

Study on The Potential of Developing Medical Tourism in Sri Lanka with Special Reference to the Major Private Hospitals in Sri Lanka

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Abstract

Medical tourism is one of the emerging segments in the global tourism arena. Asia Pacific region holds the largest share in the global medical tourism sector. But in Sri Lanka, it is still in its infancy level. Since Sri Lanka is focusing on developing medical tourism, this study helps determine the factors influencing the development of medical tourism. A quantitative method is used for this study. The sample includes the administration staff who work with international patients care of major private hospitals and key institutions related to medical tourism in Sri Lanka. The simple random sampling method is used as the sampling technique. Questionnaires are conducted to collect the primary data, and the descriptive analysis method is used in analyzing data. Results reveal that facilities in private hospitals and accommodations are sufficient to attract medical tourists. But government support and promotions are highlighted as lacking factors to develop medical tourism. Furthermore, this study suggests strategies for developing human resources, improving government support, and promoting activities to develop medical tourism in Sri Lanka. Since medical tourism is a valuable niche market, the findings of this study help to increase awareness. Medical tourism is a booming segment in Sri Lanka. Therefore, new findings such as medical tourism collaboration with indigenous treatment can be applied for developing this sector. This study encourages the government to develop the medical tourism segment in the future. And also, would provide guidelines in policymaking and updating rules and standards, cooperating with relevant institutions to develop medical tourism in Sri Lanka.

Keywords: *Factors, Medical Tourism, Potentials, Private Hospitals, Sri Lanka*

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Introduction

Background of the Study

Medical tourism is one of the emerging tourism sectors in the world. Every year about 14 million people travel abroad to obtain their medical treatments, especially for dentistry, transplants, cancer, and cosmetic surgery. It is estimated that the market is growing at a rate of around 15%-25% per year. KPMG in Thailand published that there is about 17.9% compounding annual growth rate was recorded in 2013-2019 while in 2019, it was estimated at USD 32.5 billion. In 2018 the global medical tourism market was valued at about USD 16,761 million (Medical Tourism Market, 2018). In 2012, the Asian region received about USD 100 million from medical tourism. This is expected to be USD 500 million in 2020. Patients travel to other countries to obtain their medical treatments, making them cost-effective, high-quality standard services. Compared to the USA, patients can save about 40%-55% if they visit Taiwan for the same medical treatment. This is about 50%-75% in Thailand, and in India, it is up to 65% or even 90%. (Harper, 2019). Countries like India, Thailand, and Singapore have captured more market share in the medical tourism market.

Medical tourism in Sri Lanka is in its infancy. But recently, more and more private hospitals are trying to engage in the medical tourism sector. At present Sri Lanka receives most medical tourists from Maldives and Seychelles. Colombo is the capital city of the country. Colombo is highly engaged with medical tourism in Sri Lanka compared to the other cities of Sri Lanka. The government has identified medical tourism as a subsector that could lift export earnings to the USD 20 billion targets, they have set out to achieve in 2020. They have identified that developing existing tourism and health infrastructure would help to achieve this target. According to the Sri Lankan Tourism Development Authority's (SLTDA) annual report 2019, Sri Lanka received 2,333,796 tourists in 2018. The majority of tourists are from India, China, the UK, Germany, and France. Since China is expected to overtake the United States of America, there is an advantage for Sri Lanka to promote medical tourism for Chinese tourists as a significant tourist market for medical tourism in Sri Lanka (Daily Mirror, 2017).

