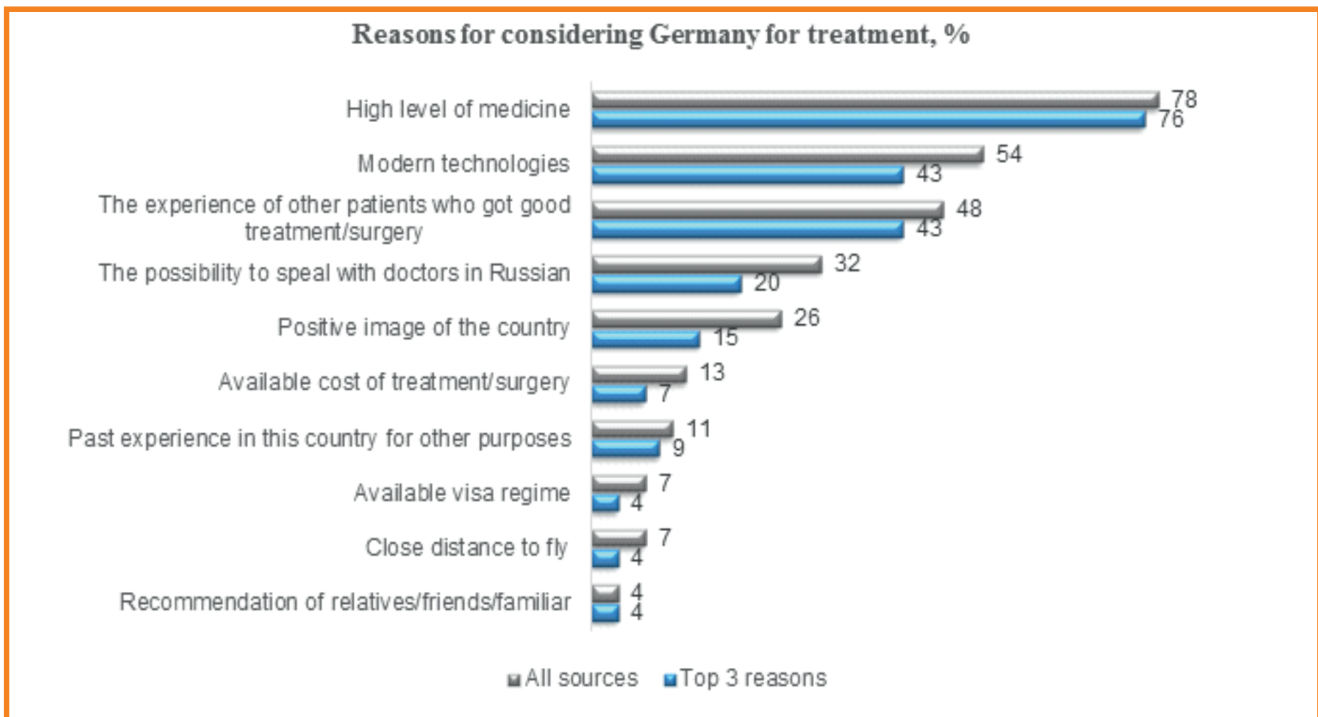
Figure 65. Influence of sources of information on Germany as a country for treatment



A7. What kind of sources has influenced on your choice for going to this particular country for treatment/surgery?
 A7. Indicate 3 main sources which are most important for you regarding the treatment/surgery?

The reasons for considering Germany as a country for medical tourism for the majority of potential users are: high level of medicine (78%), modern technologies (54%) and experience of other patients (48%).

Figure 66. Reasons for considering Germany for treatment

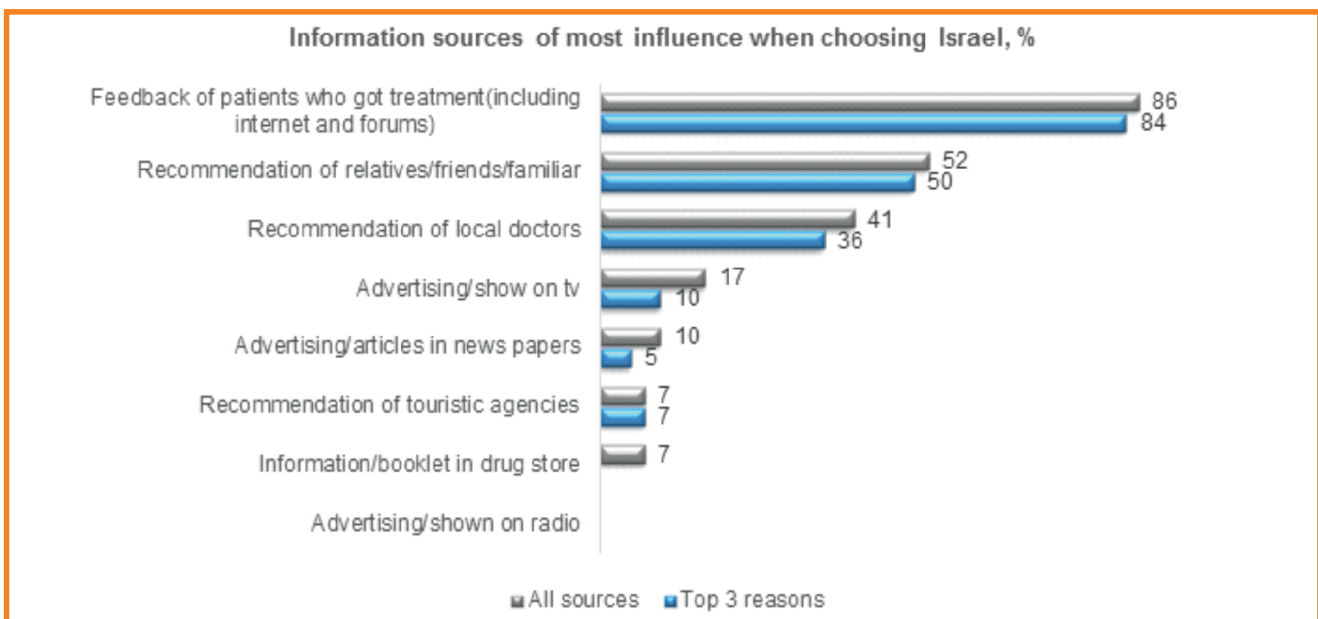


A7. What kind of sources has influenced on your choice for going to this particular country for treatment/surgery?
 A7. Indicate 3 main sources which are most important for you regarding the treatment/surgery?

Israel

For potential users of medical services considering Israel, the following information sources were used to make a decision: reviews of patients who received treatment (86%), recommendations of relatives, friends or friends (52%) and recommendations of local doctors (41%).

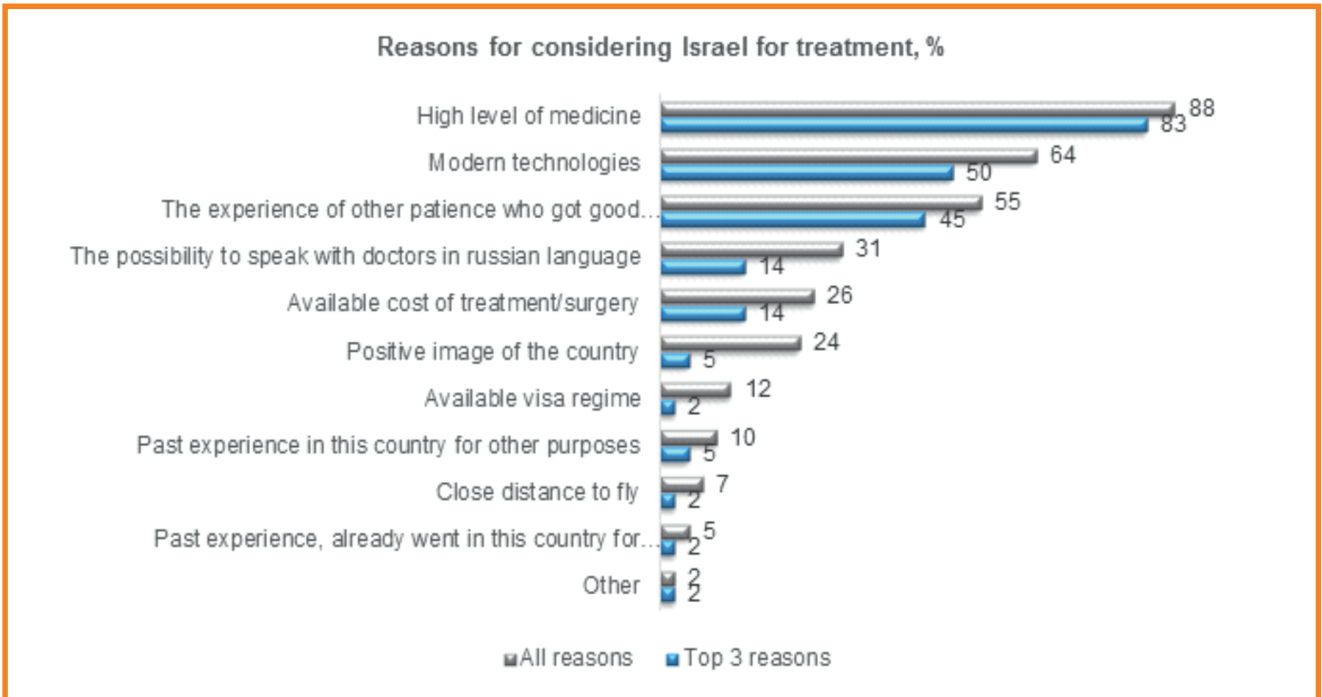
Figure 67. Influence of information sources on the choice of Israel as a country for treatment



A7. What kind of sources has influenced on your choice for going to this particular country for treatment/surgery?
 A7. Indicate 3 main sources which are most important for you regarding the treatment/surgery?

The majority of respondents considering treatment in Israel named high level of medicine (88%), modern technologies (64%) and experience of other patients (55%), as the main reasons that influenced the consideration of this country.

Figure 68. Reasons for considering Israel for treatment

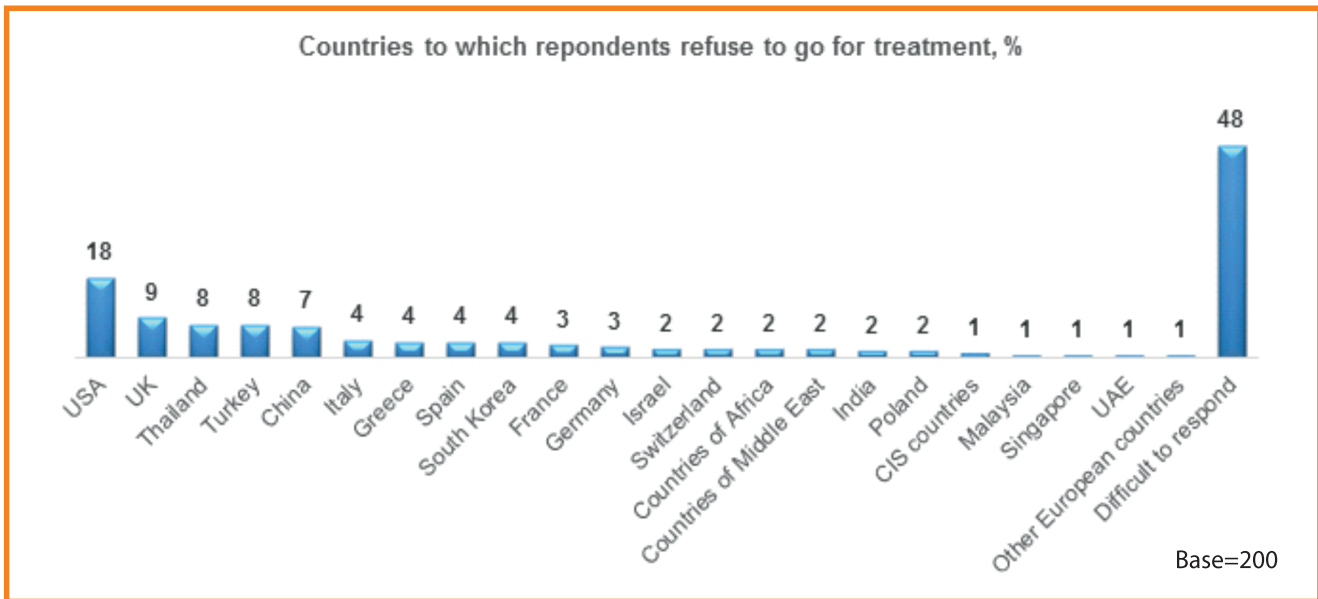


A7. What kind of sources has influenced on your choice for going to this particular country for treatment/surgery?
 A7. Indicate 3 main sources which are most important for you regarding the treatment/surgery?

7.4. Statistics (potential customers): negative attitude on medical tourism destinations

48% of potential users do not reject any particular country for travelling in terms of medical tourism, however, among the countries where respondents do not want to go for treatment, were the United States (18%), the United Kingdom (9%), Thailand (8%), Turkey (8%) and China (7%).

