

РИНОК МЕДИЧНОГО ТУРИЗМУ АНАЛІТИЧНІ ДОСЛІДЖЕННЯ (АФРИКА)

МЕТА: пошук та аналіз даних для
ОЦІНКИ ПОТЕНЦІАЛУ МЕДИЧНОГО ТУРИЗМУ
від африканських країн до Туреччини



51 КРАЇНА
АФРИКИ

Охоплені
напрямки



Економіка



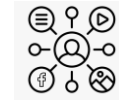
Демографічна
ситуація



Система
охорони
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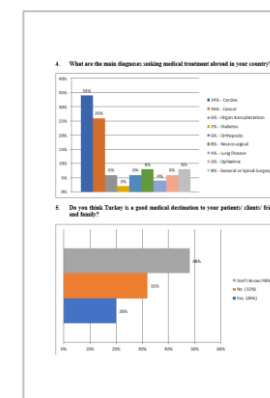
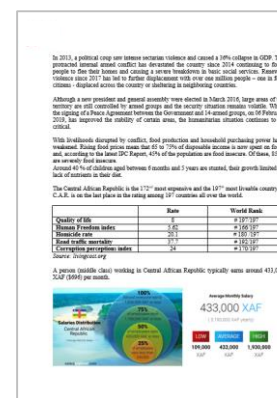
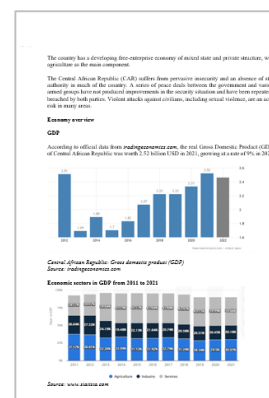


Wellness
ринок



Комунікаційні/
медійні канали

РЕЗУЛЬТАТ: 51 звіт, 3950+ сторінок АНАЛІЗУ ТА РЕКОМЕНДАЦІЙ
для державного та бізнес-секторів



Case Study:

Розкриття потенціалу медичного туризму: від Африки до Туреччини

Інсайти та висновки:

- Охоплено 51 країну Східної, Західної та Центральної Африки, аналізуючи потенціал кожної країни
- Виявлено значний потенціал африканського ринку медичного туризму, оскільки мільйони африканців шукають лікування за кордоном
- Виявлено, що сектор охорони здоров'я Туреччини був відносно невідомим в Африці, що відкриває можливості для зростання та розширення
- Виявили потребу в покращенні доступності, обізнаності та комунікаційних стратегій для просування Туреччини як найкращого місця для медичного туризму серед африканських споживачів
- Вивчили комунікаційні канали та платформи для просування медичного туризму в Африці
- Надано детальні огляди та рекомендації щодо розширення можливостей державних і приватних організацій, а також пропозиції для урядових організацій і бізнесу щодо розробки ефективних комунікаційних стратегій для залучення африканських медичних туристів



Цей матеріал містить конфіденційну інформацію, яка призначена виключно для ознайомлення. Будь-яке розповсюдження чи передача третім особам забороняються без письмового дозволу.

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I. Introduction

Population: 4.97 mln (2022 +1.95% from 2021)
GDP per capita: \$411.15 (2021 - 1% from 2020)
GDP country: \$2.52 billion (2021) (*tradingeconomics.com*)
Middle class: above ~2%

1 USD = 622.121 XAF (Central African CFA Franc)



The Central African Republic, Central African Republic, formerly Ubangi-Shari, Country, central Africa.

Central African Republic is a landlocked country and consists of a large rolling plateau. The northern half is characterized by savanna and is drained by tributaries of the Chari River. The southern half is densely forested.

The Central African Republic is roughly the size of France and is bordered by Chad to the north, Sudan and South Sudan to the north and east, the Democratic Republic of the Congo (Kinshasa) and the Republic of the Congo (Brazzaville) to the south, and Cameroon to the west.

The capital, Bangui, is situated on the southern boundary, formed by the Ubangi River, a tributary of the Congo River.

Area: 240,542 sq mi (623,000 sq km).

The people form heterogeneous ethnic groups, with the Banda, Baya (Gbaya), Mandjia, and Ngbaka constituting more than two-thirds of the inhabitants.

Languages: French, Sango (both official), several others.

