

Analysis of Hospital Readiness in West Sumatra as a Medical Tourism Hospital

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Abstract

Medical tourism is a person's trip out of town or abroad with the aim of obtaining health services. There are a lot of Indonesians traveling abroad for medical treatment, even in the province of West Sumatra. There are a lot of medical tourists traveling overseas, particularly to Malaysia and Singapore. Therefore, further study is required to determine whether the hospital is prepared to turn West Sumatra into a medical tourism destination. A qualitative methodology was employed in the study. The study was carried out between April and June of 2023. This research collected data by conducting in-depth interviews, observation and document review as well as FGDs. This study consisted of 5 respondents consisting of 5 top management of the hospital. The list of questions has been prepared according to the parameters of the researcher and processed using NVivo 12 Plus. The analysis obtained is that most West Sumatra Hospitals are ready to organize medical tourism in west Sumatra. Synergistic collaboration is needed between hospitals in West Sumatra to create a medical tourism ecosystem. There must be a leader and regulator who will always monitor and regulate medical tourism in West Sumatra.

Keywords: Medical Tourism, Hospital, West Sumatra

INTRODUCTION

The United Nations World Tourism Organisation (UNWTO) said that 2019 saw a remarkable expansion in global tourism. Tourist arrivals in all global areas saw growth in 2019, with the Middle East showing a particularly notable rise of 8%. The regions of Asia Pacific and Europe both had a growth rate of 4% (UNWTO, 2020).

With the exception of the Middle East, leisure travel is the primary reason for visiting all locations worldwide. Tourist travels in the Middle East often serve the goal of visiting friends and family, engaging in medical tourism, or participating in religious activities (UNWTO, 2020).

Medical tourism is an emerging trend in the healthcare industry that is expected to become a prominent lifestyle choice with significant potential. Presently, there is a noticeable increase in the global phenomenon of medical tourism. One indicator of this trend is the growing population of individuals in rich nations who opt out of receiving healthcare services in their own country. Instead, they prefer to go to underdeveloped countries worldwide to get a range of medical treatments, while engaging in tourism activities (Ministry of Health RI, 2015; Wandera, 2017).

Medical tourism refers to the act of travelling beyond one's own area or country to seek medical tests, treatments, or other healthcare services at a hospital. The medical tourism idea relies heavily on patients who are seeking healthcare services in other countries, since they form a crucial market for this industry. Medical tourists are individuals or collectives who engage in medical tourism (Ministry of Health of the Republic of Indonesia, 2015).

The aim of medical tourists from developing countries seeking medical services to developed countries is to get quality health services that are more technologically advanced. While the goal of patients from developed countries seeking medical services to developing countries is to seek services that are more economical (Qomar and Rahma, 2021). Someone who does medical tourism has 2 country destinations, the closest destination is a neighboring country, while the farthest destination is countries that are still on the same continent as their country of origin. Data from the Excel International Journal of Multidisciplinary Management Studies states

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that medical tourists from the Asian continent favor China, India, Malaysia, Singapore, South Korea, the Philippines, Taiwan and Turkey as medical tourism destinations (Qomar and Rahma, 2021).

In Asia, the main countries namely Malaysia, Thailand, India, and Singapore are projected to dominate at least 80% of the market. According to a study conducted by George and Nedela in 2008, India is expected to generate revenue of US\$ 2.3 million from medical tourism in 2012, with further growth anticipated. Similarly, Malaysia is also capitalizing on this opportunity, particularly in the Indonesian market. Indonesian consumers currently spend nearly US\$ 1 billion annually on medical tourism in Malaysia (Rosalina et al., 2015).

Statistical data in Indonesia showing the exact size of medical tourists are not yet available, but available information shows that there are significant numbers of patients who travel to developing countries to obtain medical services. In 2004, 1.2 million people reported travelling to India for medical care, and it is projected that this number is growing at a rate of 30% each year. Thailand received 1.1 million medical tourists in the same year. Foreign tourists receiving medical treatment in Malaysia were 130,000 in 2004, an increase of 25% from the previous number of tourists. Medical tourism in Asia is expected to generate a profit of US\$ 4.4 billion in 2012, with half of that profit going to India (Indonesian Minister of Health, 2015).