Figure 69. Countries to which respondents refuse to go for treatment

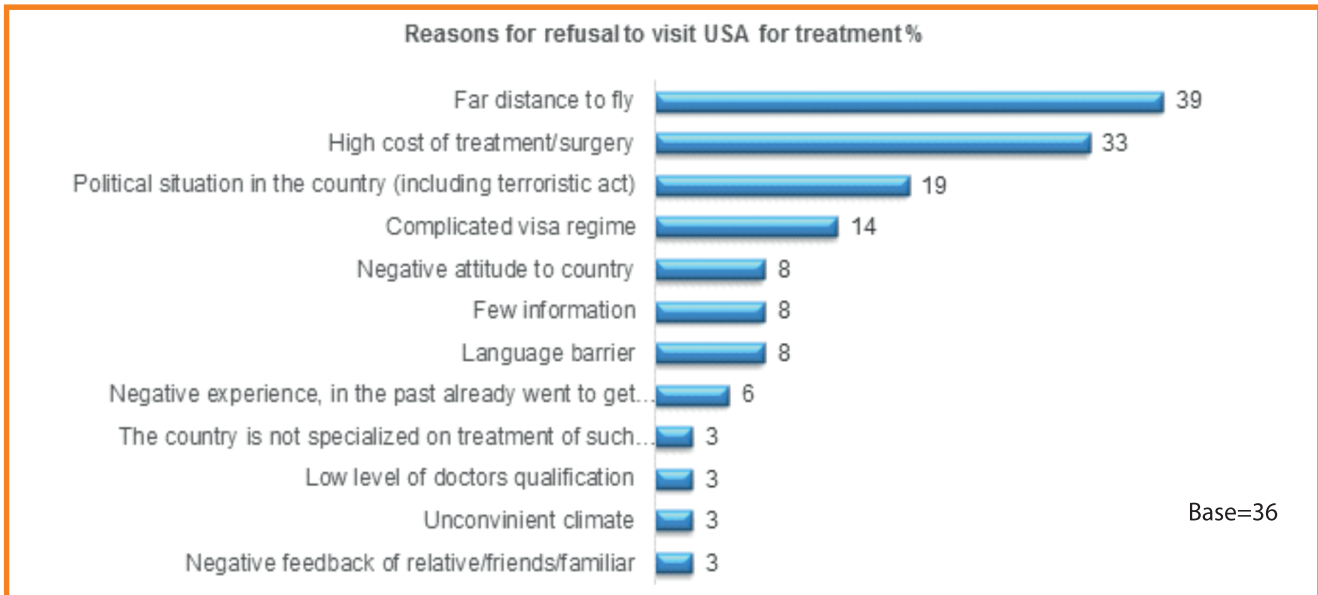


A9. In which countries you will not go for treatment/surgery?

USA

The main reasons why respondents do not consider the US for medical services are the long distance for the flight (39%), the high cost of treatment or surgery (33%), the political situation in the country (19%).

Figure 70. Reasons for refusal to visit USA for treatment

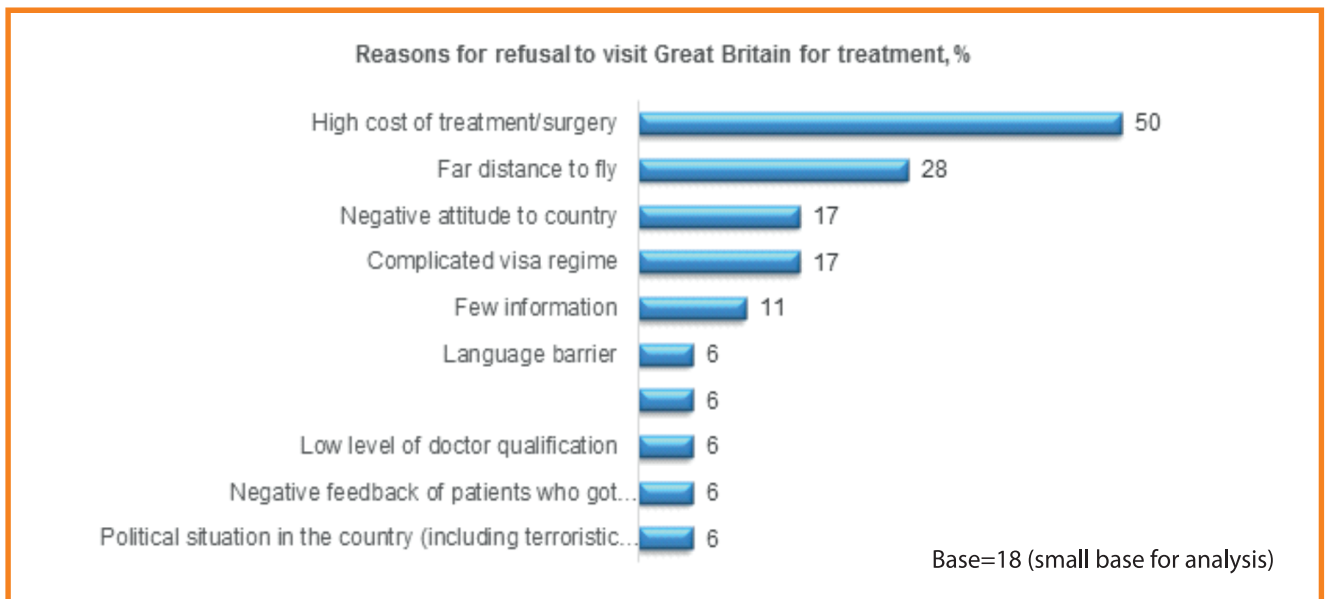


A10. Why you will not go for treatment in this country?

United Kingdom

The reasons for not considering the UK as a country for medical tourism are the following: high cost of treatment / surgery (50%), the long distance for the flight (28%), the negative attitude to the country (17%) and complicated visa regime (17%).

Figure 71. Reasons for refusal to visit Great Britain for treatment



A10. Why you will not go for treatment/surgery in this country?

Thailand

As for the reasons for refusing to consider Thailand for medical services, respondents named factors such as negative attitude towards the country (27%), negative feedback from relatives, friends or acquaintances (27%) and inappropriate climate (20%).

Figure 72. Reasons for refusal to visit Thailand for treatment

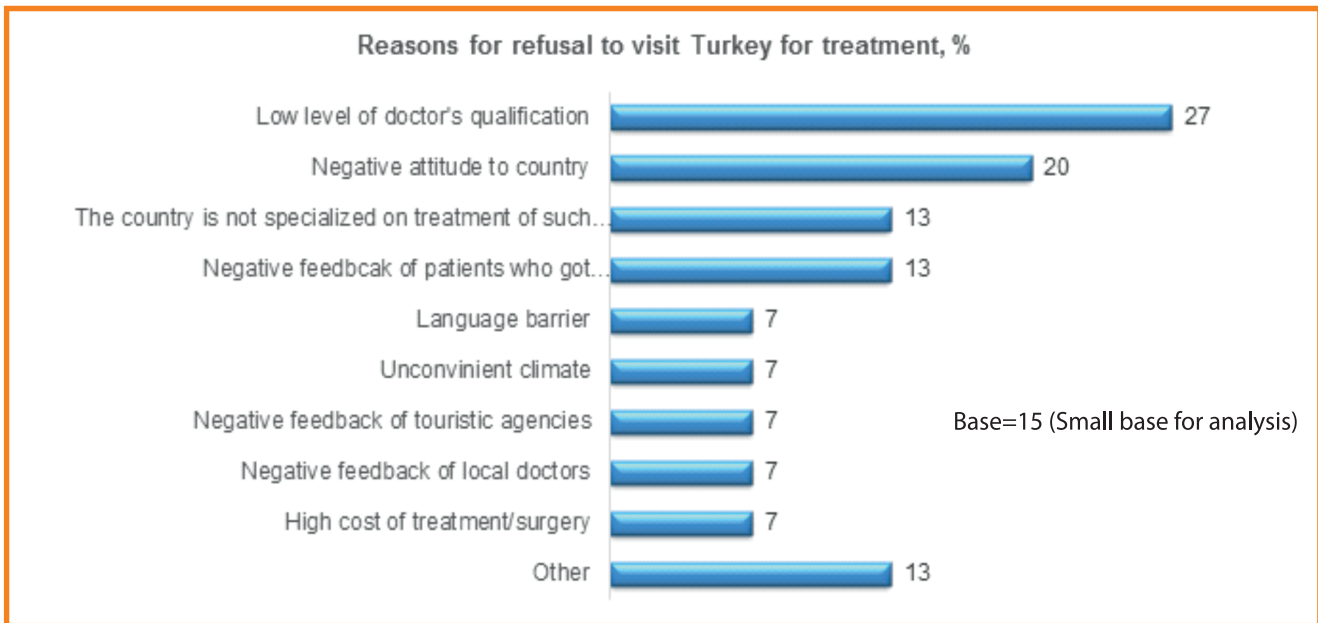


A10. Why you will not go for treatment/surgery in this country?

Turkey

The reasons for refusing to consider Turkey as a country for medical tourism are such factors as low level of doctors' qualifications (27%), negative attitude to the country (20%), the country does not specialize in respondent's interest in the disease (13%) and negative reviews of patients, who were treated in this country (13%).

Figure 73. Reasons for refusal to visit Turkey for treatment

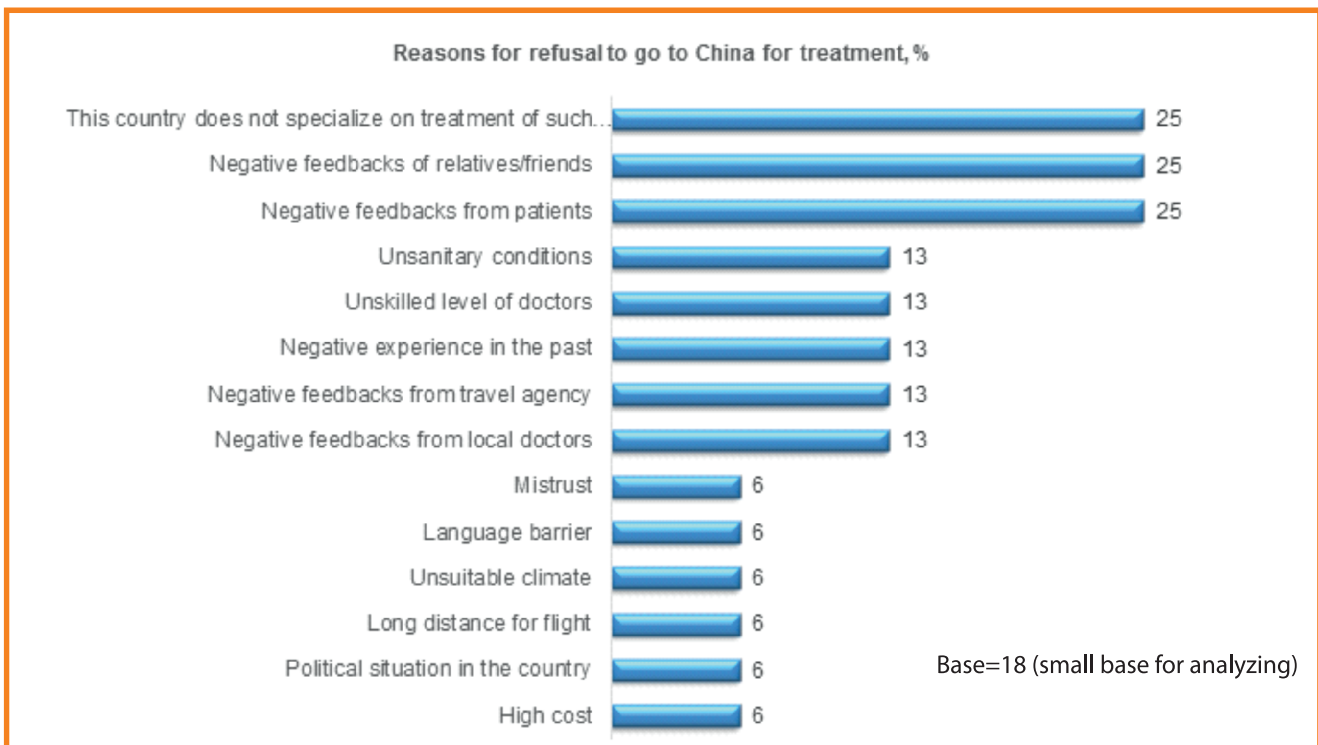


A10.Why you will not go for treatment/surgery in this country?

China

The reasons for refusing to consider China as a country for medical tourism are such factors as the negative attitude towards the country (36%), the language barrier (29%) and the low skill level of doctors (29%) and negative feedback from relatives / friends / familiars (21%).

Figure 74. Reasons for refusal to go China for treatment



A10.Why you will not go for treatment/surgery in this country?

