

Review Article

## **The Assessment of Medical Tourism in the World and Strategy Recommendations**

Derya Kara

Associate Professor, Department of Health Care Management,  
Faculty of Economics and Administrative Sciences, Gazi University, Ankara, Turkey.

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### **ABSTRACT**

Medical tourism activities within the health tourism, which have a grand potential in especially economic development and income generation of the countries, gain importance day by day. In this study, medical tourism activities are studied by emphasizing on the concept of medical tourism within the health tourism. By dwelling on the countries which are notable countries in the world in terms of medical tourism, status quo of them is presented. Moreover, some suggestions that can be effective in improving the medical tourism activities around the world and providing more economic contribution of the countries are put forward.

**Key words:** Health tourism, medical tourism.

### **INTRODUCTION**

With the importance of the health concept that has recently been gained all over the world, the tendency to the health tourism is increasing day by day and international tourism movement shows increase.

Reported by Harahseh <sup>[1]</sup> reported that there are contemporary drivers in the health tourism market, which add to the attractiveness of the sector. These include: shifting in consumer values, increased stress and work load, older population, health-care costs are escalating, new attitude towards mental and spiritual activities, the emergence of environmentalists. Reported by Ross <sup>[2]</sup> reported that there is no single definition for health tourism, health tourism is "any kind of travel to make yourself or a member of your family healthier. Defined by Carrera and Bridges <sup>[3]</sup> defined health tourism as "the organized travel outside one's local environment for the maintenance, enhancement or restoration of

an individual's wellbeing in mind and body". The health tourism contains some concrete and abstract advantages in itself. The income of the foreign tourists contributes to the economic welfare of the countries, increases the information sharing among the countries and associates strategic partnership alliances, contributes to the technology and information transfer among the countries, leads to the better services provided for the patients of their own country because of the services provided for the foreign patients on the occasion of the international competition, which are among the concrete advantages. On the other hand, the abstract advantages can be put in order as sharing the social and cultural experiences, contributing to the improvement of the international relationship, improving the global marketing and medical trade, giving image of serving the health care service, providing competition advantage, strengthening public and private partnership in the field of health,

increasing the patient satisfaction in many aspects. [4] A range of 'health' services are being provided or traded which for simplicity of discussion can be categorized into three product groups, using the broadest definition of health (rather than medical): [5]

- Wellness (Spas, lifestyle/healthy vacations, nature tourism etc.)
- Treatment (elective surgery, cosmetic surgery, joint replacement etc.)
- Rehabilitation (Dialysis, addiction programmes, and elderly care programmes)

In parallel with the high level of welfare and education in developed countries, the health service has a high cost; and the ration of the health needs and health expenses of the aging population is increasing day by day. The incremental revenue of the social security costs puts social security institutions in a hard position. To overcome these difficulties, efforts of the social security institutions and the private insurance institutions in developed countries to purchase low-cost health services by making a package agreement with the countries give high-quality of health service and are located in the vicinity are seen. [6] In sum, this present study is designed to assessment of medical tourism in the world. Some countries are very important for medical tourism activities such as India, Thailand, Singapore, USA, Malaysia, Germany, Mexico, South Africa, Brazil, Costa Rica, and Turkey. Moreover, some suggestions that can be effective in improving the medical tourism activities around the world and providing more economic contribution of the countries are put forward. From this evaluation we can reach some conclusions about opportunity in medical tourism sector in the world. Also, such rich information will contribute to the theoretical underpinnings of medical tourism.