Indonesia is still not an option for medical tourists. The large number of Indonesians traveling to neighboring countries to obtain medical services is quite large. The number of Indonesian patients seeking treatment in Malaysia is 70% and Singapore is 65% of the total number of international patients undergoing treatment in these countries. Indonesia itself still spends US\$ 11.5 million for medical expenses abroad. Even though currently almost all the desired medical services can be found in Indonesia. Many international standard hospitals in Indonesia have been found, or have very qualified medical device resources and technology, both in public and private hospitals (Qomar and Rahma, 2021).

Putra and Utarini conducted research in Denpasar stating that the understanding of medical tourism by the government, Denpasar BaliMed Hospital, PERSI and travel agents was still partial. BaliMed Denpasar Hospital does not have enough potential for medical development.

LITERATURE REVIEW

The globalization of health has led to the emergence of a distinct kind of tourism known as health tourism. Medical tourism is a rapidly expanding segment within the health tourism industry, and several governments are now developing legal and practical strategies to accommodate it. Lowered transportation expenses, increased earnings, knowledge and technology transfer, and competitive pricing all contribute to the motivation for traveling to other nations for medical purposes. Medical tourism is now one of the most rapidly expanding sectors in the global tourist industry, producing a staggering US\$60 billion in revenue each year (Heung et al., 2011).

Hospitals and governments worldwide are increasingly focusing on expanding and investing in medical tourism. Southeast Asia is often regarded as the most extensively recorded case of the advancement and endorsement of medical tourism on a regional level. However, there is a rising interest in this practice in a place that has not yet been fully established (Johnston et al., 2015).

Medical tourism encompasses several aspects and categories such as medical travel, health tourism, health travel, medical value travel, healthcare abroad, overseas medical, overseas surgical, medical outsourcing, and offshore medical (Qomar and Rahma, 2021).

The marketing strategy for hospitals in Indonesia needs to make improvements and study the services provided in the country, why there are still so many patients who go for treatment or routine health checks abroad. The hospital's marketing strategy was first initiated by analysing the segmentation of service consumers, with the aim of concentrating on a single market niche in order to provide effective service. When doing this market segmentation research, it is crucial to adhere to relevant rules, including health insurance and health care legislation that are applicable in Indonesia. This analysis can be linked to medical tourism carried out by Indonesia's neighboring countries, by placing cooperation representatives in strategic cities with their country (Setiawan and Muhandi, 2020).

Only a tiny fraction of medical tourism research specifically focusses on policy issues or integrates a policy framework in their study methodology. Interdisciplinary health and social policy publications publish more research than field-specific journals catering to practitioners. Furthermore, there are notable variations in research policy direction based on geography and academic disciplines (Virani et al., 2020).

Quoted from SQU (Sultan Qaboos University) Medical Journal, five factors were found that influenced medical tourism, namely affordability, availability of types of medical care, ease of obtaining medical care, acceptable medical care and additional reasons such as treatment technology (Qomar and Rahma, 2021).

Developing countries are popular destinations for medical tourism due to their exceptional expertise in offering non-surgical services such as yoga, ayurveda, homoeopathy, naturopathy, and meditation. These practices are highly regarded for promoting both physical and mental well-being. Services like this are growing very rapidly in developing countries such as Malaysia, Thailand and India. Other emerging trends include laser treatment, weight loss and infertility problems. Countries that are ready to provide medical tourism services should focus on both national and international accreditation systems. So far there are 35 countries that have pocketed international accreditation from the Joint Commission International (JCI). India has 16 units of hospitals with JCI accreditation certificates and Thailand has only 5 units of hospitals with JCI accreditation. Indonesia has 4 units of private hospitals that have been accredited internationally and 9 units of government hospitals that are in the process of getting international accreditation (Qomar and Rahma, 2021).

Medical tourism is a lucrative industry worth billions of dollars. It has been boosted by patients from different countries who seek medical treatment abroad. This industry encompasses various aspects such as travel and tourism, commercial activities, government relations, and international accreditation. However, it has both positive and negative effects on global health and the country hosting the medical tourists. Medical tourism is significantly influencing the future of global healthcare due to advancements in technology, the economics, and international relations. Medical travel facilitators and travel brokers are incorporated into the hotel business to locate reliable providers and guarantee seamless travel arrangements (Rusli, 2019).