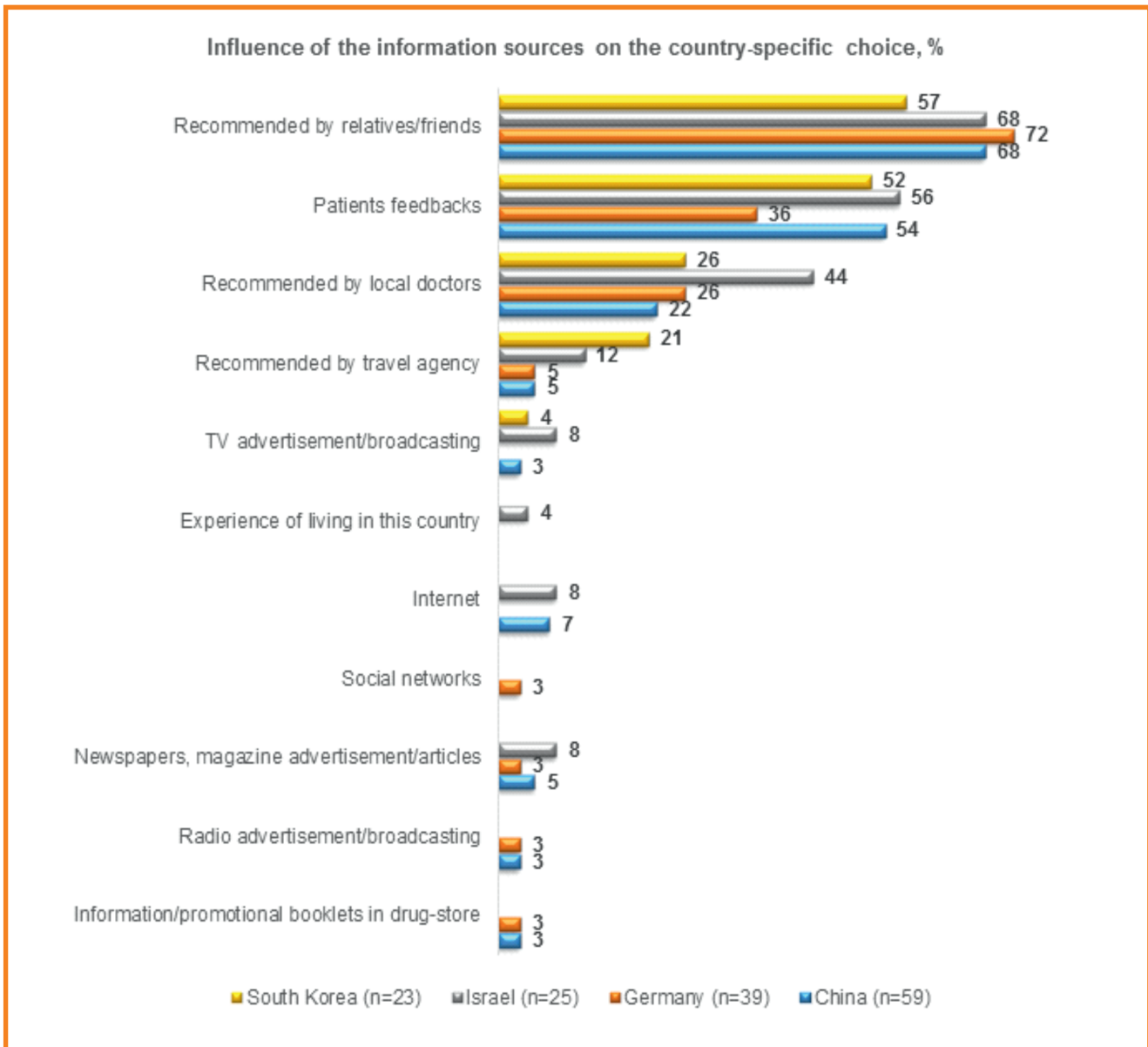
7.5. Conclusions: competitor analysis

Medical tourism destination brand positioning starts with the first level of "Knowledge", where the customers need to state the country name from Top of Mind (spontaneous first mention), additionally destination knowledge can be shown as "Spontaneous knowledge following references" and "Knowledge with a hint". Once the customers have sufficient knowledge about medical tourism destination, the following stages of take place: "Consideration", "Trial", "Use" and, finally, "Loyalty". Among the potential users of medical tourism services there is a high level of knowledge of medical tourism services in such countries as China (28%), Germany (23%), Israel (17%), but South Korea is on the 4th place. Among these four countries, South Korea has a low level of spontaneous knowledge (top of mind): 13% is the first mention and 32% is the mention with a hint. Among the countries considered by potential users for medical tourism, China stands on the first place and is considered by 35% of potential users, then - Germany and Israel (respectively 29% and 22%) and only 20% of potential users are considering South Korea.

The majority of respondents went abroad for treatment only once. The respondents traveled to Germany, China, Turkey, South Korea and Israel. The countries of the recent visit were China (29%), Germany (19%), Israel (12%) and South Korea (11%). The sources that influenced the choice to visit these countries were mostly recommendations of relatives, friends or acquaintances, reviews of patients who received treatment and recommendations of local doctors. It should be noted that the proportion of respondents who mentioned the recommendations of the travel agency as a main source of information was relatively low: China (5%), Germany (5%), Israel (12%). As for the criteria for choosing these countries, high level of medicine, modern technologies and the experience of other patients were named. It is worth noting that 60% of respondents did not consider other alternative countries as options for treatment, this can be explained by the fact that respondents initially choose only one particular country for consideration. However, among the other respondents, who did consider other countries, the names of such countries as Germany (14%), Israel (14%), China (8%), South Korea (6%) were heard.

Most respondents do not reject any particular countries for a medical tourism trip (63%), however, among the countries where respondents did not exactly go to medical treatment were the United States (11%), Thailand (9%), China (8%). Respondents do not consider the US to receive medical services because of the high cost of medical services (48%), the long distance for the flight (39%) and the political situation in the country (39%). Among the reasons for refusing to consider Thailand as a country for medical tourism, there were mentioned such reasons as clinics in this country do not specialize in the diagnoses of respondents (22%), negative feedback from relatives, friends or acquaintances (22%), unsanitary conditions (17%) and a low skill level of doctors (17%). As for the reasons for refusing to consider China for medical services, respondents named factors such as this country does not specialize in the treatment of diseases / plastic surgery, respondents' interest (25%), negative feedback from relatives, friends or acquaintances (25%) and negative reviews patients who underwent treatment or surgery (25%).

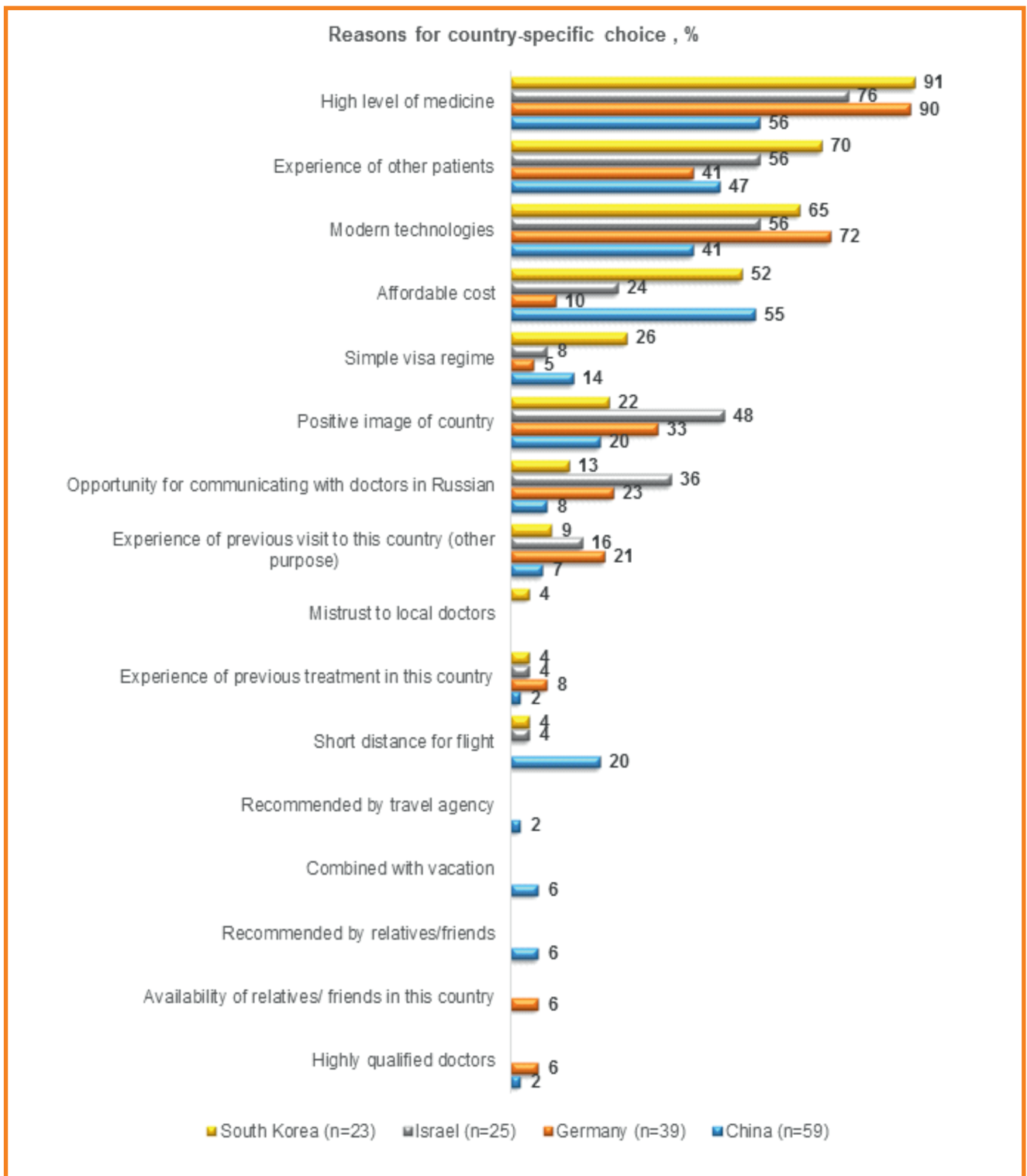
Figure 75. Information sources of most influence used to make a decision to select a specific medical tourism destination (Germany, Israel, South Korea, China)



A7. What information sources affected your choice of _____ (ANSWER A6) as a country for having medical treatment/ plastic surgery?

A8. Please place three major sources of information in descending order of priority, starting from the most important source.

Figure 76. Reasons for medical tourism destination selection (Germany, Israel, South Korea, China)

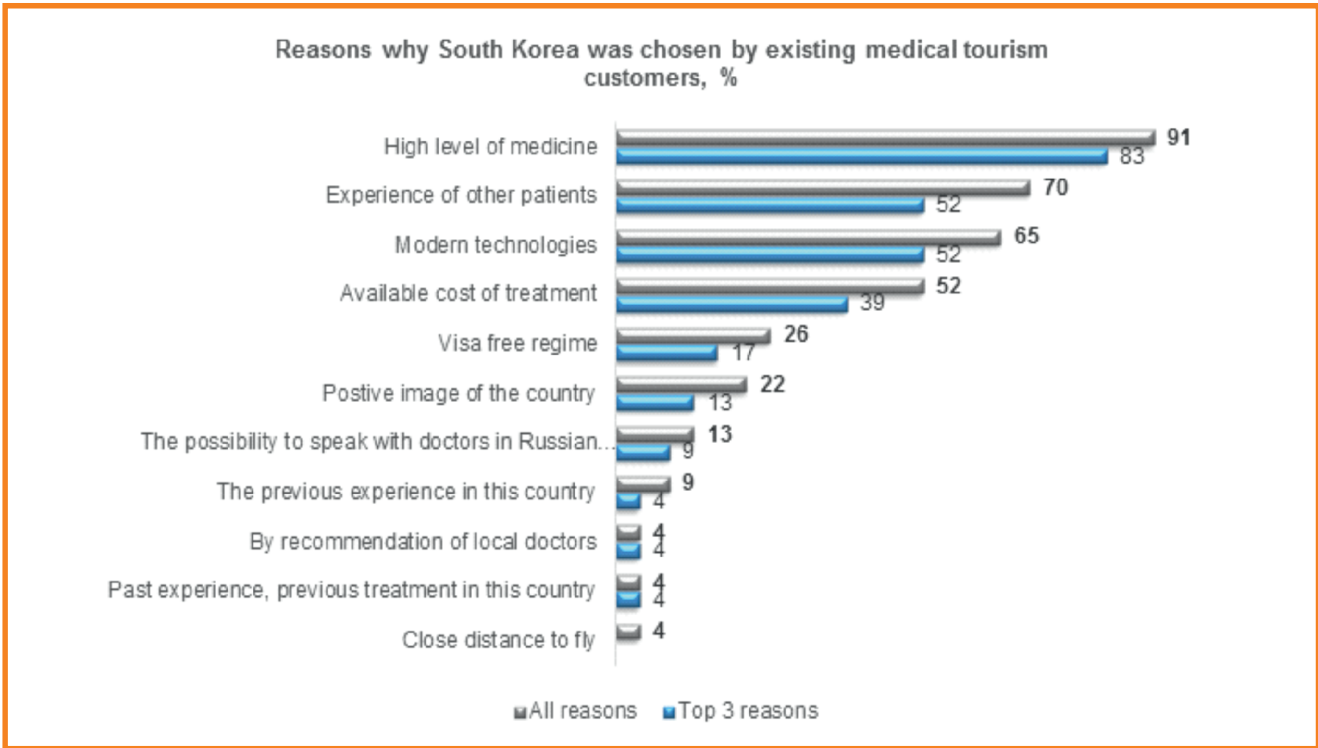


A9. Why did you go especially to _____ (ANSWER A6) for having medical treatment/surgery?
 A10. Please place three major reasons in descending order of priority, starting from the most important one

8. Medical tourism destination: South Korea

8.1. Statistics: Main reasons for choosing Korea

Figure 77. Reasons why South Korea was chosen by existing medical tourism customers.

