

# Health Tourism: SWOT analysis of the Algarve Region

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**Dissertation of master's degree course in Tourism & Hospitality**

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Region**

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I look forward to future endeavours in this field.

## Resumo

O turismo de saúde tornou-se um mercado relevante contribuindo de forma significativa para a economia dos destinos. A acessibilidade do transporte e a facilidade de comunicação permitiram que o turismo e a saúde se associassem enquanto produto turístico. Neste estudo, pretendemos analisar o potencial da região do Algarve, em Portugal, relativamente ao turismo de saúde. Para a realização deste estudo, foi construída uma análise SWOT da região, tendo por base um estudo empírico, baseado em entrevistas a *stakeholders* locais e pesquisa bibliográfica sobre o tema. O objetivo deste estudo é avaliar o potencial do turismo de saúde na região do Algarve e contribuir para o desenvolvimento do turismo de saúde em Portugal. Explorando os recursos internos e o ambiente externo, este estudo identifica os principais fatores que podem contribuir para o desenvolvimento do Algarve enquanto destino de turismo de saúde, salientando os principais constrangimentos a considerar. Além disso, traz importantes contribuições práticas que podem auxiliar na tomada de decisões estratégicas e na elaboração do planeamento de destinos para este segmento. Esta análise fornece informações para gestores e responsáveis de políticas públicas, identificando os aspetos que influenciam os fatores de sucesso por trás do desenvolvimento do setor de turismo de saúde no Algarve e ajudar a estabelecer um processo de referência na perspetiva dos profissionais da região. Concluimos que o Algarve tem condições para ser um destino turístico de sucesso se conseguir esbater a sazonalidade, identificada como um dos fatores que condiciona o sucesso deste segmento turístico de nicho.

**Palavras-chave:** turismo de saúde, turismo médico, turismo de bem-estar, análise SWOT, estratégias de desenvolvimento, Algarve

## Abstract

Health tourism has emerged as a valuable market holding a crucial position in terms of function and its economic input to a travel destination. Accessibility of transportation and ease of communication has enabled tourism and healthcare to merge seamlessly. In this study, we intend to analyse the potential of the Algarve region, in Portugal, in relation to health tourism. To carry out this study, a SWOT analysis of the region was carried out, supported by interviews with local stakeholders and bibliographic research on the subject. The aim of this study is to evaluate the potential of health tourism in the Algarve region and contribute to the development of health tourism in Portugal. By exploring internal resources and the external environment, this study identifies the main factors that can contribute to Algarve's development as a health tourism destination and point out the main constraints that should be considered. Additionally, it provides important contributions that may help in strategic decision-making and the preparation of this segment's destination planning. This analysis provides insight for strategists and policymakers to consider aspects influencing the success factors behind the development of the health tourism sector of the Algarve and helps to establish a benchmark process from the perspective of professionals in the region. We find that the Algarve has the elements for a successful tourist destination if it can manage to tackle seasonality which gives rise to other factors that affect the success of this niche tourism segment.

**Keywords:** health tourism, medical tourism, wellness tourism, SWOT analysis, development strategies, Algarve

## List of Abbreviations

AMA – American Medical Association  
AR – Augmented Reality  
CAGR – Compound Annual Growth Rate  
DMOs – Destination Management Organizations  
EHIC – European Health Insurance Card  
ETC – European Travel Commission  
F&B – Food and Beverage  
FEE – Foundation for Environmental Education  
GDP – Gross Domestic Product  
GWI – Global Wellness Institute  
HDI – Human Development Index  
HTWW – Health Tourism Worldwide  
IABx – Rotterdam’s International Advisory Board  
IITTM – Indian Institute of Tourism and Travel Management  
IoT – The Internet of Things  
IPD – Inpatient Department  
JCI – Joint Commission International  
NTOs – National Tourism Organizations  
OPD – Outpatient Department  
PHP – Portugal Health Passport  
SDG – Sustainable Development Goals  
SNS – *Serviço Nacional de Saúde*  
SWARHT – SWOT analysis of the Algarve region’s health tourism  
SWOT – Strengths, Weaknesses, Opportunities and Threats  
UNWTO – World Tourism Organisation  
VR – Virtual Reality  
WTA – Wellness Tourism Association  
WTM – Wellness Tourism Market

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# 1. INTRODUCTION

In the realm of the global economy, the healthcare industry has been experiencing substantial expansion, establishing its position as one of the most rapidly advancing industries (Chanda, 2002; Pocock & Phua, 2011). Consequently, in today's globalised world, health tourism has transpired to be a significant economic domain (Pourkhaghan et al., 2013; Eusébio et al., 2012) assuming a pivotal role in the development of tourism across diverse destinations worldwide (Soares et al., 2022). Despite being in its nascent stage in Portugal, the escalating demand of tourism has led to a surge in the emergence of new niche markets (Ferreira & Castro, 2020). The country combines key elements of what constitute the basis for a successful health tourism destination (Ferreira & Castro, 2020): sea, sun, sand, and surgery (Connell, 2006). Hence, tourist destinations with the most competitive leverage in this segment are those that successfully integrate high-quality and specialized medical services with beach tourism. Beach tourism is already a prominent pull factor for tourists in the Algarve region (Barreira & Cesário, 2018). In this context, the growth of health tourism in the Algarve is anticipated to grow due to the increasing recognition of investment prospects by both the local and international communities (Tagus Property, 2022; Saraiva, 2023), accompanied by a significant influx of individuals opting to retire in the area (Donn, 2022). The intrinsic value of Algarve's market growth lies in its potential for stimulating investment in associated sectors of healthcare, tourism, and urban development as fostering foreign direct investment in healthcare infrastructure and increasing the flow of medical tourists, accompanied by the corresponding revenue, generates additional resources for investing in healthcare (Pocock & Phua, 2011). The Portuguese national tourism board, *Turismo de Portugal*, intends to diversify its tourism opportunities in the Algarve region to increase revenue and tackle seasonality by tapping into the potential of the health tourism segment by launching initiatives such as Portugal Health Passport (PHP), a program created to provide the traveller with easy access to healthcare without needing prior appointments (Turismo de Portugal, 2022). The program includes the country's largest private hospitals such as *Hospital da Luz* and *Lusíadas*, offering comprehensive packages for healthcare services tailored for tourists, all available at a predetermined price (PHP, 2022). Other organisations such as *Grupo Hospitais Privados do Algarve (HPA)* have also entered the health tourism market in the Algarve region by initiating health and medical units (Turismo de Portugal, 2022)

With the advent of the mid-1990s, health tourism has increasingly gained momentum as an alluring form of alternative tourism across destinations worldwide, primarily attributable to the influence of globalization (de la Hoz-Correa et al., 2018) and the competitive environment (Kiliçarslan, 2019). The Industrial Revolution was a changing point for the future of medicine and new technology translated into innovations in the medical field (Schwab, 2017). Globalization has paved the way for technological advancements and establishing the standardization of healthcare practices, while also facilitating the emergence of consumer culture and enhancing the ease of

accessing services, such as enabling individuals to procure medical care in their desired locations (Hunter, 2007). Health tourism holds significant economic implications for destinations, both in terms of generating revenue from medical and wellness services and the additional value-added activities stemming from the expenses incurred by patients and their companions. However, the capacity to attract health tourists also depends on whether a country or region possesses the potential to do so. An ongoing and vigorous discussion revolves around the ethical implications and effects on the host country (Ramírez de Arellano, 2011; Johnston et al., 2011). This has led to a growing interest among practitioners and governments to conduct research on medical tourism, notably from entities such as the World Health Organization (WHO), the American Medical Association (AMA), the Indian Institute of Tourism and Travel Management (IITTM) and consultancy firms have conducted studies that highlight the economic implications for national economies (de la Hoz-Correa et al., 2018)

