

An Examination of Consumer Preferences and Competitive Positioning in Malaysia's Health Tourism Industry

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ABSTRACT

This study examines the development of the health tourism industry in Malaysia, including its evolution, current state, and future potential. Health tourism, which involves traveling abroad to receive medical treatment, is driven by factors such as lower costs, high-quality treatment, and specialized medical expertise. Since 1998, Malaysia has developed its health tourism sector significantly, despite facing challenges such as the COVID-19 pandemic. By comparing Malaysia with key destinations like Singapore and Thailand, this study identifies best practices and areas needing improvement. Data collected through structured surveys from Malaysian residents reveal the main factors influencing consumer acceptance and preferences in health tourism, including treatment costs, service quality, and medical expertise. These findings offer practical insights for strengthening Malaysia's position as a leading health tourism destination.

Keywords: Health tourism; Malaysia; medical treatment; quality of healthcare

INTRODUCTION

Since gaining independence, the distance between countries has no longer been a barrier to conducting tourism activities. This study focuses on health tourism, which refers to people travelling to a destination to seek health treatment (Global Healthcare Accreditation, 2023). In Malaysia, health tourism is not a new phenomenon; it has been established since 1998 and has consistently received government attention and support. Consequently, this industry is seen as having the potential to grow and become a health tourism hub in the future. Table 1 below shows the number of healthcare tourist arrivals in Malaysia.

TABLE 1. Number of tourist arrivals in Malaysia for healthcare from 2014 to 2024		
	Year	Number of tourists
	2014	882,000
	2015	859,000
	2016	921,000
	2017	1,050,000
	2018	1,200,000
	2019	1,220,000
	2020	689,000
	2021	561,000
	2022	850,000
	2023	1,080,000
	2024	584,468 (first half of the year)

Source: Malaysia Healthcare Travel Council (MHTC), 2023; Malaysia Investment Development Authority (MIDA), 2024; Siddiqui, 2025

Health tourism in Malaysia exhibited significant growth from 2014 to 2019. However, the COVID-19 pandemic caused a sharp decline in 2020. The sector began to recover in 2021, right until now. The Malaysia Healthcare Travel Council (MHTC) reported 1.52 million international patients in the first quarter of 2025, indicating that the Malaysia is performing satisfactorily in health tourism (Tele-Visual Infolink 2025).

There are difficulties along with the sector's strong expansion. The preferred choice of healthcare facilities for those coming to Malaysia is undoubtedly private hospitals. Despite the excellence of private hospitals, they still face a shortage of nurses. Additionally, private hospitals are also experiencing a shortage of medical supplies (Abdul Patah, 2022). This indicates that the supply chain in Malaysia's health sector is still weak and inefficient. If this problem persists, it could undermine the potential of Malaysia's health tourism industry. Understanding consumer preferences and trust in healthcare facilities can help prioritise improvements in areas such as service quality, medical staffing, and supply chain reliability.

In the Southeast Asia region, Singapore has been ranked at number 14 to have the best healthcare system in the world (Wilson 2024). Meanwhile, Thailand and Malaysia ranked 83rd and 88th, respectively. These scores indicate that Malaysia remains at a relatively low level in the health tourism industry. Comparing Malaysia to its neighbouring countries, provides valuable insight into possible enhancements and strategic positioning within the health tourism industry due to the countries' close proximity, similar cultural aspects, and comparable regional tourism flow patterns. This also suggests that there is still ample room for improvement and enhancement in this sector. Therefore, this study will (i) examine the factors influencing consumer acceptance of health tourism, and (ii) to investigate the best practices in the health tourism sector in Singapore and Thailand that can serve as exemplary models for Malaysia.

LITERATURE REVIEW

FACTORS INFLUENCING CONSUMER ACCEPTANCE OF HEALTH TOURISM

Health tourism is preferred by many consumers due to various factors. In this study, we will focus particularly on these three factors: (i) treatment costs (Zain et al. 2022), (ii) quality of treatment (Rahman, 2019), and (iii) expertise (Zain et al. 2022) (Figure 1).