#### ***Definition of Medical Tourism***

Tourists need not necessarily be hedonists, but they anticipate a beneficial outcome. In the past decade the attempt to achieve better health while on holiday,

through relaxation, exercise or visits to spas, has been taken to a new level with the emergence of a new and distinct niche in the tourist industry: medical tourism. Medical tourism as a niche has emerged from the rapid growth of what has become an industry, where people travel often long distances to overseas countries to obtain medical, dental and surgical care while simultaneously being holidaymakers, in a more conventional sense. It has grown dramatically in recent years primarily because of the high costs of treatment in rich world countries, long waiting lists (for what is not always seen institutionally as priority surgery), the relative affordability of international air travel and favourable economic exchange rates, and the ageing of the often affluent post-war baby-boom generation. [7]

Medical tourism also called as surgical tourism covers the travels that are for the medical treatment of the people. The entire medical processes within the medical tourism are carried out with doctors' supervision in full-fledged hospitals and clinics. [6] Additionally, as a part of health tourism, services are rendered in terms of both curing and rehabilitating; and improving the health status. As, within the health tourism, one does not necessarily have to be poor in health, individuals take an opportunity to be able to cure and improve their health and protect themselves from the illnesses with the activities as a recreative activity within health tourism. [8]

From marketing materials (both newspaper and web-based sites) it is apparent that the range of treatments available overseas include cosmetic surgery (breast, face, liposuction), dentistry (cosmetic, reconstruction), cardiology/ cardiac surgery (by-pass, valve replacement), orthopaedic surgery (hip replacement, resurfacing, knee replacement, joint surgery), bariatric surgery (gastric by-pass, gastric banding), IVF/reproductive system (IVF, gender reassignment), organ and tissue transplantation (organ transplantation; stem cell), eye surgery and

diagnostics and checkups. <sup>[9]</sup> Medical tourism does not need natural resources unlike its other sub-sectors of the health tourism. In order to be in service in this sector, there should be sources related to the equipments such as primarily doctor, medical personnel, hospital and clinic. <sup>[10]</sup>

### ***Medical Tourism in the World***

The increase in the interest and the participation in the health tourism in the world every single day leads to being regarded as an important source of income and helps countries to improve their facilities and resources by investing this kind of tourism.

Recently, the inclination towards the travels for medical purposes has changed its course and very few citizens of either underdeveloped countries or developing countries have begun to get health service from the underdeveloped countries that give service far and wide instead of The United States and developed European countries. <sup>[11]</sup>

Reported by Na Ranong and Na Ranong <sup>[12]</sup> the medical tourism industry has been growing worldwide. It involves about 50 countries in all continents and several Asian countries are clearly in the lead. In Asia, medical tourism is highest in India, Singapore and Thailand. These three countries, which combined comprised about 90% of the medical tourism market share in Asia in 2008, have invested heavily in their health-care infrastructures to meet the increased demand for accredited medical care through first-class facilities. Thirty five countries identified <sup>[13]</sup> as tourism destination. India, Thailand, Singapore, USA, Malaysia, Germany, Mexico, South Africa, Brazil and Costa Rica were top ten countries. Others identified as Poland, Saudi Arabia, Switzerland, Argentina, UAE, Turkey, China, Spain, UK, Australia, Cuba, France, Panama, Philippines, Belgium, Caribbean, Hungary, Israel, Japan, Jordan, Morocco, New Zealand, South Korea, Taiwan and Tunisia. The status of the top ten countries in terms of medical tourism has been summarized below:

**INDIA:** Despite the long travel time involved, India is a popular destination for medical tourists. <sup>[14]</sup> Visitors from 55 countries come to India for treatment but the biggest growth in business is from the UK and the US. <sup>[15]</sup> Health services in India have the additional advantage of providing a good mix of allopathic and alternative systems of medicine. For instance, while New Delhi has emerged as a prime destination for cardiac care, Chennai has established a niche for quality eye care, and Kerala and Karnataka have emerged as hubs for state-of-the-art Ayurvedic healing. Medical tourism sector is expanding rapidly. During the 1990s, the Indian health care sector grew at a compound annual rate of 16%. A major proportion of this growth is predicted to be attributable to the growth in the business of medical tourism. <sup>[16]</sup> The outcome of this deliberate policy show that in 2004 India had 1,8 million inbound medical tourists, making the industry's contribution to the economy an estimated USD333 million. <sup>[17]</sup> According to the studies conducted in India in 2009, it has been ranked at the second following Thailand in terms of world quality and sufficient health services for the foreign patients. The total market share of India among the players of Thailand, Singapore and Malaysia is 20%. Between the years of 2009-2011, the number of medical tourist in India has increased 30% and, until 2015, it is estimate that India will attract approximately half a million medical tourists every year. <sup>[18]</sup> To become the most important global destination it has upgraded technology, absorbed western medical protocols and emphasised low cost and prompt attention. <sup>[7]</sup> In addition to the price advantage in the country, the treatment has been able to be started without the need of waiting period because accessibility of the treatment is very easy. On the other hand, in addition to being lack of the application of "the visa on entry" to the country, with the aim of incentive and support of the health tourism, the visas which give opportunity to check into more than once and are valid for

