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Research Paper



Overcoming Challengesand Nurturing Growth: Enhancingthe Global Medical Tourism Industry Through Strategic Solutions

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ABSTRACT

Through an extensive and rigorous literature review, this paper meticulously examined the various factors that present obstacles to the thriving medical tourism industry. Over the years, medical tourism has experienced exponential growth, serving as a vital means to bridge the global healthcare accessibility gap while also generating substantial revenue for numerous countries. However, with the advent of the unprecedented COVID-19 pandemic, travel restrictions were imposed across international borders in a concerted effort to contain the rampant spread of the virus. Consequently, this resulted in an alarming escalation of the global disease burden and the subsequent collapse of economies worldwide. Given these circumstances, it has become imperative to delve into the factors that may impede the resurgence of the medical tourism industry and explore potential measures that can be undertaken to revive and rejuvenate this crucial sector.

Drawing upon the insights gleaned from relevant scholarly works and research articles, this paper comprehensively investigates the impediments afflicting the global tourism industry. Moreover, it offers practical and actionable solutions that can be implemented to facilitate the reinvigoration of the global medical tourism sector. The aim is to equip stakeholders with the necessary knowledge and tools to effectively address these challenges and actively contribute to the revival and sustenance of the industry. By meticulously examining the existing literature, this study serves as a valuable resource for policymakers, healthcare professionals, tourism organizations, and other relevant parties involved in the medical tourism sector. Through the lens of academic research, this paper provides a robust foundation upon which informed decisions and strategic interventions can be made to bolster the recovery and growth of the global medical tourism industry.

KEYWORDS: medical tourism, COVID-19, tourism revival, cross-border healthcare, global healthcare

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I. INTRODUCTION

Medical tourism refers to the practice of patients travelling across borders to receive medical treatment. This phenomenon has been in existence for over twenty years and has gained attention from researchers in recent years (Aminmansour et al., 2022; Malhotra & Dave, 2022; V. Mishra & Sharma, 2021; Nilashi et al., 2022; Ushakov &Vasyuta, 2022; Tarasenko, 2021). The motivations behind medical tourism are diverse, with patients from developing countries seeking sophisticated treatment in developed countries, and patients from developed countries looking for more affordable medical care in countries where it is readily available (Folinas et al., 2021; Zeng, 2022).

Medical tourism represents the convergence of the healthcare and tourism industries (V. Mishra & Sharma, 2021), making it an important sector for many governments. When managed effectively, medical tourism can contribute to the growth of both the medical sector and the tourism industry. The global demand for medical services has been on the rise due to an increase in the global disease burden and a growing population (Malhotra & Dave, 2022). In several countries, the absence of a robust domestic healthcare system has

exacerbated the global disease burden, hindering the achievement of the United Nations Millennium Development Goals (Folinas et al., 2021).

Medical tourism serves as a means to bridge the gap in healthcare accessibility and affordability worldwide (Kosaka et al., 2021). Governments have recognized the potential economic benefits and have invested in various medical projects to attract medical tourists and stimulate their economies (Tarasenko, 2021). The Asian-Pacific region, particularly India, Singapore, and Thailand, has emerged as a prominent hub for medical tourism, collectively accounting for about 80% of Asia's medical tourism industry (Malhotra & Dave, 2022; V. Mishra & Sharma, 2021). India alone welcomes medical tourists from approximately 55 countries and hosted around 234,000 medical tourists annually before 2020 (S. S. Kumar & Sarkar, 2022; Sharma et al., 2020).

However, the outbreak of the novel coronavirus (COVID-19) pandemic had a profound impact on medical tourism worldwide (Halim et al., 2021; Szromek, 2021; Zeng, 2022). The imposition of travel restrictions and the overwhelming focus on treating COVID-19 patients created a health crisis that hindered patients' ability to travel abroad for treatment or medical reviews (Al-Shamsi et al., 2020; Malhotra & Dave, 2022). The pandemic disrupted international travel, making it challenging even for affluent individuals who typically seek medical treatment abroad to do so (Folinas et al., 2021).