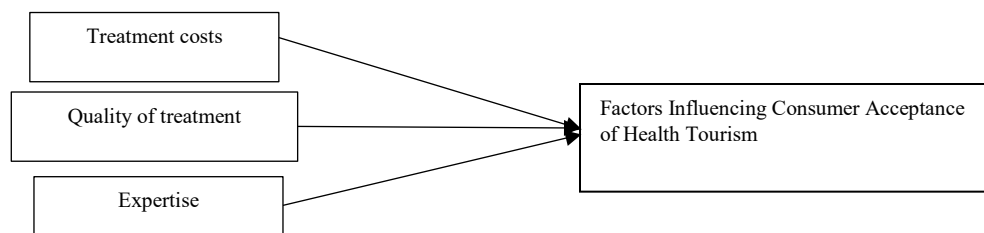


FIGURE 1. Theoretical framework

TREATMENT COSTS

The health tourism industry in Malaysia shows potential for expansion due to its ability to offer medical treatment at low costs. Zain et al. (2022) indicated that low-income tourists are often attracted to countries that advertise low-cost treatments. Rahman (2019) also found that one of the factors that compel tourists to travel abroad for treatment is the affordable treatment costs compared to those in their home countries.

Figure 2 provides a clearer comparison of costs between Malaysia, Singapore and Thailand for various types of treatments. Thus, it is evident that cost is a significant factor influencing the choice of Malaysia as an ideal destination for health tourism.

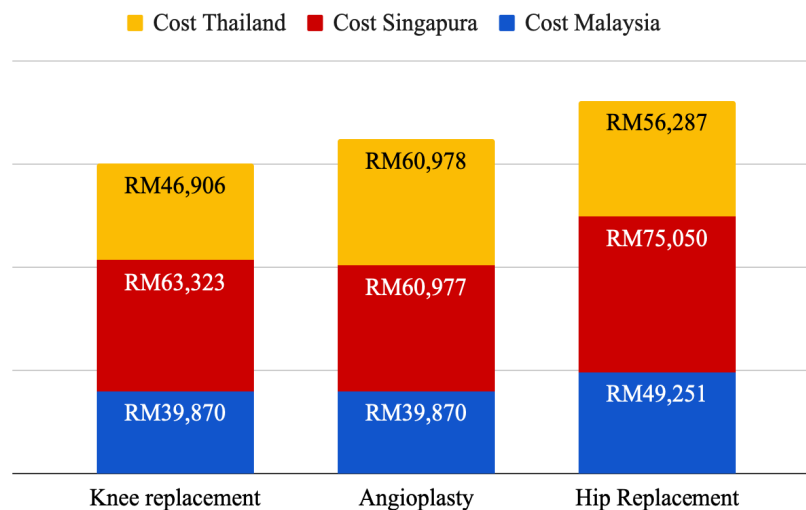


FIGURE 2. Comparison of Costs between Malaysia, Singapore, and Thailand

QUALITY OF TREATMENT

Treatment costs are positively related to the quality of services provided by hospitals (Rahman 2019). This is consistent with the study by Zarei and Maleki (2018), which states that tourists from the United States and Europe are willing to visit developing countries such as Malaysia to receive quality medical treatment at affordable price. Additionally, health tourists from Indonesia have stated that they come to Malaysia seeking the higher quality of treatment that is lacking in their own country (Zain et al. 2022).

EXPERTISE

The desire of tourists to travel abroad for treatment increases when the hospital in that country have specialised expertise that aligns with their perceptions as tourists. This statement can be supported by Zain et al. (2022) which found that Indonesian tourists target Malaysia for cardiovascular treatment because Indonesia is unable to provide sufficient expertise to meet the demand for cardiac medical services. Furthermore, the expertise of doctors can also impact the reputation of a hospital, thereby influencing tourists' decision-making (Nikbin et al. 2019).

Malaysia has the ability to expand its health tourism industry, as demonstrated by the literature above. Why does Malaysia rank lower than Singapore and Thailand? While Malaysia's affordability is a strong draw, Singapore's reputation for quality, safety, and efficiency often wins out for patients who care more about results than cost. For Malaysia to close this perception gap, Malaysia needs to go beyond cost leadership. Malaysia may improve its standing in the global health tourism market by comprehending consumer acceptance of health tourism and learning from regional best practices.

BEST PRACTICES IN SINGAPORE AND THAILAND

The best practices for medical tourism in Singapore and Thailand will be discussed, with a focus on facility and service quality, as well as expertise.

SINGAPORE

Singapore has positioned premium treatment quality as its identity in promoting health tourism (Ebrahim & Ganguli 2019). This aligns with the report from Legatum Institute Foundation (2024), which ranks Singapore first out of 167 countries worldwide in terms of service quality. A total of 21 hospitals in Singapore are accredited by the Joint Commission International (JCI), demonstrating high quality and effective treatment rates. Singapore ensures the comfort of its health tourists by providing world-class medical services (Zain et al. 2023). Despite offering high-quality standards, the costs in Singapore are still lower compared to Western countries (Ebrahim & Ganguli 2019).