6 months or a year are given to its health tourists who have come for the treatment. [6]

**THAILAND:** Thailand became known as a destination for medical tourism as early as the 1970s because it specialised in sex change operations, and later moved into cosmetic surgery [7] additionally, it attracts a large number of patients from the other Asian countries for especially cosmetic surgery, transplantation, orthopedics, odontotherapy, cardiological treatment and surgical operations. Although the foreign patients appear preferentially with the price advantage, there is no huge difference with the US in terms of the prices in especially cosmetic surgery field. [6] This popular destination for medical tourists rivals India in price and quality. Prices are typically not as low as in India, and Thai hospitals do not offer fixed pricing. [14] The hospitals and other sanitary facilities in Thailand pride themselves on having a high standard and being the first country in Asia to have accreditation by getting JCI accreditation in 2002. [18] In 2004, Thailand embarked on a five-year strategic plan to establish Thailand as “Centre of Excellent Health of Asia”. The plan focuses on three key areas: medical services, healthcare services and Thai herbal products. [15] In 2007, Thailand provided medical services for as many as 1,4 million foreign patients, including medical tourists, general tourists and foreigners working or living in Thailand or its neighbouring countries. In 2008, medical tourism in Thailand generated 46 to 52 billion baht (1 United States dollar [US\$] = 30 baht) of revenue from medical services plus 12 to 13 billion baht from related tourism. This makes for total revenues of 58 to 65 billion baht, which translate into a value added of 31 to 35 billion baht from medical services plus 5.8 to 6.5 billion baht from tourism. This amount to a total value added of 36.8 to 41.6 billion baht or 0.4% of the gross domestic product (GDP). Under various scenarios, the value added from medical tourism is projected to reach between 59 and 110 billion baht in 2012. [12] Recently, with the increase in the number of the

medical tourists who come to the country, it has become the market leader of the medical tourism that is at the top of the Asia lists and the number of international patients who came to the country in 2010 has become approximately 1, 8 million. [18]

**SINGAPORE:** This country is another important center form medical tourism in Asia. It aims to receive one million foreign patients every year. It is estimated that medical tourism in Singapore will earn it above US\$1,6billion annually. The hospitals in Singapore are extremely well equipped and are staffed by highly qualified doctors, many of them with international qualifications. [15] Singapore which has managed to set up the best health system in Asia has attracted substantial health tourists from China, South Asia and Middle East in recent years along with the contiguous countries like Indonesia and Malaysia. In addition to these countries, Singapore is regarded as an appealing health tourism area for many European countries such as USA and England. World Health Organization has placed Singapore topper place than America and Canada because of the private and public hospitals and the high quality service that Singapore has in terms of health system. [6] Singapore is the basic destination of the Japanese market. Raffles group of hospitals that is in service in Singapore also carries out activities like the airport transfers, hotel reservations and local tour. [19]

**USA:** This country continues to be the leader of medical tourism market. The leadership of USA in this particular business category is based on factors such as; ownership of modern medical facilities, provision of specialist personnel, long-term experience in the market, and interest from abroad to visit USA. [20] Reported that by Warf [21] estimates of the number of Americans traveling abroad annually to seek medical care vary considerably, depending on the source, but typically range between 180,000 and 750,000, spending at least \$2,2 billion. Although most American medical tourists seek treatment in Mexico and other