Currency: CFA franc (XAF)

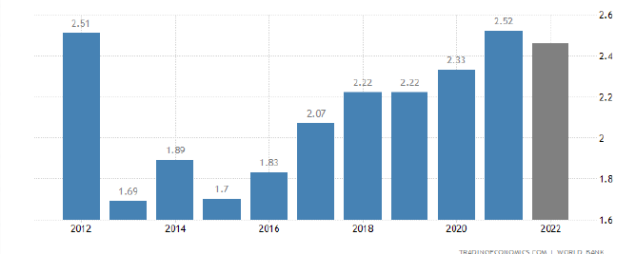
The country has a developing free-enterprise economy of mixed state and private structure, with agriculture as the main component.

The Central African Republic (CAR) suffers from pervasive insecurity and an absence of state authority in much of the country. A series of peace deals between the government and various armed groups have not produced improvements in the security situation and have been repeatedly breached by both parties. Violent attacks against civilians, including sexual violence, are an acute risk in many areas.

Economy overview

GDP

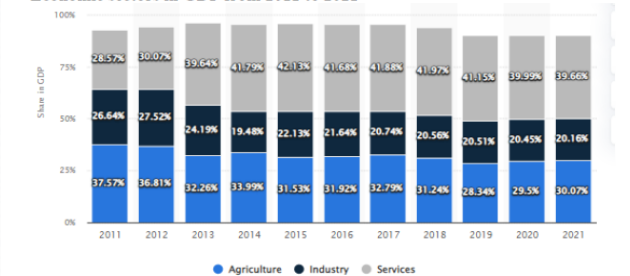
According to official data from *tradingeconomics.com*, the real Gross Domestic Product (GDP) of Central African Republic was worth 2.52 billion USD in 2021, growing at a rate of 9% in 2020.



Central African Republic: Gross domestic product (GDP)

Source: *tradingeconomics.com*

Economic sectors in GDP from 2011 to 2021



Source: *www.statista.com*



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Приклад:

II. Overview of the Central African Republic Healthcare System

1. General Overview of Healthcare System

Most importantly for global health policy; there may be no nation on the planet where the official health statistics are so poor. (conflictandhealth.biomedcentral.com)

The health system in the Central African Republic is barely functioning, due to a severe shortage of skilled health workers and medical supplies. Limited access to vaccination means that easily preventable diseases continue to take a toll. Malaria is the leading cause of death among children under five years of age. Basic lack of access to healthcare has serious repercussions, for example, for people living with HIV/AIDS.

Armed groups control 70% of the country, and large numbers of wounded have few options for treatment.

The Safeguarding Health in Conflict Coalition (SHCC) identified 107 incidents of violence against or obstruction of healthcare in the C.A.R. in 2021, compared to eight such incidents in 2020.

In these incidents vital medical supplies were looted, while 29 health workers were arrested, 16 were injured, and nine others were kidnapped.



Source: 2021 SHCC CAR Health Data

The lack of qualified personnel represents one of the biggest gaps in the national health system: there are **only 250 doctors** in the entire Central African Republic.

According to data provided by the EU in 2021, for every 100,000 live births, more than 882 women die during childbirth, more than double the average maternal mortality rate in Africa.

Some are referred to the capital, Bangui, for want of specialist facilities elsewhere. Others cannot access the care they need.

Generally, the conflict has restricted access to medical care, food, water, shelter and education.

In early November 2020, OCHA, the United Nations Office for the Coordination of Humanitarian Affairs, reported that in a population of 4.9 million, 640,700 people (13.1%), were displaced. Large-scale attacks on civilians have taken place and people live in constant fear of beatings, rape and murder.

The leading causes of death in Central African Republic

- Diarrheal diseases
- Stroke
- Influenza and Pneumonia
- Coronary Heart Disease
- Tuberculosis
- HIV/AIDS
- Hypertension
- Diabetes Mellitus
- Lung Disease
- Malaria

Source: www.worldlifeexpectancy.com

Diarrheal diseases

According to the latest WHO data published in 2020 Diarrheal diseases Deaths in Central African Republic reached 4,684 or 8.84% of total deaths. The age adjusted Death Rate is 186.48 per 100,000 of population ranks Central African Republic **#1 in the world**.

Stroke

According to the latest WHO data published in 2020 Stroke Deaths in Central African Republic reached 3,284 or 6.20% of total deaths. The age adjusted Death Rate is 181.27 per 100,000 of population ranks Central African Republic **#9 in the world**.

