

OVERCOMING UNCERTAINTIES: ADAPTING PATIENT EXPERIENCE FOR SUSTAINABLE HEALTH TOURISM

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Abstract - Recent developments have led to increasing pressure on healthcare institutions to continuously upgrade clinical capabilities and concurrently provide added-service offerings to attain strong competitive advantages. In addition to the uncertainties of the global business environment, healthcare providers must adapt to the changing needs and demands of consumers. Demands for health services are no longer confined to clinical care and have extended to include overall wellness, including both physical and mental health. This study provides an exploration of health tourism as part of the health industry constellation undergoing transformations consequently to adaptation. Based on a systematic desktop research, a descriptive analysis was employed to map the health tourism profile of three countries, namely, Malaysia, Singapore and Thailand. Compiled information on selected health institutions was then used to evaluate the degree of which Patient Experience (PX) principles were adjusted in offering health tourism destinations. Results indicate that although health tourism encompasses a broad range of experiences, high quality medical-based services allow for enhancing existing capabilities to serve as favorite destinations. Adapting PX to encapsulate hospitality in health care offers clear guidelines to ensure optimum quality of services and successful adaptation. Ultimately, this study is the starting point necessary to overcome uncertainties and shed light on the alternative paths for sustainability of health tourism.

Keywords - health tourism, patient experience, services, destinations, sustainability

INTRODUCTION

The health industry has undergone dramatic changes in the last few years. Disruptions from the COVID-19 pandemic has taken the world by storm when the aftermath led to the realization of inadequacies in the existing health services infrastructure. In the last few years, policy makers in many countries are evaluating ways to improve accessibility to quality care for all citizens. Recent developments have led to the increasing pressure for healthcare institutions to continuously upgrade clinical capabilities and concurrently provide added-service offerings to attain strong competitive advantages.

In addition to the uncertainties of the global business environment, healthcare providers must adapt to the changing needs and demands of consumers. Heightened post-pandemic concerns over health has gone far more than medical fitness and include overall wellness leading to future trends of ageing population, demands for more virtual healthcare and customized personal diets as well as increasing attention towards mental health, the environment and use of technology to improve wellness (Broom, 2022). In a recent Future of Wellness report, the McKinsey & Company estimated that the global wellness market amounted to \$1.8 Trillion where the survey found upcoming trends to include increasing demands for health at home, use of biomonitoring and wearables, personalization, shift to natural ingredients and improved doctor recommendations (McKinsey & Company, 2024). The consumer landscape in the health industry has changed and is expected to be everchanging in line with the developing medical solutions and technology.

The Global Wellness Institute (GWI), a non-profit organization that promotes education on preventive health and wellness (GWI, 2024), defined wellness as “the active pursuit of activities, choices, and lifestyles that lead to holistic health,” which is multi-faceted with such dimensions as physical, mental, emotional, spiritual, social and environmental (Yeung et al., 2020). Estimated to a total of \$5.6 Trillion in 2022, the wellness economy encompasses major contributions from such sectors as healthy eating, nutrition, and weight loss (\$1,079 Billion), personal care and beauty (\$1,089 Billion), physical activity (\$976 Billion), wellness tourism (\$651 Billion), public health prevention and personalized medicine (\$611 Billion), traditional and complementary medicine (\$519 Billion), wellness real estate (\$398 Billion); as well as fewer contributions from mental wellness (\$181 Billion), spas (\$105 Billion), workplace wellness (\$51 Billion), and springs (\$46 Billion) (GWI, 2023). These estimates showed the growing demands as well as the apparent overlap between health, wellness, tourism and other service industries. Demands for health services are no longer confined to clinical care and have extended to include overall wellness, including both physical and mental health.

From another perspective, healthcare providers have long been aware of the significance in incorporating hospitality and patient-centeredness in their operations. Traditionally focusing on the “hard” medical outcomes, reputable hospitals such as the Cleveland Clinic has brought the hospitality approach to the hospitals and embed the “soft” services with the warm welcomes, smiles and empathetic approach to patient care (Solomon, 2017). Health practitioners recognized that hospitality in hospitals is essential as the

patients' and families' needs are addressed appropriately, with dignity and appreciation so as to provide support during times of distress (Burke, 2023). The shift towards patient-centered health services is reflected in the inclusion of Compassionate Care in nursing and application of the Patient Experience (PX) concept defined in hospital management standards today. In the Joint Commission International (JCI) Accreditation Standards, which is one of the highest standards for top quality hospitals, patient-centered care is at the forefront that defines the entire set of performance indicators (JCI, 2020). As a consequence, medical institutions are adopting an ambidextrous approach of exploiting competitive advantage in the clinical portion and exploring new advantages in incorporating hospitality-related services to the existing operations.