Another strength of Singapore is the highly regarded expertise of its doctors. The study by Pham and Huyen (2015) shows that 40% of doctors in Singapore have received certification from the Specialist Accreditation Boards appointed by the Ministry of Health (MOH), demonstrating their expertise in health tourism.

THAILAND

To sustain its health tourism industry, Thailand differentiates itself by enhancing facilities that are basic necessities for its tourists (Rekrupimol & Assenov 2011). These facilities include medical transportation (land and sea), language translation services, and online immigration services. At the same time, Thailand incorporates cultural elements into its service presentation (Kanittinsuttitong 2015). This is affirmed by a study by Yusof et al. (2020), whose respondents stated that Thailand welcomed them with cultural gestures like "sawadikap" and friendly hospitality. Thus, it is undeniable that the combination of convenient and pleasant facilities and services is one of the recipes for the success of Thailand's health tourism industry.

Discussions by Pattharapinyophong (2019) and Rekrupimol and Assenov (2011) found that the reputation of hospitals and trained doctors' services are key assets of Thailand's health tourism. The efficiency and expertise of Thai doctors in various medical fields attract more health tourists to seek treatment in the country. Logically, these assets contribute to producing high-quality services. In Thailand, the element of quality not only attracts health tourists but also fosters long-term loyal relationships between health tourists and Thai hospitals (Pathomsirikul 2019). In summary, Thailand can and has succeeded in making foreign patients repeatedly use their healthcare services.

METHODOLOGY

A survey method was selected as the primary data collection method. This method involves the development of a structured questionnaire distributed to a sample population to obtain specific information from respondents.

Respondents were mainly Malaysian residents. Reasons for this choice of respondents are examining consumer preferences and competitive positioning within Malaysia's health tourism industry.

The questionnaire was distributed through two methods: online and physical distribution. A total of 349 respondents were collected through stratified random sampling. According to Field (2024), a sample size of 300 or more provides adequate statistical power, reliability, and robustness for the research. The data was collected over a three-month period in 2024.

The questionnaire includes Section A for respondents' profiles, Section B for factors influencing the acceptance of health tourism, and Section C for best practices in health tourism in Singapore and Thailand. The questionnaire was designed using a combination of closed and open-ended questions. The questionnaire was adapted from previous studies, which includes Nikbin et al. (2019), Rahman (2019), Yusof et al. (2020), and Zain et al. (2023).

The collected data were analyzed using the Statistical Package for the Social Sciences (SPSS) software. The analysis in this study includes descriptive analysis to understand the profile of respondents and their views, as well as factor analysis to identify the main factors influencing the acceptance of health tourism. Factor analysis was conducted to reduce and summarise the data by identifying relationships between the variables studied. With this approach, the study can provide a more comprehensive picture of the acceptance and views of the public towards health tourism.

RESULTS AND DISCUSSION

The demographic analysis of respondents provides a clear picture of the study participants' profiles (Table 1). The largest age group is within the range of 35-44 years, while the majority of participants are female, of Malay ethnicity, and possess a high level of education.

TABLE 1. Respondent demographics

		Frequency	Percentage
Age	18 – 24 years old	72	20.6
	25 – 34 years old	89	25.5
	35 – 44 years old	129	37.0
	45 – 54 years old	47	13.5
	55 – 64 years old	9	2.6
	65 years old and above	3	9.0
Gender	Male	103	29.5
	Female	246	70.5
Race	Malay	291	83.4
	Chinese	38	10.9
	Indian	11	3.2
	Others	9	2.6
Education level	Primary school	1	0.3
	Secondary school	86	24.6
	Diploma	84	24.1
	Bachelor's degree	144	41.3
	Master's degree	22	6.3
	PhD	8	2.3
	Professional Certification	3	0.9

N = 349

In evaluating healthcare facilities in Malaysia (Table 2), 54% of respondents rated the healthcare facilities in Malaysia as good. Additionally, 28% of respondents gave a moderate rating, while 14% described the healthcare facilities as very good. Only 4% of respondents considered the healthcare facilities to be unsatisfactory. These findings indicate that most respondents have a positive view of the healthcare facilities in Malaysia; however, attention needs to be given to the maintenance of existing facilities and the development of new ones (Rahman 2019).

TABLE 2. What is your opinion on the level of healthcare facilities in Malaysia?