Coronary Heart Disease

According to the latest WHO data published in 2020 Coronary Heart Disease Deaths in Central African Republic reached 2,900 or 5.48% of total deaths. The age adjusted Death Rate is 161.58 per 100,000 of population ranks Central African Republic **#39 in the world**.

Tuberculosis (TB)

Number of death from TB in 2019 was 8,637 people. According to the latest WHO data published in 2020 Tuberculosis Deaths in Central African Republic reached 4,704 or 8.88% of total deaths. The age adjusted Death Rate is 148.01 per 100,000 of population ranks Central African Republic **#1 in the world**.

Over the past decades, TB has been on the rise in the Central African Republic. The forced displacement of large swathes of the population due to constant ongoing crises often disrupts treatment and prevention operations. Tuberculosis is also a leading killer of HIV-positive people.

3. Insurance policy, list of insurance companies

Out-of-pocket expenditure in Central African Republic (% of current health expenditure), 2000-2019 by World Health Organization Global Health Expenditure database (apps.who.int/nha/database).



Country	Most Recent Year	Most Recent Value
Central African Republic	2019	60.32

The country has not developed a health insurance scheme for the population, and there are no local insurance companies.

Leading Health Insurance Companies in Central African Republic

- Allianz Centrafrique
- Uac
- Uac-Iard (Union Des Assurances Centrafricaines-Iard)

Broker insurance

- Ascoma Centrafrique
- Ask Gras Savoye Centrafrique
- Soccareas



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Приклад:

Sport in Central African Republic

The Central African Republic is landlocked state and much like most African countries, it has seen a lot of turmoil and conflict but what just like a lot of the African nations, it has a big heart when it comes to sports, football in particular.

Football / Soccer is the most popular pastime among the youth in most of the C.A.R. As a matter of fact, even the small villages have a makeshift football field and most establishments like schools and even churches sponsor a team either for girls or boys and, for the most part, both. Basketball, rugby, boxing and athletics are also quite popular.

Sports are becoming more and more popular for Central Africans, especially for young people.

Only well-to-do city dwellers can afford to go to the gym, spas, beauty salons and care about themselves.

Urban population pays attention to fitness, sports and gyms.

Mental Health is one part of wellness area

Central African Republic has been experiencing socio-political conflicts for decades, and political change has mainly come about through violence, leaving millions in immediate need of refuge and humanitarian assistance.

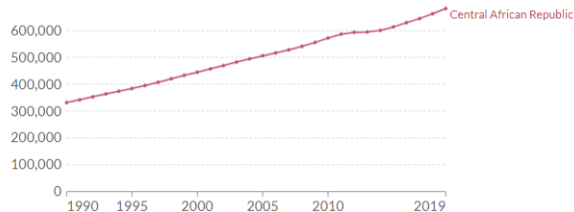
Violence and displacement expose vulnerable groups and the community at large to a number of threats and stressors. In disaster situations, estimates an increase in severe mental disorders from a projected baseline of 2-3% to an estimated 3-4% and an increase in mild or moderate mental disorders from a projected baseline of 10% to an estimated 15-20%

Number of people with mental health disorders, 1990 to 2019

Number of people with mental health and neurodevelopmental disorders, not including alcohol and drug use disorders. Figures attempt to provide a true estimate (going beyond reported diagnosis) of prevalence based on medical, epidemiological data, surveys and meta-regression modelling.



+ Add country



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Press

- Le Citoyen - private, daily
- Le Confident - private, daily
- L'Hirondelle - private, daily
- Centrafric Matin - private, daily
- La Fraternelle - private, daily
- Le Democrate - private, daily

Television

The Central African Republic was one of the first Central African countries to set up a public television station at the beginning of 1974. Yet, more than 40 years later the country's television reach is practically limited to major cities, and not throughout the national territory as seen in neighboring countries. The C.A.R. still lags in the use of television as a tool for social recovery, awareness, information, education and leisure on a national scale. However, since 2011, international private televisions have appeared on the media market. This is the case of the American Direct TV, the Cameroonian Vision 4 and the French Canal+ channels.

This international opening, although late, has now enabled the Central African diaspora to follow the news of their country in the sub-Saharan region and in Europe.

