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Medical Tourism Development - Adopted Strategies Across the Globe: A Systematic Review

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Master in Health Services Management

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PhD in Economy
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ISCTE-IUL

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Resumo

Enquanto nova indústria em crescimento, a expansão do turismo médico tem impactado a economia global nos últimos anos.

Este estudo tem como objetivo compreender o desenvolvimento do turismo médico segundo a perspectiva de prestadores de cuidados de saúde, tendo como base a identificação das melhores estratégias de marketing adotadas em diversos países. Esta revisão sistemática foi desenvolvida de acordo com as diretrizes PRISMA, onde foram selecionados 20 artigos que incluíram 11 países.

Uma visão geral do estudo demonstra que as estratégias implementadas mais comuns para adquirir uma vantagem competitiva e atrair mais clientes internacionais foram estratégias do foro promocional, de mercado ou de Porter, indicando ser eficientes no desenvolvimento do turismo médico. No entanto, alguns países criaram estratégias exclusivas, concluindo-se que há várias abordagens possíveis para o desenvolvimento deste setor, desde que os prestadores de cuidados de saúde analisem bem os seus recursos, necessidades e a procura dos pacientes pela indústria. Alguns fatores e implicações políticas também foram considerados ferramentas relevantes no processo de desenvolvimento do turismo médico.

Países como Portugal que pretendam continuar a desenvolver-se neste setor devem analisar o seu ambiente externo e interno, ter em conta os seus pontos fortes e desafios, e acompanhar continuamente a evolução do mercado, de forma a terem toda a informação necessária para tomar decisões acertadas e adotar as estratégias mais adequadas aos seus objetivos.

No futuro devem ser feitas mais pesquisas neste campo com dados mensuráveis, especialmente após o impacto que a pandemia COVID-19 pode ter causado neste mercado.

Palavras-chave: turismo médico, desenvolvimento do turismo médico, estratégia, estratégias de marketing, vantagem competitiva

Classificação JEL: I15 e M30.

Abstract

As a new fast-growing industry, medical tourism has been expanding and impacting the global economy over the years.

The purpose of this study is to better understand medical tourism development from the healthcare providers' perspective by identifying the best marketing strategies and decisions adopted in several countries. This systematic review was conducted according to the PRISMA guidelines where a total of 20 articles that included 11 countries were selected.

An overview of the study shows that the strategies more commonly adopted to gain competitive advantage in the medical tourism sector and attract more international patients were promotional, market-driven or part of Porter's generic strategies, indicating that these may be very efficient in this industry's development. However, some countries had exclusive strategies of their own, which led to the conclusion that there is no specific way of developing medical tourism as long as healthcare providers cooperate and acknowledge their resources, needs and patients' demands. Some factors and policy implications were also recognized as relevant tools in the developing process of MT.

Countries like Portugal that intend to continue developing this area should analyse their business environments, weigh their strengths and challenges, and follow the evolution of the medical tourism market, so they have all the information required to make well-planned decisions and adopt the right strategies according to their objectives.

Future research in this field related to gathering measurable data is advisable and recommended, especially after the impact the COVID-19 pandemic might have had on the market.

Keywords: medical tourism, medical tourism development, strategy, marketing strategies, competitive advantage

JEL Classification: I15 and M30

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1. Introduction

Medical tourism (MT) is a new fast-growing market sector that has been significantly impacting the global economy in the recent years. In 2019, the medical tourism market size was already estimated in between 74 to 92 billion dollars with about 21-26 million patients (Patient Beyond Borders, n.d.).

With globalization, the economic and technological interdependence between countries and the increase in tourism over the years, there has been a greater demand for the combination of tourism and healthcare (N. Lunt & Carrera, 2010). This is leading to the continuous international growth of the health market, contributing to the rapid development of the MT industry. As an example, several Asian countries, mostly India, Malaysia, Singapore, and Thailand have already been developing and promoting their MT industries for some time and are currently dominant in this evolving market (Connell, 2006; Goldbach & West, 2010; Yap et al., 2008).

Additionally, this industry's global development is also being influenced by the rising competition in the market and by numerous factors related to countries offering MT services and related to potential patients' interest in the MT sector (Ile & Tıgu, 2017). Therefore, many countries are developing strategies focused on improving factors they can control, such as the quality of healthcare services (Rodrigues et al., 2017) and, so, some factors like the international accreditation and certification of healthcare providers have become crucial to develop this industry (Ile & Tıgu, 2017).

Furthermore, with the evolution of technology, the communication and spread of information changed (Heung et al., 2011). The internet plays a major role in MT development, also helping the rise of the MT sector worldwide, since it links patients' online reviews with potential future international patients, and also, because it is a source of MT information that is a vital step in every patient interested in having these medical services (N. Lunt et al., 2010; Rodrigues et al., 2017).

Many MT development studies are related to the patients' perspective, in which they address the set of factors, risks, barriers and needs that patients consider to be of the greatest value for the decision-making process on whether or not to receive medical treatment abroad (Heydari et al., 2019; Raeissi et al., 2017; Xu et al., 2020). As stated before, the patient's decision-making process is highly influenced by various factors but also by the stakeholders around them, such as other patients, family members, friends, and health professionals (Runnels & Carrera, 2012).

In general, the role of stakeholders is very important in the regulation of medical tourism, as the success in the development of medical tourism depends a lot on the cooperation between all stakeholders so that the client has a unique health experience (Kamassi et al., 2020). So, to effectively understand this industry, it is necessary to study other stakeholders' points of view as well.

To better contextualize the experience and value perception of patients in medical tourism, it is essential to shift the focus of research to stakeholders like healthcare providers to better understand the influence their strategies have on patient attraction and on the decision-making process. Thus, this dissertation will mainly emphasize healthcare providers' perspectives about medical tourism development and its strategic ways of attracting new international clients.

1.1 Study Objectives

For the purpose of this dissertation, medical tourism is characterized as the flow of foreigners who travel in order to receive medical treatment and/or restore their health, which may include a pre or post-operative stay abroad where tourist activities are carried out (Carrera & Bridges, 2006; Johnston et al., 2010; N. Lunt & Carrera, 2010). It is a healthcare sector included in the health tourism realm that can reflect the performance and responsiveness of the countries health systems (Runnels & Carrera, 2012), and may help improve healthcare quality standards or be a source of inequity depending on the perspective taken (Johnston et al., 2010) since it needs to have the correct policies in practice to be a well-regulated asset to the country.

From the healthcare providers' points of view, this systematic review aims to answer the following research question:

1. What kind of marketing strategies are adopted by healthcare providers that can affect the attraction process of international patients and contribute to the development of the medical tourism industry?

With this aim, I propose to summarize the best strategies and practices adopted by countries to develop their MT industry, in order to further help new emerging markets and countries choose the strategies that seem more efficient and accurate for their specific MT objectives and that can build up better their MT sector.

In writing this systematic review, I intend to address medical tourism development in a different way, capable of summing up the adopted strategies by healthcare providers in different countries, leading to a better understanding of medical tourism in the healthcare providers' interpretation. As so, the main research objective of this dissertation is to comprehend the role of healthcare providers and companies in the MT market development, namely about which

used strategies contribute more for attracting and influencing patients, as they are stakeholders who strongly influence the clients' decision-making process when seeking international medical treatment (Kamassi et al., 2020).

Currently, healthcare providers have already been implementing different patient attraction strategies, where, for instance, the healthcare delivery system is based on the value of patients, and is highly focused on technological innovation in medicine and patient accommodation (Kamassi et al., 2020).

Another good example of strategies implementation was in Hong Kong, where a study was conducted to determine the factors and barriers influencing their development. That resulted in the creation and suggestion of new strategies to lift those barriers that revolved around more government support and action, new policies and plans to have travel facilitation and better investments, new promotional activities overseas and online, better cooperation between the healthcare and tourism sectors for better MT products and improving the communication skills of the health personnel (Heung et al., 2011).

In a nutshell, the MT industry has already become more structured with strategies based on quality and safety and its trends also involve more sectors besides medical services, such as the government, the health system and hospitality (Ile & Tigu, 2017)

This new systematization of information with a different approach to medical tourism will suggest better guidelines and knowledge for potential future tourists, health professionals, health facilities and for other stakeholders and adjacent sectors, like the tourism sector. In a more futuristic outlook, the elaboration of this dissertation can lead to an improvement in the general understanding of the medical tourism sector's growth, in the patient's decision of receive medical treatment in a specific country and in the improvement of the global economy.

Finally, since medical tourism is becoming the most emerging international business and is a growing phenomenon that involves economic and social benefits but also risks, I intend to further deepen this complex cluster and analyse the evolution and impact that healthcare providers have been having in improving the development of the medical tourism sector.

1.2 Dissertation Structure

In terms of the dissertation structure, it will be a typical systematic review structure with six chapters.

Initially, the topic of medical tourism is contextualized and the research objectives are displayed in the Introduction chapter. Then there is the Research Methodology section where

the processes involved in this secondary investigation that led to the selection and extraction of data are spelt out.

Moreover, there is a Results chapter that will help organize the ideas and data extracted by including a descriptive statistic of the literature analysed that will address the type of strategies adopted, examples of the strategies implemented and which factors may be relevant for patient attraction and consequently to the medical tourism development.