	Frequency	Percentage
Good	189	54.2
Moderate	97	27.8
Very good	50	14.3
Unsatisfactory	13	3.7

N = 349

Health tourism in Malaysia has the potential to develop a variety of treatments (Table 3).

TABLE 3. Which kinds of treatments could lead to the growth of Malaysian health tourism?

	Frequency	Percentage
Comprehensive medical examinations	199	57.0
Preventive health and care	54	15.5
Cardiology	30	8.6
Orthopaedics	22	6.3
Reproductive treatment	17	4.9
Dentistry	8	2.3
Cosmetic surgery	7	2.0
Cancer treatment	5	1.4
Alternative medicine	2	0.6
Chronic diseases	2	0.6
Transplant	1	0.3
Neurology	1	0.3
Organ transplant	1	0.3

N = 349

Among these types of treatments, most respondents selected comprehensive medical examinations (57%), followed by preventive health and care (16%), cardiac treatment (9%), and orthopaedics (6%). These findings suggest that comprehensive medical examinations have the greatest potential for development in Malaysia's health tourism sector. The emphasis on comprehensive medical examinations can be linked to the importance of treatment quality, as it affects the patients' quality of life (Ellis et al. 2017).

Principal Component Analysis (PCA) identified five constructs that collectively explain 62.5% of the variance (Table 4). The five factors are 'Facilities and doctor expertise', 'Packages/ bundling', 'Service quality and safety', 'Reputation', and 'Social media promotion'.

TABLE 4. Factors influencing consumer acceptance of health tourism

Criteria	1	2	3	4	5
The hospital facilities in Malaysia are good.	0.741				
The medical equipment in Malaysia is up-to-date	0.733				
Malaysia has many of the world's best medical specialists.	0.692				
Doctors explain medical decisions and processes easily and clearly.	0.715				
Medical staff have good communication with patients.	0.723				
Hospitals maintain patient privacy.	0.655				
Malaysia offers many health tourism packaged that combine medical treatment with vacations.		0.687			
Malaysia has various tourist attractions that aid in patient recovery after medical treatment.		0.702			
The quality of healthcare services in Malaysia is good.		0.801			
Treatment in most hospitals in Malaysia is comfortable.		0.758			
Malaysia has many international standard hospitals with excellent track records.			0.773		
The safety of tourists seeking healthcare services in Malaysia is assured.			0.736		
The process of getting an appointment with a doctor is easy.			0.721		
Malaysia has positive reputation as a health tourism destination.				0.763	
I get a lot of information about health tourism from social media.					0.635
Eigenvalues	8.962	2.172	1.653	1.130	1.073
Percent of variance	37.341	9.048	6.889	4.709	4.470
Cumulative variance	37.341	46.389	53.278	57.987	62.457
Cronbach's alpha	0.893	0.825	0.784	0.824	0.864
Factors mean	3.713	3.146	2.684	3.120	3.461

In selecting the best country for medical services (Table 5), Singapore is the top choice, with 31% of respondents selecting it. This closely followed by Malaysia (26%), Thailand (8%), and England (7%). Other countries show lower interest, with the United States (5%) and Japan (4%). Countries such as Korea, India, Australia, and several others have even smaller percentages.

TABLE 5. If given a choice, which country would you like to receive the best medical services?

	Frequency	Percentage
Singapore	109	31.2
Malaysia	90	25.8
Thailand	29	8.3
England	23	6.6
United States	19	5.4
Japan	14	4.0
Korea	12	3.4
India	11	3.2
Not sure	9	2.6
Australia	8	2.3
South Korea	3	0.9
Germany	3	0.9
China	3	0.9

Saudi Arabia	2	0.6
Egypt	2	0.6
Brunei	2	0.6
Ireland	2	0.6
Netherlands	1	0.3
Colombia	1	0.3
Turkey	1	0.3
New Zealand	1	0.3
Qatar	1	0.3
Indonesia	1	0.3
Palestine	1	0.3
United Arab Emirates (UAE)	1	0.3
N = 349		

Among the main factors in choosing a country (Table 6), 31% of respondents stated that specialist doctors are the primary reason for their choice. This shows that the presence of experienced and highly qualified specialists is an important factor in their decision.