The global tourism market was valued at \$104.7 billion in 2019, with an expected growth projection to reach \$273.4 billion by 2027 (Malhotra & Dave, 2022). However, the pandemic caused significant disruptions to the industry as countries closed their borders and imposed travel restrictions to contain the spread of the virus (Tatum, 2020; Ushakov &Vasyuta, 2022). The Asia-Pacific region alone experienced a loss of approximately 33 million tourists due to the pandemic (Mosazadeh et al., 2022). The recovery of the medical tourism industry from the damages caused by COVID-19 is expected to be a time-consuming process (Sharma et al., 2020; Aminmansour et al., 2022).

In summary, medical tourism has provided a means for patients to access specialized medical treatment and more affordable healthcare. It has emerged as a crucial sector, intertwining the healthcare and tourism industries, and has been particularly prominent in the Asian-Pacific region. However, the COVID-19 pandemic significantly disrupted medical tourism, leading to travel restrictions and a decline in international patient flows. The industry's recovery is expected to take considerable time, and its long-term outlook remains uncertain.

Significance of the Study

Healthcare delivery across international borders has long been a matter of concern in the field of public health. However, the emergence of the COVID-19 pandemic has brought this issue to the forefront (Kosaka et al., 2021). One particular area significantly impacted by the pandemic is the medical tourism industry, which has experienced a substantial decline in patient demand since the early stages of the crisis (Stackpole et al., 2021). In 2019, the medical tourism industry was estimated to be worth around US\$100 billion (Ushakov &Vasyuta, 2022), with projections suggesting it could reach a staggering US\$3 trillion by 2025 (Nilashi et al., 2022). Regrettably, the COVID-19 pandemic has disrupted this growth trajectory, posing a significant threat to the attainment of such ambitious goals.

It is important to note that many countries heavily rely on medical tourism as a lucrative source of revenue, contributing significantly to their Gross Domestic Product (GDP) (Kosaka et al., 2021; V. Kumar, 2020; Pandey et al., 2020; Seo & Kim, 2021; Tarasenko, 2021). Consequently, the decline of the medical tourism industry has prompted all stakeholders involved, including those in the medical and tourism sectors, to actively pursue strategies and policies aimed at reviving the industry (Ushakov &Vasyuta, 2022).

Numerous research papers have been published, each exploring how individual nations can strategize and revitalize their respective medical tourism industries. However, there is a lack of comprehensive studies that compile these strategies into a single document. Therefore, the purpose of this paper is to conduct an extensive literature review, investigating the obstacles hindering the revival of the global medical tourism industry and proposing potential strategies to facilitate its recovery.

II. METHODS

For this study, the relevant literature was sourced exclusively from scholar.google.com and pubmed.ncbi.nlm.nih.gov, two reputable scholarly websites. The search process on these platforms followed a systematic step-by-step approach, aiming to identify papers published between the years 2019 to 2023. The search was conducted using a combination of specific keywords, including "medical tourism," "COVID-19," "pandemic," "restarting tourism," and "tourism industry." By focusing on inhibitors and factors that could contribute to the revival of the medical tourism industry, the researchers carefully selected papers based on predefined inclusion and exclusion criteria established for this study.

The inclusion criteria consisted of the following considerations. First, only papers published in the English language were considered, ensuring that language barriers did not hinder comprehension and analysis. Second, the researchers specifically sought free full-text papers, enabling unrestricted access to the entire

content. Third, the selected papers had to focus on medical tourism during the COVID-19 pandemic, exploring the unique challenges and opportunities that arose in this context. Lastly, the inclusion criteria encompassed papers that examined strategies for revitalizing the medical tourism industry post-pandemic, aiming to identify potential pathways for recovery and growth.

Conversely, certain papers were excluded based on predefined exclusion criteria. Papers that focused on revitalizing the medical tourism industry without emphasizing the impact of COVID-19 were not included, as the study aimed to address the specific challenges posed by the pandemic. Additionally, duplicate publications on the same topic, even if published in different journals, were excluded to avoid redundancy and ensure a diverse range of perspectives in the selected papers.