Subsequently, the results and data revealed in the articles selected are deliberated and discussed in the Discussion section. This chapter is divided into five sub-chapters – in the first one the marketing strategies adopted were displayed and analysed into eight strategies typologies; then there is a sub-section about the relation between the relevant factors and the implemented strategies; thirdly is the mentioning of the MT industry development in Portugal that is followed by fourth sub-section with the policy implications connected to the global MT development, and finally, there is a discussion summary to resume the most important topics of this analysis.

Lastly, there is the Conclusions section to display the concluding remarks and implications discovered with this dissertation, and finally is the last chapter about the limitations and future research of this study.

2. Methodology

2.1 Data selection

To identify the factors and strategies that help develop medical tourism from the healthcare providers' points of view, studies that analysed the topic as broadly as possible were selected. Per this, the search query combined the following terms: TOPIC: (“medical tourism marketing strategy”) OR TOPIC: (“medical travel marketing strategy”) OR TOPIC: (“medical tourism patient attraction”) OR TOPIC: (“medical travel patient attraction”) OR TOPIC: (“medical tourism destination choice”) OR TOPIC: (“medical travel destination choice”) AND TOPIC: (“value”) NOT TOPIC: (“spa tourism”) NOT TOPIC: (“wellness tourism”) NOT TOPIC: (“wellbeing tourism”).

The synonyms “medical tourism” and “medical travel” were chosen to highlight and cover-up in the best possible way all articles that concern the medical tourism topic. Any articles that were related to other forms of health tourism through the terms “spa tourism”, “wellness tourism” and “wellbeing tourism” were excluded.

The search timespan included from “2010” until “2021”. The papers were peer-reviewed and in the English language only, and the systematic search of published papers was done in January 2021.

The search was performed through the following databases: Web of Science, Current Contents Connect (CCC), Derwent Innovations Index (DIIDW), KJD, MEDLINE, Russian Science Citation Index (RSCI) and SciELO.

It was found a total of 220 papers according to the flow chart with the literature selection process (Figure 2.1.1).

The papers were initially screened through the reading of their titles and abstracts.

The inclusion and exclusion criteria for screening involved the following conditions:

- *Inclusion criteria*: articles that explore strategies for attracting foreign clients and the influence of healthcare providers on the patient's decision to receive international treatment. This means articles that are related to the development of medical tourism from a healthcare providers' point of view;
- *Exclusion criteria*: articles that analyse the decision-making process, the patient's experience, and the development of medical tourism only from the perspective of the patient/citizen or from other stakeholders' views other than those mentioned above (healthcare providers' perspectives).

Regarding the type of research to analyse, no restrictions were made, so all studies were accepted if they included the healthcare providers' perspective and not the one from clients/patients. Most papers excluded in this phase explored the factors and motives that affected the patient's decision-process of getting medical treatment abroad.

After screening over the reading of titles and abstracts, 89 studies were selected for the full-text analysis.

The inclusion criteria for the final qualitative synthesis and development of this study were the same that were defined previously for the screening. After the reading of the selected papers, 69 were left out due to the following reasons:

- twenty-eight analysed only the patient's perspective of medical tourism development and strategy, including many factors and behavioural intention that led to the decision process of doing medical tourism;
- fourteen were not related to the medical tourism industry and were related to medical and healthcare services (six articles), tourism (three articles), marketing (one article), commercial healthcare facilitation (three articles) and Thai industry globalisation (one article);
- eleven analysed the information or evolution of medical tourism generally, not approaching and answering the research questions of this dissertation;
- five examined strategies that could be implemented for tourism or healthcare systems but were not related to the medical tourism development;
- two analysed how medical tourists' perceived hospital brand image as a competitive strategy or word-of-mouth and viral marketing as marketing tools to develop more the medical tourism industry in Malaysia;
- two were related to designing new concepts - a medical tourism website and a hospital hotel;
- one studied the European Union patient's rights about seeking medical tourism in other member states;
- one investigated the barriers that exist in the medical tourism development;
- one had the goal of locating all the medical tourism companies in Canada based on their websites;
- one was related to the Blue Ocean Strategy in medical tourism but did not mention any specific strategies to develop it and only revealed the medical tourism status in India;
- one analysed the role of public relations on the development of medical tourism.

- one sought to understand the medical tourism websites in Malaysia using the internet as a marketing strategy;
- one was specifically about the crisis communication strategies used by the medical tourism industry during the 2017 Caribbean hurricane season.

After full-text analysis for eligibility, 20 papers were selected for the qualitative synthesis and study investigation.

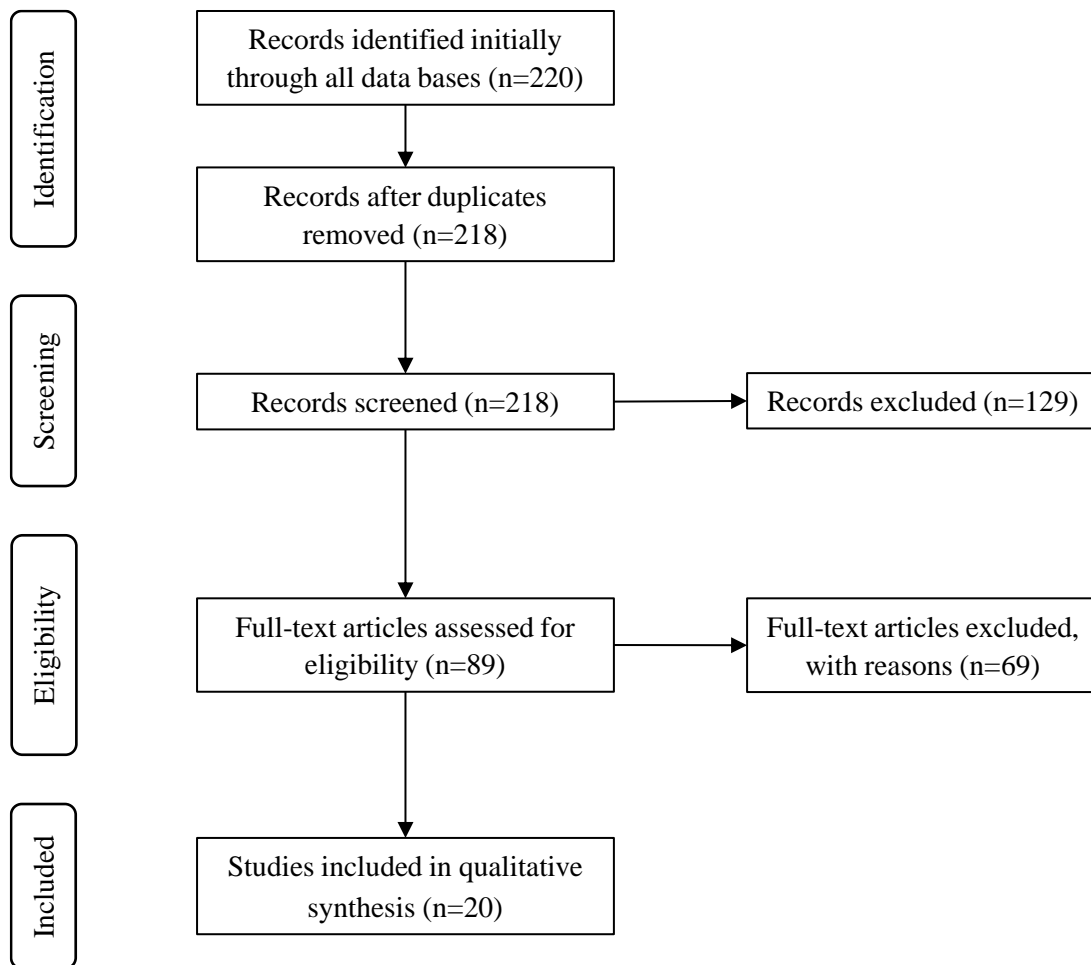


Figure 2.1.1 - PRISMA Flow chart of the screening and selection process

2.2 Data extraction

When available, the data extracted included: the author, the year of publication, the type of research, the initial theory mentioned in the study, details about the country of the study, the population studied, the relevant influential factors that support patient attraction for further medical tourism sector development, the type of strategy, and the strategies studied and adopted that influenced the development of medical tourism and could possibly attract more patients to the healthcare providers.

2.3 Data synthesis

After data collection, a diversified set of heterogeneous data is expected with different interventions and strategies aimed at attracting foreign patients and influencing the countries' medical tourism development.

All the data was extracted from the analysed and selected papers to identify the factors, aspects and strategies suggested as determinants to the development of the MT industry.

In the first instance, the collected and subsequently divided data from those studies was analysed through descriptive statistics, that included many aspects, like, the type of strategies adopted in each country, the factors that can influence the MT industry development, and the different research approaches, countries, and methods mentioned in the analysed studies. Also, all studies were submitted to a textual narrative synthesis that organized and summarized the strategies adopted and mentioned by the authors and also described the important factors influencing the MT development, features in consonance with the research question of this dissertation.

Thus, with the resumed content, a posterior critical analysis and discussion were made. In this segment all the adopted marketing strategies were segmented in strategy typologies according to their features and implementation; the previously mentioned factors were better analysed and a relation between them and the strategies implemented was established; the Portuguese MT example was denoted and elaborated, and the policy implications were also present and deliberated in this section.

3. Results

3.1 Descriptive Statistics

In the research papers that have the purpose of exploring new ways and strategies of developing medical tourism from the healthcare providers' point of view (Annex A), a variety of different approaches and topics were found.