Latin American countries, clinics in Brazil and Argentina have offered low-cost cosmetic surgery for years. [14] the most common medical procedures outsourced are heart surgeries, knee and hip replacements, elective and cosmetic surgeries and others. The most common reasons individuals from the US to elect medical tourism are either cost or long waiting times. In fact, the cost of having a surgery in India versus the United States is only a fraction anywhere from a third to a tenth of the cost. Additionally, individuals choose to go to India to have a surgery performed that has a long waiting time in the US, or a cosmetic surgery that the insurance does not cover. [22] Although the number of the tourists coming to the country has been on the decline after 11 September attacks, this situation has changed and it has been identified that hundreds of thousands of patients have again turned onto the USA like before 11 September. The 35% of the patients who go to the USA for the treatment come from the Middle East region including Turkey. Despite its high health price, the USA preserves its attraction for the foreign tourists in terms of the health tourism because of its advanced technology and high quality healthcare opportunities. [6] According to the estimations of World Tourism Organization, it is reckoned that, until 2007, 23 million potential patients will go to the overseas countries just from the USA by spending 79, 5 billion dollars. [23]

**MALAYSIA:** Hotels in Malaysia which dominate the Middle East market because of the Islamic reference become vertical integrated with hospitals. After the tsunamis disaster in 2004, the hotels in Puket Island try to invigorate the tourism industry by presenting special packages which are plastic surgery-oriented. [19] Currently, Singapore and Thailand are Malaysia's closest regional competitors in medical tourism, while India, with the Apollo chain of hotels, is also becoming an important player. Like the Malaysian government, the Singaporean and Thai governments have played a dominant role in developing,

regulating and promoting medical tourism. [24] The wealthy Asian countries such as Singapore and Japan prefer Malaysia because of the low costs in medical applications. While cheap medical applications in Malaysia appeal to Australia and the countries which are the member of the European Community, the Middle East prefers Malaysia because of both price and quality. [18]

**GERMANY:** It has an excellent healthcare system, and is considered a top destination for patients from the Middle East, UK and the United States who looking for high quality medical care. [25]

**MEXICO:** Medical tourism in Mexico has been popular trend for many years. Many Americans choose to travel south of the border for affordable medical care, and rich Mexicans travel to the USA for advanced medical treatments. Private hospitals in Mexico are growing by double digit after years of stunted growth. The hospital and medical clinic construction boom has been in small clinics and surgery centers, as well as big high quality hospitals. A number of factors are fueling this healthcare related construction; a big increase in demand from medical tourists who travel south for affordable treatment, an increasing number of Mexican middle class opting for private health care and a growing health insured population in Mexico to name a few. [26] Mexican tourism development is particularly noteworthy. First, despite a loss of world market share during the 1990s, tourism demand and supply increased faster in Mexico than in most other developing countries in absolute terms. [27] In the 1960s, Mexico began investing heavily in tourism development in Acapulco. The Mexican government offered incentives for developers to build hotels and resorts, but it did not regulate growth in Acapulco. [28] In recent years, Mexico has been a popular destination for US citizens seeking health care. Its proximity to the United States and the relatively low travel costs, have been drawing Americans and Canadians. Numbered among these are also Mexican-

Americans, who return home to their family doctor/dentist and save money. It was initially famed for its dentistry and cosmetic surgery. However its orthopedic procedures now add to Mexico's attractions. With state-of-the-art facilities comparable to American hospitals, Mexico has become one of the premier destinations for US medical tourists. <sup>[29]</sup>

**SOUTH AFRICA:** It is the first country in Africa to emerge as a medical tourism destination. It offers medical and dental care. <sup>[30]</sup> South Africa is the leading medical tourism destination in Africa, having the best healthcare system south of the Sahara. It attracts patients from other African countries such as Zambia, Zimbabwe, Botswana and Tanzania, as well as some America and European patients. <sup>[31]</sup>