Following the rigorous selection process, a total of 31 papers met the inclusion criteria and were included in the study. These papers were deemed relevant and valuable in providing insights into the effects of COVID-19 on the medical tourism industry and proposing potential strategies for its revitalization.

III. HINDERS TO THE REVIVAL OF THE GLOBAL MEDICAL TOURISM INDUSTRY

Healthcare investors have recognized medical tourism as a promising industry for economic investment (V. Mishra & Sharma, 2021). However, the COVID-19 pandemic imposed significant restrictions on travel and posed challenges to providing treatment to patients, necessitating the development of innovative solutions (Stackpole et al., 2021). To effectively address these issues and revive the medical tourism industry, it is crucial to identify and understand the factors hindering its recovery.

Cost is a critical factor influencing the choice of medical tourism destinations (Sharma et al., 2020; Zeng, 2022). Zeng (2022) further elaborates that potential medical tourists also consider the overall cost of living in destination countries before deciding where to seek treatment. Consequently, expensive destinations, including high travel costs, may impede the revival of medical tourism. Since the onset of the pandemic, the prices of air travel tickets have soared, and additional expenses such as quarantine accommodation, travel health insurance, and COVID-19 testing have further escalated the costs associated with travelling to medical tourism destinations (Kamilova et al., 2022; Seo & Kim, 2021; Stackpole et al., 2021; Zeng, 2022). According to Sharma et al. (2020), medical tourists typically seek affordable options, and the individual costs of travel components, if not subsidized, could pose a significant deterrent to global medical travel.

Before the pandemic, the medical tourism industry primarily focused on enhancing service quality and patient safety due to intense competition within the tourism sector (Zeng, 2022). However, certain Asian countries, which were popular medical tourism hubs, are grappling with poor infrastructure, limited accessibility, and challenges in maintaining patient connections (S. S. Kumar & Sarkar, 2022). Additionally, countries that experienced significant spikes in COVID-19 cases during the peak of the pandemic are likely to deter medical tourists (Ushakov &Vasyuta, 2022). The rampant spread of the virus in countries like India raised concerns about infection control and transmission management (Dash & Sharma, 2021; Khan et al., 2020). Consequently, tourists have become extremely cautious about their safety and the quality of healthcare services, potentially hampering the revival of the medical tourism industry. Sharma et al. (2020) also suggest that the severity of the pandemic in certain hub countries may render them unattractive options for medical tourists.

Another hindrance to reviving medical tourism is the shift in consumer behaviour and consumption patterns caused by the pandemic (Nilashi et al., 2022). Kaewkitipong et al. (2021) note a paradigm shift where the younger generation is increasingly concerned about their health, paralleling the concerns of the elderly. Failing to implement holistic marketing strategies in medical tourism that target and entice the younger generation to seek treatment abroad could impede the industry's revival (Malhotra & Dave, 2022). Additionally, medical tourists are attracted to destinations based on specific attributes, such as religious beliefs, and these intrinsic values play a significant role in their destination selection (Sobani et al., 2022). As Zeng (2022) indicates, over 33.33% of medical tourists consider unique features such as culinary experiences and religious facilities when choosing a destination for medical treatment. Addressing this new phase of consumer behaviour and trends in medical tourism is crucial (Kamilova et al., 2022).

The fourth hindrance to the revival of medical tourism stems from the inability of destination countries to independently provide medical personnel and resources (Kosaka et al., 2021). The pandemic prompted numerous countries to close their borders, highlighting the importance of self-reliance (Heinz et al., 2022; Kamilova et al., 2022; Mosazadeh et al., 2022; Zeng, 2022). Economic downturns and rising poverty rates affected nations with collapsing economies (Halim et al., 2021; Hassan &Bellos, 2022; Kaewkitipong et al., 2021; Seo & Kim, 2021). International travel restrictions resulted in a global GDP decline of approximately 2%, while the United Nations World Tourism Organization estimated a \$1 trillion loss to the medical tourism industry worldwide (Hassan &Bellos, 2022). For example, Cambodia faced a shortage of doctors despite being acknowledged as a medical tourism destination, underscoring the difficulties faced by countries heavily reliant on external resources (Kosaka et al., 2021). Consequently, countries lacking economic strength will struggle to revive medical tourism.