The emergence of medical tourism presents a really encouraging trend. According to Wong et al (2014), the worldwide medical tourism sector is projected to produce annual profits ranging from USD 38 to USD 55 billion. According to a study done by Gan and Frederick (2010), the United States has estimated that it would earn around US\$ 80 billion per year from the health tourism industry by 2017. This data indicates that nations such as America have made significant efforts in this area and are projected to contribute to the economic stability of this influential nation. Consequently, the health sector's globalization is advantageous for America's tourist economy (Rosalina et al., 2015).

In Indonesia, statistics for domestic tourists visiting West Sumatra reported a gender composition of 48%: 52% male compared to female. Most small age 15 years (29.34%), aged 35-44 years 15.92%. The purpose of most tourist visits is vacationing 51% and visiting relatives 38%. Types of tourism activities are rural as much as 51% and integrated tourism objects as much as 23%. The main means of transportation are private vehicles (61%) and rental (15%). The most frequent accommodation service is a relative's house as much as 83%. The main source of information is from relatives as much as 86% (W Sumatra Tourism Statistics, 2020).

The survey results recorded in NESPADA 2021, tourists who visit consist of domestic tourists (tourists outside West Sumatra and local) and foreign tourists. The composition of expenditure for domestic tourists in West Sumatra for transportation, food and drink is 24.0% and 20.1% respectively. As well as for health and beauty only about 1.9%.

Most of the favorite tourist destinations to visit are in the City of Evidence, such as the Jam Gadang, Ngarai Sianok and the Zoo. Next is the destination for the Mandeh Area which is located in Pesisir Selatan Regency. Other tourist destinations of choice for domestic tourists are the Harau Valley, Pagaruyung Palace, Mentawai Islands, Air Manis Beach, and others.

The majority of foreign visitors that visit West Sumatra are mostly from Malaysia. Foreign visitors accounted for the highest percentage of spending, with the majority being spent on food and drink (25.3%), airline

transportation (17.1%), trip packages (14.3%), automobile rental (12.6%), and shopping for souvenirs and lodging (10.7%) (NESPADA 2021).

A hospital is a healthcare facility that offers a wide range of medical services to individuals, including inpatient, outpatient, and emergency care (President of the Republic of Indonesia, 2009).

Wandera's research in 2017 found that the competitive advantage possessed by the Indian medical tourism industry, especially India's ability to meet production factors and domestic demand has encouraged India to innovate to produce the quality of the medical industry sought by South Asian medical tourists. In addition, India's cultural closeness, especially the use of language, geographical proximity, namely the location between India and South Asian countries, and administrative proximity, namely the medical visa policy granted to South Asian countries, make India the main choice for South Asian medical tourists to carry out medical tourism (Wandera, 2017).

METHOD

This research was conducted in West Sumatra from April 2023 to June 2023. This type of research is qualitative research which aims to determine the readiness of hospitals in West Sumatra as medical tourism destinations. Data collection was carried out using in-depth interview techniques, observation and document review and FGD. This study used a sampling technique using a purposive sampling technique. This study consisted of 5 respondents consisting of 5 top management of the hospital. The data obtained was analyzed with the NVivo 12 Plus system.