One way to determine whether a destination has the potential elements to be a successful healthcare tourism destination is to explore the motivations of travellers, and another is the potential of the destination. In previous research (Hekmat et al., 2022), we have explored the motivation of travellers and find that tourists are generally more proactive with organizing their own itineraries and search for more authentic and diversified experiences, therefore it is vital for destinations to rethink and restructure what they have to offer (Gale, 2005; Sedmak & Mihalic, 2008) beyond the conventional sun and sand product and provide more added-value services, specifically for the Algarve region as evidence exhibits spending shifts have occurred over time (Serra et al., 2015). This is more evident since the COVID-19 pandemic which has caused destinations to re-strategize and augment their competitiveness in Wellness Tourism (Grobet, 2023; Tan & Tyrrell, 2022) hence updated research in the field is necessary. Proactive destinations who have long-term vision and calculated research can predict tourism trends and can foresee that recent healthcare reform, rising medical costs and economic factors affecting competing travel destinations and providers have made the climate ripe for this niche tourism. Some destinations, such as Turkey even offer “health visa” for international patients and their relatives to make it easy for travellers wishing to undergo treatment (Anasayfa, n.d.). Despite numerous attempts by researchers to adapt the widely recognized SERVQUAL scale for assessing service standards in medical tourism (Debata et al., 2015; Manaf et al., 2015) a significant gap remains in integrating the distinct service aspects of both medical care and tourism within a single framework (Ghosh & Mandal, 2018). There are still several models that study the process of choosing destinations (Ye et al., 2011; Gan & Frederick, 2013; Lunt et al., 2015; de la Hoz-Correa et al., 2018), one of the most used is the model of push and pull motivations (Jönsson & Devonish, 2008; Dunne et al, 2007; Yoon & Uysal, 2005; Awaritefe, 2004; Lubbe, 2003; Hallab et al., 2003; Kozak, 2002; Heung et al., 2001; McGehee et al. 1996; Uysal & Jurowski, 1994; Crompton, 1981). Two important factors are distinguished in this model. The push factors, refer to internal forces that motivate or create a desire to satisfy a need to travel, and pull

factors, which are attributes of a destination which can be further divided into three groups: i) primary pull factors, e.g. scenery, cities, climate, wildlife, historical and local cultural attractions; ii) secondary pull factor, e.g. accommodation, catering, entertainment, sports, and iii) tertiary pull factors, e.g. marketing, prices (Lubbe, 2003). Pull motivation factors respond to and reinforce inherent push motivation factors (Heug et al., 2001; Sangpikul, 2008).

Push and pull factors describe motivation variables that lead individuals to make travel decisions and destination attributes pull or attract individuals (Yoon & Uysal, 2005). Additional research further categorized the push/pull factors to determine the broader scope of travel. The push factors of medical tourism primarily revolve around consumer or patient-related aspects, including sociodemographic (age, income, gender) and health-related factors (health status, insurance status). Conversely, the pull factors highlight the quality of medical facilities and services (such as the standard of medical care and the reputation of doctors), the country's overall environment (country image, economic stability), and the healthcare and tourism industry of the destination country (such as being a popular tourist destination and healthcare costs) (Ghosh & Mandal, 2018). Some studies analyse travel motives in wellness tourism by exploring both push and pull motives (Azman & Chan, 2010; Hallab, 2006) while some studies focus solely on push motives (Konu & Laukkanen, 2009; Mak et al., 2009). In our previous research, we looked at the push factors (Hekmat et al., 2021), while this research explores the pull factors of the Algarve region.

Evidently, interest in health, medical and wellness tourism has received much attention over the years by both academics and professionals (Bushell & Sheldon, 2009; Connell, 2011; Smith & Puczkó, 2014; Voigt & Pforr, 2014) and its application is indeed fundamental to a sustainable tourism growth for any destination, hence a study by World Tourism Organization (UNWTO) and European Travel Commission (ETC) aimed to evaluate this niche market by identifying current practices from stakeholders involved in representing health tourism, to propose a comprehensive taxonomy with a consistent terminology to define and describe the intricate system of traveling for health purposes and also to provide a practical toolkit for National Tourism Organizations (NTOs) and Destination Management Organizations (DMOs) that strive to develop health tourism (World Tourism Organization and European Travel Commission, 2018).

It is not only cross border travel that is considered health tourism, but also intra-national travel where people travel from one region to another within national borders in search of medical services (Behrmann & Smith, 2010; Chuang et al. 2014; Tham 2018). The World Trade Organization and its General Agreement on Trade in Services facilitated the unrestricted flow of products and services (Smith et al., 2009) consequently expediting the process of opening up trade in health services. This transformation has rendered health services a globally tradable commodity (Lunt et al., 2011). A significant new element of this trade has involved the movement of patients across borders in the pursuit of medical treatment and health care, a phenomenon commonly termed "medical tourism"

and in this research we explore transnational provision of medical care which refers to the supply chain of care services in the touristic context, which includes medical care providers, travel agencies, accommodation, and transportation services providers (Lee & Fernando, 2015) and examining how this sector has and continues to evolve (Ghosh & Mandal, 2018), as well as interactions among key stakeholders that influence industry developments (Bell et al., 2015).

The research objective is to use a situation analysis approach to evaluate the region and to generate broadly applicable results and strategies that other health tourism destinations may benefit from by being able to identify potential and possibilities for health tourism. The research is also intended to contribute to the growing body of literature on aspects of tourism and health (Chuang et al., 2014) and yet more to be explored.

The research begins with a review of relevant definitions, concepts, literature, and brief discussions of tourism in Portugal, particularly in the Algarve, are provided as context for the situation analysis. In this paper the focus is on both medical and wellness tourism, thus these are introduced briefly prior to the discussion of the methods used in the study results. Next, a development process is undertaken using the SWOT analysis methodology. Lastly, conclusions are presented concerning health tourism in the Algarve and the application of SWOT analysis including its limitations and biases. Recommendations for future research and development will be presented at the end.

## 2. DEFINITIONS AND CONCEPTS

Traveling in the search of wellbeing is a growing global phenomenon (Chaulagain et al., 2021; Rokni & Park, 2020; Rouland & Jarraya, 2020; Chew & Koeshendro, 2016) and yet it has existed for centuries. Throughout recorded history, individuals have ventured to distant lands or undertaken extensive journeys in search of plant medicine or to seek a known physicians for their healing abilities (Gianfaldoni et al., 2017; Badulescu & Badulescu, 2014) and this type of tourism continues to go strong, accelerating at a high pace (Horowitz et al., 2008; Ghosh & Mandal, 2018).

It is noted that the earliest medical tourism centres were established by the Persians, Greeks, ancient Romans, Europeans, and Indians (Subbaraman et al., 2021). Previous accounts indicate travels for the sanctuary of Asclepius, the Greek God of healing, recorded as the world's first medical travel destination where people would flock to the town of Epidaurus to receive treatment in the mineral springs and temple complexes which had gymnasiums, dream temples, exercise area and also snake nurseries where serpents were farmed for spiritual and healing rituals (Balaban & Marano, 2010; Subbaraman et al., 2021).