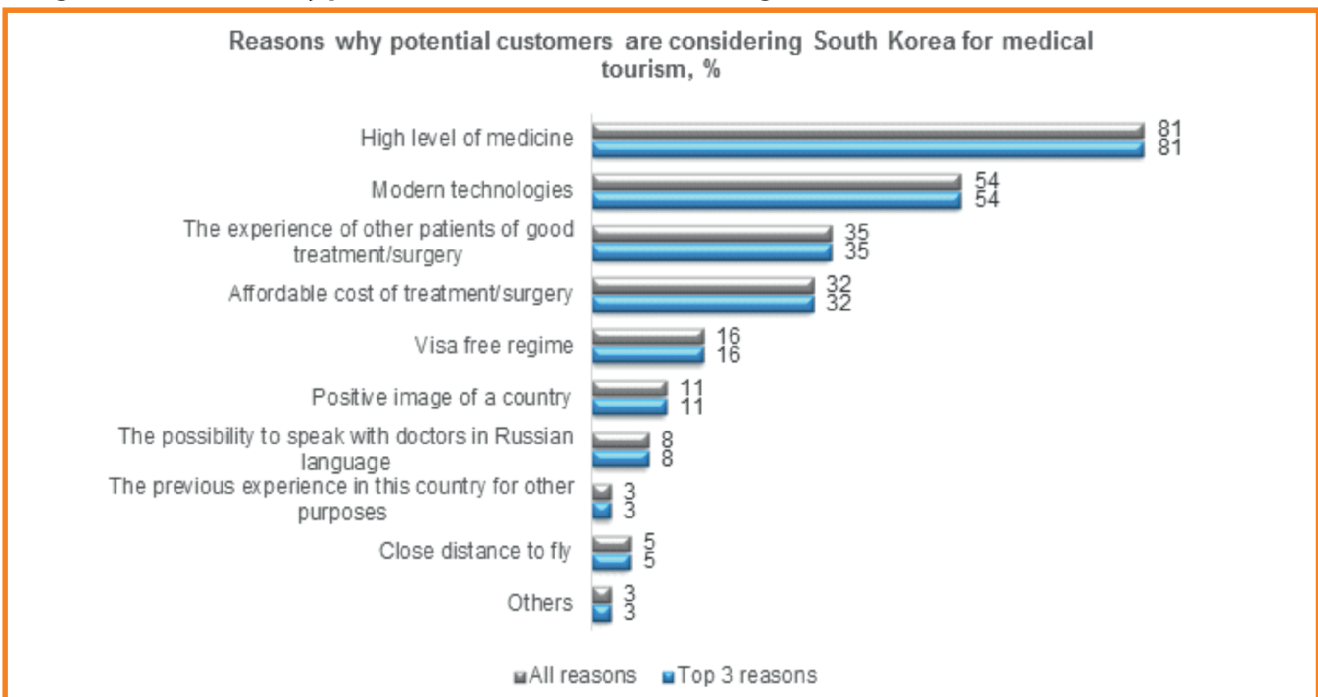


A9. Which sources of information influence on your choice of country for treatment and surgery?

A 10.. Arrange the 3 main sources in order of importance, starting with the most important

The main reasons for respondents considering South Korea are: the high level of medicine (81%), the availability of modern technologies (54%), the experience of other patients (35%), and the acceptable cost of medical services (32%).

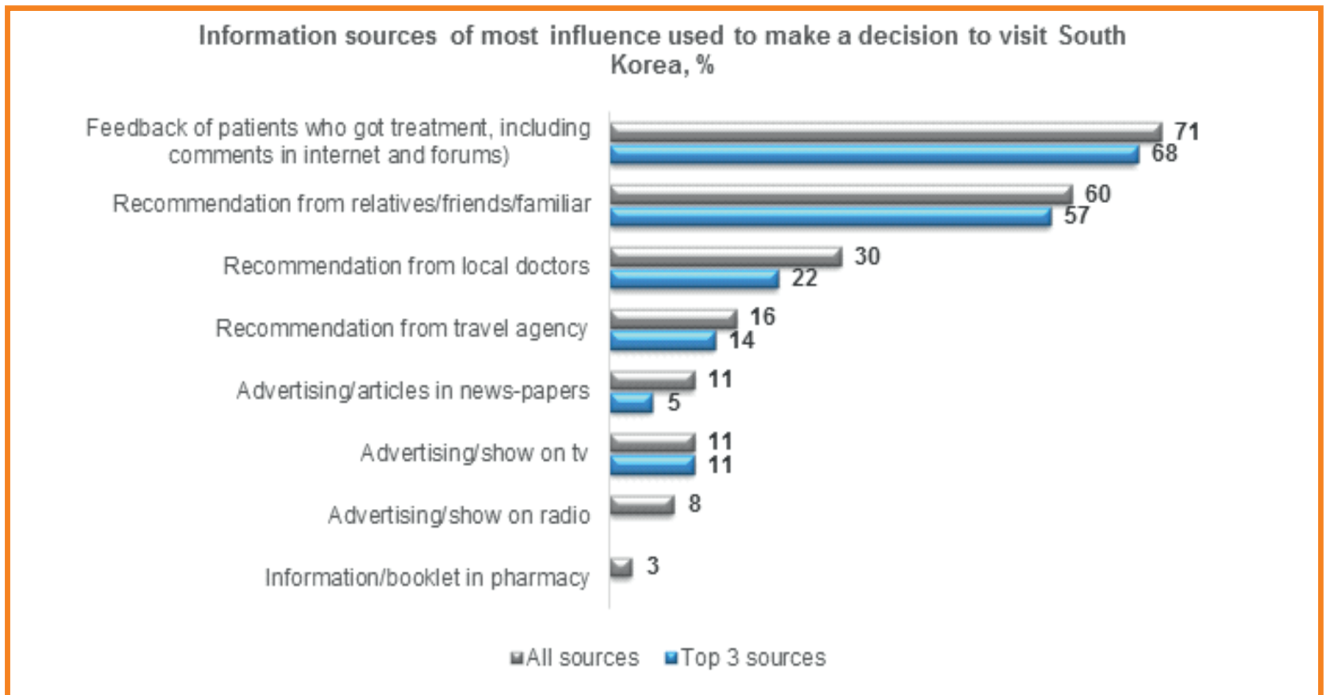
Figure 78. Reasons why potential customers are considering South Korea for medical tourism



A7. Which sources of information influence on your choice of country for treatment and surgery?
 A8. Arrange the 3 main sources in order of importance, starting with the most important

The main sources of information that influenced the consideration of South Korea as a country for medical tourism are reviews of patients who received treatment (71%) and recommendations from relatives, acquaintances or friends.

Figure 79. Information sources of most influence used to make a decision to visit South Korea

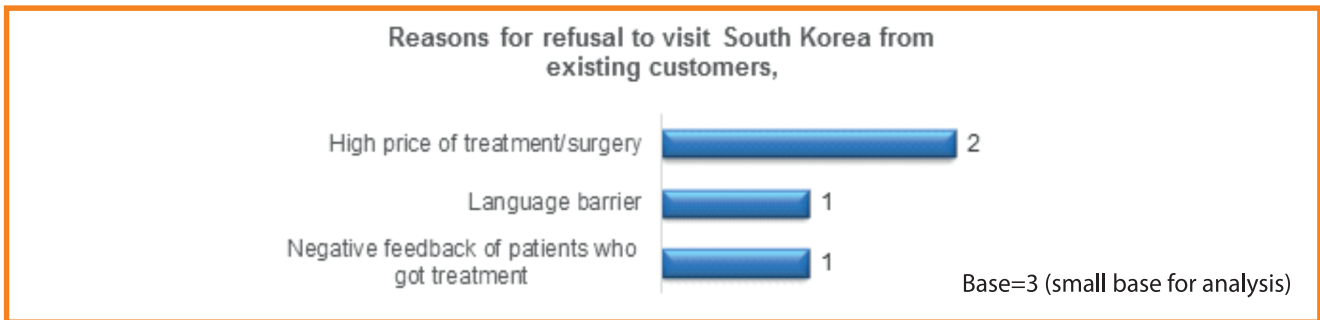


A5. Which sources of information influence on your choice of country for treatment and surgery?
 A6. Arrange the 3 main sources in order of importance, starting with the most important

8.2. Statistics: Main problems with medical tourism in Korea

Among the few reasons for not considering South Korea among actual users of medical tourism, such factors as high cost of treatment (2 people), language barrier (1 person) and negative reviews of patients who received treatment (1 person) were stated.

Figure 80. Reasons for refusal to visit South Korea from existing medical tourism customers



A10. Why you will not go for treatment in this country?

Few potential customers of medical tourism are refusing to consider South Korea due to language barrier (2 people), a long distance for a flight (2 people) and rigorous visa regime (1 person)

Figure 81. Reasons of refusal to visit South Korea from potential medical tourism customers



A.10. Why you will not go for treatment in this country?

8.3. SWOT analysis

All the advantages and disadvantages of medical tourism services have been summarized in the following SWOT summary:

Figure 82. SWOT summary of medical tourism in Korea

<p>Strengths:</p> <ul style="list-style-type: none"> • High quality medical services • Advanced, cutting-edge technology • Relatively affordable costs of treatment • Large number of accredited hospitals • Good reviews from existing customers • Easy trip organization from Kazakhstan 	<p>Weaknesses:</p> <ul style="list-style-type: none"> • Misperception of general image of Korea amongst potential customers • Association with traditional medicine and plastic surgery specialization • Internal price disparity amongst hospitals • Lack of detailed, easy-accessible information
<p>Opportunities:</p> <ul style="list-style-type: none"> • High growth potential market • Opportunities for health professionals • Strategic partnerships 	<p>Threats:</p> <ul style="list-style-type: none"> • Unstable foreign exchange • Increased competition • Economic downturn

Strengths

Main strengths of Korea as a medical tourism destination are primarily based on the opinions of existing customers and global reputation of the country. According to the International Medical Travel Journal (IMTJ) 2018, Korea scored the first place in the Destination of the year (for Health and Medical tourism), which shows its core competency in the field.

High quality healthcare services

- High level of doctor specialization
- Highly qualified, multi-profile, internationally famous clinics with a broad scientific base
- High level of advancement in plastic surgery
- Advanced treatment options available for specific diseases (ex. gastroenterology and urology)

Advanced, cutting-edge technology

- Availability of modern high-precision technology
- Continuous advancement and focus on Research & Development

Customer focus and excellent customer services

- Prompt provision of medical test results and hospital discharge
- Availability of Russian-speaking coordinators
- Polite and friendly attitude to clients
- Possibility to have Skype (video-call) consultations
- 24/7 support

Easy trip organization

- Visa-free stay for up to 90 days
- Direct flight from Almaty to Incheon

Reasonable price policy

- Price of the treatments is 30-40% cheaper, than in other medical tourism destinations (such as Germany and Israel)
- Flexible discount and bonus system
- Often hospital (or local partner) provides transfer of the patient free of charge

Weaknesses

The main weaknesses of Korea as a medical tourism destination are observed at the level of attracting potential customers in Kazakhstan. In general, a lack of accurate information and misperception of the general image of Korea are observed amongst study respondents. A good proportion of the Kazakh population is unaware about the visa free regime, direct flights to Korea and presence of Russian-speaking coordinators at Korean hospitals. Other problematic areas revealed from the study:

- 1) Increase in overall price of treatment, arising from additional need for diagnostics (patient reviews)
- 2) Healthcare quality significantly varies amongst hospitals (tourism agencies are willing to work only with trustworthy hospitals)
- 3) Necessity to visit South Korea several times for follow-up treatment (hospitals are providing medicine prescriptions only in the presence of the patient; diagnostic tests from other countries are not accepted)
- 4) Stimulating overestimated expectations of clients (from the review of family one patient: *"All hospitals in other countries declined to treat my relative with cancer, but Korean hospital assured that they can help her recover. It took 11 months of expensive treatment, but they still couldn't help her. She passed away"*)

Opportunities

There are numerous problems associated with healthcare services in Kazakhstan, and people will continue to travel abroad for medical treatment. Therefore, there are promising opportunities in attracting Kazakh nationals for medical treatment to Korea. There are potential partnerships that can be initiated and formed by various key players of the medical tourism industry. For instance, Kazakh government is actively seeking international partners to provide treatment that is not available locally. Hence, there is opportunity for development of partnerships between state Kazakh hospitals and Korean hospitals. Additionally, partnerships can be made amongst Korean service providers. For example, medical tourists are usually accompanied by family members who would need accommodation while visiting the destination countries. Many of the destination hospitals can form strategic partnerships with hotel chains and airlines to accommodate the needs of medical tourists' companions and families.

Threats

Further devaluation of the Kazakh national currency (tenge) and economic downturn in Kazakhstan may lead to reduction in paying capacity of the Kazakh population. Thus medical services abroad may become less attractive due to higher costs. Patients may choose alternative medical destinations, which provide cheaper services (for example Russia or China). Russia can gain more popularity for medical tourism due to close geographical proximity, absence of language barrier and relatively stable exchange rate (Russian ruble to Kazakhstan tenge). Additionally, Kazakh government is putting efforts to reduce the outflow of patients for treatment abroad through development/improvement of the local healthcare system. One of the most ambitious projects is the University Medical Center (UMC) in Astana, that comprises four hospitals (three of which have obtained JCI accreditation).