One area of interest that is shaped by the changing health services market is health tourism. Lee & Kim (2015) found that health tourism covers medical and wellness tourisms with clear distinctions in the purpose of the patients, where unlike wellness tourists, medical tourists mainly concerned with treating certain diseases and do not pay much attention to the entertainment-related attributes of the destinations. However, the Global Healthcare Accreditation (GHA) defined three types of health tourism, namely medical tourism, wellness tourism and preventive healthcare tourism (GHA, 2023). Various reports have shown the rapid development in health tourism, which is also expected to further grow given the increasingly prioritized consumption, followed by accessibility for medical and wellness services globally. Allied Market Research estimated that global market size for medical tourism in 2022 was \$97.31 Billion and expected to reach \$273.72 Billion by 2032 (Allied Market Research, 2023). On the other hand, since wellness tourism encompasses preventive medicine, while GWI estimated the total global market size for wellness tourism in 2022 to be \$651 Billion (GWI, 2023), Global Newswire reported \$822.3 Billion wellness tourism market in 2022 and predicted it to be \$1,922.2 Billion by 2032 (Globe Newswire, 2023). Although discourses appear to make distinctions between the term medical and wellness tourism, academic discussions converged under the umbrella category of "health tourism" (see for example Lee & Kim, 2015); Polat & Koseoglu, 2023; Majeed & Gon Kim, 2023; Roman et al., 2023). Consequently, previous studies have examined health tourism from various perspectives yet there are still uncertainties in what constitutes organizing quality services for patients that are willing to travel for certain medical and/or wellness services.

This study provides an exploration of health tourism as part of the health industry constellation undergoing transformations consequently to adaptation. Considering the changing landscape on health-related services, healthcare providers need to understand how to extend to hospitality in order to expand to health tourism. This study will observe the role of PX in well-known hospitals that allows for excellence in health tourism. Method of analysis is a systematic desktop research of prominent health tourism providers in three countries, namely Malaysia, Singapore and Thailand, to gain a good understanding on how they operate. Subsequently, this article examines how the PX concept is adapted by those high-performing hospitals to extend their breadth of services. In particular, the main objective of this study is to provide certainty that adopting PX allows healthcare providers to participate and, eventually, sustain good performance in health tourism.

METHODS

Based on a systematic desktop research, a descriptive analysis was employed to map the health tourism profile of three countries, namely, Malaysia, Singapore and Thailand. The method used in this article consists of three stages as shown in Figure 1. First stage is a broad search of the dominant segment, between medical and wellness tourism, in selected countries identified as the most favorite destinations for Indonesians. This initial stage found that Malaysia, Singapore and Thailand, are the top three destinations for Indonesians to obtain medical treatment, hence, medical tourism destinations. Subsequently, through more detailed exploration of published reports and articles available online, two prominent hospitals were selected in each country. In the third stage, analysis on the selected hospitals was conducted using the Patient Experience (PX) framework. This way, the analysis was able to determine the extent of PX adoption in the selected prominent hospitals that allow them to be the most selected destinations for health tourism.

