

# UNDERSTANDING CHINESE PERCEPTIONS TOWARD CROATIA MEDICAL TOURISM

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A FISHBEIN MODEL BASED COMPETITIVE ANALYSIS

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# INTRODUCTION

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- The purpose of this research is to study the Chinese perception toward tourism to Croatia, specifically medical tourism to the Kvarner region.
- While the Chinese outbound medical travel market is very large and growing rapidly, it is a very competitive market.
- Therefore, it is important to conduct marketing research to understand the Chinese tourists and medical tourists.

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- According to data provided by the Croatian National Tourism Board, tourists from Mainland China visiting Croatia:
    - 102,00 in 2016.
    - 163,000 in 2017, a 60 % increase
  - As stated in “With Poor Care at Home, the Rich Lead China’s Medical Tourism Boom”:
    - over 500,000 outbound medical trips were made by Chinese tourists in 2016,
    - a 400% growth rate from 2015 (100,000).
  - On average, Chinese outbound medical tourists spent RMB 50,000 (about USD 8,000) per medical tourist. (Chinese RMB nearly on par with Croatian Kuna)

# ATTITUDES TOWARDS ATTRIBUTES

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- An attitude is a lasting general evaluation
- A product or service is composed of many attributes or qualities
  - (innovative technology, cultural similarity, safe destination, high quality service)
- Product attributes may be more important to some individuals
  - (may value service quality over cultural similarity)

# MARKET RESEARCH APPLICATION

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- Market Research has developed multi-attribute models in an attempt to measure and analyze consumer attitude beliefs
- Used to predict consumer decision making

# MULTI-ATTRIBUTE MODEL

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- Attributes – characteristics of attitude object (quality of tourist destination)
- Beliefs – a belief measure assesses the extent to which the consumer perceives that a country possess a particular attribute (Croatia provides high quality medical services)
- Importance weights – reflect relative priority of an attribute to the consumer (may value cost of service over proximity to home country )

# FISHBEIN'S ATTITUDE MODEL

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$$A_{ijk} = \sum \beta_{ijk} I_{ik}$$

where:

$A_o$  = the consumer's ( $k$ 's) overall attitude toward country  $j$ .

$\beta$  = the strength of consumer belief that country  $j$  possess attribute  $i$ .

$I$  = evaluation or intensity of feelings toward attribute  $i$ .

$i$  = attribute

$j$  = country

$k$  = consumer

THE EVALUATION INTENSITY OR IMPORTANCE (I) OF EACH ATTRIBUTE CAN BE MEASURED ON A SCALE SUCH AS THE FOLLOWING:

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<b>Product Attribute</b>	Not at all Important		Neutral		Very Important
Low cost medical service	1	2	3	4	5



# RESPONDENTS INDICATE THEIR STRENGTH OF BELIEF FOR EACH ATTRIBUTE BELOW THE CORRESPONDING COUNTRY BASED ON THE SCALE:

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1 = Poor;

2 = Fair;

3 = Good;

4 = Very Good

5 = Excellent

Product attribute	Croatia	South Korea	Japan	Germany	United States
Low cost medical service					

# METHODOLOGY

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- An exploratory study was conducted in June 2018.
- A semi-structured interview format was used to allow Chinese nationals in a Beijing university classroom setting to freely discuss their impressions and opinions regarding medical tourism.
- Data was collected by a distributed questionnaire and researcher led discussion.
- The survey instrument used a Likert scale 1 to 5 with 1 being “not important at all” and 5 being “very important” to evaluate the importance of 39 medical tourism industry criteria statements and was distributed to 22 participants.

# RESULTS OF EXPLORATORY STUDY

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- Criteria statement "It is safe to travel to" received the highest importance rank 5.00/5.00
- "it's culture is similar to mine" received the lowest importance rank 2.70/5.00.
- Both response scores are positive outcomes for Croatian medical tourism from the perspective of out-bound Chinese.

# RESULTS OF PILOT STUDY

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- As a result, of the June exploratory study, the survey instrument was refined and another larger pilot study with 108 survey participants was conducted in September 2018.
- 39 medical tourism industry criteria statements were reduced to 20.
- Participants in this pilot study are university students in Beijing and other seven provinces in China.
- Their average age is 23, ranging from 18 to 24. Among them, 58% are males and 42% are females.
- 108 participants rated Importance criteria and chose one country to assign a Belief rating.
- Croatia (n) = 22; Japan (n) = 20; Korea (n) = 27; Germany (n) = 22; United States (n) = 17.