In the modern era, the current landscape of healthcare is shaped by a multitude of factors. These include the emergence of healthcare globalization and the implementation of neoliberal policies, driven by the persistent quest for cost reduction, enhanced quality of care, and decreased waiting times (Ngamvichaikit & Beise-Zee, 2014; de la Hoz-Correa et al., 2018). These dynamics collectively contribute to the evolving state of healthcare in today's world.

This dissertation examines health tourism as a comprehensive concept that encompasses both medical and wellness tourism as recognised by some authors (Mueller & Kaufmann, 2001; Smith & Puczkó, 2009; Voigt, Brown & Howat, 2011). The increasing trend of tourists seeking well-being during their travels, as observed in the field of spa tourism, where relaxation and healing are pursued through curative medical techniques, will be explored. The subsequent sections will provide a details discussion of these concepts.

The range of terminology found to describe the movement of individuals seeking treatment can divide researchers (de la Hoz-Correa et al., 2018; Hall, 2013; Kušen, 2011). To start with, tourism itself is the travel of people from one area to another and staying in a place outside their usual environment (UNWTO, 2008) and in this context tourism combined with any travel related to well-being. Health tourism is further defined as:

*'Health is the experience of physical and psychological well-being. Good health and poor health do not occur as a dichotomy, but as a continuum. The absence of disease or disability is neither sufficient nor necessary to produce a state of good health.'* (Card, 2017).

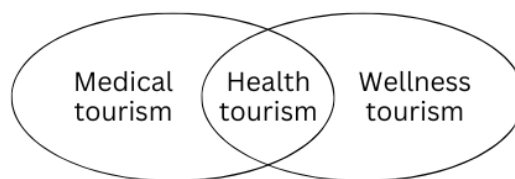
This definition builds on the previous outdated definition by WHO:

*'Health is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity.'* (WHO, 2023)

Health tourism encompasses the connections that arise from tourist's travel and lodging with the primary intention of preserving or enhancing their health (Mueller & Kaufmann, 2001). During such travels, individuals may undergo either invasive or non-invasive procedures (Mehmet Taş & Esra Çakır, 2022). In the contemporary era, especially in the aftermath of the COVID-19 pandemic, individuals are opting to utilize travel not only for leisure but also to enhance their overall well-being (Khare et al., 2021). Therefore, another definition relevant today is as organized travel outside of ones' local environment for the maintenance, enhancement, or restoration of an individual 's well-being in mind and body (Carrera & Bridges, 2006; Kazemha & Dehkordi, 2017). Such health services are also labelled as transnational healthcare which refers to going beyond national borders to attain services, also called 'transnational pursuit' which is the demand perspective and 'transnational provision', which is the supply perspective of medical care (Bell et al., 2015).

It is increasingly evident that health tourism plays an important role in opportunities for destinations (Mohan & Lamba, 2021) and an increase in tourist attraction has resulted in destinations positioning themselves in the wellness market, rising from 65 destinations in 2013 to over 100 by 2018 (GWI, 2018). Different stakeholders become intertwined and can benefit from this type of tourism. According to the industry researchers, it is important to differentiate between wellness tourism and medical tourism in order to be used in the appropriate context (Hume & DeMicco, 2007; Kušen, 2011; GWI, 2020). However, they are widely interlinked and there is vague distinction between the two as they are both health-related (Cohen, 2010) and since health refers to the general condition of the body (Webster, 2019) it is often perceived and marketed as one in the same. While medical and wellness tourism might be officially recognised as distinct categories in each country, owing to the differences in rules and regulations that govern the regulation of various treatments. However, from the tourists' perspective, they are essentially participating in health tourism (Soltani et al., 2017). Therefore, in this dissertation we take a holistic look at these two niche markets as health tourism.

Medical tourism and health tourism can be distinguished by the types of intervention, setting and inputs (Figure 1).



**Figure 1 The Branches of Health Tourism**

Source : based on Charity et al. (2013) and Zsuzsa et al. (2018)

The main factors that separate medical tourism and wellness tourism is their difference in motives, services, employee specializations, different definitions of heal and their material basis (Gabor & Oltean, 2019). Wellness tourism is characterized as proactive, involving travel to uphold or improve one’s personal well-being. In contrast, medical tourism is considered reactive and entails travelling for the specific purpose of receiving treatment, which may be either cosmetic or related to a diagnosis (GWI, 2019) (Figure 2).

<b>MEDICAL TOURISM</b>	<b>WELLNESS TOURISM</b>
REACTIVE	PROACTIVE
Travel to receive treatment for a pre-existing condition.	Travel to manage, maintain or enhance personal wellbeing.
Motivated by lower cost, high quality care, better access and/or available access to care.	Motivated by healthy living, disease prevention, stress reduction, management of poor lifestyle habits, and/or authentic experiences.
Activities are reactive to the patient's illnesses, medically needed, invasive and/or overseen by a doctor.	Activities are proactive, voluntary, noninvasive and nonmedical.

**Figure 2 Differences between medical tourism and wellness tourism concepts**

Source: based on Johnston et al. (2011)

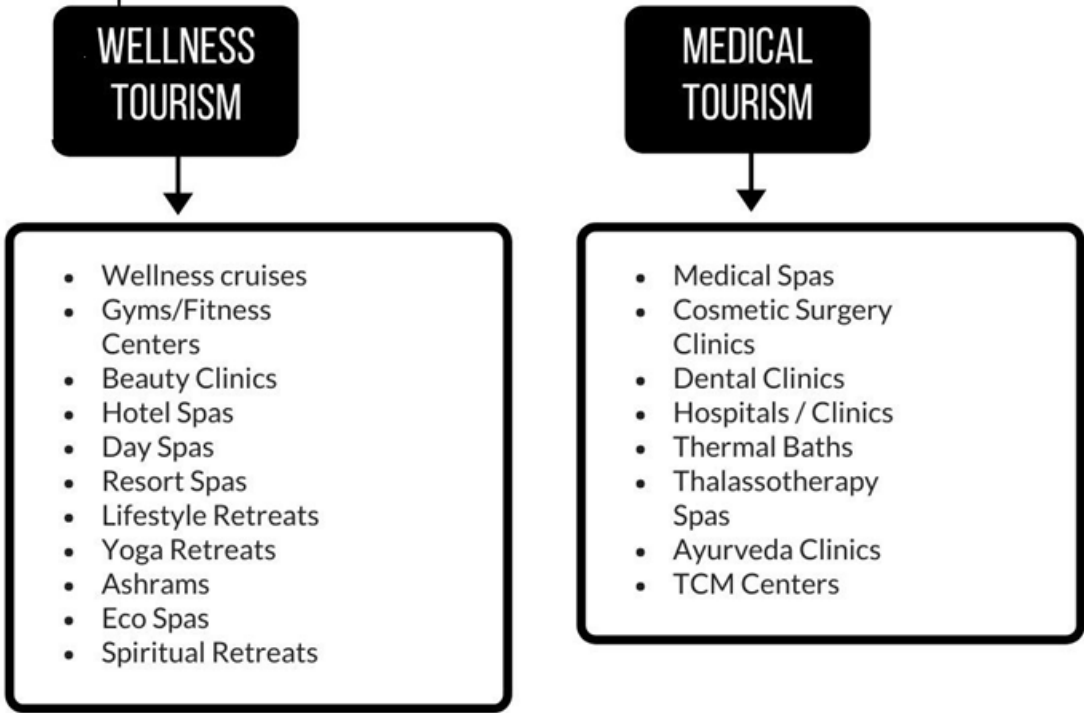
As shown in Figure 2, medical tourism can include invasive treatments (GWI, 2015) and can also fall into several different areas, such as medical treatments or surgical procedures (Wang et al., 2020).