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Lastly, Kamilova et al. (2022) emphasize the absence of tailored legislation governing medical tourism in various destinations. The lack of security laws designed to protect tourists and the absence of stipulated laws against violence targeting medical tourists create medico-legal concerns (UroosaKhan& Goyal, 2020; Mosazadeh et al., 2022). Aminmansour et al. (2022) highlight the need for a legal framework regulating collaborations between medical facilities treating medical tourists and medical tourism agencies, as the absence of such a framework poses a threat to the revival of medical tourism.

Hindrances	Authors
 Expensive travel and medical costs. A sudden increase in aeroplane travel tickets, accommodation and travel health insurance. Payments are required for testing for the virus in certain destinations. Expensive treatment costs. Reduced disposable income as the pandemic has impacted several economies. 	Kamilova et al., 2022; Seo & Kim, 2021; Stackpole et al., 2021; Zeng, 2022
Compromised service quality and medical tourist safety.>Poor infrastructure, accessibility and difficulty in staying in touch with patients after treatment.>Compromised infection control and transmission management system.	Dash & Sharma, 2021; Khan et al., 2020; V. Kumar, 2020; Sharma et al., 2020; Ushakov & Vasyuta, 2022
Change in consumer behaviour and consumption trends. > Younger medical tourists are dominating the industry with special requirements. > Consumers are selecting destinations based on specific attributes. > Selection of destinations based on intrinsic values such as religious beliefs.	Kamilova et al., 2022; Malhotra & Dave, 2022; Nilashi et al., 2022; Sobani et al., 2022; Zeng, 2022
Resource dependence of medical tourist destinations. > Dwindling economies and poverty > Absence of adequate material and human resources. Absence of stringent tailor-made laws. > Absence of global security laws for tourists. > Absence of a global legal framework that regulates the collaboration between medical facilities and travel agencies.	Halim et al., 2021; Hassan & Bellos, 2022; Kaewkitipong et al., 2021; Kamilova et al., 2022; Kosaka et al., 2021; Nilashi et al., 2022; Sobani et al., 2022; Zeng, 2022 Aminmansour et al., 2022; Khan et al., 2020; Mosazadeh et al., 2022

Table 1 Highlights the factors that hinder the revival of medical tourism

IV. STRATEGIES TO AUGMENT THE REVIVAL OF MEDICAL TOURISM

The COVID-19 pandemic prompted numerous governments worldwide to implement travel restrictions based on the World Health Organisation's (WHO) recommendations for international travel, aiming to mitigate the transmission of the virus (Zeng, 2022). Consequently, the global medical tourism industry experienced a significant decline. In 2020, the UNWTO estimated a reduction in travel by approximately 60% to 80% (Tatum, 2020). Likewise, the medical tourism industry in Asia witnessed an 80% decline in the number of medical tourists visiting the continent, while Europe and the United States experienced declines of 70% and 69% respectively. Kaewkitipong et al. (2021) project a complete recovery of the global international medical tourism industry by 2024, provided that practical strategies are implemented to facilitate its revival.