The majority of the studies had a specific model or theory as a baseline to analyse the findings, namely: Target network model, Framing theory, Dynamic capabilities theory, Theory of soft power, Multi-method design, Delphi method, SWOT Method, SWOT-AHP hybrid method, the "6Is" Social Media Monitoring Framework and other several approaches.

Countries included: The population in study belongs to different countries, from two continents – Asia and Europe. Most contributions came from Korea and Iran, where both were present in five research papers, India in four, Singapore in four, Thailand in three, and finally, Bahrain, Croatia, Greece, Malaysia, Sweden and Turkey, each in one research study.

Population included: When analysing the population included in the studies, almost all healthcare MT providers categories and main stakeholders were approached, from physicians, nurses, chief executives, directors, administrators, supervisors to medical tourism experts, professors, researchers, deputies, consultants and facilitators of public and private hospitals and other health or tourism organizations.

Strategies included: The type of strategies included in the research papers analysed were very diverse, including Porter's generic strategies, more exclusive and country-specific strategies and also a variety of international and marketing strategies (Table 3.1.1).

Table 3.1.1 - Type of strategies per country found in the studies analysed

Country	Strategy type
Bahrain	Competitiveness strategies – strategic priorities
Croatia	Development strategy - Diversification strategy
Greece	E-Marketing strategy
India	Cost leadership strategy
	Differentiation focus strategy
	Diversification strategy
	Mobilisation strategies
	Value creation strategy - Branding strategy
Iran	Development strategies - Administrative-executive, economic, marketing, informing and reforming and revising rules & regulations
	Marketing Mix strategy
	SWOT Analysis - Conservative strategies
	Planning general strategies

Korea	Cost focus strategy
	Developmental Strategies
	SWOT Analysis - Offensive and defensive strategies
	Market-driven strategies
	Promotional strategies
Malaysia	Cost focus strategy
Singapore	Branding strategy
	Differentiation strategy (with some focus)
	Market orientation/ market-driven strategy
	Resources-driven strategy
Sweden	Production orientation strategy
Thailand	Cost leadership strategy
	Product bundling strategy
	Social media marketing strategies
Turkey	Internationalization strategies

Publication years: The search query included from “2010” until “2021” to analyse the development of the medical tourism research throughout the years. Since the medical tourism topic is a recent subject, there are not many research papers about it prior to 2010, nonetheless, there has been a steady increase in the number of publications during these last ten years.

Type of research: The type of research done in these areas included qualitative, quantitative, comparative, case studies, literature review and mixed approaches (Table 3.1.2). It was possible to identify three comparative studies that analysed three or more different countries (Borg & Ljungbo, 2018; Chen et al., 2010; Ganguli & Ebrahim, 2019).

Table 3.1.2 - Research approach of the included research studies

Research Approach	Number
Literature Review	1
Qualitative	7
Quantitative	2
Case Study	4
Comparative analysis	1
Mix	5
Total	20

Strategies adopted: To systematize the strategies adopted by each country to develop their medical tourism industry, the array of different strategies mentioned in the literature was framed consistently with the textual narrative synthesis.

According to this methodology, the strategies adopted that impacted more medical tourism development are described in Table 3.1.3.

Table 3.1.3 – Strategies adopted by each country and analysed by the authors

Author	Strategies adopted
Baghaei et al., (2020)	Rank health service centres; obtain international licenses and accreditations (JCI); set the medical service fee as foreign exchange; reduce equipment fee of centres/hospitals providing MT services; attract direct foreign investment; include a visa issuance process; identify regional target markets with a shared culture and geographical proximity to establish government agencies; partnership with other countries hospitals' for patients' transfer after treatment; update & record MT statistics; create an MT informing portal.
Borg & Ljungbo, (2018)	Establish competitive treatment opportunities using destination marketing - make strong brands through attractive destinations and acclaimed hospitals; promote MT with destination branding (slogan and logos) via the internet; partnership between stakeholders in the destination branding, structure, and organization; language proficiency in patients' mother tongue.
Chakraborty & Poddar, (2018)	Promotion → hospital brand-building initiatives → customer expectations match with offerings → customer satisfaction → brand loyalty → retention of customers. Having <u>government support</u> that makes faster visa approvals, and surrogacy & organ donation laws and also some <u>hospitals facilities</u> : attractive packages; international accreditation; local guides; interpreter; insurance benefit schemes; air ticket booking and infrastructure facilities; treatment quality & options.
Chen et al., (2010)	Define target market based on Successful Story (mass media) → Design something different and propose a Niche Service (use of Porter's Generic Strategies) → build Business Model that may offer a Cluster of Services and Maintain business with strategies to gain competitive advantage.
Ebrahim & Ganguli (2017)	Develop health infrastructure; design incentive performance schemes; reduce bureaucratic health governance; set licensing standards & grade healthcare institutions; evaluate factors for turnover rates; exchange MT experience and joint strategic assessments among member states; establish strategy prioritizing reforms and improve MT competitiveness; invest in technology projects and strategies to reduce employee turnover (market-oriented management); partnership with relevant stakeholders (government, insurance, travel and hotel sectors) to target key markets through travel facilitation.
Ganguli & Ebrahim (2019)	<u>Porter's generic strategies</u> and <u>Exclusive strategies</u> : <i>India's diversification strategy</i> - entry into new markets: Internationally accredited hospitals provide treatments in many specialities; <i>Thailand's product bundling strategy</i> - grouping different services/products together for joint offerings and sales: appealing through suitable pricing strategies & special packages of MT services; <i>Singapore's branding strategy</i> - MT branding and "Singapore Medicine" implemented as a brand - regional hub of medical excellence.
Ganguli & Ebrahim (2017)	Establish a competitive position through <u>strategic planning</u> with economic priorities to create differentiated MT products; <u>public-private partnerships</u> in healthcare financing, provision and MT; <u>marketing & MT branding strategies</u> ; MT image based on medical excellence experiences, high safety standards and location attractiveness; <u>technology and innovation</u> ; telemedicine, bio-design innovation, medical informatics; <u>accreditation and governance</u> ; <u>human capital development</u> ; technical competency, excellence and leadership.
Hartmann (2019)	<u>Direct patient mobilisation</u> - acquire new clients through facilitators' websites (allows to connect with a broader audience and promote the service), making them medical travellers in personal consultations; <u>Channel partner mobilisation</u> - outsource the mobilisation of patients to people based in their home countries that refer the patients to the facilitators at the travel destination; <u>Patient testimonial mobilisation</u> - gaining new clients through positive testimonials and word-of-mouth from former patients.

Author	Strategies adopted
Jabbari et al. (2013)	Update the hospitals' website; Partnership with companies to send SMS to introduce the hospitals; Use telephone counselling services; Provide periodic reports; Give a discount to foreign patients based on international markets and their place of living; Preparing and giving special forms to patients when leaving the hospital; Asking patients for services' feedback within 10 days after being discharged; Provide the patients with facilities - Internet, TV, and computer games; Installing hospital signs.
John et al. (2018)	Use of social media channels for MT services promotion, research, customer involvement & to influence destination choice; Build communities of interest to improve customer interaction; Manage online communities to strengthen the brands; Interaction with online users through online games and quizzes; Encourage users to participate in competitions and healthcare campaigns through social media platforms.
Jun (2016)	Promote excellence & innovation through strategic positioning; Focus on safety and quality to gain credibility; Put multilingual professionals and services customized to foreign patients in the international medical care centre; Partnership with international medical institutes (follow-up care support) and insurance providers (fewer problems with insurance coverage); Increase use of public relations efforts, marketing activities and communication materials highlighting the MT benefits.
S. Kim et al. (2013)	Enhance the quality of the medical services; achieve international certification; improve promotional strategies and legal issues; train professionals for MT; maintain price transparency; establish patient-oriented service systems; develop IT-Based medical services; cooperation of stakeholders
Kim & Seo (2019)	Establish the MT information system and brand the Korean MT - offer a joint treatment of western and oriental medicine; prepare the industry expansion to the medical wellness tourism industry by training healthcare experts; organize tailored medical services to foreign patients.
Li et al. (2021)	Differentiation based on traditional and contemporary beauty culture; advertising technology and authentic Korean cultural experience; provide online consulting, reservation and surgery information for prospective clients; promote MT by emphasising the ability of cosmetic procedures to transform people's lives; standard package that includes the medical expenses and other travel-related costs (accommodation, meals, guide fees and transportation); use of testimonials and aspiring language while promoting MT.
Momeni et al. (2017)	<u>Joint venture strategy</u> - connection and cooperation with other regional countries, creation of shared companies with neighbouring countries in order of patient transmission; Cooperation through mass media and advertisement; Creation of medical insurance or accepting international insurance between countries. <u>Divestiture strategy</u> - divestiture of services by the public to the private sector. After these strategies, market development and market penetration strategy should be considered and implemented.
Najafinasab et al. (2020)	Design targeted planning to attract more patients to the organization's hospitals; develop a website for the organization's medical centres; attempts towards international ACI and JCI accreditation certificates of medical centres; training the medical staff - communications skills and international languages.
Rokni et al. (2013)	Allocate the responsibility of executive affairs to another section; Monitor recovery period and present variable packages of tourism; Make policies related to foreign investments to establish the project of Shiraz Health Town; Expand the promotion of MT through cultural closeness; Brand Shiraz medical ability.
Gredičak & Demonja (2020)	Establish an effective competition & communication strategy: Obtain accreditation and international certification; Improve public sector quality and the private sector MT; Promote MT services; Connect with international facilitators; Insist on high service quality standards, training of staff, quality equipment and accommodation units, expansion of services, laws and legal acts changes, reduction of administration, and measures of fiscal policy to attract investment and more efficient use of EU funds.
Uner et al. (2020)	Hospital operators use dual channels: low-commitment independent intermediaries located in foreign markets that identify and serve patients, and integrated channel systems in high potential markets; Establish diagnosis centres abroad → brand awareness and opportunity to test a country's market potential; Engage in foreign direct investment; Export of managerial know-how in management contracts form; International portfolio participation in Acibadem group to receive investment attention.
Vicky et al. (2018)	Website evaluation → more detail in 4 categories: update General Website Information with FAQs and downloadable material; Information about Services Provided by Each Provider - have hotel/flight booking services, more information about visa, insurance, pre and post care services, and translated services; Website Interactivity - more interactivity with the customer and more testimonials from patients available; and Medical Tourism Exclusive Information - put price information and add hospitals' credentials.