RESULTS AND DISCUSSION

General Knowledge Medical tourism

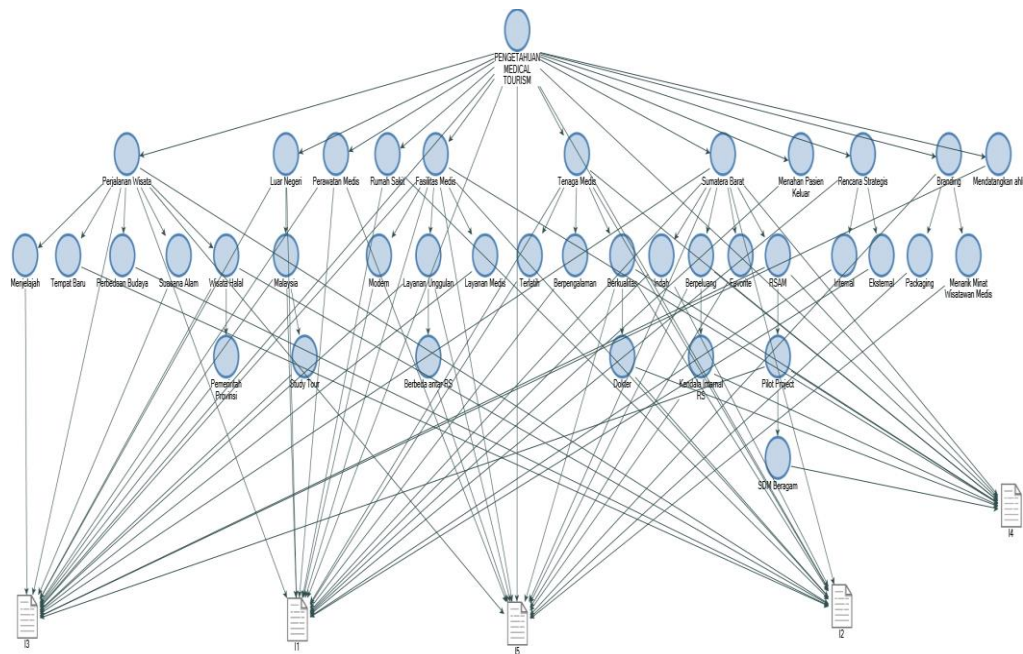


Figure 1. General Knowledge of Medical Tourism

Medical tourism refers to the act of patients traveling to other areas or nations to obtain medical care, while also having the chance to discover various cultures. According to Permenkes Number 76 of 2015, medical tourism refers to traveling outside of one's own area or country to get medical exams, treatments, or other medical services at a hospital (Menkes, 2015). West Sumatra also has many tourist spots. There are 65 great tourist attractions in West Sumatra, including the Bukittinggi Clock Tower, the Most Beautiful Village in the World Pariangan, Padang Beach, the Enchantment of the Mentawai Islands and others (Nanda, 2023). Thus,

services and attract patients both from within the country and from abroad. The development of this superior service is also expected to be able to support medical tourism, which has the potential to bring in foreign exchange and improve the image of the hospitals and the regions they lead.

Superior products must be the focus of development and meet the needs of patients, both from the local area and from outside the region or country. The development of superior products is also an important strategy to improve the competitiveness and reputation of hospitals in the healthcare industry. Permenkes Number 76 of 2015 emphasizes the importance of superior products in the provision of health services. This involves delivering high-quality services by utilizing the expertise of human resources, advanced technology, and a strong commitment to excellence (Menkes, 2015). In the research on the readiness of the Awal Bros Batam Hospital to become medical tourism, it was found that one of the advantages of the Awal Bros Batam Hospital was that it had many excellent services (Sutanto, Mauliana, & Wahab, 2022). So that with superior products, it will strengthen the potential of hospitals in West Sumatra to become hospitals for medical tourism.