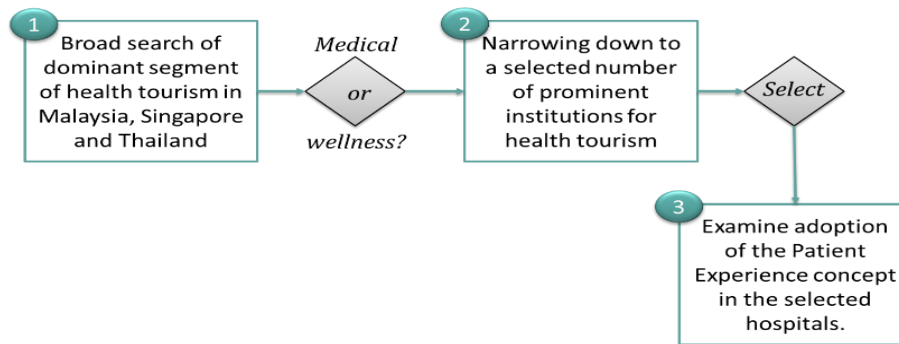


Figure 1. Method of Analysis: Systematic Desktop Research

Identifying Healthcare Providers as Subjects of Analysis

According to the Global Healthcare Accreditation, the 10 best health tourism destinations in the world are Mexico, Costa Rica, Malaysia, Thailand, Turkey, India, Taiwan, South Korea, Singapore and Uni Arab Emirates (GHA, 2024). These countries are considered the best health tourism destinations due to a set of factors that include affordable costs, high quality services, state-of-the-art medical facilities, skilled medical personnel, and robust infrastructures. In addition, the medical institutions are well-known for healthcare services with engaging tourism experiences to attract more international patients. Based on observations and opinions from various researchers, Indonesian people have five favorite country destinations that they often visit for medical services, namely, Malaysia, Singapore, Thailand, United Arab Emirates and South Korea. These countries became favorites due to such factors as the close distances, similar cultures or affordable prices. Considering these five countries are highly recognized for world-class, high quality medical treatments, they are predominantly famous for the medical segment of health tourism.

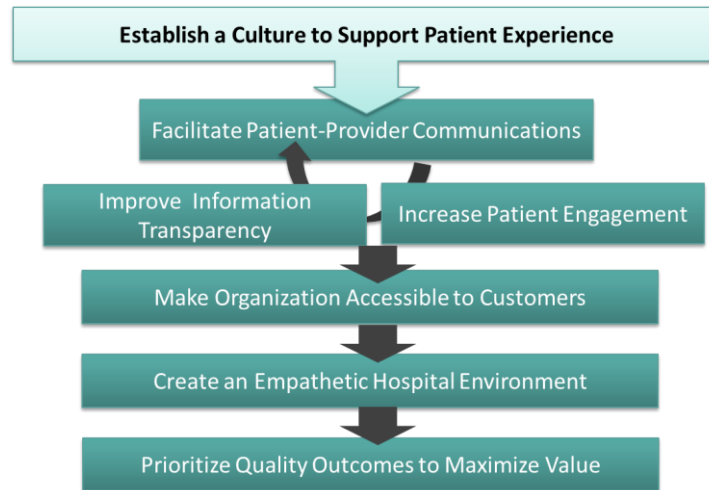
The scope of analysis in this article is the top three countries, namely, Malaysia, Singapore and Thailand, where each is represented by two of the most prominent hospitals. Based on the preliminary desktop research, the three selected countries provide sufficient data necessary for analyzing high-performing healthcare providers. To represent Malaysia, two hospitals selected for further examinations are Gleneagles Kuala Lumpur and Sunway Medical Center. For Singapore, the analysis is on Mount Elizabeth Hospital and Singapore General Hospital. In Thailand, two of the most prominent hospitals identified are Bumrungrad International Hospital and Siriraj Piyamaharajkarun Hospital. These hospitals were selected based on Newsweek's Best Hospital Rankings as published online (Newsweek, 2024a, 2024b, 2024c). The rankings were determined by an online survey of more than 85,000 medical experts and public data on patient satisfaction surveys. In particular, the hospitals' scores were determined considering such metrics as hygiene and patient-doctor ratios as well as a Statista survey on whether hospitals use Patient Reported Outcome Measures (PROMs), which are standardized questionnaires completed by patients to assess their experiences.

The Patient Experience Framework

Realizing the criticality of quality healthcare on hospital performance and reputation, leading hospitals around the world adopt PX in providing health services. Now globally known as a core dimension of health-care quality, the fundamental concept of PX is the human experience of health-care services where "people are taking after people" throughout a continuum, starting from when patients experience health, to experiencing disease and obtaining healthcare services (Oben, 2020). Healthcare providers must understand and prioritize PX as the main factor for organizational success and sustainability, which determines the ability for hospitals to attain competitive advantage (Birkelien, 2017). In other words, service quality is measured from the patients' perceptions on the care received. Therefore, hospitals need to not only ensure good clinical outcomes but also positive perceptions of their services.