Relevant factors supporting patient attraction for further medical tourism development:

By reading the selected research papers entirely and analyzing their data, it was possible to understand that before the mentioning and implementation of strategies, there is a gathering of a significant number of factors that are considered important for medical tourism providers and organizations as to better develop their medical tourism sector and attract more foreign patients.

According to the literature, the rapid MT development is influenced by factors from a country offering medical services and by factors that motivate and make a client interested in medical tourism (Ile & Tıgu, 2017). Many factors have already been considered influential in a client's MT decision-making process, including health and healthcare system, economic, social, diplomatic and travel pattern factors (Johnson et al., 2015). Other decision factors relevant to MT include: quality of care, training of healthcare professionals, safety and confidence, cultural aspects, and accreditation of healthcare facilities, and some of these variables and motivations can even be divided into three types of factors – procedure-based, travel-based, and cost-based (Henson et al., 2015; Johnston et al., 2010).

With the purpose of gathering and organizing the important factors discussed in each study, a table was made where it was possible to display twenty-three factors that were mentioned in different studies and countries (Table 3.1.4). The total number of studies that reference each factor is available at the end of the table, making it then possible to know the most to least common factors stated among the studies to further analyse the marketing strategies mentioned before.

To summarize the table, the most cited relevant factors by the selected studies were: promoting medical tourism through general marketing, stated in 17 of the 20 studies analysed; MT providers having high-quality healthcare services, also in 17 studies; having well-established infrastructure and facilities, in 14 studies; having skilled health personnel with expertise in 14 studies; having international certification and accreditation, in 10 studies; and having credibility and reputation in 9 studies; and also using patient testimonials, examples and successful medical stories/procedures to attract more clients, in 6 of the 20 studies analysed.

Other factors mentioned in some countries that can be equally significant to MT providers were having advanced technology and innovation; promoting MT online through media, websites, internet, advertisement, and branding, all in 5 of the 20 studies; and training and giving education to the staff; and being able to have government support, both in 4 studies.

In contrast, there were factors more specific to each country/study that are decisive in developing medical tourism, but that are less general and common than other studies, such as: investing in the MT sector, having safety, trust, confidence and reliance on MT providers and

facilities, and developing the human resources area - which were identified in 3 of the 20 studies analysed; product development, MT providers attention to price, economy, communication, and language; analysing customers' reviews and feedback; coordinating health and tourism industries and patients having continued treatment and specialized care - that were stated only by 2 studies each; and MT providers having efficiency, management competency, and inviting hospital business partners - that were all only mentioned in one of the 20 studies analysed.

Additionally to this information, some factors are connected and may be dependent on others, because, for instance, in order to have “credibility and reputation”, a healthcare provider will have to already offer “high-quality healthcare services” or have skilled professionals or international accreditation, so that the reputation can be built through time.

To sum up, by looking at the overall literature results, there might exist some relation between the strategies implemented and the most common factors relevant to the medical tourism development, something that will be discussed in more detail in the next chapter.

Table 3.1.4 – Most influential factors on medical tourism development according to each author

Authors	Country	high-quality healthcare services	well-established infrastructure and facilities	skilled health personnel with expertise	international accreditation and certification	credibility and reputation	use of testimonials - examples and successful medical stories/procedures	advanced technology and innovation	Marketing and Promoting MT					staff education and training	government support and policies	investment	safety	trust, confidence, and reliance	human resources development	product development	price and economy	communication and language	analyse customers' reviews and feedback	coordination of the health and tourism industries - natural attractions	continued treatment, specialized care	efficiency	management competency	invite hospital business partners
									general	online – media, websites, internet	advertisement	branding	facilitators															
Ebrahim & Ganguli	Bahrain	X		X		X							X	X		X										X		
Gredičak & Demonja	Croatia	X	X	X	X		X					X		X				X										
Vicky et al.	Greece					X	X			X																		
Hartmann	India	X	X	X				X	X			X																
Chakraborty & Poddar		X	X	X	X		X		X	X		X										X					X	
Chen et al.	India, Korea, Malaysia, Singapore, Thailand	X	X	X	X	X	X		X	X					X	X				X					X			
Ganguli & Ebrahim	India, Singapore, Thailand	X	X		X	X						X																
Borg & Ljungbo	Singapore, Sweden	X	X			X			X			X				X					X							

Authors	Country	high-quality healthcare services	well-established infrastructure and facilities	skilled health personnel with expertise	international accreditation and certification	credibility and reputation	use of testimonials - examples and successful medical stories/procedures	advanced technology and innovation	Marketing and Promoting MT					staff education and training	government support and politics	investment	safety	trust, confidence, and reliance	human resources development	product development	price and economy	communication and language	analyse customers' reviews and feedback	coordination of the health and tourism industries - natural attractions	continued treatment, specialized care	efficiency	management competency	invite hospital business partners	
		general	online – media, websites, internet	advertisement	branding	facilitators																							
Najafinasab et al.	Iran	X		X	X			X	X										X	X				X					
Rokni et al.		X	X						X		X																		
Jabbari et al.		X		X				X	X		X		X						X	X				X	X				
Momeni et al.		X	X	X										X															
Baghaei et al.		X	X	X	X	X				X	X	X		X															
Jun	Korea	X			X	X		X	X	X						X													
S. Kim et al.		X	X	X	X				X					X	X						X	X							
K. L. Kim, & Seo		X	X	X					X		X																		
Li et al.			X	X			X	X	X			X																	
Ganguli & Ebrahim	Singapore	X	X	X	X	X			X			X				X													
John et al.	Thailand						X		X			X											X						
Uner et al.	Turkey	X	X	X	X	X			X																X				
TOTAL		17	14	14	10	9	6	5	17	5	5	5	1	4	4	3	3	3	3	2	2	2	2	2	2	2	1	1	1

4. Discussion

This review was conducted to assess the various strategies adopted in different countries related to the attraction of potential foreign patients and that can influence the development of their medical tourism industry. In order to analyse and debate the results mentioned above, this chapter was divided into five sub-topics: the eight strategy types adopted, the relation between the important factors for MT development and those strategies, the Portuguese MT case development in more detail, the policy implications regarding these strategies and global MT development, and lastly a summary of this chapter.

4.1 Adopted Marketing Strategies

In general, to develop a specific industry, strategy is the main resource to achieve competitive advantage and better performance results (Hansen et al., 2006). There are also many strategic typologies already and, in this case, so as to develop the medical tourism industry, countries' healthcare organizations/medical tourism providers adopted the following strategies.

4.1.1 Promotion strategies – Branding, e-marketing, and marketing-mix

To start off, the most mentioned strategy type in the literature analysed to boost the medical tourism industry are strategies related to marketing communication – ways and tools to promote the MT sector in the country and that can come in all forms – from e-marketing to branding and social media. Despite being mentioned in almost all studies analysed, the studies that emphasized more the MT promotion were the following:

For some authors, *branding* as a marketing strategy is certainly necessary to have a competitive advantage in medical tourism. The Asian MT industry has a very competitive and challenging business environment, resulting in brands becoming the main firms' resource since a strong brand is associated with increased purchase intent, sales, customer loyalty and satisfaction and perceptions of high quality (Guiry & Vequist, 2015).

In India, it is believed that government support and the implementation of hospital facilities, such as international accreditation, insurance benefit schemes and treatment quality, will create a hospital brand that will accommodate customer satisfaction and bring brand loyalty that will, then, encourage the retention of customers (Chakraborty & Poddar, 2018). As of in Singapore, this marketing strategy was approached differently, since they developed a “Singapore Medicine” brand that made the country a global centre and regional hub of clinical excellence, developing more the country's medical tourism sector (Ganguli & Ebrahim, 2019).

Moreover, *E-marketing* is considered a technology innovative marketing that allows interactivity between a company and customers, and it is an impressive tool to reach international markets digitally, through websites or social media for example (Skudiene et al., 2015). Also, social media is recognized as an effective marketing tool for MT providers, since it is a promotional channel that collects data relatively to trends, feedback and customer behaviour and can enable engagement and interaction with customers/online users (John et al., 2018). So, countries like Thailand, Korea, and Greece, use an *e-marketing strategy* to promote their medical tourism online, through social media, brochures, and websites, respectively.

