

Exploration of Obstacles and Key Roles in the Development of the Medical Tourism Industry

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ABSTRACT

The medical tourism industry is currently experiencing rapid development in several countries. However, in some developing countries there are challenges to develop medical tourism. The author's goal is to critically assess the literature that examines the factors that are obstacles or challenges in the development of medical tourism as well as the potential strategies they present in their research. This study uses a systematic literature review taken from three databases; Pubmed, Scopus and Google Scholar. All studies taken from the results of the screening discussed the factors that are obstacles in developing medical tourism and presented potential strategies to overcome these obstacles. The results of the conclusion state that the role of the government is a key role in developing and promoting the medical tourism industry. The regulations that are built and the policies made by the government and stakeholders will be able to benefit the medical tourism industry which leads to an improvement in the economy and the welfare of its people. By properly managing and informing the policy-making and decision-making process, governments and industry stakeholders can drive the development and growth of these industries, resulting in the benefits of increasing the economy, including additional resources and revenues for healthcare investment in the country

Keywords: challenges; obstacles; strategy; elaboration; development; medical tourism

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INTRODUCTION

Traveling abroad in search of better health and well-being is not a new phenomenon. Since the 18th century, patients with high financial ability from developing countries have traveled to Europe and the Americas for medical treatment (Amars, 2021; Firdaus Arifin, 2019). Every year, millions of people in the United States travel to other countries to get medical treatment called medical tourism (Ali et al., 2024). According to Syahmardi Yacob et al., (2024) The growth of the rapidly growing medical tourism industry today is influenced by the main driving factors that come from the countries of origin of tourists. These factors include expensive medical costs, insurance that does not cover some diseases, very long waiting times for medical procedures to the unavailability of specific medical care (Biswas et al., 2024).

Medical tourism has experienced substantial growth in recent years. According to data from credible international reports such as the World Bank and the Medical Tourism Association, the medical tourism industry in 2016 could generate a turnover of \$100 billion for the destination country (Shirisa & Kumari, 2023). As many as 11 million

tourists travel to get medical services. The industry is growing at a rate of 25% per annum and according to previous medical tourism research, each tourist brings about \$5000 to the destination country and can create permanent jobs for every \$7000 (Asiabar et al., 2021).

Medical tourism involves a wide range of stakeholders including healthcare providers, healthcare marketers, facilitators, accreditation bodies, government agencies, healthcare facilities, and host communities (Badi'ah & Kp, 2022). This implies that all of these stakeholders must function appropriately, both individually and collectively, in order for a country to become an attractive medical tourism destination. Many experts have investigated various aspects of medical tourism such as the motivations and characteristics of medical tourists, the influencers and sources of information that shape their decisions, the competitiveness of medical tourism destinations, and the roles played by various stakeholders in the industry (Hosseini et al., 2023).

In a previous study conducted in Indonesia in 2022, it was explained that the challenges faced in developing medical tourism are divided into 3 levels, namely macro, meso, and micro. At the macro level, the challenges faced are regulatory issues, the number of health services, the distribution of supporting resources, and public trust. At the meso level, the challenges of medical tourism are hospital facilities and supporting facilities that are still minimal and the marketing process where Indonesia's current focus is more on halal tourism than medical tourism. Furthermore, at the micro level, medical tourism challenges are in the form of low competence of health workers and non-health workers (Supriadi et al., 2024).

This research is unique by integrating multi-level (macro, meso, micro) analysis of the challenges faced by the medical tourism industry in Indonesia, as well as comparing it with international practices. This research not only identifies existing barriers, but also proposes a cross-stakeholder, collaboration-based development strategy, including governments, healthcare providers, and local communities. This approach provides a new perspective on how Indonesia can position itself as a competitive medical tourism destination in the Southeast Asian region.

This research aims to identify the main challenges faced by the medical tourism industry in Indonesia at the macro, meso, and micro levels, as well as formulate sustainable development strategies by taking into account global competitiveness and local potential. By exploring international practices, this study also aims to provide adaptive recommendations for Indonesia in overcoming specific existing barriers. This research is expected to provide academic benefits by enriching the medical tourism literature based on local contexts as well as practical benefits by providing strategic guidance for policymakers to design regulations that support the industry. In addition, this research provides insights to industry players to improve the competitiveness of their services, while encouraging medical tourism as one of the new pillars of national economic development and improving the quality of health services to attract international tourists.

METHOD

This study uses the systematic literature review method to analyze and synthesize relevant data from various sources of scientific literature. This method is designed to provide a comprehensive, structured, and transparent picture of the research topic by adhering to applicable guidelines, such as PRISMA (Preferred Reporting Items for Systematic Reviews and Meta-Analyses).