Problem Statement

Sri Lanka Export Development Board (EDB) has mentioned that Sri Lanka is an emerging medical tourism destination due to cost-effectiveness for medical treatments and the quality of the medical services provided to patients. Athukorale (2018) has highlighted the developing medical tourism sector as a key factor to develop tourism in Sri Lanka. Since Sri Lanka is an island with compact tourist attractions, there are many opportunities to expand medical tourism. Not only natural attractions but also human attractions can also be identified as resources. Since Sri Lanka is famous for hospitality, many exotic attractions and skilful labourers in the medical sector can develop medical

tourism in Sri Lanka. Countries in Asian regions have won a good reputation for medical tourism. But Sri Lanka is still not developed as a medical tourism destination as other competitive medical tourism destinations in the Asian region. Therefore, understanding the current state of the medical tourism segment in Sri Lanka and identifying the factors affecting the development of the medical tourism segment in Sri Lanka is necessary. Therefore, this study is undertaken to identify whether available resources, facilities, and services are enough for medical tourism development and identify significant issues to the development of medical tourism in Sri Lanka.

Research Questions:

- What are the factors that affect the development of medical tourism in Sri Lanka?
- What is the relationship between factors that affect medical tourism and the potential development of medical tourism ?

Research Objectives:

- To identify factors affecting developing medical tourism in Sri Lanka.
- To understand the relationship between factors that affect medical tourism and the potential development of medical tourism.

Significance of the study

This study provides knowledge on a niche tourism market segment. Moreover, this study provides information on the importance of engaging the medical tourism market. This niche segment of the tourism industry provides a significant contribution to the development of the world economy. Especially medical tourism helps to develop the economy of developing countries. Sectors like tourism, transportation, pharmaceutical industry, and hospitality have developed with medical tourism (Rejeb et al., 2019). Majorly, Sri Lanka is facing vast suffering from seasonality issues in the tourism industry. Engaging with medical tourism would be a better solution for seasonality issues. Moreover, it contributes to infrastructure and facility development, human resources empowerment, and foreign exchange earnings. This study is not only limited to policymaking and industrial significance but academic significance also. Furthermore, this study helps to enhance knowledge on the global medical tourism segment's comparative understanding and the current situation of the medical tourism segment in Sri Lanka. As a whole, this study provides a thorough understanding of policymaking, industrial and academic significance on medical tourism development in Sri Lanka.

Literature Review

Medical Tourism

Term medical tourism always combines with health tourism. Health tourism means "The organized travel outside one's local environment for the maintenance, enhancement or restoration of an individual's wellbeing in mind and body" (Carrera & Bridges, 2006). Health tourism is a broader term that "encompasses all treatments that enhance the wellbeing of the human body in both internally and externally from spa and relaxation treatments, cosmetic surgeries to elective surgeries and essential surgeries which include essential procedures such as heart transplants or hip implants" (Caballero & Mugomba, 2007). Health tourism can be divided into various sub-sectors. Mainly it can be divided into two sub-sectors as wellness and medical (Collins et al., 2018; Smith & Puczko, 2008).

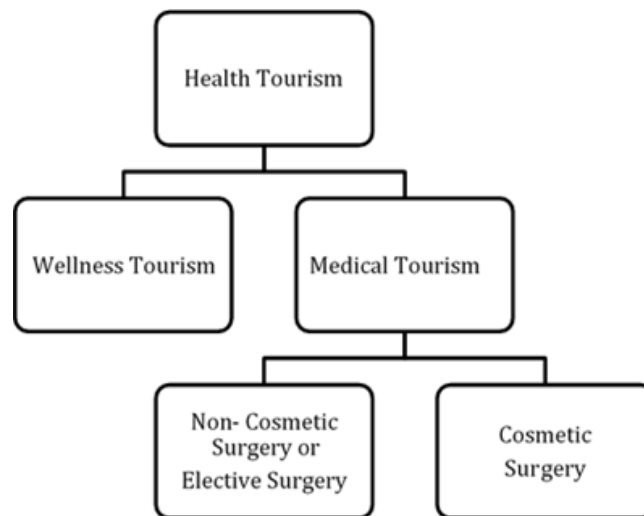


Figure 1: Typology of Health Tourism

Source: Caballero, & Mugomba, (2007).