Affordability has always been a key factor for medical tourists when selecting destinations for treatment. Countries such as India, Singapore, Malaysia, and Hong Kong have been popular choices due to their relatively lower healthcare costs (Khan et al., 2020; V. Mishra & Sharma, 2021; Mosazadeh et al., 2022). As previously mentioned, medical tourism entails expenses for flights, accommodation, medical and travel insurance, as well as COVID-19 testing. It is now crucial for governments of medical tourism destinations to collaborate with travel and tourism regulatory bodies such as the WTO and UNWTO to subsidize travel costs like airlines and hotels. To mitigate travel costs while sustaining the industry, medical tourist destinations should consider investing in a robust telemedicine system to provide remote treatment options for patients. Malaysia and South Korea have already embraced telemedicine to maintain their competitiveness in the market (Stackpole et al., 2021). Furthermore, governments should invest in healthcare infrastructure and foster strong partnerships between private and public hospitals (Seo & Kim, 2021) to ensure affordable treatment for all. Despite being a developing country, India has invested in its medical sector by offering cost-effective treatment services, making it an attractive destination for medical tourism (Sharma et al., 2020). In contrast, healthcare services in the United Kingdom (UK) and the USA are known to be expensive (UroosaKhan& Goyal, 2020). For instance, the cost of open-heart surgery in the USA is approximately \$100,000, whereas, in India, it is as low as \$2,000 or even less (V. Mishra & Sharma, 2021). Similarly, healthcare treatment costs in Malaysia, another developing country, are about 40% lower than in Singapore. Consequently, the medical tourism industry

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tends to gravitate toward more affordable destinations, but gradually subsidizing costs across nations will ultimately increase tourist patronage.

Even before the pandemic, the medical tourism industry was highly competitive, and its competitiveness intensified further in the aftermath (Malhotra & Dave, 2022; Nilashi et al., 2022; Stackpole et al., 2021; Umukoro et al., 2020). As mentioned earlier, patients prioritize service quality and safety when choosing a medical tourist destination, especially in the post-pandemic era. The pandemic's unpredictable nature necessitates policy adjustments and reassessments to ensure service quality (Malhotra & Dave, 2022). Establishing a reputable medical facility requires substantial investments (Mosazadeh et al., 2022; Ushakov &Vasyuta, 2022) to foster innovation, data management, and overall excellence (Hassan &Bellos, 2022). Technological advancements and sophistication are crucial for delivering quality healthcare, and that is precisely what patients seek (Heinz et al., 2022; Seo & Kim, 2021; Zeng, 2022). Therefore, Mosazadeh et al. (2022) propose that medical tourist destinations should invest in research on technology and artificial intelligence to revitalize the industry. Turkey's medical tourism industry serves as an example, having established itself by providing quality and innovative healthcare services (Kamilova et al., 2022). Moreover, marketing efforts for medical tourist destinations should include comprehensive information about the patient's treatment and the destination itself (Nilashi et al., 2022). According to Seo and Kim (2021), utmost honesty and transparency should be upheld by both medical tourists and service providers during the marketing phase. Effective online marketing and telehealthcare play a crucial role in providing quality care to medical tourists (Kaewkitipong et al., 2021). To address safety concerns, Ushakov and Vasyuta (2022) recommend implementing stringent infection control measures to minimize the transmission of infections within healthcare facilities. Additionally, since many medical tourists also require accommodation in hotels, hospital authorities should collaborate with hotels to ensure clean and infection-free environments (UroosaKhan& Goyal, 2020). Dash and Sharma (2021) further suggest including tour operators in the adoption of infection control programs to provide comprehensive protection for medical tourists.

Medical tourism was traditionally associated with geriatrics and individuals with chronic diseases, but consumer behaviour and trends have shifted. The industry is now increasingly dominated by younger medical tourists, necessitating medical tourist destinations to promote their culture, cuisine, and religious attractions to attract this demographic (Kaewkitipong et al., 2021). Incorporating sightseeing activities into medical tourism offerings is also likely to appeal to potential medical tourists (UroosaKhan& Goyal, 2020). Malhotra and Dave (2022) emphasize the importance of diversifying services through branding and enhancing the image of medical tourist destinations to be more youth-friendly as a means of reviving the industry. Furthermore, investing in and promoting beauty and wellness tourism can attract young medical tourists in large numbers (V. Mishra & Sharma, 2021).