Adopting PX in hospitals not only requires embedding patient-centered care in the policies and procedures but the basic principles also need to be consistently implemented throughout the organization. At its core, the process of providing health care is humanity throughout the patient-provider interactions, which affects patients and practitioners (Oben, 2020). Aside from a complete PX adoption in hospitals, management must always thrive for improvements so as to maintain and consistently enhance service quality. Birkelien (2017) offers a framework for PX improvements in hospitals that allows for complete orchestration of an organization system that prioritize patient-provider communications, promote information transparency and patient engagement. The framework consists of seven elements designed to

prescribe how management can work towards establishing an accessible organization with an empathetic environment that aims for maximizing value (Birkelien, 2017). A graphical representation of the framework is presented in Figure 2.



Source: Adapted from the Framework for Patient Experience Improvement as proposed by Birkelien (2017).

Figure 2. Theoretical Framework for PX

LITERATURE REVIEW

Previous studies have shown the significance of facilities and promotion to influence tourists to visit certain destinations (see for example Iswidyamarsha & Dewantara, 2020; Kusumawardhani & Dasa, 2022). Issues related with sustainability in tourism has also promoted discussions, particularly in the field of ecotourism (see for example Dewi et al., 2023; Ardiansyah et al., 2024), as well as few and recent studies conducted on sustainability in health or wellness tourism (see for example Albasrie et al., 2024; Garjan et al., 2023; Wijaya & Priantara, 2024). For this article, the literature review conducted as the premise of this study include two parts. First part is the review on previous studies in scientific journals surrounding the topics of health tourism and patient experience, especially how these constructs relate to organization performance. Second part is the information obtained from various reports and websites available online on the health tourism profile of the selected countries and hospitals. Key information on the selected hospitals collected from various sources are presented in Appendix I.

Patient Experience and Health Tourism

Health tourism is considered an umbrella term that encompass medical, wellness and tourist attractions, representing a highly complex matter considering the vast tourists' expectations and perceptions (Majeed & Gon Kim, 2023). Contextually, health tourism can be distinguished between illness and curative treatments (medical tourism), health and preventive treatments (wellness tourism) and wellness and promotive experiences (well-being tourism) where most research works were on the demand side (Polat & Koseoglu, 2023). From another perspective, health tourism can be categorized into three divisions, medical, curative, and spa and wellness (Roman et al., 2023). Evidently, studies related to health tourism are still developing and consensus on the scope of this field in hospitality research appears vague. Any traveling activities, entertainment, consumption and services related to human welfare seem to be included as health tourism. As a consequence, most studies are through cross-sectional surveys and a strong theory on health tourism has not been established (Polat & Koseoglu, 2023).

Roman et al. (2023) conducted a comprehensive literature review and discovered four areas in health tourism that have been substantially studied scientifically. The first area is the significance of trust leading to patient satisfaction. The second area is the predominance of health impacts provided by the destination, which includes economics, as the main consideration in selecting destinations. Third area is on topics related with health behavior as the main portion of current lifestyle. Fourth area is discussions on the pattern of people traveling for health and simultaneously going to certain destinations for pleasure. In other words, as health tourism revolves around human activity, the subject is an amalgamation of various streams of

studies, including medical, psychology, hospitality, technology, and so on. This may be the source of the complexity in health tourism and why scientific research is still emerging.

Nevertheless, from a strategic management point of view, health tourism service providers can be observed from the strategy process perspective. Moreover, stemming from the patients traveling for medical treatments phenomenon, providing health-related services requires a certain kind of organization. Business organizations with the most experience in providing solutions to help people to be healthy are the hospitals where internationally acclaimed institutions provide health-related services at optimum performance. Therefore, examination of prominent, internationally accredited hospitals offers insights on how to provide good health tourism destinations. Such hospitals orient towards patient experience, which is defined as “the sum of all interactions, shaped by an organization’s culture, that influence patient perceptions across the continuum of care” (The Beryl Institute, 2024). Essential elements of PX as defined by the Beryl Institute include interactions, culture, perceptions and the continuum of care.