Many scholars have presented definitions regarding medical tourism. Collins et al. (2018) have described 'Medical tourism' is concerned with Western medicine such as complex diagnostic tests, surgeries related to cancer, cardiac, organ transplant, hip/knee replacements and reproductive". Furthermore, he has mentioned medical tourism as Travelling abroad or outbound from one's country of residence to the host country for medical treatments, diagnostic tests, and complex phenomena like surgeries. Medical tourism originated in Roman Britain when wealthy people started to travel to significant spa towns for taking baths in healing waters. Numerous other spa and sanatorium towns from Europe to the Middle East attracted prosperous visitors (Enderwick & Nagar, 2011). Recently, travelling for medical purposes began from English-speaking countries (United States) due to the considerable cost and avoiding waiting lists. Generally, in most western

countries, the cost of medical treatments is high. Patients can find the same treatments in Asian countries like Singapore at a lower cost. Enderwick & Nagar (2011) have highlighted that the key difference between historical and contemporary medical tourists is that the latter medical tourists tend to enjoy new healthcare opportunities which do not necessitate almost unlimited resources. Now they do not travel for only medical treatments, and they seek to find more relaxation and other enjoyment factors while on their tour. Technology and information systems have played a significant role to develop medical tourism.

Some countries are well renowned for medical tourism. According to Stephano (n.d.), the top 10 medical tourism destinations in the world can be identified as Thailand, India, Brazil, Malaysia, Turkey, Mexico, Costa Rica, Taiwan, South Korea, and Singapore. Asia Pacific region holds the largest share in the medical tourism market. Availability of treatments for a lower cost, no waiting lists, non-availability of some treatments in the home country, tourism and vacation, privacy, and confidentiality (Horowitz & Rosensweig, 2007) are the reasons to develop medical tourism. Furthermore, Kahveci (2017) mentioned that Undeveloped and developing countries are endowed with qualified human resources, advanced technological devices, and tourism facilities with competitive prices compared to the developed countries for supplying health care to the patients have caused to develop medical tourism. Medical tourism has both positive and negative impacts. Positive impacts are higher than negative impacts. If a country is targeting medical tourism, the country should have a developed medical infrastructure and facilities. Singapore is the best example of this. When the medical infrastructure is developed, it will increase the overall health of the people. Medical tourism directly contributes to the country's economy. It is direct foreign income. This type of income is a big boost for countries like Sri Lanka. For example, in countries like Thailand; a considerable amount of a country's GDP is obtained through medical tourism. There are some negative impacts of medical tourism also. Illegal organ planting is one of them. In India, this has become a common thing. People are kidnapped and killed for their organs such as lungs, kidneys. Poor people tend to sell their organs for money. All these things are believed to be connected with medical tourism.

Factors affecting medical tourists' arrivals

Earlier medical tourism was bound to high-income citizens of developed countries who travelled to receive sufficient health services from a developed country. But today it is reversed (Aktas & Gokce, n.d.). Mainly, the Globalization of the international health standards and increasing standards of health technologies. Some treatments are charged higher prices in the home country, but the same treatments are charged at lesser prices with similar services. This reason would drive medical tourists more. Furthermore, avoiding waiting lists and some not available treatments in the home country also encouraged medical tourists to travel to another country. Most western countries have insurance systems, but some treatments cannot be charged in insurance systems. For that reason, some medical tourists are encouraged to travel to medical tourism destinations to get treatments, especially in aesthetics, cosmetic surgery, and in vitro fertilization. Receiving

more quality health services and the positive psychological effect of travel and treatment incorporation on the patient also affected medical tourists' arrival. Furthermore, Tourism and vacation and Privacy and confidentiality also contributed to medical tourists' arrivals (Horowitz & Rosensweig, 2007). Since the medical tourism segment is lucrative, most private hospitals in profit-oriented organizations are encouraged to get involved. Therefore, there can be a trend of engaging private hospitals in the medical tourism segment rather than private sector hospitals.