While the primary purpose of travel may be to receive medical treatment, it may also encompass other treatments related to well-being that fall under the category of wellness tourism, hence the term health tourism. As a result, authors generally agree that medical tourism is a subset of health tourism (Pocock & Phua, 2011).

Wellness tourism, the other subset of health tourism involves non-invasive treatment (GWI, 2015) and is defined as travel to enhance, stabilize and when needed, restore physical, mental, and social well-being, while accessing health services in a location where the individual is neither a citizen nor a resident (Kaspar, 1996). The wellness tourism market can be categorized into 2 groups:

i) the primary wellness travellers, these are people motivated to travel for the purpose of wellness services and choose their destination based on its wellness offerings (e.g., someone visiting a wellness resort or participating in a yoga retreat); ii) and secondary wellness travellers, are those whose primary motive is not wellness but they intend to partake in wellness activities during any kind of travel (e.g., someone who visits a gym, gets a massage, or prioritizes healthy food when they take a trip) (GWI, 2021). Wellness tourism mainly comprises of secondary wellness travellers, who account for 89% of wellness tourism trips and 86% of expenditures in 2017. Secondary wellness tourism also continues to grow at a faster rate than primary wellness tourism, at 10% compared to 8% annually, from 2015-2017 (GWI, 2018). Beyond categorization by purpose, wellness travel can further be categorized by type: domestic and international. Domestic tourism segment is projected to represent robust revenue growth, recording more than \$13.2 Tn by 2026-end (GWI, 2021).

Wellness tourism includes niches markets such as spiritual tourism (Mansfeld & McIntosh, 2009) pilgrimage tourism, yoga tourism (Maharani, 2020) or babymoon tourism (Novelli et al., 2022; Gabor & Oltean, 2019) and hence continuously evolving and interlinking with other forms of tourism. Differentiation between both subsets are illustrated in Figure 3.



**Figure 3 Types of activities of wellness tourism and medical tourism**

Source: Based on Johnston et al. (2011)

<sup>1</sup> All currency is in US dollars

In this research we will adopt the perspective aligning with Carrera and Bridges (2006) who provide a comprehensive definition of health tourism, suggesting that it involves organized travel outside one's local environment to maintain, enhance or restore an individual's well-being regarding both mind and body (Carrera & Bridges, 2006).

As medicine and wellness increasingly intertwine within the domain of tourism and become embraced by mainstream trends, a novel perspective on the multidimensional aspects of well-being and health has emerged (Medina-Munoz & Medina Munoz, 2013). This shift has led to a re-evaluation and reformulation of the traditional notion of health into a more holistic focus on overall well-being (Kamassi *et al.*, 2020; Kazakov & Oyner, 2020; Dilletta *et al.*, 2020). Considering previous shifts in the leisure and tourism sector, it becomes evident that traditional services may not meet the needs of future tourists and professionals within these industries anticipate substantial alterations in the services delivered to customers and the diverse range of activities made available (Chen *et al.*, 2013).

Numerous researchers concur that it is essential to incorporate elements of hedonistic and eudaimonic nature into the traveller's experience as wellness tourism strives to continuously meet tourist demand (Park & Ahn, 2022; Houge Mackenzie & Raymond, 2020; Lee & Jeoung, 2019; Filep & Deery, 2010). Empirical evidence confirms that higher satisfaction is achieved for travellers when they have distinct and positive experiences that align with their anticipated objectives and even more so when their expectations are exceeded. Conversely, the absence of such experiences diminished their overall contentment and well-being. Considering the profound impact of experiences on tourist cognitive, emotional, behavioural, and attitudinal responses towards a destination and its attributes, it becomes imperative to explore the significance of experiential reactions as a fundamental component of tourist's well-being within the tourism industry. Such investigation holds the potential to yield valuable insights into their overall engagement and evaluation of the destination (Liu *et al.*, 2023; Ghosh & Mandal, 2018).

With the increasing interest of travelling for well-being, business models choose to boost competitiveness by encompassing medical and wellness modalities by offering comprehensive health and wellness solutions, as seen in integrative resorts that represent a confluence of both markets (Schweder & Hunziker, 2020).

Some resorts choose to cater to both industries and take advantage of the increasing demand for measurable therapies. They do so by incorporating diagnostic services and offering personalised programs to their customers (Schweder & Hunziker, 2020).

The basic wellness facilities include massages, body treatments and facials, hydrothermal experiences, nutrition conscious eateries, fitness and mind & body programs and wellness programming but with the competitive market, trends are expanded to include health check-ups and

diagnostics (PHP, 2022), specialized therapies and biohacking, rehabilitation and aesthetics and dermatology (Schweder & Hunziker, 2020).

Health tourism plays a crucial role in fostering sustainable tourism growth in various destinations. Recognizing its significance, a collaborative study conducted by the World Tourism Organization (UNWTO) and the European Travel Commission (ETC) aimed to explore this emerging market. The study focused on examining current practices among stakeholders engaged in health tourism representation and creating a comprehensive taxonomy with standardization terms to define and illustrate the complex landscape of health -focused travel. Furthermore, the study aimed to provide practical guidance in the form of a toolkit for national tourism organizations (NTOs) and destination management organizations (DMOs) striving to develop and promote health tourism (ETC and WTO, 2018).

Health services is a growing market commodity that can be seamlessly integrated into tourism plans and as ease of travel continues to grow through budget airlines and frequent daily flights, travellers, irrespective of their nationality, are willing to move to new destinations to receive health services (Loureiro et al., 2015). Today we find medical tourism flourishing at a global level and it has become increasingly common for people of developed countries to travel to less developed countries for treatment (CDC, 2021; Dalen & Alpert, 2019) and vice versa (Chaudhary, 2008).

While there are a wide myriad of driving factors of health tourism, it generally appeals to people who search elsewhere due to healthcare costs (CDC, 2021; Moghavvemi et al. 2017; Ehrbeck et al., 2008), transportation facilities (Ghosh & Mandal, 2018), long patient waiting lists (Abubakar & Ilkan, 2016), quality service and care (John & Larke, 2016; Wu et al., 2016) or even unavailability of treatment (Borman 2004) resulting in travel for medical purposes (Hanefeld et al., 2015; Ngamvichaikit & Beise-Zee, 2014; Hanefeld et al., 2014; Pocock & Phua, 2011; Hopkins et al., 2010). Other factors that motivate travelling country to country for health services, is anonymity and privacy (Behrmann & Smith, 2010) for services such as abortion, which may be illegal in one country and provide the traveller with safe procedures in another, such is the case in Canada, which has a highly sought-after abortion tourism due to its laws (Behrmann & Smith, 2010).