Top TV stations

- Television Centrafricaine (TVCA) - state-run

Radio

Radio has been the most popular and important media in the Central African Republic from the 1950s to the present day. Easily accessible and less expensive, radio reaches almost all social strata. Whether in the provinces or in the capital Bangui, almost all of the broadcasting is in Sango or in French, with varying proportions. Thanks to base stations installed in several provincial cities, more than 75 % of households have at least one receiver).

There are 4 types of radio stations in the country, namely community, public, confessional and private ones.

Top Radio stations

- Radio Centrafrique - state-run
- Radio Notre Dame - Catholic
- Radio Ndeke Luka - run by Swiss NGO Fondation Hirondelle
- Guira FM - operated by UN stabilisation mission

Mobile connections in The Central African Republic in 2022

Data from GSMA Intelligence shows:

- There were 1.64 million cellular mobile connections in Central African Republic at the start of 2022.

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Most used social media platforms in Central African Republic as of November 2022



Facebook users in Central African Republic, 2022

Data published in Meta's advertising resources indicates that Facebook had 131.2 thousand users in the Central African Republic in early 2022.

The company's revised audience figures mean that Facebook's ad reach in the Central African Republic was equivalent to 2.6% of the total population at the start of 2022.

However, Facebook restricts the use of its platform to people aged 13 and above, so it's also worth highlighting that 4.2% of the "eligible" audience in the Central African Republic uses Facebook in 2022.

For additional context, Facebook's ad reach in the Central African Republic was equivalent to 36.9% of the local internet user base (regardless of age) in January 2022.

At the start of 2022, 33.8% of Facebook's ad audience in the Central African Republic was female, while 66.2% was male.

Instagram users in Central African Republic, 2022

Numbers published in Meta's advertising tools indicate that Instagram had 10.1 thousand users in the Central African Republic in early 2022.

This figure suggests that Instagram's ad reach in the Central African Republic was equivalent to 0.2 % of the total population at the start of the year.

However, Instagram restricts the use of its platform to people aged 13 and above, so it's helpful to know that 0.3 % of the "eligible" audience in the Central African Republic uses Instagram in 2022.

It's also worth noting that Instagram's ad reach in the Central African Republic at the start of 2022 was equivalent to 2.8% of the local internet user base (regardless of age).

In early 2022, 28.6% of Instagram's ad audience in the Central African Republic was female, while 71.4% was male.

Facebook Messenger users in Central African Republic, 2022

Data published in Meta's advertising resources indicate that ads on Facebook Messenger reached 42.1 thousand users in the Central African Republic in early 2022.

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Приклад:

The company's revised audience numbers suggest that Facebook Messenger's ad reach in the Central African Republic was equivalent to 0.8% of the total population at the start of the year.

Facebook Messenger restricts the use of its platform to people aged 13 and above though, so it's also worth highlighting that ads reach 1.3% of Facebook Messenger's "eligible" audience in the Central African Republic in 2022.

For additional context, Facebook Messenger's ad reach in the Central African Republic is equivalent to 11.9% of the local internet user base (regardless of age).

At the start of 2022, 31.3% of Facebook Messenger's ad audience in the Central African Republic was female, while 68.7% was male.

2. General business recommendations to attract Central African customers

Central Africans are one of the poorest nations in the World. Wealthy Central Africans potentially are ready to consider to go abroad for treatment but they choose mostly Cameroon, Sudan, India or Europe as country destination due to the lack of information about medical tourism to Turkey, long distance, difficult transportation, service cost.

There is demand for medical tourism but very small amount and they are looking for the lowest costs. There is an extremely small percentage of people who can afford treatment abroad. Here are some suggestions for increase awareness among wealthy Central Africans.

General Strategy proposal

Taking into account very low level of potential medical travelers, low penetration rate of media, limited internet access and low percentage of usage Social Media, it's not recommended to invest in direct advertising campaign.

Main focus on the market B2B

The only possible way to enter C.A.R. is to focus on B2B communication with NGOs providing assistance to the healthcare system of C.A.R. and Central African medical staff.