In Thailand, by using social media channels, it is possible to build communities of interest to improve customer interaction and manage those communities to strengthen the medical tourism brand, which is very important to make their MT sector known in other countries (John et al., 2018). In contrast, Korea promotes MT through images and promotional messages showing excellence and innovativeness, but also builds credibility by focusing on safety and quality while communicating its services and frames their benefits by creating international partnerships and increasing public relations efforts (Jun, 2016). In the research paper about website evaluation, it was also possible to realize that some information and interactivity must be established to attract new customers, like information about services provided by each provider, insurance and patient testimonials (Vicky et al., 2018).

Finally, in Iran, the techniques of the *Marketing Mix*, one of the most popular marketing concepts that feature 4Ps (product, price, place, and promotion) (Borden, 1964; Lahtinen et al., 2020), were employed to make optimal decisions regarding MT. This incurred in the adoption of more strategies, such as, updating the hospitals' websites, use telephone counselling services, giving foreign patients discounts and special forms, provide them with facilities (internet and TV), and ask for patients' feedback 10 days after being discharged (Jabbari et al., 2013).

4.1.2 Market orientation – market-driven and resources-driven strategies

A very common marketing orientation method employed is the market orientation approach. This approach to business studies the market with a focus on satisfying the customers' needs and desires, meaning it is a truly customer-first approach that creates products/services to satisfy them (Kopp, 2021). This ensures customer satisfaction and promotes brand loyalty, nonetheless, since the market is always changing and requires the constant gathering of new information, it also needs continual investment in research (Roberts, 2019).

In a Korean study, it was possible to realize that the *market-driven strategy* influenced and redefined the development of the nation's soft power, brand, and identity, by establishing

strategies along the lines of providing online consulting, reservation and surgery information; having differentiation based on traditional beauty culture; advertising technology and authentic Korean cultural experience; having a standard package that includes the medical expenses and other travel-related costs; and using patient testimonials while promoting MT (Li et al., 2021).

Curiously, Singapore established a competitive position in the MT market by having a strong relationship between its pillars that relies on strategic governmental leadership, where there is a planning and managing of its resources and a response to the global market opportunities. In other words, this country balances two strategy types - a *market-driven strategy*, by adapting its health infrastructure to have better high-quality products/services to fulfil patients' demand, and a *resources-driven strategy*, where Singapore took advantage of its resources' strengths, such as products' diversity and modern and innovative infrastructure, to make its MT market grow. Some important pillars for their competitive position include public-private partnerships, marketing strategies - *marketing mix* and *branding*, technology and innovation in telemedicine, bio-design innovation, medical informatics, accreditation and governance, and human capital development (Ganguli & Ebrahim, 2017).

In a comparative study between Singapore and Sweden, despite having different marketing orientation strategies, having a good location and reputation played a major role in the marketing of medical services and also, the city names combined with a hospital brand helped marketing the medical treatments provided in both countries. Nevertheless, as noticed in the previous paragraph, Singapore is very *market-oriented* in MT, the hospitals are more responsive to change and entail a greater emphasis on quality service to patients, being a significant hub and medical treatment centre in Asia, and it is one of the most efficient healthcare systems in the world (Borg & Ljungbo, 2018).

4.1.3 Production orientation strategy

Another marketing orientation is the production orientation strategy, which is characterized by being centred around the price, focusing on lowering production costs to meet the customers' price needs. The main goal is to reduce costs, so, this approach has price-based messages as key marketing communication, has a low cost to customers and also focuses its resources towards operations being more efficient than other approaches (Bott, 2021; Roberts, 2019).

Regarding the comparative study between Singapore and Sweden (Borg & Ljungbo, 2018), Sweden, on the other hand, is more conservative and has a *production-oriented approach*, because it maximizes utility to patients to provide better healthcare. Nevertheless, some of the strategies adopted in these two countries were, therefore: promoting MT through destination

branding via internet communication; using destination marketing in treatment opportunities and having competitive treatment alternatives; and establishing a partnership between stakeholders in destination branding, structure and organization (Borg & Ljungbo, 2018).

4.1.4 Product orientation strategy

An additional marketing orientation approach is the product orientation strategy where there is the constant improvement and refining of a companies' products, meaning that is centred around the quality of a product. It has a focus on innovation and skills development, often increasing its price, and some of the tools used include product research, testing and focus (Njogu, 2020; Roberts, 2019).

In addition to other strategies, Thailand also decided to follow the product orientation strategy and implemented a *product bundling strategy*, grouping different services/products together for joint offerings and sales, making it appealing through suitable pricing strategies, and special packages of MT services (Ganguli & Ebrahim, 2019).

4.1.5 Porter's Generic Strategies

According to Porter's Generic Strategies Model (Porter, 1985), three strategic approaches can be applied to the medical tourism industry so as to gain competitive advantage – cost leadership, differentiation and focus (cost focus and differentiation focus). In the literature analysed, five Asian countries were found implementing these strategies:

Firstly, Thailand practices a *cost leadership strategy*, because it became a general low-cost producer that gained market share in the industry by offering competitively priced medical packages. This cost affordability attracted more foreign clients, being now considered a low-cost MT destination (Chen et al., 2010; Ganguli & Ebrahim, 2019).

Interestingly, India also uses a *cost leadership strategy* due to its low prices, but since the market is dynamic and there are other resources available, it has also moved to another strategy. This strategy was labelled a *diversification strategy* by some authors (Ganguli & Ebrahim, 2019), because now it provides quality treatments in several specialities, particularly in the surgical field, which pleases a lot of foreign patients, but was also termed a *differentiation focus strategy* by other authors (Chen et al., 2010) since it seeks differentiation in a selected industry segment, which in this case is the surgical sphere, focusing more in the open heart surgery and joint implants.

Additionally, Singapore also follows a *differentiation strategy* (with some focus on cosmetic surgery), as it has positioned itself on high-tech complex quality healthcare, based on

the marketing approach of branding the country as a clinical excellence centre, making it unique in the MT industry (Ganguli & Ebrahim, 2019).

Lastly, Korea and Malaysia go for a *cost focus strategy* because both focus on cosmetic procedures/surgery and offer the general advantage of low-cost labour, which means they seek a cost advantage in their targeted segment in the MT industry (Chen et al., 2010; Porter, 1985).

By having a niche service strategy in mind like the ones mentioned previously, according to Chen et. al (2010), it is then possible to build a business model that offers that specific cluster of services with a competitive advantage, making the country reach above-average profitability.

4.1.6 Strategies based on SWOT

Furthermore, some countries focused more on strategies that depend on the concept of SWOT to study their MT market, which means that the Strengths (S), Weaknesses (W), Opportunities (O) and Threats (T) of that analysis can be linked to each other in four ways (SO, WO, ST and WT), making a TOWS Matrix that gives different strategic options - aggressive/offensive, conservative, competitive and defensive strategies (Wehrich, 1982).

As a result, according to its SWOT Matrix framework, Korea must follow its main strategies, that are *offensive* and *defensive strategies* (SO and WT) to have a competitive advantage. Some of those strategies are boost the quality of the medical services; achieve international certification; improve promotional strategies - publication of successful cases, having medical portal sites, cooperation with other governmental agencies; improve legal issues such as visa procedures; establish patient-oriented service systems; and stakeholders cooperating to ensure excellent services (S. Kim et al., 2013).

In Iran, the application of the SWOT technique in two studies indicated that the dominant strategies should be more *conservative* (WO). So, in one study, Iran planned the following strategies: design targeted planning to attract more patients to the organization's hospitals; develop a multilingual website for the organization's medical centres; attempt towards international ACI and JCI accreditation certificates of medical centres, and training the communication skills of the medical staff (Najafinasab et al., 2020).

Other authors decided to embrace different *conservative strategies*, like the *joint venture strategy*, where there is a cooperation of neighbouring countries through mass media and advertisement with the creation or acceptance of insurance and creation of shared companies with those countries; and also a *divestiture strategy* of services by the public to the private sector (Momeni et al., 2017).

4.1.7 Development strategies

Furthermore, in order to continue their business development, some countries like Iran and Korea also implemented *general development strategies* so its MT markets remain in constant growth and expansion in all areas (sales, marketing, project and product management, etc), being then possible to identify new business opportunities, trends, customers and partnerships to continue the MT industry development (Seth, 2020).

In Iran, these strategies were divided into five main themes - Administrative-executive, economic, marketing, informing, and reforming and revising rules & regulations. Some of those included: obtaining international licenses and accreditations to build trust in the services' quality; attract direct foreign investment; include a visa issuance process; identify regional target markets with shared culture, religion, language, and geographical proximity; partnership with other hospitals' countries; update & record health tourist statistics; and establish an MT informing portal (Baghaei et al., 2020). Besides, other authors after analysing the potential of Central Iran also decided to offer variable packages of tourism; expand the promotion of MT and brand Shiraz medical ability; and make policies on absorbing the foreign investments to establish the project of Shiraz Health Town (Rokni et al., 2013).

Relatively to Korea, they decided to establish the MT information system and brand the MT; prepare the industry expansion by training global healthcare experts; and organize tailored medical services considering different backgrounds and foreign patients' cultures (K. L. Kim & Seo, 2019).

Finally, Turkey decided to implement general *internationalization strategies* to also grow its MT market, which included: establishing diagnosis centres abroad for brand awareness and to test a country's market potential; engage in foreign direct investment; partake in Acibadem group to receive investment attention by global investment funds; and finally the hospital operators integrated channel systems in high potential markets and also decided to avail of independent mediators located in foreign markets to identify and serve foreign patients (Uner et al., 2020).