## **2.1 Health and wellness traveller motivations**

Previous studies show that travellers are motivated by a few common factors such as nature (Hekmat et al., 2022) which is an important factor that can strengthen a destinations attraction for health tourism (Ivanišević, 1999). According to some studies, natural resources are essential for both wellness improvement and the development of a destination's pull for health tourism (Moreno-González et al., 2020) and destinations often use their natural resources such as spa, thermal water, moderate climate, and others to advertise for health tourism (Mrčela et al., 2015). Studies also

indicate that travellers prefer to include activities such as healing walking tours, massages, spa experiences, thermal/mineral springs, and climbing/hiking into their itinerary (Hekmat et al., 2022) and evident by statistics from GWI as shown in Figure 4. These are characteristics that the Algarve region has and can offer to visitors. Other studies show that consumer behaviour is fuelled by the desire for meaningful travel experiences which include sustainable wellness solutions such as learning a 'wellness practice' during their wellness travel. An example of this is House of Om in Ubud, Bali, where travellers go to rest and relax and meanwhile take short courses, such as yoga training, to help them maintain their own well-being (House of Om, 2023). Platforms such as Airbnb and Viavii also allow travellers to choose from a list of activities in the health and wellness category (Viavii, 2023).

According to a global survey of 504 wellness travellers by Compare Retreats of the ages between 18-76 exploring consumers' behaviour, preferences, and desires (Compare Retreats Magazine, 2018) wellness travellers surveyed research and found retreats were via Google search (80.5%), friend referrals (65.6%), and Instagram (45.7%) and once again mental health was ranked number one for the purpose of wellness travel. The survey asked respondents to rank mental, physical, and spiritual health in order of importance: mental health lead by 62.9% particularly by Millennials with 67.2% ranking it as first compared to 57.7% of Generation X and only 52.5% of the 50+ group. Overall, physical health was ranked first by 24.4% of respondents, and second by 57.9%, indicating it to still be important to much wellness travellers. Spiritual health ranked last, with 75.8% respondents selecting it as their lowest priority (Compare Retreats Magazine, 2018).

Sustainability policies have shown to have big impact on the decision of wellness travellers with 89.5% of wellness travellers surveyed want wellness retreats to have a plastic-free policy (Compare Retreats Magazine, 2018). Service providers such as hotels and resorts have changed the landscape of the term 'health tourism' giving travellers the perception of pleasure rather than 'deprivation' which may have previously been associated with health tourism.

**MOST IMPORTANT FACTORS FOR TRAVELLERS WHEN SELECTING A WELLNESS TOURISM DESTINATION?**



**Figure 4: Factors influencing wellness destination selection.**

Source: Based on GWI, 2022

## 2.2 Global industry overview

The main countries attracting tourists in health tourism in the past decade are Mexico (Tore, 2016), Panama, Brazil, Costa Rica, Hungary, Malaysia, India, Jordan, Thailand, Singapore, and South Korea (Barca et al., 2013). Southeast Asian countries are very popular for both medical and wellness tourism, mostly visited by tourists from the Middle East, South Asia, Southeast Asia, Europe, and as far as the United States (Noree et al., 2014) and similarly, trends show that South and Central American countries like Argentina, Chile, Mexico, and Costa Rica also gain from health tourism (Reddy et al., 2010). Since the rise of health tourism in the mid 1990's, Asia took a strong stance in developing the healthcare facilities it provides to travellers and has been a fast growing in the medical tourism sector (Fisher & Sood, 2014). Thailand aimed to become a prominent destination in medical tourism in Asia and have been successful at achieving this goal. The "Thailand: Centre of Excellent Health Care of Asia" policy was launched in 2003 and later renewed in 2012 by the government agency known as the Thailand Board of Investment (Noree et al., 2014). Currently, the Ministries of Commerce, Department of Export Promotion, and the Ministry of Health, in collaboration with private hospitals, have taken on the primary role of implementing this policy (Pocock & Phua, 2011). The Burmungund Hospital was established in 1997 and now sees over 1.1 million patients a year, in both outpatient department (OPD) and inpatient department (IPD),

520,000 of whom are international patients from over 190 countries worldwide (Bumrungrad International Hospital, 2021). Thailand, Singapore, and India dominate 90% of Southeast Asia's medical tourism investment (Noree et al., 2014).

Within Europe, the increasing cases of stress-related health issues has boosted the market growth in the region and therefore caused a rise in wellness services (Wellness Tourism Market, 2021). Health tourism contributes to the economic development of a country which in turn improves the populations health status such as increased life expectancy and child mortality rate (Blouin et al., 2009).

Another positive impact of medical tourism is that it encourages professional development and competitiveness in the industry, thereby enhancing quality in the national health care systems (Snyder et al., 2013). Medical tourism has been on the rise in both public sector hospitals and private sector hospitals, with a notable presence in corporatized healthcare facilities. Which in destinations such as Singapore where hospitals have undergone corporatization, they benefit from more autonomy and exposure to market competition under government ownership. This strategic move aims to reduce costs and enhance the quality of services provided as well, the revenues generated from medical tourism, which are taxable, allow for the government to reinvest the profits back into the public health system (Pocock & Phua, 2011).

It has also created opportunities for online portals and agencies as patients search online for information on seeking treatment abroad (Lunt et al., 2011; Turner, 2012), a significant part of this tourism segment for both patients and medical providers (Turner, 2013).

In the Euro Health Consumer Index of 2018, Portugal holds the 13th position (Björnberg & Yung Phang, 2019), highlighting its standing in terms of healthcare services. Common border countries may collaborate in providing cross national public funding for health care services from providers in other countries (Rosenmöller et al., 2006). This is reoccurring as the ease of movement between European Union (EU) states has contributed to the accessibility of health tourism, as EU residents are entitled to medical assistance within other member states, with costs being reimbursed by their national healthcare providers (Bertinato et al., 2005).

The global wellness tourism industry accounted for USD 639.4 billion in 2017, representing 6.6% of all tourism trips and 16.8% of total tourism expenditure (GWI, 2018). In 2019, the medical tourism industry was estimated to be valued at \$74-\$92 billion, serving 21-26 million consumers worldwide, who spent an average of \$3,550 per visit (Patients Beyond Borders, 2023).

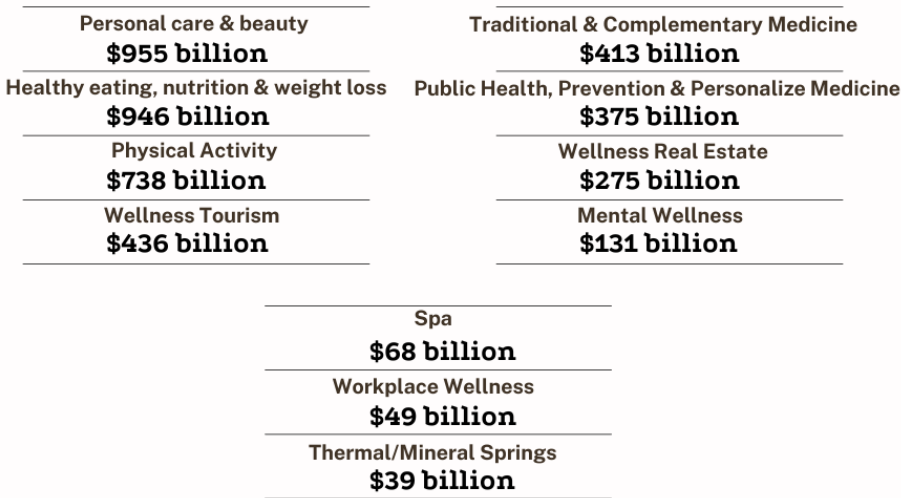
In 2020, the global wellness tourism market was valued at \$801.6 billion and projected to reach \$1,592,6 billion by 2030. According to those numbers, the compound annual growth rate (CAGR) will be 7.2% from 2021 to 2030 (Kale & Deshmukh, 2021) emphasizing the significant growth potential and prospects within the wellness tourism sector.