9. Development strategy for medical tourism in Korea

9.1. General image: customer-centered communication strategy

The conducted study revealed that the three main reasons why potential patients refuse to visit South Korea are:

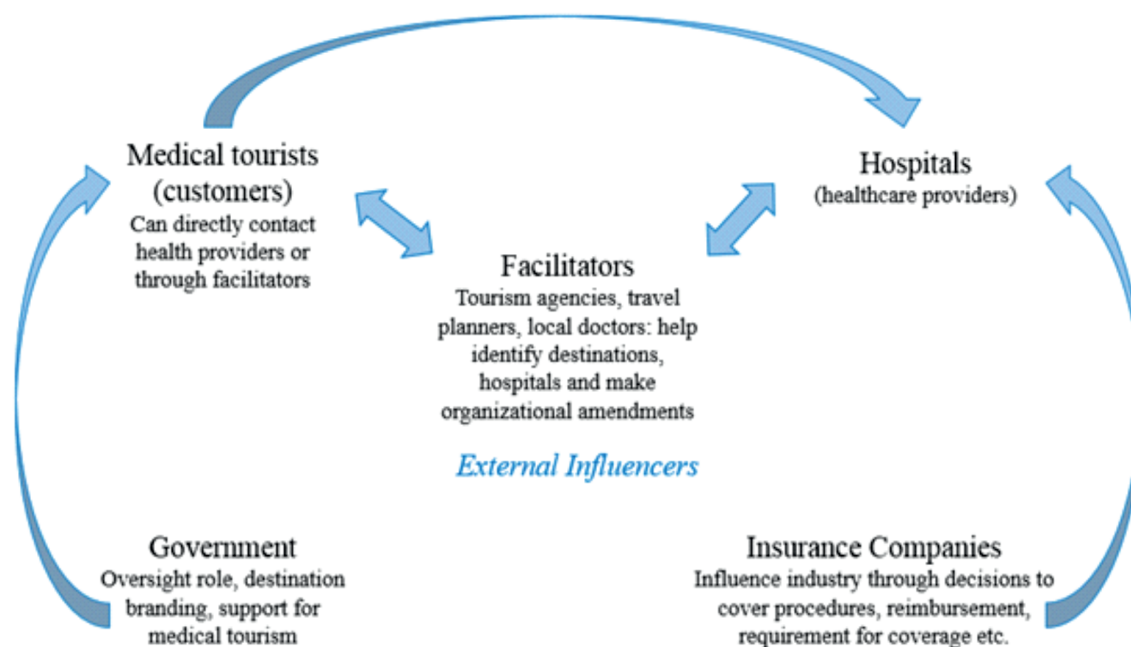
- Rigorous visa regime
- Language barrier
- Far distance for travelling

All these factors arise due to lack of information and misperception of the general image of Korea amongst Kazakhstan population. It is therefore, important to develop an effective communication strategy to ensure that accurate and positive information about South Korea reaches the customer. **Three main aims of customer-centered communication strategy:**

- 1) **Increased brand awareness**
- 2) **Increased brand preference**
- 3) **Promote greater reach at lower cost**

Customer-centered communication strategy has to be addressed in a coordinated marketing approach which includes all parties involved (tourism agencies, private practitioners, clinics and hospitals, insurance companies, government, ministries and research institutes). This strategy has to be achieved through various communication channels and focus on stimulating “word-of-mouth” marketing amongst Kazakhstan population. Customer-centered communication strategy has no direct influence on generating income for medical tourism industry, however it has a strong influence in attracting patients in the long-term and short-term perspectives.

Figure 83. All the parties involved and their coordination in medical tourism



The government has the main role in “**greater reach at lower cost**” strategic area through promoting geographical proximity and easy access to Korea. Geographical proximity is likely related to cost because the more distant countries tend to be associated with higher travel costs. Thus patient travel is likewise affected by wider economic and external factors such as exchange rate fluctuations, restrictions to travel (ease in obtaining visas) and security concerns. More efforts have to be made to promote geographical proximity and easy access to Korea for Kazakhstan people. This study has shown that proportion of Kazakhstan population is unaware about visa free access to Korea for Kazakh nationals. This misunderstanding of rigorous visa process, is one of the reasons potential customers are not considering to visit Korea. In addition, a good proportion of study respondents were unaware about direct flight from Almaty International Airport to Incheon International Airport. Moreover, population is relatively uninformed about presence of Asiana Airlines. Therefore, it is very important to put more efforts into promotion and marketing of airlines conducting flights to Korea.

General image of Korea has to be associated with top medical tourism destination and high quality healthcare. All types of international co-operation and mutual respect between Kazakhstan and South Korea have to be well covered by the media to enforce the understanding of friendship by citizens of the two countries. Representatives of Korean administration should be encouraged to actively participate (and organize) trade fairs, exhibitions, conferences, public events by its consular and private company offices. Government has a very important role in supporting cross-border movement of medical professionals through tight co-operation with Kazakh hospitals, medical universities and Ministry of Healthcare.

“Increased brand awareness” mainly relies on SEO (Search Engine Optimization). SEO is a combination of strategies, techniques and tactics used to increase the amount of visitors to a website by obtaining a high-ranking placement in the search results page of a search engine — including Google, Bing, Yahoo, Yandex, Mail.ru and other search engines. It is important to note that due to recent tensions between Russia and Western Countries, more Russian-speaking users are shifting from using Google to Russian-based Yandex engine (see Appendix III for further details). Currently, Yandex is home to 87 million internet users in the CIS countries (according to the Association of Internet Trade Companies (AITC)). All the parties involved in medical tourism services need to clearly define the links/keywords associated with their work to boost customer (patient) awareness through all search engines. Hospitals, tourism agencies and other parties directly involved in the contact with potential customers should maintain easy access and quick response practice. Websites, social media accounts and general information about medical tourism in Korea (including online portals such as Wikipedia) should contain up-to-date information. Information about high standards of Korean Healthcare System can be clearly delivered to the customers through outlining (and continuing rise) of overall rating of Korea through the various medical tourism ratings. **It is very important to highlight through all possible information channels the current success of South Korea which was ranked first in the destination of the year category according to International Medical Travel Journal 2018.** It is also recommended to continue outlining other medical tourism rankings such as MTI (Medical Tourism Index). Currently, South Korea holds the 8th ranking in the global MTI report⁴.

“Increased brand preference” area should focus on ensuring that potential customers choose Korea (and its healthcare) amongst other medical tourism destinations. Nowadays, influencer marketing plays a very important role in targeting clients. As the Kazakh population became more technologically advanced, influencer marketing has made its way to the forefront of stimulating Kazakhstan clients. Key social media trend in Kazakhstan created by “viners” has made a revolution in influencer marketing tactics. “Viners” are people who make funny short videos about everyday life and their creations called vines. In Kazakhstan, Instagram is used as an online shop, forum to discuss issues personal and otherwise, a news agency and now a platform for viners. At the same time, Kazakhstan users started spending four times as much time front of their phone displays⁵. The likes, comments and reposts changed the lives of viners, since the companies realised that their direct audience is huge. For example, one of the most influential vine channels in Kazakhstan is @yuframe with an audience of 2.9 million people (in 2017) and this number is still increasing. @yuframe is managed by four students making entertaining videos every day. Recent posts advertise flower delivery, educational agency, language centers in different countries and even the mobile (and internet) operator Beeline. Kazakhstan companies are devoting more time and effort to influencer marketing tactic than ever before.

In relation to medical tourism to Korea, influencer marketing has promising potential to promote wellness, spa/beauty, cosmetic treatment (surgery) services. This is explained by relatively young audience of social media platforms. Hospitals providing these types of services will be able to demonstrate impressive guest content through co-operation with viners and other social media stars. Korean hospitals can introduce Brand Ambassador Program which will allow to create memorable, valuable and gorgeous looking content about wellness/beauty services.

⁵<https://astanatimes.com/2016/08/kazakh-viners-gain-popularity-15-seconds-at-a-time/>

⁴MTI Global Ranking Report 2016 and 2017

Instagram and YouTube platforms are mainly focused on targeting the young audiences. However, adult audiences in Kazakhstan have also become very technologically advanced mostly through the use of Russian (CIS) social media platforms. Two major Russian-speaking platforms are “VK” (stands for Russian vKontakte) and “Odnoklassniki”. VK is the most visited website in Russia and is also number one social media platform in Russia, Ukraine and Kazakhstan, with 100 million users categorized as active users. Facebook has also gained massive popularity amongst the adult population in the Russian-speaking world. Adult population is mainly keen on joining the groups, associations and news sources in these social media platforms. This study has shown, recommendations from other patients play the major role in influencing decision to visit Korea for medical tourism. Therefore, it is strongly recommended to support the groups where existing clients share the opinions (experiences) about medical tourism in Korea. It is also recommended to stimulate clients to leave reviews on official hospital pages in Facebook (or VK). Active participation of Korean medical tourism representatives will allow to create long-term relationships with the clients (patients). Korean hospitals can also directly engage with potential customers by sharing success treatment stories. It is also recommended to continue promoting medical tourism to Korea through Facebook and VK advertisement system.

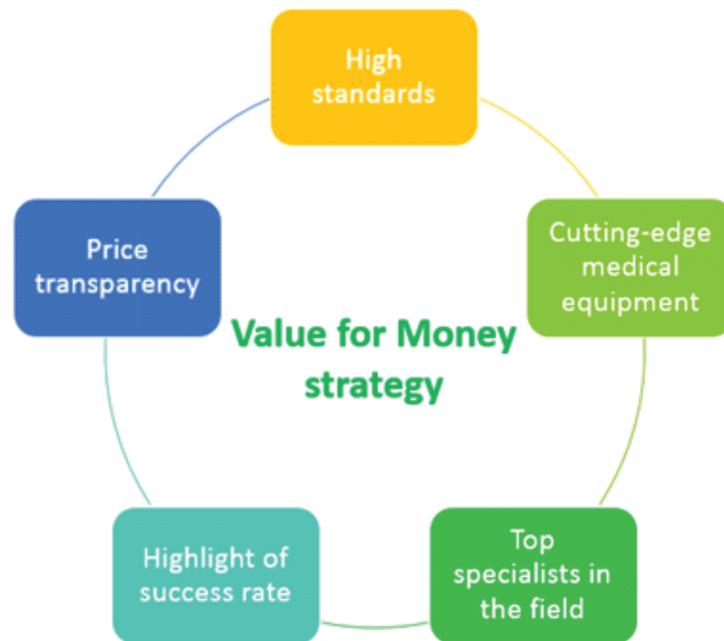
This study has shown that existing medical tourism customers were unsatisfied with the accommodation for patient-accompanying people and accommodation outside the hospitals. To improve this area healthcare providers (hospitals) may consider establishing partnerships with Expedia, Booking.com and Trip Advisor to facilitate in accommodating patients (and their relatives/friends) in close proximity to hospital and at a special rate.

9.2. Korean hospitals: value for money, provider-patient communication strategies

Value for Money strategy

The concept Value for Money (VfM) has been central to healthcare policies and delivery of healthcare for significant time. Simplistically, VfM concept is straightforward: it represents the ratio of some measure of valued health system outputs to the associated expenditure. VfM strategy usually has three components, economy, efficiency and effectiveness. In regard to the current study, the VfM strategy for Korean Hospitals has been re-centered where the main goal is to assure the customer that resources (spent for treatment in Korea) are successfully transformed into valued health outputs. In that sense, the VfM strategy has been separated into five key areas dedicating to delivering accurate information to the customer: high standards, cutting-edge medical equipment, top specialists in the field, highlight of success rate and comparison of price tables.

Figure 84. Five areas of Value for Money strategy for Korean hospitals



- 1) **High standards** area pursues to ensure the customer has understanding of high quality standards imposed in all Korean hospitals. Korean Hospitals need to clearly show the customers that they maintain and continue high standards of practice through JCI (Joint Commission International). It is important to outline that a high number of Korean hospitals possess the JCI accreditation in comparison to Kazakhstan (The hospitals which have JCI accreditation include: the hospitals of the Corporate Fund "University Medical Center" (Republican Diagnostic Center, National Research Center for Maternal and Child Health, National Children's Rehabilitation Center and National Scientific Center for Oncology and Transplantation) and National Scientific Cardiac Surgery Center).
- 2) **Cutting edge medical equipment** area pursues the goal to spread the information regarding the scientific advancements, revolutionary medical equipment and technologies used in the Korean hospitals. South Korea has gained the international fame for beauty enhancement services and methods. It is usually on the "top of mind" whenever people think of cosmetic surgery. However, other unique cutting-edge technologies developed in Korea are less known. It is important to highlight that Korean hospitals continue to improve the methods of treatment to provide minimally invasive surgery including laparoscopic, thoracoscopic and robotic surgery. Customers should be informed that they can get the exclusive type of treatment in Korean hospitals, that is not found anywhere else in the world. Detailed information about technology, their features and benefits have to be clearly shown in the website of Korean hospitals. In addition, it can be very efficient to spread the videos of advanced technology methods through YouTube and other video platforms. Such social media coverage will allow to attract more interest to scientific developments in Korea and assist gaining global fame as a leader in medical device industry.