In conclusion, Croatia also developed a *diversification strategy* as the dominant development strategy to establish an effective competitive strategy. Some of the actions taken were: obtaining an accreditation system and international certification; partnership with international facilitators; promotion and sale of MT services; insist on high-quality services standards, training of skilled staff, expansion of services, and measuring fiscal policy to attract investment and more efficient use of EU funds (Gredičak & Demonja, 2020).

4.1.8 Exclusive strategies

Besides all the marketing strategies mentioned before, some countries developed specific strategies essential for their MT growth that do not fit in entirely with the above categories.

For instance, Bahrain came up with several *strategic priorities* in all departments - from developing health infrastructure, designing incentive performance schemes, and reducing bureaucratic health governance to setting health licensing standards, evaluating factors for turnover rates, and exploiting the market opportunity. It also established international market-oriented management with investments in technology and infrastructure projects and, as well, cooperated with allied economic sectors (government, insurance, travel and hotel sectors) to target key markets through travel facilitation (Ebrahim & Ganguli, 2017).

On another note, India acquired some *mobilisation strategies* with the help of medical tourism facilitators. Facilitators, or brokers, play a vital role in the decision-making process of medical tourists, being their main source of vital information and services regarding health, medical treatments, travelling abroad and follow-up necessities. They are a very important bridge between patients and healthcare providers and can influence a client's first impression of medical tourism since they add value to the whole pre and post patient's journey (Mohamad et al., 2012; Penney et al., 2011).

So, relatively to India, the three mobilisation strategies mentioned in the study were: 1. *Direct patient mobilisation*, where facilitators acquire new clients through their websites, that allow them to communicate directly with a broader audience and promote their service, converting the clients in medical travellers in personal consultations; 2. *Channel partner mobilisation*, which outsources the mobilisation of patients to people who are based in their home countries that refer the patients to the facilitators at the travel destination; and 3. *Patient testimonial mobilisation*, when the country gains new clients through positive testimonials and word-of-mouth from past patients (Hartmann, 2019).

4.2 Relation between MT factors and adopted strategies

As revealed before, throughout the reading of the selected studies, quite a few factors were mentioned as relevant when establishing strategies to pursue the development of the MT industry.

Sometimes relevant factors were present in different strategy types and were used as a base for the implementation of the strategies. An example of this matter is the factor "skilled health personnel with expertise". In order to attract more patients or have a competitive advantage in the MT market, a healthcare provider will need, for example, to deliver better and higher quality

healthcare services, and for that, it may need to implement strategies related to the training of health professionals. So, this factor was an essential part of adopting certain health personnel strategies and those strategies can be from different strategy types. Another example is the “marketing and promoting of MT” factors that are scattered throughout a lot of countries’ adopted strategies that belong to different marketing strategy types despite those factors being more related to the promotion strategy type group.

As a matter of fact, by analyzing the most common factors mentioned in the selected studies, some of the most commonly adopted strategies in some countries have almost the same type of factors attached. For instance, Croatia, India and Singapore have developed similar strategies that were intertwined to the same factors, like the “promoting MT”, “international certification and accreditation”, “high-quality healthcare services” and “skilled health personnel” factors (Chakraborty & Poddar, 2018; Ganguli & Ebrahim, 2017; Gredičak & Demonja, 2020).

Ultimately, there is also an interesting correlation between studies from the same country. In the five studies from Iran and also on other five studies that reference Korea, four factors always appear as crucial for the development of their MT industry – “high-quality healthcare services”, “well-established infrastructure and facilities”, “skilled health personnel with expertise” and “general marketing to promote MT”.

Based on these two ideas it is possible to confirm that there is a connection between factors and strategies adopted in a country, and also, some factors are considered more important and effective than others in the MT development and attraction of foreign patients.

4.3 Medical tourism development in Portugal

Medical tourism in Portugal is still a new evolving concept that needs to be addressed. In fact, it only started being a government priority in the last few years with the development of several projects and initiatives to improve Portugal’s MT credibility and reputation and also to make use of some aspects this country already has in its favour (Vicente, 2014).

According to several sources, Portugal has relevant features, both in tourism and in health, that can lead to a better position in the MT international market, such as good location and weather, fast-paced evolving innovation, hospitals accredited by JCI, high-quality healthcare system and facilities, hospitality, cost competitiveness, safety, modernity, and professional experience (*Medical Tourism in Portugal*, 2018; MedicalPort, 2021; Vicente, 2014).

By comparing these characteristics with the factors from Table 3.1.4, it is possible to imply that many of the features of this country were also cited in the analysed studies from other

countries, like having “high-quality healthcare services”, “skilled health personnel with expertise” and “international certification and accreditation”. Therefore, Portugal also carries some of the most cited and relevant factors to attract new MT clients and to help boost MT development.

On a related note, in 2016 the Project *Medical Tourism in Portugal – Health, Wellness and Tourism in Portugal* (Cunha, 2016) was released by the Health Cluster Portugal (HCP) and included many strategies and initiatives for MT visibility and development. Some of the most important ones were the following:

a) Promotion actions to build the country's image and international reputation as a reference destination such as: being present in international events, conferences; organize familiarization trips and roadshows; creation and distribution of brochures in digital and paper format in several languages, and external promotion of state and diplomacy.

b) Creation of the *Medical Tourism in Portugal* brand with the elaboration of the “Medical Tourism in Portugal” Portal to promote Portugal’s healthcare services and providers (*Medical Tourism in Portugal*, 2018). This is a reputation-oriented web portal that serves as the base infrastructure for the Health Tourism’s communication strategy and that uses business intelligence as a tool to have all the vital information, statistics, trends, and databases updated, to then provide and spread all the information needed for a possible future client to assess.

c) Partner with the most reputable healthcare providers, facilitators (like MedicalPort (MedicalPort, 2013)), main hotel units and other important tourism and health operators.

In addition to those strategies, more recently, HCP, Turismo de Portugal and other entities signed a Protocol in 2019 to promote a more effective management of MT called *Protocolo de cooperação para a promoção internacional da oferta portuguesa de Turismo Médico* (Turismo de Portugal, 2019a). Likewise, there is also a *Portugal Health Passport* initiative promoted by Turismo de Portugal that gives tourists access to special offers in private healthcare providers in case they need healthcare services during their stay that include urgent care and preventive medicine services (*Portugal Health Passport*, 2019; Turismo de Portugal, 2019b).

Some of these strategies can be compared to the marketing strategies adopted in other countries that were mentioned previously in the selected papers analysed. For instance, the communication strategies, promotion, and branding are included in the *promotional strategies* group and there are also *development* and *exclusive strategies* in these projects like the creation of the passport, and the partnership with facilitators.

After all, these incentives, factors, and strategies in the country are a great start to the growth and development of Portugal’s MT, however, there is still a lot of work to be done for

Portugal to be associated with medical tourism and have a relevant position in this market. Despite the key competitive advantages mentioned before, there must be more communication strategies and a steady flow of clients provided with the greatest professional standards to gain more international credibility in this sector (Vicente, 2014). For now, the government only built the main channels and rules for the MT industry (Vicente, 2014) and, perhaps the development of a national strategy involving the government, public and private entities with important contributions to the MT will have a strong impact on this area's visibility internationally.

4.4 Policy Implications

As a further matter, something that is also present with the rise and development of the MT industry and is related to the implementation of these strategies is the emergence of risks and challenges, mostly regarding policy implications for health systems. Although many countries are promoting and facilitating medical tourism, there is a lack of regulation, legal frameworks, and guidelines in this industry (de la Hoz-Correa et al., 2018; Gola, 2016; N. T. Lunt et al., 2013; Pocock & Phua, 2011).

A big reason for this is the difficulty in regulating medical tourism flows between countries' borders, and so, the absence of reliable data like that makes it difficult to create policy responses to risks (N. T. Lunt et al., 2013).

In 2011, Pocock and Phua made a framework that identified the policy implications of MT development for health systems based on three Asian countries - Thailand, Singapore, and Malaysia (Pocock & Phua, 2011). Until today, the five domains of this framework (governance, delivery, financing, human resources, and regulation) can serve as a useful base to explore the development of MT in new settings and can be modified for a specific country's MT case (Johnston et al., 2015; Pocock & Phua, 2011). For example, to improve MT regulation, the number of clients brought by facilitators should be controlled and the creation of protocols for quality control and international health facilities' accreditation is essential.

By analysing closer this framework, it is possible to see that some of the strategies adopted in countries analysed in this study are related to policy implications. Some healthcare providers established strategies, such as, improvement of travel visas; creation of partnerships to give health insurance benefits; acquiring hospitals' international accreditation and quality certifications; and giving more training to healthcare professionals to deliver the best medical care.

Besides these policies, another crucial first contact with a potential client is through medical tourism websites. Websites are an excellent way to promote MT and, as noticed

previously, promotional strategies are among the most common strategies adopted by countries to develop more their MT industry. Unfortunately, there is also no regulation relative to the information and services provided on these websites, so, a study decided to create a policy that would set minimum standards of care regarding trustworthiness and quality information and that would also protect the client in regards to the information provided (Maguire et al., 2016). This is a specific context that can help control the digital promotion of MT, one of the biggest marketing strategies used to make this sector grow internationally.

In the end, medical tourism can bring many economic benefits to a country, however, it needs to be well-managed with the right strategies and well-regulated in its policies.

4.5 Discussion synopsis

All in all, from this whole section it is possible to conclude that each strategy type is unique and different - they may go by different methods and paths to reach the goal, however, all of them have the same purpose of developing the MT industry and attracting more foreign patients.