# TOURISM DESTINATION/COUNTRY ENVIRONMENT/ ATTRIBUTE IMPORTANCE

Tourism destination/Country environment attribute	Average score
Has a stable exchange rate	3.70
Has overall a positive country image	3.97
Is culturally similar to mine	3.29
Is a safe tourism destination	4.44
Is an attractive tourist destination	3.93
Has a direct flight from China	3.61
Is easy to secure a visa to visit	3.81
Has high-quality local transportation, food and beverage, and accommodations	3.97
Many cultural and natural attractions	3.84

# MEDICAL TOURISM COSTS /ATTRIBUTE IMPORTANCE

Medical Tourism Costs attribute	Average score
Is low cost to fly to	3.68
Has low costs in local transportation, food and beverage, and accommodations	3.76
Has low treatment costs	3.94

# FACILITY AND SERVICES /ATTRIBUTE IMPORTANCE

Facility and Services Attribute	Average Score
Has well trained doctors	4.27
Has well experienced doctors	4.28
High healthcare quality indicators (e.g., low infection rate)	4.32
Has quality treatments and medical materials	4.25
State of art medical equipment	4.21
Accreditation of the hospital/medical facility (e.g., JCI, ISQUA)	4.26
Has a good reputation for medical care	4.21
Doctors and staff speak English	4.14

# BELIEF \* IMPORTANCE ( $B_{IJK}$ $I_{IK}$ ) RANK BY COUNTRY

Tourism destination/Country environment attribute	Croatia	Japan	South Korea	Germany	United States
Has a stable exchange rate	61.30	38.36	52.35	58.48	42.60
Has overall a positive country image	64.11	37.74	59.42	57.28	46.65
Is culturally similar to mine	40.19	32.34	39.50	41.37	29.51
Is a safe tourism destination	88.51	57.33	74.97	73.80	57.41
Is an attractive tourist destination	72.06	47.63	61.51	60.76	54.92
Has a direct flight from China	57.27	44.68	52.13	49.95	51.07
Is easy to secure a visa to visit	59.50	43.13	62.35	58.13	46.98
Has high-quality local transportation, food and beverage, and accommodations	67.67	53.44	60.99	59.89	59.60
Many cultural and natural attractions	66.87	46.72	53.00	55.90	54.28



# BELIEF \* IMPORTANCE ( $B_{IJK} I_{IK}$ ) RANK BY COUNTRY

Medical Tourism Costs attribute	Croatia	Japan	South Korea	Germany	United States
Is low cost to fly to	54.62	39.94	54.54	46.01	46.55
Has low costs in local transportation, food and beverage, and accommodations	63.09	44.40	54.44	47.73	42.91
Has low treatment costs	69.53	41.48	66.93	56.25	52.63

# BELIEF \* IMPORTANCE ( $B_{IJK} I_{IK}$ ) RANK BY COUNTRY

Facility and Services Attribute	Croatia	Japan	South Korea	Germany	United States
Has well trained doctors	79.57	56.16	80.31	70.52	68.28
Has well experienced doctors	75.56	55.19	81.82	70.14	68.79
High healthcare quality indicators (e.g., low infection rate)	78.95	56.49	78.88	73.80	69.27
Has quality treatments and medical materials	78.95	55.58	73.58	72.80	68.79
State of art medical equipment	72.25	60.95	73.74	72.62	61.63
Accreditation of the hospital/medical facility (e.g., JCI, ISQUA)	75.77	59.45	78.63	73.21	66.85
Has a good reputation for medical care	77.36	59.60	73.20	67.67	63.76
Doctors and staff speak English	71.84	54.67	70.09	70.52	63.06

# FISHBEIN SCORES FOR COUNTRIES OF MEDICAL TOURISM

Country	Tourism Destination/Country Environment Score	Medical Tourism Costs Score	Facility and Services Score	Total multi-attribute attitude score
Croatia	577.48	187.24	610.25	1374.97
South Korea	516.22	175.91	610.25	1302.38
Germany	515.56	149.99	500.76	1166.31
United States	443.02	142.09	530.43	1115.54
Japan	401.37	125.82	458.09	985.28

# DISCUSSION

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- Croatia has the highest overall rank based on the modified Fishbein Model.
- This is a small convenient sample in a pilot study among college students.
- The results highlight the growth potential for the Chinese inbound medical tourism into Croatia.
- The next phase of this study of the general public can provide practical applications to better serve the Chinese inbound medical tourist target market.