Pandemics are inherently unpredictable, and the patterns of infected individuals can be equally volatile. This reality calls for countries to reassess their operations and strive for self-reliance (Malhotra & Dave, 2022). Kosaka et al. (2021) assert that reviving medical tourism requires substantial investments in expanding the medical sector, including human and material resources, to enhance the resilience of medical tourist destinations. The capacity to withstand unpredictable border openings and closures during pandemics (Stackpole et al., 2021). Adequate material resources and competent human resources are essential for sustaining the industry in tourist destinations during unprecedented events like the COVID-19 pandemic (Kosaka et al., 2021).

The trust of medical tourists is unpredictable, and security considerations play a vital role in their decision-making process (Aminmansour et al., 2022; Ushakov &Vasyuta, 2022). To ensure global security for medical tourists, Seo and Kim (2021) recommend collaboration between governments to establish a legal framework specifically tailored to tourism security. Additionally, fostering administrative cooperation between private and public medical facilities is crucial for enhancing patient security. Establishing a centralized database for medical tourism, containing information on patients' statuses, the medical facilities they are receiving treatment from, and their housing details, would further strengthen security and well-being (Gupta et al., 2020; Kamilova et al., 2022; Mosazadeh et al., 2022). Aminmansour et al. (2022) also suggest that governments of countries whose citizens travel abroad for medical tourism should implement stringent policies to ensure their safety in destination countries. Enforcing robust tourism laws to regulate and monitor the activities of travel agents globally would contribute to the security of medical tourists (Aminmansour et al., 2022; Halim et al., 2021; Kamilova et al., 2022).

 Table 2 Practical solutions to factors that hinder the revival of medical tourism

Solutions	Authors
Offering affordable treatment and travel costs.	Khan et al., 2020; V. Mishra & Sharma, 2021; Mosazadeh et al.,
Governments of medical tourist destinations should liaise	2022; Seo & Kim, 2021; Sharma et al., 2020; Stackpole et al., 2021
with travel and tourism regulatory bodies to subsidize travel costs.	
> Governments of medical tourist destinations should	
invest in healthcare to make it much more affordable.	
> Collaboration between private and public hospitals to	

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Authors
Dash & Sharma, 2021; Hassan & Bellos, 2022; Heinz et al., 2022;
Kaewkitipong et al., 2021; Kamilova et al., 2022; Malhotra & Dave,
2022; Mosazadeh et al., 2022; Nilashi et al., 2022; Seo & Kim,
2021; Umukoro et al., 2020; Ushakov & Vasyuta, 2022; Zeng, 2022
Kanaditinana at al. 2021. Khan at al. 2020. Mail (
Kaewkitipong et al., 2021; Khan et al., 2020; Malhotra & Dave, 2022; V. Mishra & Sharma, 2021
2022, v. ivitsina & Silalina, 2021
Kosaka et al., 2021; Malhotra & Dave, 2022; Stackpole et al., 2021
Aminmansour et al., 2022; Gupta et al., 2020; Halim et al., 2021; Kamilaus et al. 2022: Massardah et al. 2022; Sas & Kim 2021;
Kamilova et al., 2022; Mosazadeh et al., 2022; Seo & Kim, 2021; Ushakov & Vasyuta, 2022
Ushakuv & vasyula, 2022

V. CONCLUSION

This research paper conducted an extensive literature review to identify various factors that hinder the global revival of medical tourism. These factors encompass expensive travel and medical costs, compromised service quality and concerns about medical tourist safety, shifts in consumer behaviour and consumption trends, the reliance on resources in medical tourist destinations, and the lack of robust and tailored regulations to ensure the security of medical tourists.

Based on these hindrances, the paper provides practical recommendations to enhance the revival of the medical tourism industry. These solutions entail subsidizing travel and medical costs through strategic investments, leveraging technology and artificial intelligence (AI) to improve service quality, implementing stringent infection control measures in hospitals and hotels, integrating sightseeing activities into medical tourism packages, investing in and promoting beauty and wellness tourism, allocating substantial funds to develop self-sustaining medical tourist destinations, fostering collaborations between governments to establish a global security system for medical tourists, and implementing stringent security policies by governments to protect their citizens travelling abroad for medical tourism purposes.

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