Specifically, PX provides the foundation for a set of quality-service standards in hospitals. Management adopting PX can consistently implement a set of operational elements prescribed so as to ensure positive outcome. In US hospitals, compliance to PX is enforced by the Government since 2008, through the mandatory Hospital Consumer Assessment of Healthcare Providers and Systems (HCAHPS) Survey where hospitals must use a set of standardized questionnaires to collect data on patient satisfaction (Birkelien, 2017). Healthcare practitioners and regulators have long realized the necessary emphasis on measuring and reporting of patient satisfaction because good performance depends on customer service and patient-provider interactions (Fottler et al., 2002). Applying PX principles in hospital management practices is essential for not only ensuring good clinical outcomes but also providing quality services.

Center of the PX construct is human experience in healthcare, which is “grounded in the experiences of patients & families, members of the healthcare workforce and the communities they serve” (The Beryl Institute, 2024). Fundamentally, PX in hospitals is about instilling the basic notion that human experiences are unique and begins when the individual is healthy then shift to conditions where the individual experience disease and followed by the health-care services (Oben, 2020). Hospital management needs to organize the resources so as to provide healthcare services that promote positive human experiences as the patients’ experiences. More importantly, adopting PX is at the core of high-performing hospitals where quality services means both outstanding clinical capabilities and excellent hospitality, which should be implemented throughout the organization. In the proposed conceptual framework, Birkelien (2017) prescribed a culture that provisions PX as the initial and most important step, which can be achieved by creating certain job titles, develop training programs for engaging employees and establish a leadership for implementing prioritization of PX in the implemented values and norms. In addition, the framework includes three pre-requisites for hospital organizations, namely, creating communication channels facilitating patient-provider communications, improve information symmetry with the use of technology, and shift locus of control of care decisions to patients to improve engagement. Finally, the framework aims for establishing an accessible, vis a vis, convenient and approachable health institutions, so as to create an empathetic environment necessary for prioritizing quality outcomes to maximize value.

Since PX principles define the quality specifications of health care, compliance to the standards is expected to ensure quality and consistency of care. Studies have shown that healthcare providers become high performing organizations when PX becomes the overall strategic theme of the organization. A study conducted by the Deloitte Center for Health Solutions, for example, found strong evidence that improving PX would lead to increased financial performance due to stronger customer loyalty, reputation and brand (Betts et al., 2016).

Health Tourism in Malaysia

Based on the Malaysia Medical Tourism Report, Malaysia attracts many medical tourists from Indonesia with top destinations for Indonesian medical tourists to include Penang and Kuala Lumpur (Alvarez & Marsal, 2024). According to the Malaysia Healthcare Travel Council (MHTC), in 2019 around 1.2 million foreign tourists visited Malaysia for health care purposes and 80% of this number came from Indonesia (Putri, 2023). The great interest for Indonesian people to acquire health tourism in Malaysia can be due to several reasons, such as the geographical proximity between Indonesia and Malaysia so that flight prices are cheaper, treatment prices are more affordable and the language is easier to understand. In addition, Malaysia has been recognized as a safe and reliable health care destination under the supervision of the Malaysian Ministry of Health where many hospitals in Malaysia have been internationally accredited (Malaysia Healthcare Travel Council, 2018).

Retrieved from the Malaysia Investment Development Authority's official website, Malaysia's medical technology sector is characterized by increased investment in R&D and innovative approaches. The nation's goal is to become a leading ASEAN hub for medical devices, utilizing technologies such as additive manufacturing, automation, and IoT. The industry's exports of manufactured equipment, including medical devices, totaled RM63.4 billion, while about 88% of medical equipment is still imported. Following global trends, Malaysia's industry emphasizes ESG practices, with companies implementing sustainable manufacturing and operations (MIDA, 2024).

Gleneagles Kuala Lumpur and Sunway Medical Centre are two of the best hospitals in Malaysia, where these two hospitals are also the most visited hospitals by Indonesian patients (The Vibes, 2024). According to Newsweek (2024a), Gleneagles Kuala Lumpur took first place with a score of 89.50% and was followed by Sunway Medical Centre with a score of 88.84%. These two hospitals are private hospitals that have been accredited nationally and internationally, have a variety of specialties, services and excellent facilities (key information is presented in Appendix I).