Data Search Strategy

The database sources used in searching for literature in this study include *PubMed*, *Scopus* and *Google Scholar* with the period 2017-2024. Journal search uses keywords consisting of 1. "challenges" OR "obstacles" OR "barriers", 2. "strategy" OR "elaboration", 3. "development" OR "developing", 4. "Medical Tourism". Given time and resource constraints, researchers did not manually search *conference proceedings*, gray literature reports and major journals.

Eligibility Criteria

The eligibility criteria in this study include inclusion and exclusion criteria. The inclusion criteria in this study include: 1) literature in the form of scientific journals, 2) scientific journal sources are from *PubMed*, *Scopus* and *Google Scholar*, 3) articles must be accessible in *full text* form, 4) scientific journals must be in English or Indonesian, 5) Discussion of scientific journals includes exploration of challenges and key roles in developing medical tourism and potential strategies that can be pursued 6) years publication of scientific journals between 2017-2024, 7) research design used qualitative or descriptive. The exclusion criteria are those that do not match the inclusion criteria.

Research Selection and Synthesis

This type of research is a systematic literature review where the details of the process include determining the strategy and source of data search, selecting studies through quality assessment according to selection criteria, data synthesis and data extraction. Of the three databases used by researchers in searching for scientific journal articles, 56 journal articles were identified, 2 of which were issued because there was duplication of journal articles. Then, 27 journal articles were removed because the title and abstract did not match the inclusion criteria. Of the 26 scientific journal articles that were screened, there were 23 articles that did not meet the eligibility criteria so that only 3 scientific journals were used in systematic literature review research such as in the PRISMA flow chart shown in Figure 1.

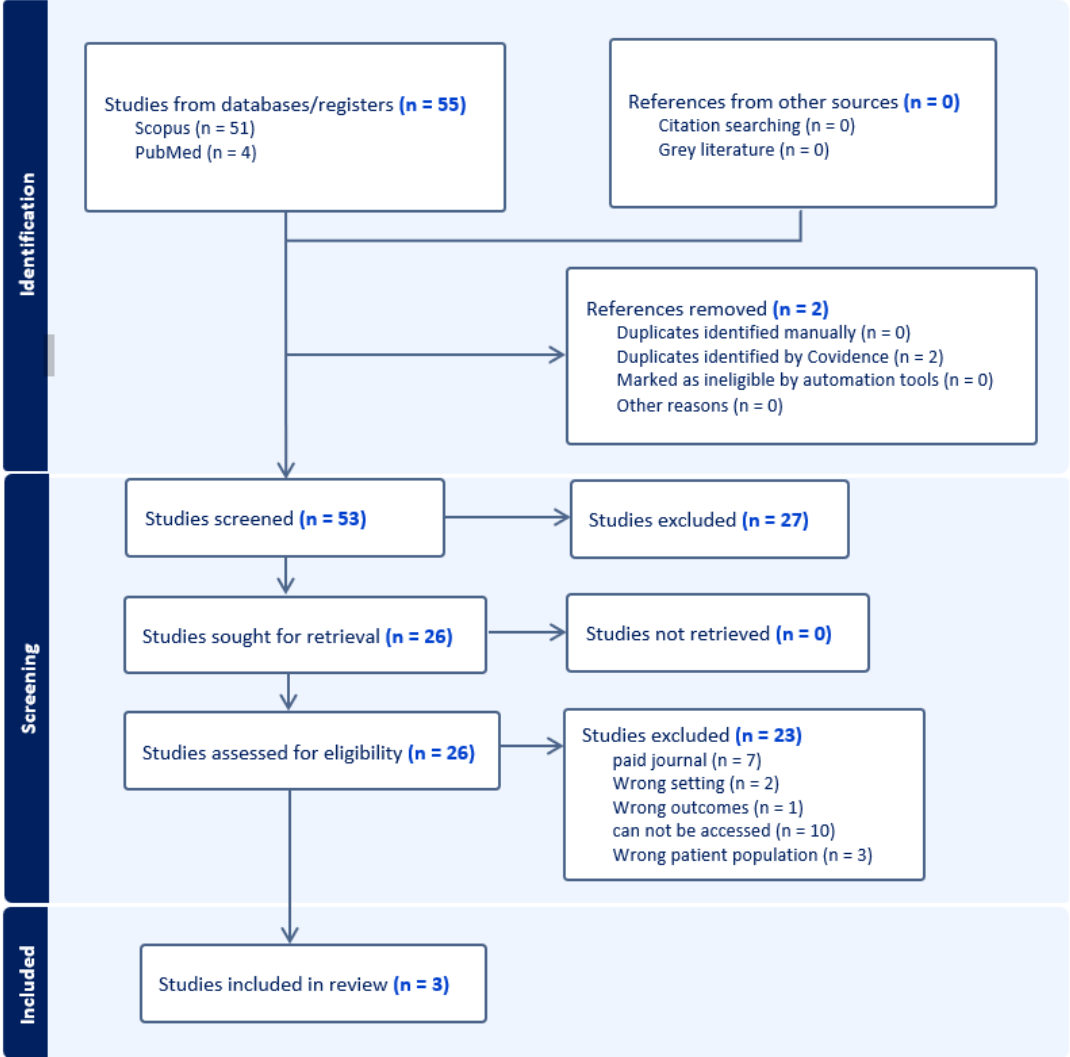


Figure 1. PRISMA flow chart that describes the systematic process of literature selection