3) Top specialists in the field. Although the hospital image and ranking is key to attracting customers, doctors and professors of Korean hospitals are less known. It is therefore, very important to allow doctors to “build their name” in the global arena. It is estimated that more than two million doctors and practitioners maintain an individual profile on LinkedIn for healthcare marketing purposes. There are several reasons why doctors are encouraged to have a LinkedIn profile. First one is the reputation management, where “you are your personal brand” and the doctor can display all his achievements, trainings and experiences. Second is the enhanced online visibility of doctors which will allow potential customers to easily find information about qualifications and specialization, thereby facilitating direct contact between the patient and doctor. Third is easy access for communication with other doctors, where LinkedIn generates a pathway for referrals and professional networking.

4) Highlight of success rate. This study has shown that the most influential sources of information for decision making process are recommendations from other patients and family/friend referrals. Therefore, it is essential for the hospitals to “Shout Out Success Stories” of their patients. All the positive reviews and incredible stories should be delivered to the public through media coverage. This can be achieved by co-operation with TV channels, newspapers, magazines and online news sources.

5) Price transparency. The study has shown some controversial points regarding the pricing in Korean hospitals. Tourism agencies and patients generally state that it is more expensive to undergo a medical treatment in Germany or Israel in comparison to Korea. On the other side, some patients have experienced a rise in the overall price of treatment (arising due to additional diagnostics) upon their arrival to Korea. In order to ensure, that the customer is offered what he is expecting it is very open to maintain a “clear pricing information”. Customers must be informed about the division of all expenses of their treatment, through easy access to price information on the hospital website. In addition, it is useful to develop a guideline stating the types of diseases/conditions where additional costs of treatment can arise. This will allow the potential customers to plan their budget more efficiently and know what to expect once they arrive to the hospital. For the returning customers, hospitals may consider offering discounts for full package check-ups and spa tours.

Provider-patient communication strategy

The main aim of the provider-patient communication strategy is to engage with the customer on a personal level at all times. In order to allow the patient to reach the ultimate level of trust with his doctor, a close relationship has to be developed. Patients need to be able to contact their doctors, hospital representatives, coordinators easily at all times. Hospitals must ensure that all essential information can be accessed easily in Russian and English languages. From the overall satisfaction of medical services abroad the key improvement areas for hospitals were revealed: assistance in accommodation for patient-accompanying people, accommodation outside the hospital, translation services, hospital meals and post-treatment care. To cover these areas accordingly, the patient-provider communication strategy is separated according to three stages:

- 1) Pre-treatment
- 2) Treatment
- 3) Post-treatment

Figure 85. Key hospital improvement areas revealed from this study



- 1) **Pre-treatment phase.** Once the customers have made a decision to visit South Korea for medical treatment, they contact the hospital to ask for consultations (directly or through tourism agencies). It is very important, to make sure that the customer receives a prompt, detailed response with the type of treatment offered. It is highly appreciated when the customer can contact hospital coordinators through audio or video call (such as WhatsApp and Skype). Therefore, clear contacts information must be stated on the hospital website including: information desk, telephone numbers and coordinator names in Russian and English language. In order to facilitate communication with the patient, the hospitals can introduce an online consultation chat at their website (one a person opens the hospital website an automatic online consultant window pops up). Some customers, have stated that they find it hard to change the language on the website of some hospitals, hence it is important to ensure that the language options are clearly displayed.
Another important improvement area coving trip organization is accommodation. A significant number of patients were not fully satisfied with the accommodation services for accompanying people (their family). When a patient arrives for a serious treatment, the hospital should aim to provide the best support not only for the patient, but for his family. Sometimes, the family has to find hotels themselves, which may be located far from the hospital. This means that they need to find appropriate means for travelling to the hospital, thereby generating additional worries for people. To improve this, the hospitals are recommended to provide stationary accommodation for people accompanying patients with severe conditions. In other cases, the hospitals may consider a co-operation with nearby hotels for accommodation (patients/their relatives can stay at this hotel at a lower price).

- 2) **Treatment phase.** Some patients have stated that they were unhappy with the food provided at the Korean hospitals. In order to create a more “cozy, homestay” environment hospitals should make sure they provide a wide variety of meals for different tastes. Some Korean hospitals do provide a very good selection of menus for every type of customer, however not many people are aware of it. Customers have stated that they found it difficult to discover all the hospital facilities due to lack of information provided. To cover these problems, hospitals may introduce Mobile Apps which allow patients to easily track their stay in the hospital. A good starting point would be a General Information Mobile App, where patient can find all the essential information about his stay in the hospital.

Figure 86. Types of Mobile Apps hospitals can introduce to improve communication with patients⁶.



⁶Source: Merraine Group Inc
<https://www.merraine.com/8-types-mobile-hospital-apps-3-features-patients-want/>

These Mobile Apps can allow patients:

- Locate themselves around the hospitals more easily. The App should show detailed maps and detect patient location.
- Contact their coordinators and other hospital staff through a centered platform.
- ER/Urgent Care Apps – Route patients to the nearest and most cost-effective urgent care choice. Provide directions, travel time, wait times, insurance options, etc.
- Wayfinding Apps – Help patients find their way around the hospital. Search for departments, staff members, physicians. Provide location-based push messaging, maps, and more.
- Pregnancy/Childbirth Apps – Help to educate patients and keep them on schedule for appointments and care with a pregnancy tracker. Provide information for both pre and postnatal care, as well as newborn infant care.
- General Hospital Apps – A main app for the hospital to spotlight your branding and messaging. This overall app can provide hospital information, services provided, virtual tour, ER wait times, etc.
- Cancer Care/Outpatient Apps – Engage with outpatients about their condition and increase adherence to their treatment plan. Patients can manage their care team and lab results with their treatment tracker.
- Physician Referral Apps – Referrals, long a thorn in the side of patients and doctors alike, also get the app treatment. Provide a quick and easy referral process and strengthen physician relationships at your facility. Request appointments directly from the app.
- Wellness Apps – Encourage patients to track their own health. Provide a health tracker, exercise class schedules, and health and wellness tips. Even offer a reward program to encourage regular use.
- Medication Tracking Apps – Encourage adherence to prescription regimen by tracking doses, intervals, meals, and feelings. Help manage response to treatment and make sure there are no medication conflicts.

3) **Post-treatment phase.** A good proportion of medical tourism users were not satisfied with the post-treatment support. People have found it difficult to ask for additional consultations/advice from their doctors and coordinators. Although, hospitals may not be happy to spend more time with the patients who have returned home, it is highly important to maintain the contact with the customer in the long-term perspective. Such attitude to patients will allow to generate a “loyal customer” base and patients will gladly spread the word for hospital services amongst their friends and relatives. Post-treatment communication can be achieved through emails, audio and video calls.

In the case of check-up diagnostics, wellness and spa services hospitals can consider introduction of referral programs. To ensure efficient record, all customers should be registered on official hospital website of mobile app, having their personal accounts. This strategy is a win-win situation for referrer and referee, and for the hospital. The referral program has to be promoted at the front and center of hospital homepage, on their newsletter and social streams, giving the customers steady exposure to join and make referrals. In addition, hospitals may introduce special packages for Kazakh national holiday dates, when people have extended vacations. For example, International Women's Day (8th of March) which is associated with long weekends and holidays.

9.3. Tourism agencies/local doctors: intermediary facilitator strategy

During the past years the role of tourism agencies has significantly reduced. This study has shown that only 3 in 10 patients plan their medical trip through tourism agencies. Potential customers are not willing to use tourism agency services all information is accessible through internet and customers can plan their trip themselves. Thus, consumers are empowered to achieve the same results as the travel/agencies through online bookings and purchases. In addition, tourism agency services are associated with additional costs for the trip amongst customers. Another important factor is the ability to provide specialized medical advice for the patients by travel/tourist agencies. Agents usually do not have any medical specialization and can misguide the patients towards “unsuitable” hospitals. A wide majority of Kazakh medical tourism agents have not visited the destination country/hospital or do not possess necessary information they are offering/presenting to a client. This predisposes the risk of patients being unsatisfied with medical tourism services abroad. After first referral from the tourism agencies, the client has no interest in contacting the agency again and can easily arrange his second trip directly with the hospital. This creates a conflict between hospitals and medical tourism agencies, since the latter are still willing to claim a commission from secondary visits. Nevertheless, the study has shown that 14-16% of potential clients were influenced through tourism agencies. Therefore, it is still very important to deliver up-to-date information about Korean hospitals and co-operate with the tourism agencies.

Another, influencing factor revealed from the study were recommendations from local doctors. It was estimated that approximately 22-30% of potential clients received advice about going abroad for treatment from their doctors in Kazakhstan. Thus, it is also important to make establish strong relationships between Kazakh and Korean doctors.

Promotion through tourism agencies and local doctors is proposed in “**Intermediary facilitator strategy**”. The main aim of this strategy is to “educate” and ensure that accurate and essential information about Korean healthcare is delivered to agencies and doctors. This can be achieved through:

- **Active engagement in scientific journal publications.** Medical/scientific reviews play the key role in delivering information about new methods, devices and technologies used in healthcare. Korean doctors are especially encouraged to publish in peer-reviews journals as it has become the main medium for communication between doctors and scientists. Apart from other topic-related, domain-specific journals it is recommended to actively participate in statistical studies of global healthcare (for example in the International Journal of Medicine and Public Health). From 2007 to 2016 the scientific literature related to global health tourism research registered a small growth rate of 7.26% per annum. However, qualitative performance of global health tourism research literature measured in terms of citation impact is 8.78 per paper in 10 years period⁷.
- **Providing educational courses, internships for Kazakh doctors and conducting master-classes by Korean doctors** will provide direct experience and exposure of the advanced level of Korean healthcare. Developing educational/internship programs is an excellent strategy for investing in the future of Korean healthcare and its success, as it leads to establishment of a long-term relationships. Doctors who have studied in Korea will be able to recommend treatment options and methodologies which are not available in Kazakhstan. This is very important because customers (patients) will be forwarded from specialists in the field, thus they will be more confident in success of treatment in Korea. In addition, provision of trainings for Kazakh doctors on using cutting-edge technologies (which are not available in Kazakhstan) will also stimulate the Korean medical device exports as these doctors will create a demand for new Korean technologies upon their arrival back home.
- **Organization and participation in conferences, seminars, public events** is important for networking and promoting Korean healthcare. Active participation international conferences will make Korean doctors/representatives become known figures in academic circles and shape their leadership reputation. Importantly, all types of public events can open new opportunities and perspectives in future development of healthcare services.

⁷USA is the top most productive country in the world in health tourism research. The other countries joining the top 10 most productive countries in 2007-16: U.K (12.59% share), Canada and Australia (7.45% and 7.10%), India and Germany (3.45% and 3.38%), Italy, Spain, France and Netherlands (from 2.53% to 2.95%) during 2007-16.

9.4. Collaboration strategies

Collaboration with Kazakhstan public healthcare services

There is a specific list of conditions that cannot be treated in Kazakhstan and patients are treated abroad by public funds. Kazakhstan's major corporate fund University Medical Center (UMC) is actively interested in co-operation with international hospitals in treatment of all types of child diseases and the following adult conditions:

- Arteriovenous malformations and tumors requiring a radio-surgical method of treatment (gamma-knife) because of localization in the surgically inaccessible functionally important areas of the brain.
- Arteriovenous malformations of the vessels of the brainstem, spinal cord and arterial aneurysms for endovascular treatment.
- Tumors of the base of the skull for trans-oral removal.
- Malignant neoplasms of the eye requiring radio-surgical treatment (gamma knife, radioactive applicators).
- Kerato-prosthetics.
- Diseases requiring the transplantation of the heart, kidney, liver, lungs, bone marrow.
- Stenosis of the larynx.
- Stenosis of the trachea.

There is a good opportunity for Korean hospitals to develop bilateral cooperation with the UMC. According to the UMC website all international clinics interested should provide information about their hospital/clinic, statistics, specialization, pricing and conditions for making agreements to the UMC Department of International Cooperation⁸.

Collaboration with private medical insurance companies

Compulsory health insurance became one of the main implementations of 2017 in Kazakhstan (new employer obligations from 1 July 2017. Law No. 405-V on Mandatory Social Medical Insurance, of 16 November 2015 set up a state medical insurance fund to finance the public health system). If earlier health insurance for many years operated in the category as voluntary, the introduction of compulsory health insurance in Kazakhstan bears a tremendous change. Employers, including all foreign legal entities operating in Kazakhstan, must withhold and pay contributions to the new medical insurance fund. From 1 July 2017, employers have to pay 2% of their employees' income out of their own funds and from 1 January 2018, the rate of contributions will rise annually, reaching 5% in 2020. Thus, in 2018 the rate will be 3% and in 2019, 4%. Medical insurance contributions are collected by the newly funded Social Health Insurance Fund (SHIF) which aims to improve the current healthcare system. Full transition to the compulsory health insurance will step into action on 31 March 2020. With this measure Kazakhstan government aims to stimulate the development of private health insurance market. Private health insurance companies are encouraged to make an agreement with the SHIF in order to maintain their exclusive provision of the healthcare services. If the employer prefers to cover his employees by the private health insurance, he wouldn't need to pay the contributions to the SHIF (bearing that an agreement between private health insurance company and SHIF is made). It is expected that a wide majority of the employers will consider obtaining private health insurance packages for the following reasons: financial protection and risk minimization in the event of a serious disease condition, absence of queues in hospital, access to more sophisticated medicines and treatment options, most importantly – comfort of the insured people. In 2017, the amount of the insured people with the private healthcare companies was approximately 2%. At the moment, private medical insurance companies do not cover treatment abroad (with the exclusion of NSK, described further). If the insurers make some adjustment and cover the cost of treatment abroad in their health insurance plans, consumers are more likely to pursue medical services abroad. Therefore, there is a possibility for collaboration with the elite medical insurance companies who provide services for the well-off Kazakh population.