TABLE 6. Reasons for choosing this country		
	Frequency	Percentage
Specialist Doctors	109	31.2
Modern and advanced medical technology	75	21.5
Having good facilities	58	16.6
Satisfactory services	47	13.5
Affordable treatment costs	20	5.7
Diverse medical quality	20	5.7
Low transportation costs	15	4.3
Not sure	5	1.4
N = 349		

Modern and advanced medical technology (21%) is the second most important factor. This reflects respondents' trust in the medical technological advancements of the chosen country. A total of 17% of respondents indicated that good facilities are their primary reason for choosing a country, showing that comprehensive and quality medical facilities are also a key consideration.

Satisfactory services (14%) indicate that a good service experience and customer satisfaction are important in making decisions. Affordable treatment costs and diverse medical quality are each chosen by 6% of respondents. This shows that while medical quality and treatment costs are important, they are not as dominant factors as specialist doctors and medical technology.

Overall, the presence of highly qualified specialist doctors, modern and advanced medical technology, and good facilities are the main factors influencing respondents' decisions in choosing a country for medical services. Satisfactory services and affordable treatment costs are also important factors, although less dominant. This provides useful guidance to medical service providers in improving aspects that are important to their customers.

In identifying how respondents view the promotion of Malaysia's health tourism compared to Thailand and Singapore (Table 7), 19% of respondents stated that the promotion was less attractive, while 16% felt it was unsatisfactory. This indicates that a negative perception that needs to be addressed by the authorities.

TABLE 7. Comparison of Malaysia's health tourism promotion with Singapore and Thailand		
	Frequency	Percentage
Average	88	25.2
Affordable costs	75	21.5
Less attractive promotion	65	18.6
Unsatisfactory	55	15.8
Very encouraging	48	13.8
Best	10	2.9
Nor sure	8	2.3
N = 349		

On the positive side, 22% of respondents stated that medical costs in Malaysia are affordable, which is one of the country's main advantages in the health tourism sector. Additionally, 25% of respondents viewed Malaysia's health tourism promotion as average, indicating that while the promotion does not stand out, it is also not too bad.

Other positive views were recorded with 14% of respondents stating that the promotional efforts in Malaysia are very encouraging, and 3% of respondents considered these promotions to be the best compared to Thailand and Singapore. This shows that there is a portion of respondents who view Malaysia's promotional efforts positively and appreciate the efforts made.

This indicates that although there are positive elements such as affordable medical costs and some highly encouraging views, there is still a need to improve the promotional efforts for health tourism in Malaysia. More

attractive and satisfactory promotions need to be prioritized to compete more effectively with Thailand and Singapore. This conclusion provides useful guidance to the authorities to enhance promotional efforts and improve aspects that are important to health tourists.

CONCLUSION

In conclusion, the study's findings suggest that Malaysia's health tourism industry is in good condition and continues to grow, albeit with some areas needing improvement. To maximize the advantages Malaysia possesses, the government must play an effective role in finding solutions to address the shortcomings faced by the health tourism industry.

With the increasing market competition, Malaysia needs to identify a unique selling proposition to strengthen its industry. Malaysia must create a national branding plan to position the country as a top medical tourism destination. Potential hospitals in Malaysia should be supported by the government to obtain various international accreditations to shine on the global stage. Malaysian hospitals require strong accreditation standards to ensure that patients receive high-quality care. At the same time, regular audits and inspections are required to guarantee that the high-quality standards are met.

Government collaboration with foreign investors or non-governmental organizations (NGOs) is seen as crucial for generating substantial capital. This capital is vital for Malaysia's health tourism industry to improve facilities, amenities, technology, and equipment in line with current advancements. With these changes, health services and systems can be enhanced, leading to increased satisfaction and trust from tourists. In short, drastic actions by the government are necessary to ensure the excellence of this industry.

Indonesia is Malaysia's main source market for medical tourism (Alvarez & Marshal 2024). It has been stated that 2 million Indonesians travel abroad for medical examinations and treatments. Future research should investigate the reasons why Indonesians choose to travel to Malaysia for medical treatment. Other possible medical tourism destinations include China, India, Bangladesh, Cambodia, Myanmar and the Middle East. Due to the lack of infrastructure, cultural similarities, and the availability of frequent direct flights, these markets present opportunities for Malaysia.

The excellence of Singapore and Thailand's health tourism industries is undeniable, as evidenced by the discussions above. Malaysia's reference to the health tourism industries of Thailand and Singapore is seen as essential in providing the country with a focused plan for transforming health tourism. By doing so, Malaysia can maximize advantages in cost, expertise, quality, service ethics, and facilities. Overall, the changes Malaysia will implement in the future are expected to realize the country's aspiration to become the best 'health tourism destination,' qualifying to be on the global health tourism index alongside Singapore and Thailand.

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