Service quality

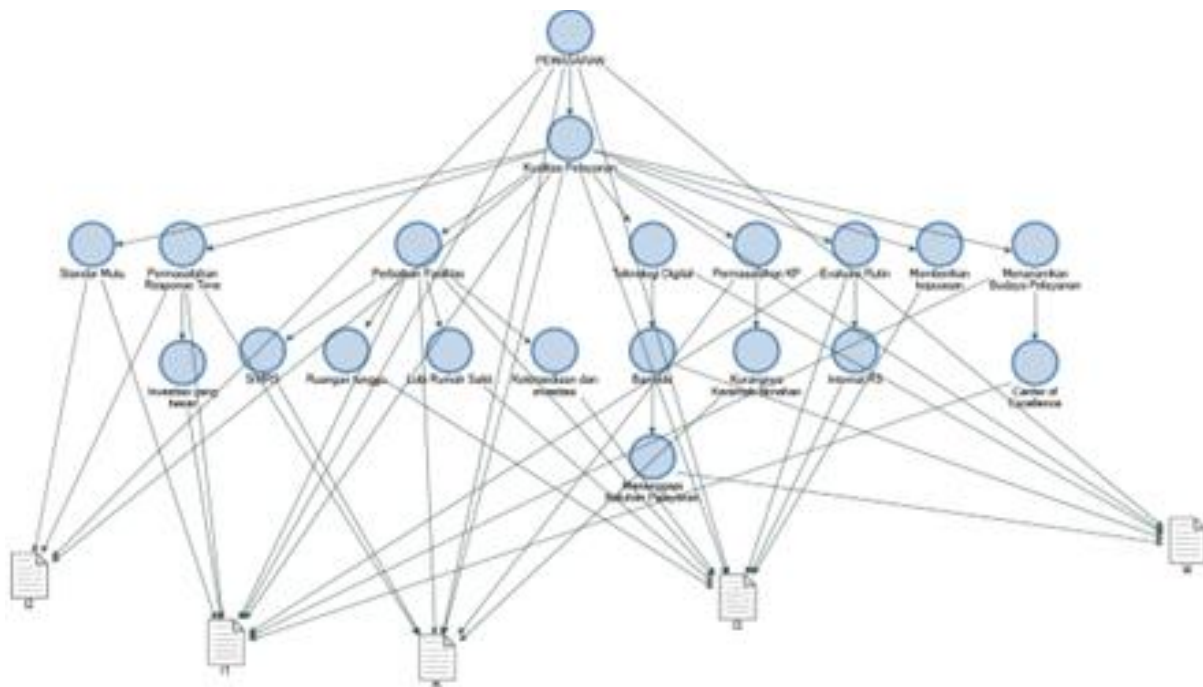


Figure 5. Service Marketing

In this parameter, the quality of service at the hospital is suboptimal in this category, as shown by the existence of several barriers, particularly with patient waiting time, maintenance of patient medical records, and patient satisfaction levels. Some hospitals have adopted innovations and strategies to improve services, while others still need to make improvements in terms of digitalized hospital information management and service culture. There is awareness of the importance of improving service quality to support medical tourism, and support from the government is considered important in this effort. Overall, every hospital always strives to improve the quality of service at the hospital they lead through various innovations and increasing service effectiveness. The results of this study are in line with research on the Readiness of Indonesian Hospitals to Face Medical Tourism Competition in Southeast Asia. This study showed that several factors attracted patients' interest in getting services at the hospital, including high-quality services and short service times (Intama & Sulistiadi, 2022).

Several hospitals emphasize the importance of high-quality services to support medical tourism and build a better hospital image. All hospital informants realized that better service required changes in service culture and behavior, as well as investment in building superior and quality human resources, technology, and

infrastructure. This research is also in line with the results of research on the identification of factors that influence medical tourism in hospitals in Indonesia. In this study it was found that hospitals must prepare strong personnel, facilities, access and promotions if they want to become medical tourism destinations (Kusumawati, 2018). The study conducted by Wang, Feng, and Wu (2020) identified several crucial factors in medical tourism. These factors include the attainment of specialized skills and a reputable reputation among doctors, health assessments, the presence of internationally certified medical professionals and staff, assurance of treatment quality and safety, high standards of medical care, excellent healthcare services, a patient-centered approach by medical staff, advanced medical technologies, accessibility to medications, on-site pharmaceutical assistance and prescriptions, promptness of medical treatment from initial contact to actual care, adherence to quality care standards, and availability of hospital contact information.

Promotion



Figure 6. Promotional marketing

In general, each hospital informant realized the importance of promotion for the commercialization of medical tourism in West Sumatra and the use of social media to increase the visibility and image of the hospital in supporting medical tourism efforts. Some hospitals also noted challenges in following more agile promotion practices such as overseas hospitals where promotion is a major part of long-term investment. Promotion or marketing is also the main obstacle to the development of medical tourism in the United Arab Emirates (Bulatovic & Iankova, 2021).

This study aligns with the findings of studies performed in hospitals in Indonesia. In this study it was found that hospitals must prepare strong personnel, facilities, access and promotions if they want to become medical tourism destinations (Kusumawati, 2018). The availability of clear information is also a tool for promotion for hospitals wishing to develop medical tourism (Intama & Sulistiadi, 2022). An essential need for the development of medical tourism at the West Sumatra Hospital is the establishment of a promotion or marketing team.