**BRAZIL:** Albert Einstein Hospital is the first JCI-accredited facility outside of the US and more than a dozen Brazilian medical facilities have since been similarly accredited. Brazil requires visas for US citizens based on a reciprocal arrangement since Brazilians are required to obtain a visa to visit the US. <sup>[32]</sup> Brazil has some of the leading hospitals in the world, particularly in the private sector, and its plastic surgeons have an excellent reputation. The cost of medical procedures in Brazil are much lower than in the United States, yet higher than in other medical tourism destination such as Thailand and India. Private surgeons and top hospitals in Brazil are gradually entering the medical tourism market and trying to accommodate the needs of the English and Spanish speaking health travelers. The large Arab community in Brazil is also a factor in attracting a flow of medical travelers from the Middle East. <sup>[31]</sup>

**COSTA RICA:** Medical tourism to Costa Rica has origins dating to the 1980s, when occasional visitors searching for low cost cosmetic surgery began to venture into the nation. In addition to lower costs, many medical tourists to Costa Rica comment favorably on the quality of care before and after surgery, noting the nation's tradition of hospitality extends to the health care field:

doctors in San José spend more time with their patients compared to physicians in the U.S. and conduct more frequent follow-up visits. As in many national medical tourism markets, in Costa Rica's medical tourism early stages the sector was essentially synonymous with face lifts, Botox treatments, and liposuction. Plastic surgery continues to be an important part of the tourist-oriented health care sector, and Costa Rica today boasts of 40 certified cosmetic surgeons. <sup>[21]</sup> In a report from McKinsey & Company, it was highlighted that medical tourists from the United States and Canada, prefer Latin American countries like Costa Rica due to the shorter travel time, affordable costs, and an opportunity for a memorable vacation. Costa Rica has modern hospitals and state-of-the-art clinics which utilize the latest in medical technologies and board-certified surgeons who are trained and certified in North America or Europe. Moreover, there are three Joint Commission International accredited (JCI) Hospitals in Costa Rica. All three are in San Jose, Costa Rica. When the World Health Organization (WHO) ranked the world's health systems in the year 2000, Costa Rica was ranked as number 36, which was higher than the U.S. and together with Dominica it dominated the list amongst the Central American countries. <sup>[33]</sup> Reported by Connell <sup>[7]</sup> the only specific survey undertaken appears to have been in Costa Rica where a 1991 university study found that 14 percent of all visitors to Costa Rica came to receive some sort of medical care, usually cosmetic surgery and dental work.

**TURKEY:** Turkey has become an important destination for the tourists, who participate in health tourism, with its geographical position, its natural and historical beauties and its climate. In Turkey, it is possible to assume the infrastructure and high-quality equipment of the hospitals, the education and experiences of the medical service personnel which is suitable for the European norm, the price advantages that Turkey gives compared to the other countries, the unique natural and

historical wealth with especially its geographical position, high-quality tourism management which merges with suitable climatic conditions, Turk hospitality that is worldwide known, as the factors of competitive superiority on the subject of medical tourism. [6] Most of the patients who come to Turkey come from Europe. A significant part of the patients who come to the country come for the visual impairment and, secondly, for the infecundity treatment. These tourists who prefer Turkey for the eye operation stay average 4-5 days in the country and it is known that the patients who come just for the eye operation have spent approximately 2.500 dollars. When it is thought that the average payment per person is 2500 dollars in medical tourism and the average holiday tourism payment is 650 dollars, it is easily understood how important the medical market. [19] In addition to Europe, Turkey has the significant characteristics of market for the Middle East and Russia; and it appeals to especially the countries with low income such as Albania in Europe and the former Soviet countries such as Georgia, Azerbaijan, Turkmenistan, Uzbekistan and Kazakhstan. [10] At the present, Turkey is one of the significant countries for the patients who travel abroad within the scope of cosmetics and dental operation. For example; the prices of the cosmetics surgery are very high in England and Canada and a long waiting period is needed to undergo surgery. Turkey gives opportunity of treatment which is affordable for everyone, recovery in a sunny climate and vacationing to its patients. [18] Although there is a process led by the private sector within the health tourism, public sector has already done what is necessary for “the healthcare service given to the foreigner” with its all the elements. [34]

## DISCUSSION

When the tourism sector is evaluated in terms of economical, political, social and cultural, it is possible to say that it makes a huge economical contribution to the world

economy. Recently, due to the positive development in the field of health, it is possible to say that many of the citizens prefer different countries. Because of the operations with low cost which are among the significant elements for the tourists who participate in the health tourism and the high quality-requested services, these have helped these countries to be preferred. The study examined the some countries which are notable countries in the world in terms of medical tourism. The suggestions can provide global implications for the medical tourism activities in the world.