Health Tourism in Singapore

Singapore is very popular for its progress in the economy, advanced infrastructure, quality education, especially medical health. According to the Legatum Prosperity Index Report in 2022, Singapore was ranked first as the country with the best health services and conditions in the world, with a score of 86.89 out of 100 points while, Indonesia is in 87th place with an index score of 71.13 points (Muhamad, 2023). This is one of the reasons for the high number of Indonesian patients seeking treatments in Singapore. Apart from that, compared to Indonesia, in terms of the number of medical personnel resources, Singapore appears to be more proportional in providing treatments for patients. According to a news report, it is recorded that in 2022 Singapore will have 16,009 doctors for a population of 5.4 million, or 1 doctor for 354 patients, while in Indonesia, there are 205,597 doctors out of a population of 260 million, or 1 doctor for 1,264 patients (Alam, 2023).

According to the Singapore Tourism Board Annual Report 2022/2023, Singapore's tourism industry has bounced back in 2022, although it has not yet reached pre-pandemic levels. Singapore's Department of Statistics (2024) reported that as of the end of 2023 the total receipts from tourism amounted to S\$27.16 billion where the highest number of travelers originated from South East Asian countries were tourists from Indonesia (43.61%) and Malaysia (20.62%). Based on an article from Budget Direct insurance, Singapore is a popular destination for medical tourism due to its comfortable climate that most people find easy to adjust to, efficient public transportation, advanced medical technology, and many famous tourist attractions such as Gardens by the Bay, Marina Bay Sands, Resorts World Sentosa, Singapore Botanic Gardens, and Mandai Nature Precinct (Budget Direct Insurance, 2023). Patients also have the opportunity to undergo the necessary medical treatments while vacationing in Singapore

One of the most well-known hospitals for providing good medical services to the patients traveling to Singapore is Mount Elizabeth Hospital, a JCI accredited provider of quality health care. According to the information on their website, Mount Elizabeth Hospital has won numerous prestigious awards. They have been recognized as the Hospital of the Year in Asia Pacific for several consecutive years and have also won awards at the Asia Pacific Healthcare & Medical Tourism Awards (Mount Elizabeth, 2024). Another leading hospital is the Singapore General Hospital, which also is JCI accredited and was ranked first in (Newsweek, 2024b) with a score of 90.60% as well as the first in Asia to achieve Magnet Recognition in 2010 for nursing excellence awarded by the American Nurses Credentialing Centre.

Health Tourism in Thailand

As reported by MedicalTourism.com (2024), Thailand is highly famous for its natural tourism and the wealth of its culture. Not only that, but Thailand is also known as a medical tourism destination with a good reputation. In the 2020-2021 Medical Tourism Index published by the International Healthcare Research Center, Thailand was ranked 5th out of 46 countries in Medical Tourism Industry and 15th out of 46 countries in terms of quality of facilities & services. Thailand is globally known for the expertise in cosmetic surgery, dental care, cardiology, orthopedics and fertility treatments. Apart from that, Thailand also provides competitive prices where various websites have indicated costs incurred by patients undergoing treatment in Thailand are 50-75% cheaper than other countries such as the US and Australia (MedicalTourism.com, 2024). This shows that Thailand deserves to be a destination for tourists from all over the world who want to receive treatment with the best quality and affordable prices.

In 2022, the US International Trade Administration (2024) reported Thailand's medical device market value to be approximately \$7.2 Billion. In addition, the website reported an estimated \$829 million medical tourism market value as forecasted by the Siam Commercial Bank Economic Intelligence center. Moreover, as a consequence to the growing demand for medical services, Krungsri Bank Research Center

estimated a continuous rise due to increasing illness rates and the number of tourists seeking medical treatments, higher investments coming from private hospitals as well as the increasing global awareness in health and wellness (The International Trade Administration, 2024b). Apart from having sophisticated and modern medical care, Thailand is also famous for its traditional medicine. On the Thailand Foundation website, it was noted that "The Thai traditional medicine is a method of healing and boosting vitality using herbs as food and medicine" (Thailand Foundation, 2024). Some examples of traditional Thai medicine include "Ya dom" is a Thai inhaler, "Ya hom" is made from a variety of herbs, spices, and aromatic plants., Nuad Thai is a form of therapeutic touch, and "Riak Khwan" is one the practice of maintaining mental health combined with physical health.