Infrastructure Technology

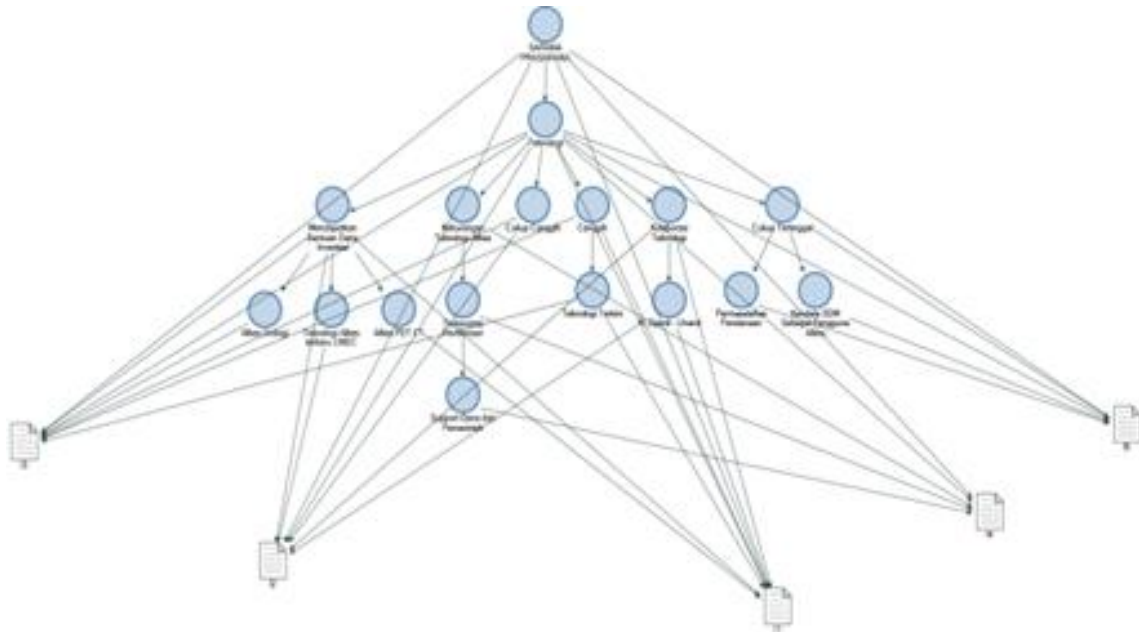


Figure 7. Technology

As a whole, it can be understood from the five informants that several hospitals have adopted sophisticated health technology and continue to develop the use of technology to provide better services. However, they face limited funding, which becomes an obstacle in increasing the availability of health technology in several hospitals. Funding assistance from the government and good fund management are important factors in overcoming these limitations. Support and investment in competent human resources is also important for health technology to be utilized effectively. This study aligns with the findings of research on medical tourism in hospitals in Indonesia, where the result is that professional and superior health workers are needed as well as sophisticated health technology as a development requirement for medical tourism (Kusumawati, 2018).

Building

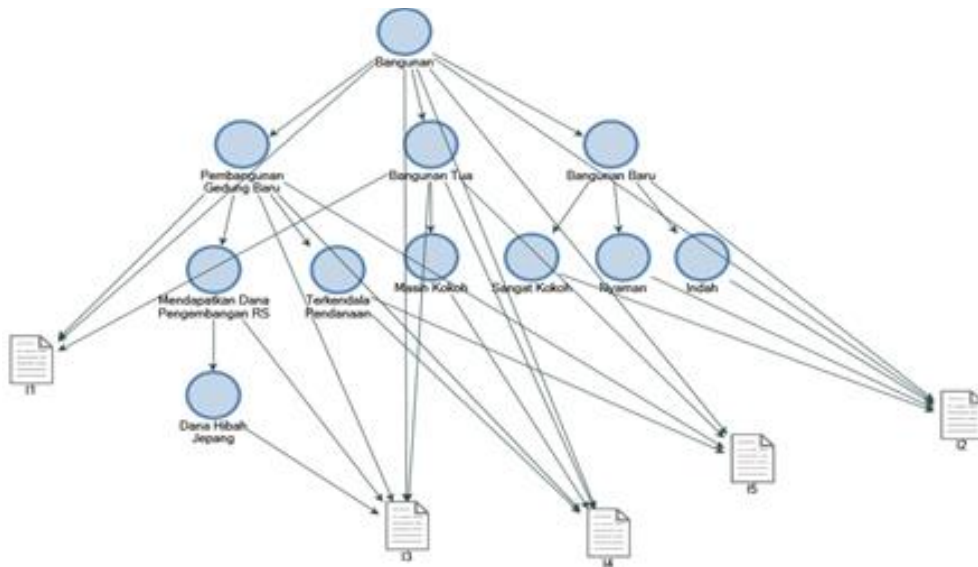


Figure 8. Building.

Hospitals have a variety of building conditions, from new and comfortable to those currently under construction. Improving building services and facilities is important so that hospitals can provide better services for patients and support medical tourism efforts in West Sumatra. Obstacles related to funding are also things that need to be overcome to optimize hospital facilities and buildings. This study aligns with the findings of research (Nieamah & Purwoko, 2021) which discusses the components of developing health tourism in Yogyakarta, including adequate facilities. This can be done by completing supporting facilities for health tourism and building attractive buildings/facilities so that they become a special attraction.