⁸E-mail interdepartment@umc.org.kz

1. "Kazinstrah"⁹ a private health insurance which is formed by the financial group of Kazakhstan National bank (Halyk bank). A medical insurance package offers distant medical advice from leading Russian doctors. The service is provided through the mobile application "Online doctor" or through website (kis.onlinedoctor.ru). **The patients are able to contact Russian doctors through an online chat, audio/video calls to get the medical advice and consultations.** This package also covers the "secondary opinion" services aimed to confirm the established diagnosis of the patient.
2. "NSK insurance company"¹⁰ offers the Global Protector program, which is separated by different packages. The "Gold" package allows the patients to undergo a full health check-up in specific hospitals in Spain, Germany, Switzerland, Israel, Portugal and Brazil at a reduced rate (covered by the patient). The insurance company provides trip organization (including transfer, local translation services, accommodation etc.) for the insured. **NSK insurance also provides "online doctor" and "secondary opinion" services in similarity to Kazinstrah.**
3. Kazakh Healthcare and Medical Insurance Corporation "Interteach"¹¹ offers the services of foreign doctors in their clinics in Kazakhstan. The foreign doctor staff have at least 5 years of medical experience in European countries, USA, UAE, Australia, China, Japan and others.

⁹<http://www.kazakhinstrakh.kz/>

¹⁰<https://nsk.kz/>

¹¹<http://www.interteach.kz/en/>

References

Information used:	Information source:	Author:
Qualitative and quantitative study interview and results presentation	Deep interviews and questionnaire responses of tourism agencies, existing and potential medical tourists	LLP "GfK Kazakhstan"
Medical tourism country ratings Medical tourism index (MTI)	2015 Full Global Report 2016 Full Global Report Arabic Destinations Full Report European Destinations Full Report	International Healthcare Research Center
Healthcare sector statistics: Republic of Kazakhstan	Republic of Kazakhstan Population Health and Healthcare Organization Activities: Statistical Report 2016	Ministry of Healthcare and Social Development, Republic of Kazakhstan
Healthcare system structure: Republic of Kazakhstan	Review of the healthcare system in the Republic of Kazakhstan: Final Report, November 2017	Organization for Economic Co-Operation and Development
Government support for treatment abroad	Preliminary report for government transfer of Kazakhstan citizens for treatment abroad (September 2018)	University Medical Center Astana
National healthcare projects in the Republic of Kazakhstan	Research & Analysis on Public Awarded Projects of Healthcare Sector in Kazakhstan with Region of Almaty, Karaganda and Kyzylorda	Kazakhstan Public-Private Partnership Center Korea Health Industry Development Institute (KHIDI)

Appendix I: tourism agencies

Education and tourism centre Best KZ

Full name of the company (in Latin letters):

Center obrazovaniya I turizma BESTkz

Address: 110000 Republic of Kazakhstan, Kostanay city, Tauelsizdik 70

Website: www.bestkz.kz

Email: bestkz.kz@mail.ru

Telephones: +7 7142 547170 +7 776 054 7170

Company registration date: 07.10.2010

Description of the company: In 2017 Best KZ has celebrated 7-year anniversary of providing tourism services in Kostanay area. Main goal of the company: to become a reliable partner in holiday and education organization for clients. The client base of the company is constantly expanding which describes the professional and service quality. The company has partnerships with large foreign tourism agencies, large hotels, small hostels, visa centres and airlines. In 2015 the company has expanded its service portfolio and started to develop local tourism. They are offering 16 different travel packages to explore Kostanay area, including healthcare sanatoriums.

Experience in medical tourism services: Main areas- sanatoriums in Russia and Kazakhstan. Has experience in co-operation with Chinese hospitals in Beijing, Dalian, Urumqi, Tangantszy. Has a partnership with JSC "Medicine" in Moscow, Russia.

Typical diagnoses/conditions: Oncology, problems with musculoskeletal system, endocrine system, vitiligo



Allasia

Address:

Republic of Kazakhstan, Almaty, Samal 2 district, house 58, office 105.

Website: www.allasia.su

Email: hello@allasia.kz

Telephones +7 (705) 155-59-89, +7 (727) 248-08-02

Company description: From 2014 provides medical tourism services and support. Specialises in medical tourism organization to South Korea and other countries of South-East Asia. Provides services for the Kazakh and Russian citizens.

Medical tourism services offered: "Allasia" prepares the full package of documents required for the travel, communicates with the foreign partner to organize guest transfer, accommodation allocation, assistance with communication in the hospital and other related questions. The company provides flight, hotel bookings and visa support.

Typical diagnoses/conditions: Oncology, plastic surgery, orthopaedics, dentistry, IVF, check-up diagnostics and treatment



ASIAN TRAVEL CLUB

Address: Republic of Kazakhstan, Almaty, Satpaev, 30.

Website: www.asiantravelclub.kz

Email: info@atravel.kz

Telephones: 7-727-317-34-09, (director: 7-727-292-34-12)

Company description: Operates since 2010 as a tour agent.

Most popular medical tourism destinations: Provides medical travel support in all destinations. Popular: Georgia – mineral waters, South Korea and Japan – plastic surgery, Czech Republic – mineral waters, Slovenia



DESTINATIONS.KZ

Address: Republic of Kazakhstan, Astana, Pobeda, 6

Website: www.destinations.kz

Email: agent2@destinations.kz

Telephones: 7 (717) 294-49-44, 7 (717) 294-49-77, 7 (717) 294-44-69, 8-7079449440

Company description: Operates since 2011, providing assistance with flight bookings, tour packages, hotel booking, visa support, medical tourism.

Typical diagnoses/conditions: Gastrointestinal ulcers, skin diseases, diagnostics and treatment of joints, oncology, neurology.

Most popular medical tourism destinations: South Korea, Czech Republic, Slovenia, Germany, Hungary, China, Switzerland.



GULDEN & TRAVEL

Address: Republic of Kazakhstan, Almaty, Kazybek bi, 50.

Website: www.guldentravel.kz

Email: guldentravel@mail.ru

Telephones: 7-727-272-53-41, 7-727-329-65-58

Company description:

Since 2007 Gulden&Travel» offers the following services:

- Group tour and individual trip organization
- Organization of tours in Almaty and Almaty area
- Organization of holidays in Issyk Kul (Kyrgyzstan)
- Organization of holidays abroad
- Flight bookings
- Visa support and registration (China, Schengen, USA)
- International medical health insurance (for trips)

Typical diagnoses/conditions: Prevention medicine and diagnostics, plastic surgeries. Treatment packages.

Most popular medical tourism destinations: Czech Republic, China, Slovenia.



Happytravel.kz

Address:

Republic of Kazakhstan, Almaty, Mamyр 2 district, house 2, office 29

Website: <http://happytravel.kz>

Email: ht_med@mail.ru

Telephones: +77477445799

Company registration details: Licence number T-909N11003135. Registered in May 2008.

Company description: Tourism company with a 10 years' experience in organizing local and foreign tours

Typical diagnoses/conditions: Diagnostics, oncology treatment, orthopaedics



HONEY-MOON

Address: Almaty Tole Bi 50-54 of 58

Website: Facebook and Instagram profile

Email: honey-moon@inbox.ru

Telephones: +77272726141

Company registration date: 08.06 2005

Company description: Organization of tours abroad: hotel and flight bookings, education abroad, wedding ceremonies and medical tourism to Korea, Spain, Germany, China, Thailand, Israel, Czech Republic.

Experience in medical tourism services: Since 2005 sends patients to China, Dalian for osteochondrosis, joint and spine treatment. Israel – diagnostics and treatment of children with cerebral palsy. Germany – oncology, cardio diagnostics. Czech Republic – gastrointestinal treatment. Slovenia, Spain – treatment of respiratory system (asthma). Thailand – acupuncture treatments.

Typical diagnoses/conditions: Osteoporosis, hernia, cardio diseases, cerebral palsy, joint diseases.

LLP Korea Vision Almaty

Address:

Main office: Republic of Kazakhstan, Almaty, Satpayev 24.

Representative offices: in Astana, Saryarka 12. Shymkent, Akpan Batyr

Website: www.koreavision.kz

Email: info@koreavision.kz

Telephones: 8 (727) 3903313; 87756074723/ 8 (7172) 784997; 87750002655/ 87750002658

Company description: Company was founded on December 1 2011. Since then the company has gained a reputation in providing quality and professional services. The number of patients transferred to Korea through "Korea Vision" is steadily growing. The company is providing "door to door" package in trip organization to Korea, starting from primary consultations and completing with final registration in the hospital. The company maintains contacts with its clients after the treatment. "Korea Vision" cooperates with private and public hospitals. It also has 10 subagent partnership companies. Staff includes 8 people. Experience in providing medical tourism services: 6 years.

Typical diagnoses/conditions: Check-up, oncology, plastic surgery, joint replacements, spine diseases, ambulatory care



KORKEM TRAVEL

Address: Republic of Kazakhstan, Rozybakiyev 43/1.

Email: korkemtravel@mail.ru

Telephones: +77023502509, +77272438302

Company registration details:

Licence number 6007N⁰0003286 registered on 18.07.2011

Company description: International and domestic tourism, medical tourism, business tourism, extreme tour packages.

Experience in medical tourism services: Overall has transferred 27 patients to South Korea, China, Germany, USA (Miami).

Typical diagnoses/conditions: Plastic surgery, joint treatment, breast cancer

Most popular medical tourism destinations: China – Hainan, plastic surgery and dentistry



MEDASTANA

Address: Republic of Kazakhstan, Koshkarbayeva, 26, 25

Website: www.medastana.kz

Email: astanamed@gmail.com

Telephones: +7 701 303 21 34, +7 702 292 0994

Company registration details: №0004615 from 09.11.2016

Company description: Sending tourists to South Korea, Germany, Lithuania, Georgia. In 2012-2013 has sent 20 patients, in 2016 has sent 6 patients (2 to Soon Chun Hyang clinic, 2 to Germany, 1 to Lithuania, 1 to Georgia). In 2012 has co-operated with SNUH, SNUH Bundang, Samsung, ASAN, Severance, Cardio Clinic Sejong, St. Mary Hospital. Has visited the conference organized by KHIDI.

Types of services offered: Provides logistic support – convenient travel route (flight bookings), visa support (if needed).

Typical diagnoses/conditions: Usually oncology (including child cancer), plastic surgery, dentistry, IVF.



Ramis Group

Address: Republic of Kazakhstan, Baytursynov 16, office 7.

Email: ramis_tourizm@mail.ru

Telephones: 7-727-233-84-26, 7-727-279-25-71, 7-707-226-84-55

Company registration details: Licence number №0484420 from 5 September 2009.

Company description: Since 2009 provides medical tourism support, “hot deal” packages, flight and hotel booking, visa support, shopping tours, cruises and education abroad.

Typical diagnoses/conditions: Diagnosis and treatment of gastrointestinal diseases, joints.

Most popular medical tourism destinations: Turkey, Egypt, Thailand, Europe, Korea, China, Czech Republic, Germany.

LLP «Seven Best Services»

Address: Republic of Kazakhstan, Astana, Chehoyev 14 office 1

Website: www.sbst.kz

Email: sabituly@gmail.com

Telephones: +77471857315

Company registration details: BIN 100540014058 on 26 May 2010

Company description: Provides tourism support abroad. Has stopped activity in 2017, in 2018 is planning to start working in the area of medical tourism.

LLP «Hermes-Tour ZHAZ»

Address: Republic of Kazakhstan, Uralsk city, Kurmangazy, 167.

Email: germestour@mail.ru

Telephones: 8-701-390-39-33

Company description: Since 2000 provides tourism services, education abroad, medical tourism, pilgrimage tours.

Typical diagnoses/conditions: Gastrointestinal ulcers, skin diseases, diagnostics and treatment.

Most popular medical tourism destinations: South Korea, Israel, Italy, China, Germany, France, Slovenia, Czech Republic, Azerbaijan.

LLP «NurAnel»

Website: www.nuranel.satu.kz

Email: Elmira-dzahrbole@mail.ru

Telephones: +7 777 3681009, +7 7788147778

Company registration details: 1010009825551 09 February 2011.

Company description:

In 2016 the company has organized medical tourism information tour to South Korea. The group consisted of 40 people.