Curiously, each country analysed the strategies that fitted the best their needs and demands, and it is possible to notice that some countries have been implementing different strategy typologies at the same time and may already have been developing their marketing strategies for many years. This is something possible to conclude by having analysed different studies made in the same country. Some country examples that implemented various strategy types to gain a competitive advantage in the MT sector are India, Iran, Korea, Singapore, and Thailand.

Additionally and interestingly enough, Asian countries like India, Singapore and Thailand are among the leaders in MT development at a global level (Ganguli & Ebrahim, 2019), so having an analysis and understanding of their competitiveness and strategies can be of strategic value to new medical tourism providers in other countries because it can help them deal with new and future emerging MT trends and rely their strategic plans and decisions on Asian countries.

Another aspect noticed is that each strategy type can also be suitable for several countries. For instance, some strategy typologies were more common between some countries, like the promotion strategies, market-driven strategies, and Porter's generic strategies, and in contrast, there were some strategies used only by one country, such as the exclusive strategies and the production orientation strategy. With this detail, it is possible to conclude that some countries go for specific strategies that are suitable only for their country, for their healthcare providers and for their unique characteristics and do not fit another country's features. And other countries may adopt the same type of strategies because they might have similar healthcare

providers/organizations that can have alike policies, and/or have similar government support, and/or give the same attention to specific MT factors and/or have similar ways of developing their MT.

In general, I believe that to be able to increase the development of MT, a country's healthcare providers/organizations must acknowledge their resources, strengths, needs and medical tourist's demands. They will need to analyse and understand its internal and external business environments so that it is possible to manage all the information and make thoughtful decisions relatively to strategies and policies that may be adopted and that can help them have a competitive advantage in the MT market and attract more foreign clients.

So, there is no specific way of developing MT – each path is unique and exclusive to a country and it may have similarities with others. There might be some adopted strategies more efficient than others, but then again, I believe that with the right tools, information and analysis, each healthcare MT provider or country will make the best and most efficient decisions to pursue their goals. Nevertheless, a strategy should not be implemented alone if a healthcare provider is looking for a rapid solution to develop its MT sector – adopting several strategies together will have a better effect short and long term.

To put it briefly, many factors have to be acknowledged and studied so as to adopt the right strategies, and also many strategies help with developing and regulating the MT industry - they just need to be implemented at the right time and accordingly to a country or healthcare provider/organization's objectives. The key to a good MT development is to continuously follow the MT industry and assess and analyse which strategies should be implemented, improved, or withdrawn from their decisions, depending on the state of the market, the government priorities and policies, and the studies carried out over time.

5. Conclusions

As noticed throughout this whole study, the medical tourism industry is becoming more and more popular, being already a worldwide economic phenomenon that some countries started investing in and developing in these recent years to attract more international patients.

In this systematic review, the marketing strategies adopted regarding MT development in different countries were analysed. Several strategy typologies emerged as important and common to many countries, especially the “promotion strategies” using the internet, and digital platforms since they are key drivers to communicate, advertise and spread MT information and services online. In addition, some factors like “international accreditation and certification” were also settled as relevant in the developing process of MT.

This study reveals that the marketing strategies implemented have a great impact on a country’s medical tourism sector, however, there is no right answer to develop better the MT industry. As long as there is continuous monitoring of the industry and the decisions are well-planned and accordingly with the country’s and healthcare provider’s objectives and laws, a government’s country can decide which of the strategies analysed may suit its purposes best.

Although there is an effort to make this industry more structured based on quality and safety services and through the implementation of policies, partnerships and marketing strategies, medical tourism continues to be a complex cluster with many risks and ethical complications and little data regarding theory, so there are still many areas to improve and many topics that can be approached academically.

5.1 Implications

After writing the present dissertation, it is possible to infer that the findings obtained contribute to the medical tourism theory and can strengthen the empirical evidence in this area since research about the MT industry development is still on an emerging stage.

Notwithstanding, from the 220 articles found about this subject, in the end, only 20 of them were effectively related to MT strategies and development, meaning this research’s findings add to the quite limited and sparse literature on interpretations of what strategies may contribute to the MT development.

Furthermore, the systematic identification of strategies to attract more foreign clients and develop the MT industry can help support other scholars in their future studies about this subject.

6. Study Limitations and Future Research

The present dissertation reviewed empirical research on medical tourism strategies from the past decade, however, there are several limitations to this study.

First, although medical tourism has already begun been studied many years ago, it is still considered a fairly new topic, since it is still not very much explored - something that was made clear with the scarce number of studies with eligibility criteria for this study -, and so, this systematic review can also have less validity because of being in a “new” field.

Another limitation within this study is in the methodology section. There is the possibility that some studies about the MT development might not have been captured by the search query and the analysis may neglect relevant findings in other databases, and also, the extraction, analysis and quality of the data have only been handled by the author.

Future research in this field is advisable and recommended, especially after the COVID-19 pandemic. Studies namely related to gathering measurable data on medical tourism development should be contemplated. Researchers could also consider the following in future studies:

1. A weight analysis and meta-analysis might be helpful to identify the best MT marketing strategies from healthcare providers and MT professionals’ perspectives.
2. Analyse the medical tourism in Portugal in more detail to develop more its competitive advantage in this understudied topic;
3. Do marketing plans to decide the path a country should take to develop well its MT, with all the stakeholders involved having a common strategy.
4. The role and impact of online promotion tools, such as the internet and social platforms in the development and information of the MT industry.
5. The impact the COVID-19 pandemic had on the development of the medical tourism sector.

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Attachments

Annex A: Strategies adopted in countries from the medical tourism providers' point of view

Author (Year)	Type of research	Initial theory	Strategy type	Population in study	Country	Strategies adopted	Relevant factors supporting patient attraction for further medical tourism sector development
(Baghaei et al., 2020)	Qualitative	N/A	Development strategies - Administrative-executive, economic, marketing, informing and reforming and revising rules & regulations	experts in medical tourism in Ahvaz Jundishapur University of Medical Sciences with at least 10 years of employment history and knowledge and experience in MT	Iran	Rank health service centres; obtain international licenses and accreditations (JCI); set the medical service fee as foreign exchange; reduce equipment fee of centres/hospitals providing MT services; attract direct foreign investment; include a visa issuance process; identify regional target markets with a shared culture and geographical proximity to establish government agencies; partnership with other countries hospitals' for patients' transfer after treatment; update & record MT statistics; create an MT informing portal.	general conditions, personnel, medical equipment, website standards, credit, quality of health care, training of medical staff, social marketing, mass advertising
(Borg & Ljungbo, 2018)	Qualitative and Comparative	interpretative research paradigm Constructivist and interpretivist theory	International market-oriented strategies	hospital managers, physicians, researchers, and consultants	Sweden, Singapore	Establish competitive treatment opportunities using destination marketing - make strong brands through attractive destinations and acclaimed hospitals; promote MT with destination branding (slogan and logos) via the internet; partnership between stakeholders in the destination branding, structure, and organization; language proficiency in patients' mother tongue.	quality of care, destination branding and marketing, reputation, infrastructure, trust, confidence, reliance, communication
(Chakraborty & Poddar, 2018)	Qualitative	New model - customer-centric approach	value creation strategy - Create Hospital Brand	doctors, nurses, supporting staffs and medical superintendent of different private hospitals in Kolkata	India	Promotion → hospital brand-building initiatives → customer expectations match with offerings → customer satisfaction → brand loyalty → retention of customers. Having <u>government support</u> that makes faster visa approvals, and surrogacy & organ donation laws and also some <u>hospitals facilities</u> : attractive packages; international accreditation; local guides; interpreter; insurance benefit schemes; air ticket booking and infrastructure facilities; treatment quality & options.	health personnel quality & communication, marketing activities, promote hospital through website & media successful stories, quality services and facilities, international accreditation, government support, brand promotional activities & marketing, analyse customers' feedback report, invite hospital business partners
(Chen et al., 2010)	Literature review	N/A	Niche Services Strategies - Cost leadership and Differentiation	N/A	Malaysia, Korea, Thailand, Singapore, India	Define target market based on Successful Story (mass media) → Design something different and propose a Niche Service (use of Porter's Generic Strategies) → build Business Model that may offer a Cluster of Services and Maintain business with strategies to gain competitive advantage.	updated facilities, trust, safety, efficiency, skills, facility availability, reputation, price difference, marketing and mass media, examples and successful stories, service quality by certified institution (JCI)
(Ebrahim & Ganguli, 2017)	Qualitative and Quantitative	New model - thematic analyses	competitiveness strategies	private medical tourism providers (stakeholders) - Medical, Surgical, Dental, Diagnostic and Healthcare Administration specializations	Bahrain	Develop health infrastructure; design incentive performance schemes; reduce bureaucratic health governance; set licensing standards & grade healthcare institutions; evaluate factors for turnover rates; exchange MT experience and joint strategic assessments among member states; establish strategy prioritizing reforms and improve MT competitiveness; invest in technology projects and strategies to reduce employee turnover (market-oriented management); partnership with relevant stakeholders (government, insurance, travel and hotel sectors) to target key markets through travel facilitation.	level of reputation and trustworthiness, services quality, human resources, investment, physical resources, management competency, government support
(Ganguli & Ebrahim, 2019)	Comparative analysis	cross-country benchmarking analysis	Porter's generic strategies - cost leadership, differentiation and focus; and Exclusive strategies	N/A	India, Singapore, Thailand	<u>Porter's generic strategies</u> and <u>Exclusive strategies</u> : <i>India's diversification strategy</i> - entry into new markets: Internationally accredited hospitals provide treatments in many specialities; <i>Thailand's product bundling strategy</i> - grouping different services/products together for joint offerings and sales; appealing through suitable pricing strategies & special packages of MT services; <i>Singapore's branding strategy</i> - MT branding and "Singapore Medicine" implemented as a brand - regional hub of medical excellence.	JCI accreditation, infrastructure, reputation, high quality care, medical training