The best hospital in Thailand is Bumrungrad International Hospital, which was ranked first as the best hospital in Thailand by Newsweek (2024c) with a score of 93% This hospital is accredited by JCI, GHA, A-HA according to the website Bumrungrad International Hospital. This hospital provides highly complex medical care with advanced innovations, including the use of advanced drugs that require highly skilled and experienced medical personnel. Apart from that, there is Siriraj Piyamaharajkarun Hospital which is ranked second with a score of 87.34% in Newsweek (2024c). On November 22 2014, this hospital was accredited by JCI certification for the clinical care program – Total Knee Replacement Program (SIPH, 2024).

RESULTS AND DISCUSSION

A compiled information on selected health institutions were then used to evaluate the degree of which Patient Experience (PX) principles were adjusted in offering health tourism destinations. Considering the selected hospitals analyzed are all JCI accredited, adherence to PX is evident and the prescribed PX framework offers a baseline. Data obtained from the desktop research was then used to examine how high-performing hospitals make strategic adjustments in order to address the increasing health tourism market.

First and foremost, the baseline PX framework begins with establishing an organization culture built upon values and norms prioritizing patients in shaping staff behavior (Birkelien, 2017). Instilled in the values of such hospitals as Gleneagles and Bumrungrad, are patient safety and care. Emphasis on high quality human resources is evident in the rigorous recruitment selection and training established. In Bumrungrad for example, the corporate holding Company also owns and operates its own personnel development and training center in a separate entity with the main objective of providing competent personnel for the hospital and affiliates. In addition, with operating structures oriented towards PX, the hospitals are strict with placing key personnel with the appropriate credentials and implementing stringent Key Performance Indicators (KPIs). Aligned with a comprehensive set of policies and procedures, patient-provided interactions are organized in an orderly manner and closely monitored. With the support of updated information technology, information transparency is maintained through the use of e-medical records and information systems throughout the hospitals.

As all of the hospitals included in this study are already JCI Accredited, the baseline requirements for patient-centered services are satisfied. Explicitly stated in the JCI Accreditation Standards for Hospital (JCI, 2021), Section 2 covers the patient-centered standards that includes International Patient Safety Goals, Access to Care and Continuity Care, Patient-Centered Care, Assessment of Patients, Care of Patients, Anesthesia and Surgical Care, Medication Management and Use. Such strict standards define the required policies and procedures to be implemented related with patient care, including implementing patient surveys to collect data on perceptions of hospital services and facilities. The collected data on patients' perceptions are regularly analyzed to further improve performance and develop an accessible organization. This is also evident on the data used by Newsweek to determine the hospitals' scores.

Moreover, Section 3 of the JCI Standards encompass Quality Improvement and Patient Safety, Prevention Control and Infections, Governance Leadership and Directions, Facility Management and Safety, Staff Qualifications and Education, Management of Information, which provide health care organization management standards (JCI, 2020). In other words, JCI accredited hospitals are equipped with guidelines on developing the organization and systems to make the hospital easily accessible. More importantly, the patient-centered core of the guidelines allowed for creating an overall empathetic environment through managing the physical and tangible assets. As a result, the examined hospitals demonstrate good performance as reflected by the highly praised services and increasing revenues.

When opportunity arises for the hospitals to extend the market to tourism, hospitals adapted without needing to make any major adjustments. Given that the prevailing culture centers around PX, compliance to standards is imprinted in the members of the organization. However, the hospitals must extend the patient services to consider international patients traveling, which usually involves family members and have to

consider their budget constraints. In addition to strengthening its medical capabilities, the hospitals responded to the increasing demand for health tourism by providing added services, such as transport to and from the airport, provide timely and accurate information on hotels in the proximity of the hospital, and hire customer service officers for VIP patients. Hospital management is able to leverage off existing resources and capabilities to further create value. As reflected in the increasing number of health tourists visiting the hospitals in Malaysia, Singapore and Thailand, the already leading hospitals maintain competitiveness and build capabilities for extending to hospitality.

Results indicate that although health tourism encompasses a broad range of experiences, high quality medical-based services allow for enhancing existing capabilities to serve as favorite destinations. Hospitals already adhering to PX has agility for quick adaptation considering the highly standardized patient care already implemented. This shows that health providers that are already high-performing do not have any difficulties to capture new markets. In fact, directing attention to health tourism allows the hospital to target a vastly wide range of patients in search for wellness and well-being. Few hospitals are even collaborating with other health services providers to design products catering to health tourism experiences, such as, offering medical check-up packages in luxurious accommodations and include spa treatments or meditation sessions.