- Tourism: Medical tourism. Treatment abroad
- Hotel and flight booking
- Exclusive tour organization
- Combined tours in Europe and Asia
- Sea cruises
- Wedding ceremonies and honeymoons
- Romantic tours
- Extreme tours
- Education abroad
- Domestic tours in Kazakhstan
- Visa support
- Transportation services: transfer
- Translation services



Seven islands (Zheti aral)

Address: Republic of Kazakhtan, Astana, Zhanabek Torhan, 2

Website: www.semostrovoov.kz

Email: sem.ostrovov@gmail.ru

Telephones: 7-7172-46-85-98, 7-775-999-30-70

Company description: Provides tourism services since 2014, Euro-tours, foreign country tours, domestic tourism, medical tours.

Typical diagnoses/conditions: Check-ups, diagnostics, treatments of internal organs and cancer.

Most popular medical tourism destinations: China, Greece, Israel



LLP «Alex Tours»

Address:

Republic of Kazakhstan, Almaty, Timiryazev 42, №15/109, office 316

Website: www.alextoours.net

Email: alextoours09@gmail.com

Telephones: +7 (727)246 06 14 ; +7 777 2501765

Company registration details: Licence number № 5809-e-1910-01 from 20 November 2013

Company description: Company was founded in 2013, comprised of 15 staff members. Working on individual and group tours. Mainly to Europe and Asia.

Most popular medical tourism destinations: Israel (Dead Sea) – psoriasis, Greece (Athens) – dentistry, plastic surgery, Evia peninsula – musculoskeletal system, nervous system. Germany – check-up and oncology. South Korea – mammoplasty.



LLP «Business Point Way»

Address: Republic of Kazakhstan, Almaty, Kazybek Bi 125/1, office 53

Website: www.bpoint.kz

Email: infobpoint@gmail.com

Telephones: +7 727 367 08 59, +7 7707 972 30 42, +7 705 740 53 67

Company registration details: Licence number № 6949 -1910 – 02 from 20

March 2014

Company description: Visa support, consultations for departure/arrival of Kazakhstan/foreign citizens.



LLP ELMA TRAVEL

Address:

KAZAKHSTAN, ALMATY, KABANBAY BATYRA STREET ZHK

Email: hameda_7070@mail.ru

Telephones: +77273900393

Company description: International and domestic tourism, visa support, document registration support, tour packages and flight bookings.

Typical diagnoses/conditions: Post-trauma care, gynaecologic diseases

Most popular medical tourism destinations: China, India, Israel, South Korea

LLP «Varvarka Travel & Ko»

Address: Republic of Kazakhstan, Almaty, Baytursynov 113, office 10.

Email: varvarka_travel@mail.ru

Telephones: 8 (727) 3293983

Company description: Company is operating since 2010. Director has 18 years experience in tourism sector. Provides individual tours as well as holiday packages in worldwide destinations.

Typical diagnoses/conditions: Wellness tourism

Most popular medical tourism destinations: Czech Republic (Karlovy Vary, Marianske Lazny)

LLP LV travel

Address:

Republic of Kazakhstan, 050022, Almaty, Seyfillin 524/98, office 8

Website: LVTRAVEL.KZ

Email: LVTRAVEL_LAURA@MAIL.RU

Telephones: +7- 727- 2725417

Company registration details: Licence number № 155 from 18.04.2002

Company description: Company was founded in 2002, since then the activity has expanded to worldwide tour organization. Services include flight and hotel bookings, villas, apartments, guest houses – VIP to economic packages. Car rental, visa support, medical tourism and other.

Typical diagnoses/conditions: Diagnostics, treatment, surgical intervention, IVF, plastic surgeries, cancer.

Most popular medical tourism destinations: Germany, Israel, Turkey, South Korea



GLORIA INCORPORATION



Address: 050010, 45 DOSTYK, ALMATY, KAZAKHSTAN

Website: www.gloria-inc.kz

Email: travel@gloria-inc.kz

Telephones: +7 771 414 1416

Company registration details: Licence number №0133992 from 30.11.2005

Company description: **Gloria Incorporation** company was founded in 2005, primarily specializing in individual tour organization. The company is focused in provision of flexible tours, where the client can choose the most convenient tour planning. Gloria Incorporation company has developed a clear understanding about specific countries, through participation and organization of internships/trainings abroad, which predispose the company to high quality service provision. **Gloria Incorporation** constantly maintains the contact with international partners, thereby it promptly replies to all customer enquiries. **Gloria Incorporation** provides tour organization services worldwide, arranges special programmes, education abroad, medical tourism, participation in cultural events, business trip and business seminar organization. According to client demands.

Types of services offered in terms of medical tourism:

- Planning and organization of individual program for treatment, diagnostics, physiotherapy and recovery
- Assistance in medical provider (hospital) and specialist (doctor) selection
- High quality translation services of medical records, translation services at the hospital, and patient accompany abroad
- Visa support (medical visa application)
- Transport bookings and transfer services
- Provision of security and VIP services
- Cultural programme for patients, and patient-accompanying people, leisure and shopping
- In emergency situation: organization of specialized transport
- Confidentiality of personal, financial and medical information.

Typical diagnoses/conditions: Various

Most popular medical tourism destinations: South Korea, Israel, Germany, Czech Republic

Federal agency for medical tourism “Vernal”

Addresses:

Vladivostok, Russia office
+7 (423) 245-22-44
Nizheportovaya, 1, Navy Station building, office 315, 3 floor
E-mail: info@vernal-travel.ru
Telephone: 8 914 960 12 10

Representative offices in Kazakhstan:
Almaty, Nazarbayev str 124, office 10
Contact name: Elena Kim
E-mail: eve@vernal-travel.ru
+7 (777) 1-911-911

Astana
E-mail: astana@vernal-travel.ru
+7 (777) 222-19-22

Aktobe (Aktobe, Uralsk, Atyrau, Aktau)
Contact name: Yekaterina Grigoriyeva
Email: aktobe@vernal-travel.ru
+7 (777) 222-48-48

Website:

www.vernal-travel.ru
www.vernal-travel.kz

Email:

E-mail: eve@vernal-travel.ru
E-mail: info@vernal-travel.ru

Telephones:

+7 (423) 245-22-44 Russia Vladivostok
+7 (777) 1-911-911 Almaty Kazakhstan

Company registration details: 04.03.2005 ОГРН 1052504078956

Company description: Medical tourism company “Vernal” is one of the leaders in organizing quality diagnostics, treatment and physiotherapy in the best medical centers of South Korea and South-East Asia. The company provides services for Russian and Kazakh citizens.

“Vernal” was founded in 2005 in Vladivostok, and the company was part of a large holding which offered exclusively recreational and corporate tours. In 2009 the company has changed the development strategy and started providing medical tourism services. Nowadays, “Vernal” has gained significant experience in organization of quality solutions to health problems in all medical areas in South Korea, Singapore, Thailand, Japan and China. “Vernal” company was founded on the spiritual human values – faith, hope, love, which are reflected in the corporate strategy of the company, as well as daily communication with the clients.

The company has representative offices in numerous cities in Russia, as well as in South Korea and Singapore. The staff is comprised of 30 people across different regions of Russia, Kazakhstan and South Korea.

Medical tourism services description:

The company has the following statistics:

- over 7000 organized medical tourism trips;
- dozens of children, born with aid of reproductive technology;
- more than 10 charity surgeries performed along with the Asian clinics;
- organized more than 20 educational trips, trainings for the doctors from Far East Russia and Moscow.

Typical diagnoses/conditions: Oncology, plastic surgery, gastrointestinal system diseases, thyroid gland diseases, musculoskeletal problems



MEDICAL TOUR

Address:

Republic of Kazakhstan, 010000, Astana, Almaty street 1, ВП 1А

Website: www.medical-tour.kz

Email: medical-tour@bk.ru

Telephones: +7 7172 256435 / +77024142355 / +77789085819

Company registration details: 01.03.2013

Company description: Company provides medical tourism support to foreign countries, provides services for diagnostics and treatment trip organization

Experience in providing medical tourism services:

- Member of the International Medical Tourism Association (IMTAA);
- co-operates with European and Asian countries in the sphere of medical tourism
- approximately 150-170 patients sent to Korea, approximately 100-150 patients sent to Spain and Germany per year;
- organizes free, charity consultations of doctors from Korea and Germany;
- occasionally organizes mentorships and professional development for local doctors;

Services offered in terms of medical tourism

- patient consultation (primary request to the company)
- transfer of required treatment request to hospitals
- flight booking
- medical insurance provision for the trip
- assistance in accommodation selection in close proximity to hospital
- visa support
- organization of transfer in airport and hotel
- Organization of city tours организация экскурсий по городу за границей
- personal selection of top hospital for the patient
- making appointment to see famous doctors upon patient request
- translation services
- prompt reply to patients regarding available treatments abroad
- provision of company representatives to accompany patients abroad
- professional translation of medical reports
- delivery of medicines for the patients upon his return to home country
- maintenance of contact between the patient and his doctor upon return to home country
- trip organization for patients with disabilities or in severe health state

Typical diagnoses/conditions: Oncology, orthopedics, neurosurgery, surgery



Appendix II: medical insurance companies

Medical Assistance Group

LLP "Medical Assistance Group" is the medical assistant branch of JSC "Eurasia" insurance company, which provides health insurance services for clients. JSC "Eurasia" is the leader amongst insurance companies in Kazakhstan.



Registered address: Republic of Kazakhstan, 050004, Almaty, Abdullinyh, 6

PHH 600 900 555 602

БИН 050 640 009 866

Address: Almaty, Timiryazev, 21 (Markov street corner)

Telephones: +7 (727) 258-48-37, 258-48-38, 292-84-04, 258-48-34

E-mail: medical@theurasia.kz

LLP Assistance Company "Medi-service"

LLP Assistance Company "Medi-Service" – is the medical insurance company which provides services for the clients of JSC "Kazkommerts-Policy" insurance company (branch of Qazkom bank). The company has two personal medical centers in Almaty.

Headquarters of JSC IC "Kazkommerts-Policy"

Address: Almaty, Bayzakova, 125/185, (Aiteke Bi corner)

Telephones: +7 (727) 295-22-33, +7 (727) 320-00-32, 320-00-23, 258-48-08 (call-centre)

"Medi-Service" Medical Centre

Address: Almaty, Abay, 52 «B»

Telephones: + 7 (727) 2 500 005 + 7 771 506 1080

"Medi-Service" Paediatric Centre

Address: Almaty, Dostyk 36

Telephone: + 7 (727) 291 78 81 + 7 771 506 1056



Kazinstrah

JSC "Kazinstrah" belongs to the financial group of the National Bank of Kazakhstan (Halyk Bank) and holds the leading position in the Kazakh insurance market.

Address: A05A1B9, Almaty, Abay, 109 «V», н.п. 9а.

Telephone : +7 (727) 2 599 899, 797

E-mail: info@halykSK.kz



Nomad Life

Since 2012 JSC «NOMAD LIFE» holds the leading position in life insurance on assets, personal capital, payments, insurance reserve, as well as obligatory insurance of workers upon accidents and annuity insurance.

Address: 050000, Almaty, Satpayev, 30 A, BC «Tengiz Towers», 1 block, 3,4 floor

Telephone: [+7 \(727\) 320 10 60](tel:+77273201060) [+7 \(727\) 320 10 61](tel:+77273201061)

Fax: [+7 \(727\) 320 10 59](tel:+77273201059)

E-mail: info@nomadlife.kz



“Victoria” Insurance company

“Victoria” Insurance company provides insurance services since 1993.

The current license allows to perform 12 types of voluntary insurance and 7 types of compulsory insurance. Belongs to the group of material (non-life) insurance companies. “Victoria” insurance company holds the second place in Kazakhstan on volume of assets and equity funds, amongst 34 insurance companies.



Address: Almaty, Seifullin 521

Telephone: +7 (727) 250-69-36

Kommesk-Omir

JSC insurance company “Kommesk-Omir” operates for 26 years in the Kazakhstan market. Rated in top 5 insurance companies in the general insurance sector.



Address: Almaty, Nauryzbay batyr, 19

Telephone: +7 727 244 74 00

NSK

JSC “Oil Insurance Company NSK” offers medical insurance packages for different types of social classes. Includes the Global Protector program, where patients can receive a treatment abroad at a special rate.



Address: Republic of Kazakhstan, Almaty, Almagul, 15a, 050060 – A15C0B1

Registered address: Republic of Kazakhstan, Astana, Barayev 15

Telephone: +7 727 258-18-00, 2258

E-mail: info@nsk.kz

Centras Insurance

JSC «Centras Insurance» was founded in 1997. The main shareholders of the company are large corporations, which comprise the “Centras Group”.



Address: Shevchenko, 157V, (Klochkov corner) Almaty, Republic of Kazakhstan, 050008

Telephone: +7 (727) 259-77-55

Interteach

JSC “Kazakhstan Healthcare and Medical Insurance Corporation Interteach” is famous for its international staff members. Provides insurance packages for the large companies including: Air Astana, Petro Kazakhstan, TENGIZCHEVROIL, Baker Hughes, Chevron, Schlumberger, Nazarbayev Intellectual School, ExxonMobil, Shell Kazakhstan Development B.V., NCOС N.V., KazGerMunai, Kazminerals Bozshakol, Embassy of USA and Israel.



Address: Almaty, Nazarbayev street, 275E.

Telephone: 8 (727) 3200206

E-mail: interteach@interteach.kz