Medical tourism in Sri Lanka

The medical tourism segment is developing recently. At present Sri Lanka receives most medical tourists from Maldives and Seychelles. Sri Lanka does not have much history regarding medical tourism. The history of medical tourism in Sri Lanka does not exceed more than ten years. In 2015, the private hospital association targeted 20,000 medical tourists and increased it to 100,000 by 2020. About 15% of the total foreign patients come to Lanka hospitals. Highly competent doctors and nurses, a high standard of service, and full of attractions can be identified as potentials for medical tourists. By this time there can be a better intervention of private and government sectors for developing medical tourism in Sri Lanka. Durdans Hospital Private Limited and Lanka Hospital Private Limited have already started promoting medical tourism in Sri Lanka. They have signed some agreements with international organizations to promote medical tourism in Sri Lanka. Further, the government of Sri Lanka also provides its support for developing medical tourism. But further, there can be identified barriers regarding medical tourism to promote with comparatively other competitive destinations in South East Asia.

Methodology

Research Approach

The researcher has used the deductive approach for this study. The deductive approach is developed theory and builds a hypothesis and designs a strategy to test the hypothesis (Creswell, 2014). Quantitative methods design is applied to present the researcher's study because quantitative data tends to be open-ended without predetermined responses (Creswell, 2014).

Research Design

Quantitative data were gathered through semi-structured questionnaires. A simple random sample was applied for this study. Since medical tourism in Sri Lanka is still in its infancy, it could not be found a definitive list of private hospitals engaged in medical tourism. Therefore, five major private hospitals in Sri Lanka that conduct medical tourism are selected based on the Export Development Board committee. The exact size of the population was used as the sample. Semi-structured questionnaires were distributed

among the 51 staff members working in the international patient care units of the selected private hospitals in Sri Lanka. The semi-structured questionnaire consisted of 29 questions which were measured from a 5-point Likert scale. Previous research on medical tourism identified key factors' effects on medical tourism and medical tourism development issues. The researcher developed the conceptual framework based on previous studies such as Oberoi & Kansra, 2019; Kahveci & Okutmus, 2017; Heung et al., 2011; Medhekar, 2019; Collins et al., 2019; Karamehmet, 2017. Figure 2 shows the conceptual framework, which is used in this study.

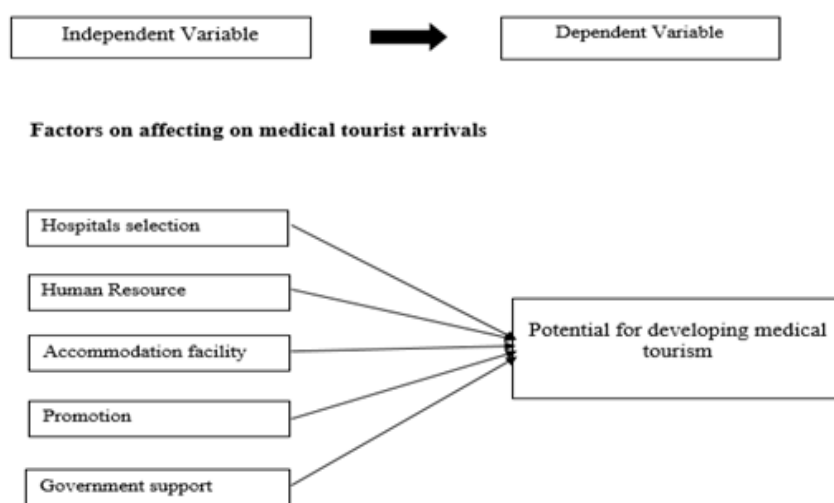


Figure 2: Conceptual Framework

This model consists of independent variables and dependent variables. The dependent variable describes the potential for developing medical tourism in Sri Lanka, while factors affecting medical tourist arrival are described as the independent variable. The independent variable consists of five dimensions: Hospital Selection, Human Resources, Accommodation Facility, Promotion, and Government Support. Based on the previous literature, the researcher has developed a conceptual framework. Six factors have been identified under the dimension of hospital selection. The human resource factor consists of five dimensions, while the accommodation facility consists of three factors. Then two factors are under promotion, and three factors are mentioned in Government Support.