RESULTS AND DISCUSSION

Based on the results of the research outlined in this document, the challenges in the development of medical tourism in Indonesia can be categorized into three main levels, namely macro, meso, and micro. At the macro level, challenges include limited health facilities and supporting resources such as insufficient number of doctors and hospitals, lack of supportive regulations such as special visas for medical tourists, and high taxes on medical devices (Ulaş & Anadol, 2016). Public trust in domestic health services also needs to be built (Sukmana et al., 2021; Zariyah et al., 2023). At the meso level, the main challenges involve unclear prices and health care packages, lack of digital information about health facilities, and lack of supporting facilities such as medicines and medical devices (Fathiah, 2023). In addition, there are not many hospitals that focus on medical tourism, as well as international accreditation programs such as JCI that are still limited (Arisanti, 2019; Azwar et al., 2023; Sumual et al., 2024). At the micro level, obstacles

include low competence of health workers, language barriers, and lack of training related to services for foreign patients (Setiawan, 2021).

Proposed strategies to address these challenges include equitable distribution of medical personnel, development of tourism-based health services, achievement of international accreditation, and improvement of medical personnel skills in communicating and speaking foreign languages. In addition, the promotion and marketing of medical tourism needs to be improved through cooperation with relevant ministries and the use of information technology (Abdillah et al., 2020; Saputra et al., 2023). The implementation of this strategy is expected to increase Indonesia's competitiveness in the medical tourism sector and attract more health tourists from various countries.

Discussion

Research related to factors influencing the development of the medical tourism industry in Indonesia written by Supriadi, et.al., using language that is easy for readers to understand. In addition, the systematics of the writing and explanations related to the results of the research make it easier for readers to understand by dividing the challenges of developing the medical tourism industry into three group levels, namely macro, meso and micro levels so that readers can understand that at each level from large to small scales has a role in becoming a challenge in the development of medical tourism, so that the strategies taken to overcome these challenges can also be adjusted to the level. However, the drawback in this study is that it focuses more on the perspectives of governments and health care providers. Meanwhile, the perspective of the community is not discussed in the study.

The research conducted by Somayeh, et.al., in Isfahan Province, Iran uses two languages, namely English and Russian, but this is not a problem for readers. This research presents many images, model concepts and diagrams so that it is easier for readers to understand the content of the research. Overall, the explanation of this study is very detailed yet easy for readers to understand. The results of the study are divided into 8 classifications of factors that act as challenges for the medical tourism industry and each classification is explained using a problem index framework and each problem index is divided into sub-sub-indexes of problems then categorized and determined the priority level of the problem so that readers can understand what is the biggest problem in each classification of medical tourism challenges. However, this study does not show the limitations and shortcomings of the research, but the author estimates that this study does not really describe the perspective of the Isfahan community, Iran.

In the research conducted by Ladan Rokni, et al. in North Korea combined the concept of literature review and interviews. The study does not explain in detail or classify the challenges of the tourism industry in South Korea, unlike the research of Supriyadi, et al. and Somayeh, et al. The weakness of this study is that it uses a small number of samples to be interviewed so that the data does not represent the general medical tourism problem in South Korea. In addition, the research does not take from the perspective of public demand.

CONCLUSION

Based on the results and discussion of the research, it can be concluded that the medical tourism industry faces a number of obstacles that affect its growth. These obstacles include weak government policy support, regulations that have not accommodated the medical tourism sector, the availability of health facilities and tourism infrastructure that have not been integrated, marketing strategies that are not optimal, and limited human resources in terms of communication, foreign language skills, and competence. In addition, Ladan Rokni et al's research emphasized the importance of cultural and language adaptation as a special challenge in developing this industry.

This research makes a significant contribution in understanding the challenges as well as the potential for the development of the medical tourism industry. With insights from these studies, the central government is expected to develop policies that better support the medical tourism industry, including integrating relevant regulations, improving the quality of infrastructure, and providing incentives to healthcare and tourism providers. In addition, the results of this study provide a framework for stakeholders such as healthcare providers, marketers, medical tourism facilitators, and accreditation bodies to design comprehensive business strategies. Through proper management, the medical tourism industry has great potential to have a significant economic impact. The additional income from medical tourism can be used to increase investment in healthcare services and encourage the growth of other economic sectors. Therefore, collaboration between the government and industry stakeholders is urgently needed to create an effective and sustainable development strategy.

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