The number of the countries which aim to improve the medical tourism is increasing day by day. Moreover, these countries build their infrastructures and politics by collaborating with each other as the stakeholders of private and public sector, and by forming plus value for their countries. [11] When the different destinations are considered, it is possible to say that they have many geographic features and beauties. It is important for each destination to bring one or some of the health tourism kinds into the forefront by considering these factors. What is important for the destination is to put forward that it is suitable for what kind of health tourism and to incline to branding. [35] The competitive factors such as cheap service given to the tourists, short waiting periods, wealthy cultural heritage, private service, the quality in world class should be taken into consideration in order to get a sufficient share from the health tourism. [23]

The expectations from medical treatment services are different. It contains wide range of expectations from preventing the illnesses to protective medicine without relaxation in itself. While feeling good and relaxing is important for the youth for that moment, taking precautions for the illnesses are important for the older people. There are many criteria of individual decisions for the correct applications in medical wellness. The individuals' own needs are in the foreground. The guests want to find the most suitable relationship of price and

product from the large spectrum of product and the service. [36]

The security of the patients is also very important for the firms that give health service. During the period from the entrance of a tourist to the facility to the exit, the current health of the tourist should not get worse or the existing situation of him/her should not deteriorate more. Giving health services brings the security of the tourist health to the foreground in the touristic facility. The touristic facilities should raise awareness of the employees and take necessary precautions in order that the health of the tourists who come to improve their health or to regain their health should not get worse or deteriorate. [8]

Three factors are basically needed in order to carry out the applications of the health tourism efficiently and productively. The first of these factors is the tourism facilities (climate, nature, history etc.). The other one is health service facilities (hospitals, personnel, technologic facilities, specialties, affordable prices, healing water etc.). The last one is the existence of the professional organizations that will meet the health tourism sector with the consumers. The harmony and the management of these factors' existence bring with using the current potency efficiently. [37] The facilities that give health services should be careful on some points in order to be able to be one of the leader countries by using their resources efficiently:

- The countries should choose the target market by determining the prudential strategies in medical tourism and should focus on the request, need and expectations of this target market.
- The primary stimulants for each citizen should be considered by showing regard to the cultural differences.
- The studies and researches of the national and international marketing for removing the negative images about the country should be given importance.

- An active work environment should be provided by collaborating with the public and private sectors' hospitals.
- Employing the personnel knowing more than one foreign languages within themselves
- In-service training should be given to their personnel.
- Sufficient information about the European health legislation and patient rights should be given to their personnel.
- The coordination should be facilitated with the foreign insurance companies.
- The hospitals should need to be accredited.
- The technologic and physical infrastructures of the hospitals should be improved.
- The advantages of the historical, natural and cultural beauties of the country should be provided for the patients who come to the country with the aim of treatment by presenting package programs.
- The consumer satisfaction should be given by enhancing the service quality in the companies giving health service.
- The collaboration between the tour operators which are in the tourism sector, travel agencies, transportation companies; and healthcare organizations should be facilitated.

It is possible to say that the medical tourism applications within the tourism sector which has a significant position in the national economy serve an active role in marketing the natural, historical and cultural values of the country better. The share that the countries will get from the world cake in health tourism can be increased and the incomes can be increased. The assessment of the medical tourism activities in some countries may be considered a limitation of this study. Future research can be conducted



different countries or perspective. The study results provide information that can be utilized in understanding and improving the medical tourism activities in the world.

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