Research Hypothesis

H1 a: There is a relationship between factors effect on Hospital Selection and medical tourism development in Sri Lanka.

H0 a: There is no relationship between factors affecting Hospital Selection and medical tourism development in Sri Lanka.

H1 b: There is a relationship between Human Resources in the medical sector of Sri Lanka and medical tourism development in Sri Lanka.

H0 b: There is no relationship between Human Resources in the medical sector of Sri Lanka and medical tourism development in Sri Lanka.

H1 c: There is a relationship between accommodation facilities in Sri Lanka and medical tourism development in Sri Lanka.

H0 c: There is no relationship between accommodation facilities in Sri Lanka and medical tourism development in Sri Lanka.

H1 d: There is a relationship between Promotion activities and medical tourism development in Sri Lanka.

H0 d: There is no relationship between Promotion activities and medical tourism development in Sri Lanka.

H1 e: There is a relationship between Government Support and medical tourism development in Sri Lanka.

H0 e: There is no relationship between Government Support and medical tourism development in Sri Lanka.

Validity and Reliability Analysis

The term reliability refers to the consistency of a research study or measuring test. Cronbach's Alpha value is calculated to test the internal consistency reliability of the instrument. The research instrument is considered to be reliable, and an alpha score of 0.7 is generally acceptable. Validity defines as the extent to which the concept is accurately measured. Kaiser-Meyer-Olkin (KMO) value is calculated to test the adequacy of sample size. KMO value of 0.5 is set as a generally accepted value. Validity and reliability in this study are confirmed since both reliability and validity test values are more significant than generally acceptable values.

Data Analysis Techniques

The researcher has analyzed the collected data using Statistical Package for Social Science (SPSS) statistical software and descriptive analysis. The tested result is obtained by thoroughly analyzing the data using the software. Descriptive analysis refers to raw data information in a form that will make it researchers easy to realize and interpret. Descriptive statistics are provided by frequencies, measures of central tendency, and dispersion. Frequency procedure is used to obtain statistics and graphical displays which are useful in presenting various types of variables.

Data Analysis

Factors affecting medical tourism development

Table 1.1 shows the factors affecting the potential of medical tourism development. The researchers used quantitative data and calculated each mean value for each dimension to identify issues. The highest factor is identified as the "Availability of transport to the potential for developing medical tourism" with the highest mean value of 4.3137. The lowest mean value is identified as "Promoting of doctors" with the average mean value being selected as 3.

The accreditation facility that the hospitals in Sri Lanka obtain was identified as the second highest mean value of factors affecting medical tourism's potential development. Other significant factors for the potential for developing medical tourism were availability of supportive facilities, cost effect for selecting a hospital, availability of the number of doctors, reputation for the hospital, waiting time for the patients, Policies and rules etc. Meanwhile, the lowest mean value for factors to develop medical tourism is identified as Promoting of doctors. Then, promotion through the internet, Public-private participation to develop medical tourism in Sri Lanka, government support and Service quality, and nurses' experience are identified as issues to develop medical tourism in Sri Lanka.

Table 1.1: Factors effects on developing medical tourism in Sri Lanka

Dimensions	Factors	Mean value by developing factors	Mean value by dimensions
Selection of hospital	Cost	4.0588	4.0196
	Waiting time for the patient	3.6471	
	Reputation for the hospital	4.0392	
	Accreditation facility	4.2353	
	Availability of supportive facilities	4.0980	
	Capacity of hospital	3.8039	
Human resources	Number of doctors	4.0588	3.6495
	Availability of accredited and specialists' doctors	3.7353	
	Number of nurses	4.0588	
	Service quality and experience of nurses	2.9608	
	Language fluency	3.5098	
Accommodation facility	Availability of transport	4.3137	4.1765
	Facilities in hotel rooms	3.3922	
	Available attractions	4.1569	
Promotion	Internet	2.7745	2.6928
	Promoting of doctors	2.5294	
Government support	Public-private participation	2.8431	3.2431
	Government support	2.882	
	Policies and rules	3.6667	
Dependent Variable (Arrivals)	Number of arrivals	3.7255	3.6765