In 2017, Europe was the most popular destination for wellness travel, at an estimated 292 million trips (GWI, 2018) and the highest revenue share on 2020 (Wellness Tourism Market, 2021). The global wellness tourism market was at \$720 billion in 2019 and then fell to \$436 billion in 2020 during the COVID-19 pandemic which disrupted travel worldwide. The market later went on to grow again in 2022 to 476.1 billion USD and is expected to reach 1.2 trillion USD by 2030 (Gough, 2022) or between \$1.3 billion to \$1.1 trillion – according to other research entities.

Grand View Research estimates that the global wellness tourism market will reach a high of \$2.1 trillion by 2030 with a CAGR of 12.42/5 from 2023 to 2030.

Meanwhile the global medical tourism market, which was valued at \$104.68 billion in 2019 (Sanjivan & Sahil, 2020) hit a halt and was at \$97.3 billion in 2022 (IMARC Group, 2022). It is anticipated to reach \$273.72 billion by 2027, with a CAGR of 12.8% in terms of value during the period from 2019 to 2027 (Sanjivan & Sahil, 2020). In terms of volume, the global medical tourism market saw 23,042.90 thousand patients in 2019 and this number is projected to increase to 70,358.61 thousand patients by 2027, exhibiting a CAGR of 15% from 2019 to 2027 (Sanjivan & Sahil, 2020). In reflection, the economy generated by health tourism activities was estimated to range between \$65 billion and \$87.5 billion in 2019 billion (Salehi-Esfahani et al., 2021). IMARC group predicts the market to reach \$337 billion by 2028, resulting in a CAGR of 23.6% during 2023-2028, few of the reasons being that insurance providers are increasingly offering extensive insurance coverage and the geriatric population is growing (IMARC Group, 2022).

While the healthcare economy is growing, this puts health tourism in a favourable position with destinations in search of sustainable tourism (Pocock & Phua, 2011). To further identify trends, the GWI, divides the wellness economy into eleven sectors (Figure 5).



**Figure 5: Sectors of the Wellness Economy**  
Source: based on GWI, 2021

As all other economies, wellness tourism dropped from a \$720 billion market in 2019 to \$436 billion in 2020, due to the pandemic which nearly halted all forms of travel, leaving airports closed and aircrafts grounded in an unprecedented series of events unrecognized to the world. However, as the world returns to business as usual it is expected that wellness tourism will grow rapidly in the coming years with 20.9% annual growth and the market reaching \$1.1 trillion in 2025 (GWI, 2021).

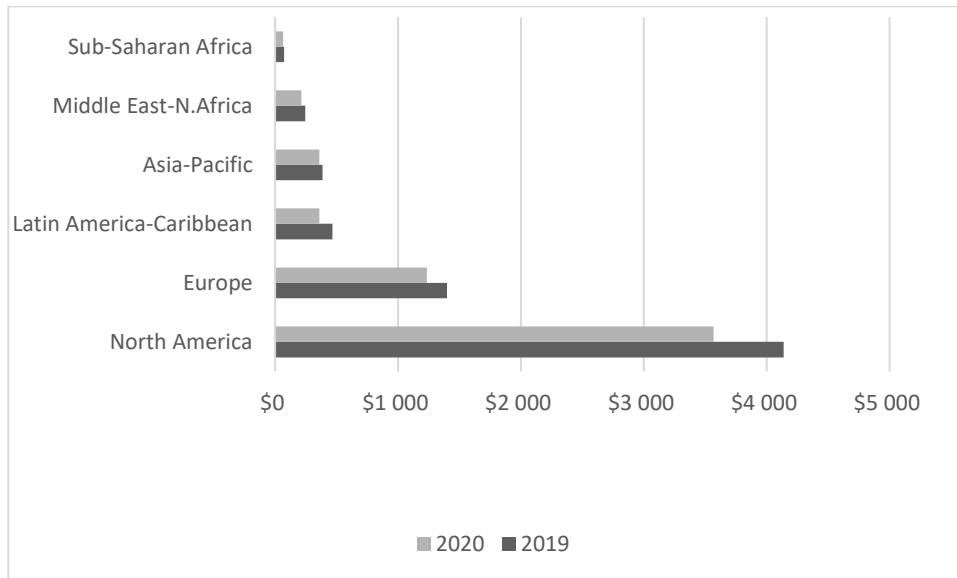
This type of niche tourism is important to the sector because of its significance on the economy. International wellness tourists spend on average 35% more than the typical international tourist spent. In 2020, wellness tourists spent an average of \$1,601 per trip and domestic wellness tourists spent \$619 per trip, 177% more than the average domestic tourist. Secondary wellness travellers, whom are travellers with varied degrees of interest in wellness accounted for 92% of wellness trips and 90% of wellness tourism expenditures in 2020. Secondary wellness travellers may include activities, nutrition, treatments, mind-body experiences into their business or leisure travel as a secondary motive of their trip (Raju Kale & Roshan Deshmukh, 2021).

It is also reported that wellness travellers are well-educated with a desire to try new experiences in line with well-being and are comfortable spending money, spending on average \$1,528 per trip or 53 percent more than the typical international tourist (GWI, 2018).

Domestic wellness segment is increasingly growing, particularly since the COVID-19 pandemic since travellers feel safer being closer to home, more familiar with the current regulations considering they change often, do not need visa or passport, do not need to convert money to a different currency and therefore more convenient to travel domestically. Therefore, the domestic segment holds major share of the wellness tourism market (Wellness Tourism Market, 2021).

In 2019 Global Market Insights forecasted that revenue from both invasive and non-invasive aesthetic procedures will reach USD 22.2 billion, a CAGR of 11.5% until 2025, coming mostly from non-invasive treatments, rather than plastic surgery. The Patients Beyond Borders research report indicates that the global medical tourism market is growing at a rate of 15-25%. Spending on medical tourism has grown as a share of total international visitor spending from 0.6% in 2000 to 1.2% by 2017. The trending reason of travelling in the medical tourism industry is cosmetic surgery (Patients Beyond Borders, 2023) and in wellness tourism, the leading reason is for mental health (GWI, 2022).

Competition for attracting health tourists continues to grow, considerably inducing stakeholders of healthcare and tourism sectors to implement different strategies such as boost quality of health care services, adopt competitive pricing strategies, and create investment projects of international merits to gain and maintain tourism levels (Sandberg, 2017; Connell, 2013) and assisting larger volumes of health tourists (Khan et al., 2020). Currently North America and Europe manage to be leading in wellness economy per capita and can be a positive indicator or wellness expenditure by tourists (shown in Figure 6).



**Figure 6: Wellness Economy Per Capita 2019-2020**

Source: Based on GWI, 2022

To understand how some countries use these approaches to their advantage in tourism we must observe why people travel.

The choice of travel for well-being is split between the traveller's decision and occasionally the health facility which suggests it. Health facilities may outsource patients abroad through cross national purchasing agreements when they are unable to treat a patient due to lack of specialists, equipment, long waiting lists, lack of or limitations of health insurance and high costs (Lowson et al., 2002; Burge et al., 2004; Glinos et al., 2006; Muscat et al., 2006; Valentova et al., 2016) and an augmented level of promotion by hospitals and countries as medical tourism destinations (Ghosh and Mandal, 2018). In 2020, 31.6 million (9.7%) people in USA didn't have health insurance (Cha & Cohen, 2022) and they make up for representing 20% of the outbound medical tourist market (Misrahi et al., 2019). In other cases, travellers opt for health services abroad due to dissatisfaction of services in their own countries of residence (Veerasoontorn and Beise-Zee, 2010; York, 2008), lower costs (Noree et al., 2014) or services not available in their own country of residence (Khaydarova & Joanna, 2022).