Cost

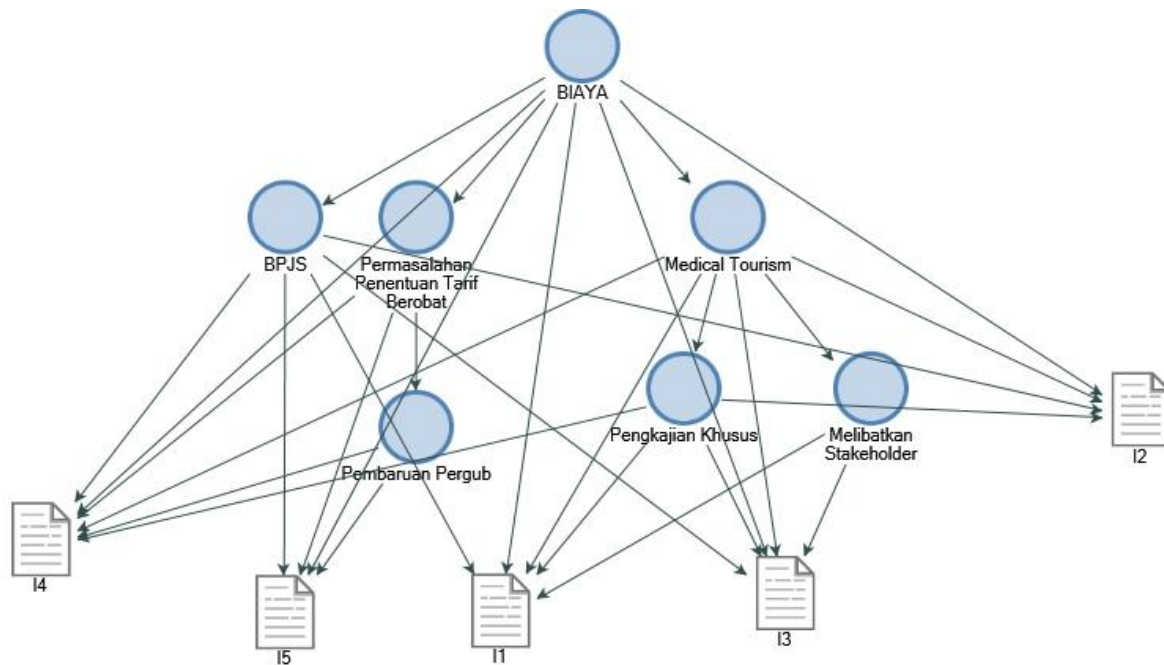


Figure 9. Cost

The cost of medical services for each hospital informant may vary depending on the type of treatment and funding used. Improving medical tourism services requires different financing strategies and cooperation with various parties to achieve the desired targets. Some medical tourism destination countries offer health care at a lower cost compared to the patient's country of origin. Efficient financing can help patients achieve more affordable treatment costs. The results of this study are in line with research (Intama & Sulistiadi, 2022) which found that one of the factors that influence patients' interest in getting health services is affordable prices. So that adequate financing allows hospitals and medical facilities in destination countries to build and update infrastructure and adopt the latest medical technology to provide better services to patients.

Certain medical treatments can be very expensive, and patients may find it difficult to pay for these costs even when getting a good offer. In this study, four main factors were discussed, namely destination competitiveness, service quality, tourist attitude, and cost (Santoso, Andajani, & Megawati, 2020). By overcoming challenges and optimizing opportunities, medical tourism can continue to grow and provide significant benefits for all parties involved.