Source: Survey Data, 2020

Potential for the development of medical tourism

According to table 1.2, R2 can be identified as the proportion of variance in the dependent variable (potential for the development of medical tourism) which can be explained with independent variables (Hospital Selection, Human Resource, Accommodation Facility, Promotion and Government Support). The value of R2 is 0.503, which indicates that the study's predictor variables have accounted for 50.3% of the variation in factors for medical tourism development. The significance level of the ANOVA table is 0.000, which is less than 0.05. It provides evidence to the fact that the model is moderately fitted to the regression model.

Table 1.2: Model Summary

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate	Durbin-Watson
1	.709	.503	.448	.57483	1.666

Pearson's correlation analysis shows the relationship between the factors affecting medical tourism development and the potential medical tourism development in Sri Lanka. Relationships of all the variables can be accepted because all values are less than 0.05. All the variables show a positive relationship; it means all variables positively influence medical tourism development. Two variables: the hospital selection factor and human resource factor shows moderate level positive relationships. Both these variables have more influence on the development of medical tourism in Sri Lanka. Other variables like accommodation facility, promotion and government support variables have less influence on medical tourism development in Sri Lanka.

Table 1.3: Summary of the correlation of the independent variables

Variables	Pearson value	Significant value	Comments
Hospital Selection	0.556	0.000	Moderate level of positive relationship
Human Resource	0.604	0.000	Moderate level of positive relationship
Accommodation facility	0.477	0.000	Low level of positive relationship
Promotion	0.286	0.004	Low level of positive relationship
Government support	0.469	0.000	Low level of positive relationship

Source: Survey Data, 2020

Further, to describe the relationships of all independent variables, coefficient values are studied. When the Hospital Selection variable increases by one unit, the medical tourism variable will be positively affected from 0.62 units, which means factors like lesser cost, limited waiting time, hospitals' reputation, etc. positively affect the development of medical tourism in Sri Lanka. This statement also can be accepted with a 99.4% interval because the significance value is lesser than 0.05. Factors such as hospital selection variables, human resource variables also positively affect medical tourism development in Sri Lanka. Human resources related to medical tourism in Sri Lanka are positively affected by the development of medical tourism in Sri Lanka. Since the Beta value shows 0.426, this statement cannot be accepted due to the significant value being greater than 0.05. It means available human resources are not enough for medical tourism development in Sri Lanka. Availability of government support also positively affects medical tourism development. The Positive Beta value obtained shows the evidence for that. But greater significance indicates that available government support is not enough to develop medical tourism in Sri Lanka. The accommodation variable has a negative beta value, and it means that increasing accommodation facilities negatively affect medical tourism development in Sri Lanka. Therefore, accommodation variables do not affect the development of medical tourism in Sri Lanka. The promotion variable also shows a negative Beta value. It means available promotion activities do not cause medical tourism development in Sri Lanka, and this statement also cannot be accepted due to the more excellent significance value.

Table 1.4: Coefficient Model

Unstandardized Coefficient	Standardized Coefficient				
	B	Std. Error	Beta	T	Si
Hospital Selection (HS)	.620	.213	.463	2.911	.006
Human Resource (HR)	.426	.259	.320	1.644	.107
Accommodation (AC)	-.361	.160	-.301	-2.264	.028
Promotion (PR)	-.058	.119	-.073	-.487	.629
Government Support (GS)	.145	.160	.137	.905	.370