Author (Year)	Type of research	Initial theory	Strategy type	Population in study	Country	Strategies adopted	Relevant factors supporting patient attraction for further medical tourism sector development
(Ganguli & Ebrahim, 2017)	Case Study - qualitative approach	holistic examination of related literature and explicitly	Market-driven strategy and resources-driven strategy	N/A	Singapore	Establish a competitive position through <u>strategic planning</u> with economic priorities to create differentiated MT products; <u>public-private partnerships</u> in healthcare financing, provision and MT; <u>marketing & MT branding strategies</u> ; MT image based on medical excellence experiences, high safety standards and location attractiveness; <u>technology and innovation</u> : telemedicine, bio-design innovation, medical informatics; <u>accreditation and governance</u> : <u>human capital development</u> ; technical competency, excellence and leadership.	high quality diagnostic and intervention medicine, modern healthcare infrastructure, marketing and branding, promotion, skilled medical personnel, international accreditation, reputation of care and safety
(Hartmann, 2019)	Qualitative	conceptualising facilitators as brokers - ethnographic practice-centred approach	Mobilisation strategies	Representatives of medical travel companies (directors or employees) and self-employed facilitators.	India	<u>Direct patient mobilisation</u> - acquire new clients through facilitators' websites (allows to connect with a broader audience and promote the service), making them medical travellers in personal consultations; <u>Channel partner mobilisation</u> - outsource the mobilisation of patients to people based in their home countries that refer the patients to the facilitators at the travel destination; <u>Patient testimonial mobilisation</u> - gaining new clients through positive testimonials and word-of-mouth from former patients.	advanced technology, state of the art infrastructure, excellent doctors with proficiency, promoting MT through online marketing, internet, and facilitators
(Jabbari et al., 2013)	Qualitative: descriptive-analytical cross-sectional study	N/A	Marketing Mix	public and private hospitals of Shiraz	Iran	Update the hospitals' website; Partnership with companies to send SMS to introduce the hospitals; Use telephone counselling services; Provide periodic reports; Give a discount to foreign patients based on international markets and their place of living; Preparing and giving special forms to patients when leaving the hospital; Asking patients for services' feedback within 10 days after being discharged; Provide the patients with facilities - Internet, TV, and computer games; Installing hospital signs.	continued treatment, development of human resources, system of information, marketing, product development, coordination of the health industry with the tourism industry, advertisement, staff training, high quality services and technology
(John et al., 2018)	Quantitative and Qualitative	the "6Is" Social Media Monitoring Framework	Social media marketing strategies	international hospitals in Thailand (providers) accredited by the Joint Commission International	Thailand	Use of social media channels for MT services promotion, research, customer involvement & to influence destination choice; Build communities of interest to improve customer interaction; Manage online communities to strengthen the brands; Interaction with online users through online games and quizzes; Encourage users to participate in competitions and healthcare campaigns through social media platforms.	successful medical cases on social media, electronic word of mouth and online customer reviews, promotion, and branding
(Jun, 2016)	Quantitative and qualitative	Framing theory	Promotional strategies	medical tourism providers with downloadable brochures in Korea International Medical Association (KIMA)	Korea	Promote excellence & innovation through strategic positioning; Focus on safety and quality to gain credibility; Put multilingual professionals and services customized to foreign patients in the international medical care centre; Partnership with international medical institutes (follow-up care support) and insurance providers (fewer problems with insurance coverage); Increase use of public relations efforts, marketing activities and communication materials highlighting the MT benefits.	credibility with statistics regarding the number of patients treated, success rates, and JCI or other accreditations; safety, quality of services, high technology and innovation, promotion, online information
(S. Kim et al., 2013)	Qualitative	SWOT method	Offensive and defensive strategies	MT officials of the KTO, administrative staff members in MT or international cooperation sections in hospitals, and doctors specialized in plastic surgery.	Korea	Enhance the quality of the medical services; achieve international certification; improve promotional strategies and legal issues; train professionals for MT; maintain price transparency; establish patient-oriented service systems; develop IT-Based medical services; cooperation of stakeholders	facilities and attractions, infrastructure, government attitudes, expertise, economy, investment potential, promotion, language and communication, politics and restrictions, international accreditation
(K. L. Kim & Seo, 2019)	Quantitative Review	N/A	Developmental Strategies	N/A	South Korea	Establish the MT information system and brand the Korean MT - offer a joint treatment of western and oriental medicine; prepare the industry expansion to the medical wellness tourism industry by training healthcare experts; organize tailored medical services to foreign patients.	advertisement and promotion, quality, infrastructure, professional skills
(Li et al., 2021)	Case Study (Qualitative)	Theory of soft power and nation rebranding	Market-driven strategies	N/A	Korea	Differentiation based on traditional and contemporary beauty culture; advertising technology and authentic Korean cultural experience; provide online consulting, reservation and surgery information for prospective clients; promote MT by emphasising the ability of cosmetic procedures to transform people's lives; standard package that includes the medical expenses and other travel-related costs (accommodation, meals, guide fees and transportation); use of testimonials and aspiring language while promoting MT.	marketing & branding, professionals' skills and expertise, advanced technology, well established infrastructure (variety of health programmes, and well-equipped facilities), use of testimonials to promote MT

Author (Year)	Type of research	Initial theory	Strategy type	Population in study	Country	Strategies adopted	Relevant factors supporting patient attraction for further medical tourism sector development
(Momeni et al., 2017)	Qualitative	Multi-method Design - Delphi and weighting techniques	Joint venture and divestiture strategies	main stakeholders of private and public sectors in East Azerbaijan province - chief executives, supervisors, deputies, an expert, a professor, a physician, and a researcher	Iran	<u>Joint venture strategy</u> - connection and cooperation with other regional countries, creation of shared companies with neighbouring countries in order of patient transmission; Cooperation through mass media and advertisement; Creation of medical insurance or accepting international insurance between countries. <u>Divestiture strategy</u> - divestiture of services by the public to the private sector. After these strategies, market development and market penetration strategy should be considered and implemented.	Expert manpower, high-quality services, improved infrastructure, government support
(Najafinasab et al., 2020)	Qualitative (focus groups); Quantitative (AHP)	SWOT-AHP hybrid method	Conservative strategies	Experts in tourism and medicine, SSO health experts, managers, and experts of Tourism Holding of Social Security Organization.	Iran	Design targeted planning to attract more patients to the organization's hospitals; develop a website for the organization's medical centres; attempts towards international accreditation ACI and JCI certificates of medical centres; training the medical staff - communications skills and international languages.	high-quality services, competent physicians, having abundant natural attractions; Public infrastructure development, human resources development, information system & marketing & product development
(Rokni et al., 2013)	Qualitative	Delphi method and Target network model	Planning strategies	experienced people of extensive knowledge on medical tourism from hospitals in Shiraz	Iran	Allocate the responsibility of executive affairs to another section; Monitor recovery period and present variable packages of tourism; Make policies related to foreign investments to establish the project of Shiraz Health Town; Expand the promotion of MT through cultural closeness; Brand Shiraz medical ability.	Quality, marketing - advertisement media, infrastructure
(Gredičak & Démonja, 2020)	Case Study Review	N/A	Diversification strategy - Strategic product development	N/A	Croatia	Establish an effective competition & communication strategy: Obtain accreditation and international certification; Improve public sector quality and the private sector MT; Promote MT services; Connect with international facilitators; Insist on high service quality standards, training of staff, quality equipment and accommodation units, expansion of services, laws and legal acts changes, reduction of administration, and measures of fiscal policy to attract investment and more efficient use of EU funds.	Quality, human resources building, infrastructures, accreditation & international certification, health personnel experience & education, percentage of successful cure/performed procedure, specialized sales and promotion, marketing, continuous investment
(Uner et al., 2020)	Case study	Dynamic capabilities theory	Internationalization strategies	executive directors and board members of nine Turkish hospital operators	Turkey	Hospital operators use dual channels: low-commitment independent intermediaries located in foreign markets that identify and serve patients, and integrated channel systems in high potential markets; Establish diagnosis centres abroad → brand awareness and opportunity to test a country's market potential; Engage in foreign direct investment; Export of managerial know-how in management contracts form; International portfolio participation in Acibadem group to receive investment attention.	modern facilities and medical infrastructure, world-class physicians, specialized care, quality of medical care, marketing, international certification, reputation
(Vicky et al., 2018)	Quantitative	N/A	E-Marketing strategy	medical tourism providers with head offices or affiliate offices in Greece	Greece	Website evaluation → more detail in 4 categories: update General Website Information with FAQs and downloadable material; Information about Services Provided by Each Provider - have hotel/flight booking services, more information about visa, insurance, pre and post care services, and translated services; Website Interactivity - more interactivity with the customer and more testimonials from patients available; and Medical Tourism Exclusive Information - put price information and add hospitals' credentials.	online marketing and advertising, patients' testimonials for credibility