According to the Global Wellness Institute, destinations should measure their performance in the wellness tourism industry using the metrics following: community wellbeing, environmental wellbeing, sustainable and regenerative practice, local employment rates, visitor satisfaction, visitor spend (GWI, 2022). These metrics fit in the UN's Sustainability Development Goals framework and destinations can align their theory of change with Sustainable Development Goals (SDG) indicators while also combining other standard metrics (and/or custom metrics) with planning and understanding and turning global challenges into business opportunities.

## 2.3 The Portuguese context

Portugal generally holds allure as a tourist destination. The tourism sector makes up 6.5% of the country's GDP (Pordata, 2023). Additionally, Portugal ranks 6th globally in the 2022 global peace index, a significant factor for travellers when choosing a destination, irrespective of their main purpose of travel (Hekmat et al., 2022). Additionally, the country has an attractive pull for those seeking healthcare for a myriad of reasons. Portugal has a history of health tourism, starting with the thermal spa treatments, which have long been a pull factor for Portugal (Araujo et al., 2014) and has been recognized in European history to have the oldest thermal unit in the world since 1485, known as *Caldas da Rainha* (the Queen's Baths) by orders of Queen Leonor, wife of John II of Portugal as she is said to have witnessed peasants bathing in muddy waters 80 Km north of Lisbon, and after experimenting herself and finding relief for an affliction she ordered the building of a bath house, hospital and church as a means to heal the community (Carvalho, 2017).

The pursuit of fostering a tourism-friendly environment has led to notable shifts in the Portuguese tourism industry, particularly with a newfound emphasis on healthcare. As Portugal's Key Public Health Indicators are on the higher scale of European averages according to the OECD statistics, with higher life expectancy at 81.2, this reinforces the country's quality of Healthcare (OECD, 2022) and a good factor of the destination's attractiveness. Portugal's life expectancy was at 81.6 and Europe's average was at 78.6 in 2019 (WHO, 2023). The year 2019 has been taken into consideration due to the disruption of the 2020 pandemic. The country boasts an organized healthcare system which is mainly centralized by a Health Ministry. According to the World Health Organization Portugal's health system is considered the 9th best in Europe and the 40th best in the world. According to the 2023 Health Care Index by Numbeo, by mid-year Portugal stands to be the 22nd country to have the best healthcare systems in the world (Numbeo, 2023). The country also ranked 9th in the quality of healthcare and 22nd in World Index of Healthcare Innovation in 2022. In the same index it ranked 13th for patient-centred care and 3rd in infrastructure within the country's medical system (Rigney, 2023). Hospitals such as *Lusíadas* and *Hospital Particular do Algarve* operate numerous branches in the Algarve and provide access to foreigners at a fee. Among European Union (EU) countries, Portugal boasts the highest concentration of generalist medical practitioners, with a ratio of 241 per 100,000 inhabitants (Eurostat Celebrates Portugal, 2018).

One of the factors that Algarve accentuates is that it can provide access without the long waiting ques for private healthcare services which is an important factor for health tourism.

Currently Portugal has few programs that attract tourists to make Portugal their destination of choice for healthcare. Turismo de Portugal has developed a package of healthcare services for tourists called Portugal Health Passport (PHP). The PHP promises health check-ups and more without appointments. The program promises high quality care at fixed prices at their participating hospitals such as CUF, *Hospital da Luz* and *Lusíadas* (PHP, 2023).

Medical Port is an organization that acts as a third party which connects private hospitals and clinics by providing the patient with a concierge service that takes care of translations, booking medical appointments, finding alternatives when the preferred healthcare unit is unavailable, assists in documentations, escorts the patient to the healthcare centre and facilitates in administrative formalities (Medical Port, 2021).

Websites such as [healingholidays.com](http://healingholidays.com), provide a platform for travellers to browse through medical and wellness packages within Portugal, with options such as medical spas. A wellness expert is connected to the traveller to curate the right package (Healing Holidays, 2023). Resorts such as Epic Sana offer programmes like fitness, detox, yoga, and mindfulness as well as customized diet plans by their resident nutritionist.

In August 2022, tourism accommodation sector reached record breaking numbers with 3.4 million registered guests and 9.9 million overnight stays exceeding pre-pandemic August 2019 by 1.2% and 2.8% respectively. 3.7 million of the overnight stays (-11.4%) belonged to the domestic market and 6.2 million overnights stays (+86.9%) contributed by external markets. Compared to August 2019, the domestic market grew by 8.2% and external markets declined by 0.2% (INE, 2022). There was an increase of 27.6% in both revenue and accommodation compared to July 2019 (INE, 2022). It seems the COVID-19 pandemic has influenced individuals to become more proactive in their personal health and therefore aspire to travel more for well-being purposes (Alexa et al., 2021) with focus on yoga, meditation, physical health, and longevity (Majeed & Ramkissoon, 2020). Which is favourable to Algarve's tourism industry as over the years, coastal destinations aim to diversify their attractiveness due to the seasonal shortcomings of relying on sun and sea (Valle et al., 2011). Algarve has potential to extend its tourism offerings to the interior area of the region (Agapito et al., 2014) and with the guidance of the Portuguese National Tourism Strategy 2027, an initiative to make Portugal one of the world's most competitive and sustainable tourism destinations by proactive attention to economic, social, and environmental development (Turismo de Portugal, 2017).

By February 2023, Algarve registered 4 million overnight stays surpassing 2022 numbers. Compared to February 2020 (pre COVID-19) overnight stays increased by 5.9% (INE, 2023).

The Algarve itself attracts English-speaking retirees, particularly British people due to the region's strong historic and cultural links with England. Previous studies show that travellers over the age of 56 tend to be in favour of activities such as thermal baths which is a key element in health tourism (Pinos-Navarrete et al., 2022; Anaya-Aquilar et al., 2021; Liberato et al., 2021; Silvério et al., 2021).

While Portugal lies along the Atlantic coast of the Iberian Peninsula in southwestern Europe, the region of Algarve is in the southernmost part of Portugal which boasts Mediterranean climate which bring long, warm and dry summers and very mild winters. In 2021, Algarve was placed as the

fourth most developed region in Portugal out of seven regions with a human development index (HDI) 0.866 while the entire country's HDI average was 0.864 (Conceição, 2022).

Algarve economy is based on producing foods such as seafood and different fruit and vegetables, such as oranges, figs, plums, carob pods, almonds, avocados, tomatoes, cauliflowers, strawberries, and raspberries but its economy is also heavily dependent on tourism and constitute the bulk of the Algarve's summer economy. Tourism plays an important role in the Algarve region (Bienvenido-Huertas et al., 2020; Do Valle et al., 2012).

One of the driving factors for Algarve's attraction as a health destination is the presence of an international airport located in Faro, the region's administrative centre. Visitors can arrive at Faro and take other modes of transport to the other cities.