Tourist Attraction

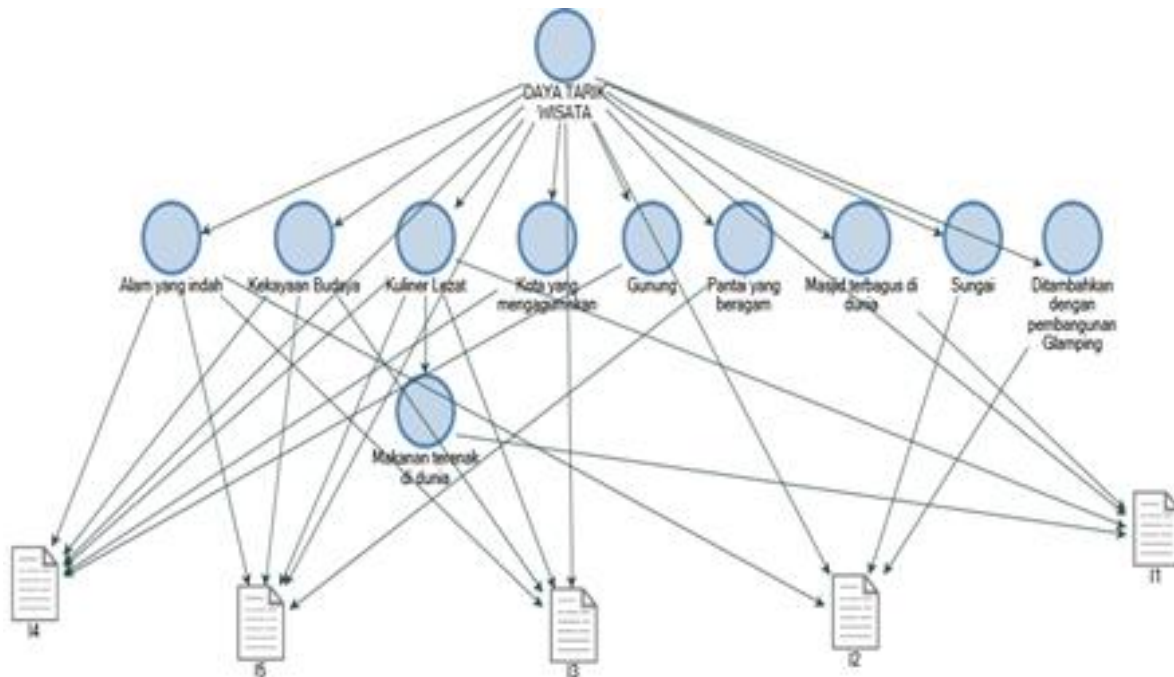


Figure 10. Tourist Attraction

West Sumatra has diverse and captivating tourist resources, making it a valuable addition to the development of medical tourism in the region. West Sumatra has extraordinary tourist attractions, especially in terms of natural beauty, cultural heritage and culinary. West Sumatra has a diverse range of natural features including lakes, valleys, mountains, beaches, and seas. Additionally, the region is rich in cultural diversity and offers a variety of unique local traditions and customs. Several areas such as Padang Beach, Bukittinggi, Solok, and Pariaman stand out as attractive tourist destinations (Ferniza, 2017).

There is still potential that has not been fully explored. The main key to creating an area with a good tourism industry is the realization of visitor comfort. The convenience of visitors can be realized if there is a tourism-friendly culture and community behavior and there is mutually sustainable infrastructure between tourist destinations (Hesna, Suraji, Istijino, Hidayat, & Ophyandri, 2016). One of the tourism potentials is particularly in the development of medical tourism. Medical tourism is one of the challenges and opportunities to develop tourism in West Sumatra. By taking advantage of the rich local tourism potential, the development of medical tourism can be an attractive solution for patients from all over the world who are looking for quality health care while enjoying the natural charm and culture of the region.

Confirmation Question

Overall it can be understood that some informants expressed readiness and support to make the hospital a medical tourism hospital. With good readiness from RS. M. Djamil, RSAM and RS. Unand. There is an awareness of the importance of internal improvement, including in terms of human resources and services, to comply with medical tourism standards. Collaboration with various related parties, including the Tour Organizers Association, airlines, hotels and restaurants, is considered important to build a solid ecosystem. Several informants stated that the readiness to become a medical tourism hospital was still in progress and required careful preparation.

CONCLUSIONS

The knowledge of all informants from the hospital about medical tourism is adequate. M Djamil Hospital, Unand Hospital and RSAM have the best readiness in terms of human resources and marketing. Meanwhile, in

terms of promotion, RSAM, M Djamil Hospital, and Unand Hospital were the best. M Djamil Hospital, Unand Hospital and RSAM have high readiness in terms of facilities and infrastructure. The cost of medical treatment in the context of medical tourism is different from the use of BPJS (Fee for service). All areas around the hospital have very interesting tourist destinations. The level of readiness of the best hospitals in undergoing medical tourism is M Djamil, Unand Hospital and RSAM.

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