Adapting PX to encapsulate hospitality in health care offers clear guidelines to ensure optimum quality of services and successful adaptation. Since health tourism encompasses various activities related to overall wellness, which is subjective in nature, providing health tourism services may be uncertain. Businesses may find it difficult to formulate a unique strategy for attaining competitive advantage. For the hospitals, however, orienting services towards PX provide the structure and directions to make necessary adjustments for catering to the patients' needs. Well renowned high-performing hospitals only need to revert to their already established patient-centered care and work towards consistently advancing to achieve new competitiveness and sustain performance. A summary of the analysis is presented in Table 1.

Table 1. Summary of Analysis: PX Adaptation in Leading International Hospitals

| | Baseline PX | Adapted for Health Tourism |
|--|--|--|
| Culture Support PX | Vision, mission and values focused in patient safety and care; Strong HR management and development processes. | Already focused on safety and patient care, adjusting to provide services for international patients. |
| Patient-provider communications | Clear and strict protocols for interacting with patients; Patient-provider communication mechanisms | Doctors, nurses and hospital personnel comply with the international standards and speak fluent English to serve foreign patients. |
| Information Transparency | Multiple communication channels; website contains full information in English. | Consistently update information, communication channels equipped for international inquiries including with patient families; Provide information on hotels and attractions near hospital. |
| Patient Engagement | Routinely conduct patient satisfaction surveys; Managing customer complaints | Adjusting patient services extending to international patients and families; facilitate airport and/or patient transport. |
| Accessible Organization | Ease of inquiring services, access to hospital information; responsive towards patient inquiries and care. | Extending information availability for international patients, ensure information on added services for patients are easily accessible and services officers readily available. |
| Empathetic Environment | Large facilities and modern technology provide for safe and comprehensive care; Competent staffs allow for assuring comfort. | Designs are developed to optimize patient safety and care; facilities to include commercial areas so as to support patients' caretaking and help families with what they need; all personnel comply with standard operations and able to communicate in English. |

| | | |
|-------------------------|---|--|
| Prioritize Value | Hospitals not only able to retain patients but also provide services for more patients each year; Financial performance improvements each year. | Adjusting administrative processes to accommodate international insurances, various international payment methods; able to seize opportunity for health tourism and number of international patients increase as business grows. |
|-------------------------|---|--|

CONCLUSION

Current trends showed how the health industry has widened its scope to include wellness and tourism. Advances in medical technology and pharmaceuticals allow for the emergence of healthcare services to include addressing the needs for beauty, anti-aging and weight-loss treatments. Leading hospitals are aware of the potential value that can be obtained by servicing the tourism market. Consequently, health care providers have adjusted their points of views and gradually incorporate hospitality to enhance patient care. Those that are already highly performing, consistently thrive to achieve new levels of competitiveness and advance to health tourism.

Examining the selected institutions in this article showed that adapting PX to accommodate the tourism market is attainable. Required adjustments are in line with the already prevailing standards imposed by such international standard organizations as the JCI. These hospitals only need to retain existing operations and continue to enhance services so as to achieve new levels of quality standings. In line with the Resource-Based View of strategic management, hospitals that are already accredited at the highest level of quality have the unique capabilities that allow them to achieve new advantages. Where initially hospitals are considered only for treating diseases can now offer health treatments aimed for wellness, and even become the destination for patients to acquire various healing experiences. Hospitals are adapting to the changing market landscape and paving the way for the emergence of health tourism with PX where quality services become the main attraction.

Due to the limited resources and accessibility to collect primary data, this article is constrained by the data available in public documents and online sources. However, this approach allows for contributing to a new research stream that combines hospitality with strategic management theories. Future studies should include primary data and more subject as well as explore new types of health tourism destinations, such as retreats and resorts. Regardless, this article offers practical implications for hospitals in Indonesia where undertaking the patterns of high-performing hospital operations would not only significantly improve quality of health care but also extend to tourism. Compliance to PX may be costly but future returns are exponential with the ability to attract tourists seeking health and wellness to Indonesia. Ultimately, this study is the starting point necessary to overcome uncertainties and shed light on the alternative paths for sustainability of health tourism.

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