- Develop a B2B communication strategy with a focus on collaborating with NGOs and private sector (only in capital) for example: doctor exchange projects, invitation for presentation directly to medical institutions in Turkey, charitable programs, etc. Private clinics are available to recommend to wealthy people in the capital the best opportunity for treatment in Turkey
- Develop a B2B communication strategy with a focus on collaborating with medical staff, major healthcare actors and private sector in Central African Republic to increase their awareness of medical tourism to Turkey and its advantages, to build their loyal network of doctors to recommend to their patients Turkey as country destination
- Organization and participation in medical&wellness online events, training of healthcare worker and/or exhibitions in order to Central African medical professional network the latest

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top of the line medical infrastructures, technologies, staff, medical tourism packages, and so on

- Also, it could be effective to involve Turkish NGOs (working in social support), for example Turkish Cooperation and Coordination Agency (TIKA)

3. Recommendations for communication strategy

Due to low level of potential medical travelers, it's not recommended to invest big budgets in direct advertising campaign. It should be stressed on PR activities in media.

The main recommendations strategies for communication of Medical Tourism to build trust and to help customer to make a decision

- Communication with NGOs medical staff & management and Private healthcare facilities (online trainings, printed materials with contacts of Turkish companies that are useful in choosing a treatment) to increase the level of awareness of medical staff and potential consumers
- Focus primarily on those diseases that most concern Central Africans and for which it is difficult for them to get quality treatment and care at home (cancer, cardiology, infectious diseases, plastic surgery and others)
- Focus in communication on the qualifications and high professional level of health specialists and partners: trainings / exchange of experience to show the possibilities of medicine in Turkey: infrastructure, technology, health care, personnel
- Communication about the widespread use of modern medical technology in Turkey for diagnosis and treatment
- Focus on customer support service in communication, including help in language translation on all levels, Visa assistance, concierge services and others; this will give additional advantages to Turkish medical tourism proposal

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Being one of sixteen landlocked countries in Africa, transport infrastructure is critical to the future security of the Central African Republic. The \$223 million Beloko Dry Port initiative aims to construct a dry dock and multi-modal terminal in Beloko.

Meanwhile, construction continues on the Ouesso Bangui Mbaikoro Road section in the Central African Republic. The project, which will boost transport routes in the region and promote intra-regional trade and movement, involves constructing a 1384 kilometre road running between the Congo, the Central African Republic and Chad. The Central African Republic section extends 724 kilometres with an estimated cost of \$376 million.

The Chinese-owned Shanxi Construction Investment Group Company continues developing the \$65 million Bangui Solar PV power plant. Located on a 75-hectare site near Danzi, 20km north of Bangui, the plant will have a power generation capacity of 25 MWp.

Energy

Energy Access in the Central African Republic is extremely limited for both electricity and non-solid fuels. Only 14% of the population has access to electricity, mainly in the capital Bangui, while access is almost absent in rural areas.

Wood and charcoal dominates the domestic energies for cooking and heating, throughout the country and biomass represented 94% of the final energy consumption in 2011.

However, the Central African Republic has a good endowment in renewable energies, especially biomass and hydro, but also solar. Hydropower represent more than half of the installed capacity in the country (the rest being diesel). Renewable energies are limited by many factors, including an inadequate institutional and legal framework, insufficient planning and coordination, internal capacity, lack of financing. Energy efficiency measures are also limited by a lack of a proper institutional framework.

The Central African Republic prepared a SEforALL Gap Analysis / Rapid Assessment that provisionally indicated a 50% access rate to electricity to be reached by 2030.

Oil and Gas Field Equipment

In 2020, Central African Republic imported \$40.1M in Refined Petroleum, becoming the 179th largest importer of Refined Petroleum in the world. Central African Republic imports Refined Petroleum primarily from: Democratic Republic of the Congo (\$37.8M), France (\$547k), United Arab Emirates (\$499k), Senegal (\$442k), and India (\$159k).

Finance and trade

The Central African Republic is a member of Financial Cooperation in Central Africa (Coopération Financière en Afrique Centrale; CFA) and also an active member of the Central African Economic and Monetary Union (Communauté Economique et Monétaire de l'Afrique Centrale; CEMAC). The country's central bank, Banque des États de l'Afrique Centrale, issues the CFA franc. There are several commercial banks that are partially French-owned.

The government has experienced sizable budgetary deficits since the early 1980s. Supported by standby programs from the IMF, direct budgetary aid from France, and assistance from other donors, the Central African government continues to struggle with the burden of a large and often inefficient public sector. Foreign investment is theoretically welcomed and encouraged by liberal

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