Source: Survey Data, 2020

Stated hypotheses are used to assess whether available factors which affect medical tourism are enough to develop medical tourism in Sri Lanka at present. Based on the values given by the hypothesis, it indicates that available factors on Hospital Selection are enough to develop medical tourism in Sri Lanka since the first hypothesis was accepted. Available human resources are not enough to develop medical tourism in Sri Lanka due to the second hypothesis being rejected. Available accommodation

facilities are enough to develop medical tourism in Sri Lanka. But negative Beta values highlighted that increasing accommodation facilities do not cause the development of medical tourism in Sri Lanka. Therefore, the analysis results highlighted that available accommodation facilities are enough for medical tourism development, and there is no need to increase. Based on the hypothesis results, available government support is not enough to develop medical tourism in Sri Lanka. As a whole, factors available on hospital selection and accommodation facilities are capable of medical tourism development. In contrast, available human resources, promotion and government support are not capable of developing medical tourism in Sri Lanka.

Conclusion

Sri Lanka is one of the very famous tourist destinations in the world in several dimensions. But yet medical tourism is in its infancy level, though the Asia Pacific holds the largest market share. To develop this segment identifying current situations and identifying issues is a must. Available transport facilities, tourist attractions, accommodation facilities and the number of available doctors and nurses are enough to develop medical tourism. The cheaper cost of health services, lesser waiting time obtained accreditation facilities, and better supportive facilities are mainly driven to attract medical tourists to Sri Lanka. But the main issue to developing medical tourism is the lack of promotion activities are highlighted. This study highlights available hospital selection factors such as lesser cost, limited waiting time, accreditations and support facilities that are enough to develop medical tourism. But available human resources and promotion and government support are not sufficient. Therefore, some recommendations are suggested to mitigate those issues.

Implications and Recommendations

Implications

This study has facilitated necessary implications for key stakeholders in the medical tourism industry. This helps to identify barriers and provide suggestions to mitigate them. The findings of this study can be used for private hospitals in Sri Lanka. Private hospitals can identify their strengths which affects the development of medical tourism in Sri Lanka. Furthermore, hospitals can identify their weaknesses in developing medical tourism, and studies can be used to develop issues for developing medical tourism. This research helps to highlight the issues which affect the development of medical tourism in Sri Lanka. Therefore, government-related bodies can know operations and key players in the medical tourism sector. For the Ministry of Health, this study provides knowledge about medical tourism and provides a thorough understanding of the importance of developing medical tourism in Sri Lanka.

Furthermore, this study facilitates policy-making, supports establishing standards, and develops infrastructures regarding the medical tourism sector in Sri Lanka. This study has identified a new and lucrative tourism segment. Therefore, SLPB can adjust its promotion campaigns by providing sufficient weightage and effective marketing strategies to promote medical tourism in Sri Lanka.

Recommendations

Developing both Doctors, Nurses, and other employees' human resource factor is a must to develop the medical tourism segment. Therefore, some strategies can be applied. Arranging overseas training programs for high-end surgeries and increasing in-house doctors and nurses are more important. As well as facilitating abroad work experience for nurses, establishing nursing schools with a higher standard would help develop the human resource factor. Increasing promotion activities would help to enhance awareness of medical tourism in Sri Lanka. Therefore, some promotion strategies can be applied. Such as participating in international exhibitions, identifying new potential markets; countries that do not have well-developed medical facilities, including the medical tourism sector in the primary tourism campaign, affiliating with insurance companies, and interacting with wellness tourism can be recommended. Government support for promotion is mostly needed.

Furthermore, to remove some legal barriers; government involvement is highly needed. Key institutions should provide much attention to developing medical tourism. Limitation: massive documentation, providing funds, and altering some legal barriers such as kidney transplants can be highlighted.

Suggestions for future researchers

Some further studies can be conducted regarding the demand perspective in medical tourism or the push and pull factor motives. Since there is a small market for medical tourism, identifying the basic need of medical tourists would be more critical. Furthermore, a comparison study can be done between two or more medical destinations that would be more effective in the medical tourism arena.

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