Figure 7: Figure of the Algarve region

Source: [www.visitalgarve.com](http://www.visitalgarve.com)

The Algarve region encompasses 16 municipalities, spanning an area of 4,997 km<sup>2</sup>, and boasts approximately 300 km of picturesque coastline (Autarquia 360, n.d.). Renowned as Portugal's foremost tourist destination (Bienvenido-Huertas et al., 2020), the Algarve offers over 100 stunning beaches, 88 of which proudly hold the coveted Blue Flag designation (Ana, 2023). The Blue Flag certification, conferred by the Foundation for Environmental Education (FEE) based on stringent standards (FEE, 2021), serves as an influential factor in travelers' destination choices, alongside accessibility to the beach (Do Valle et al., 2012; Barreira & Cesário, 2018). Notably, a survey conducted by Turismo Do Algarve reveals that both domestic and international tourists prioritize beach-related activities when visiting the region, with percentages of 42% and 47% respectively. Other popular reasons for visiting include engaging in sports (9% and 6%) and seeking relaxation (8% and 10%) (Turismo Do Algarve, 2016).

In recent years, the Algarve region has experienced a significant transformation due to its burgeoning popularity as a tourist destination. This has resulted in a surge of construction projects, including hotels, apartment complexes and residential housing. The resident population is 105,142

as of 2022, (SEFSTAT - Portal De Estatistica, n.d) with an average age of 45.34 years in 2021 (Urbistat, 2023).

The official tourist websites of the Algarve promote a diverse range of attractions that serve as compelling factors for visitors. These include the region's pristine beaches, renowned golf courses, captivating natural landscapes, opportunities for cycling and walking, tantalizing gastronomy and wines, rich cultural traditions, options for health and wellness, nautical activities, a blend of business and leisure offerings, sports and adventurous pursuits, entertainment options, cultural routes, opportunities for motorhome tourism, creative tourism initiatives and even industrial tourism.

While short term tourism is an important aspect of Algarve, another important point is the slow tourism involved in the region. In recent years Algarve has become a popular destination for retirees to spend long periods of time and spend their retirement funds. It is also recognized as one of the world's best places to retire (Maunder, 2023) which is evident as 21.5% of the immigrants that move to Portugal are retired (Donn, 2022). In 2017, Europe had 183 million people aged 60 or older; it is estimated that, by 2050, this number will increase to 247.2 million (Guerreiro et al., 2022). Considering the ease of movement within EU borders it is a desired option due to the warmer climate.

In 2019, the Algarve recorded five million tourist arrivals. However due to the global pandemic which halted and slowed down tourism, in 2020 the region recorded approximately two million arrivals and 2.73 million visitors in 2021 (Lopez, 2022). Since Algarve is part of the EU this gives access to citizens of all the EU member states to access healthcare within Portugal and their national purchaser reimburses the costs of their treatment abroad. *Serviço Nacional de Saúde* (SNS) provides public healthcare services for people from the EU (Bertinato et al., 2005), European Economic Area and Switzerland who hold a valid European Health Insurance Card (EHIC). With the EHIC, individuals are entitled to receive free healthcare service for a duration of up to 90 days (Silva, 2022).

Managing subtle intricacies can be the differentiating factor in boosting revenues, cultivating fresh partnerships, and expanding market shares. The role of a travel agent holds paramount importance in ensuring the triumph of a destination. It is crucial to possess a fundamental understanding of medical and wellness procedures that pique a patient's interest. These prerequisites equip travel agents to stay aligned with an ever-evolving learning curve, ensuring the continued relevance and prosperity of their businesses. This involves the introduction of novel tourism forms like eco-tourism, heritage tourism, and community-based tourism, which represent revamped iterations of wellness tourism (Conway & Timms, 2010).

## 3. METHODOLOGY

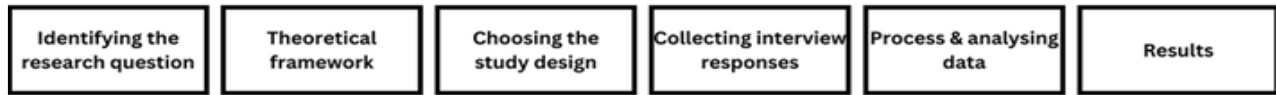
### 3.1 Research design

For this dissertation, the raw data was extracted during 2022, from the journals included in three bibliographic databases and search engines: Scopus, Google Scholar and B-On. The raw data serves as the foundation for subsequent data analysis and interpretation. The data was extracted by using search key words such as: “medical tourism”, “health tourism”, “medical tourist”, “health tourist”, “Algarve medical tourism”, “Algarve wellness tourism”. Preference was given to more recent publication on the topic between the years 2015-2022, however prior work was considered as per availability on the subject. The terms medical tourism/medical tourist and health tourism/health tourists provided a high number of results and to ultimately enhance the focus and relevance of the findings we narrowed by first selecting articles published since 2019, and then by reading the titles and abstract and revising the content of the articles to verify the relevance of the articles to the dissertation topic consequently a majority were eliminated during this process. For academic purposes, the collected articles were subsequently classified based on their content focus. After categorization, a comprehensive analysis of all articles was conducted to identify the various points of interaction between health tourism and different functions of the healthcare system. Throughout the analysis, new material was consistently incorporated to enrich the findings. As the research progressed, older papers were scrutinised and used if it was deemed necessary and, the plural and singular forms of the keywords were searched (e.g., tourist and tourists). Papers in relevance to the Algarve were particularly rare to come by and therefore data had to be collected from multiple government entities and websites.

During the initial phase, a qualitative synthesis of existing knowledge was undertaken to establish a basis for evaluating and developing new frameworks related to health tourism. This involved a thorough examination of relevant literature in the field of tourism, with a specific focus on health tourism, medical tourism, wellness tourism, and the Algarve region's role in tourism. The synthesis encompassed a comprehensive analysis of existing published works, including books, articles, and various other sources pertaining to health tourism.

The initial phase started with finding the gap in previous research and identifying multiple research questions before sieving into a final research question. The second phase was creating a theoretical framework and then choosing the study design. Then interview questions were formed with the intention to gain perspective of stakeholders that can add value to the research question. Multiple stakeholders were contacted to collect responses. Once the responses were obtained the data was processed and analysed before the final phase which was results and conclusion.

This is portrayed in Figure 8.



**Figure 8: Methodology Design**

Source: Own elaboration

## 3.2 Qualitative Research

Qualitative research is a type of scientific inquiry that aims to explore and understand complex phenomena, behaviours, and experiences from the perspective of the participants involved (Creswell & Poth, 2016). This type of research approach often involves in-depth investigations, open-ended questions, and flexible methodologies, allowing researchers to immerse themselves in the context to better comprehend the intricacies of the subject under study (Denzin & Lincoln, 2018). Some common methods used in qualitative research include interviews, observations, focus groups, content analysis, and case studies (Merriam & Tisdell, 2016). As a form of qualitative research, SWOT analysis involves the collection and analysis of non-numeric data. The process typically begins with gathering information through internal and external assessments, interviews, and other qualitative data sources to identify the entity's strengths and weaknesses. These internal factors often involve subjective assessments, perceptions, and opinions of individuals within the organization (Wehrich, 1982). Similarly, the identification of opportunities and threats relies on external environmental observations and contextual understanding, which are central aspects of qualitative research (Helms & Nixon, 2010). In this research, a series of questions were gathered that would be conducive of exploring the landscape of health tourism in the Algarve region through the perspective of professionals in the industry.

## 3.3 SWOT Analysis Technique

As mentioned, to assess the potential of health tourism in Algarve, a SWOT analysis was conducted. The empirical foundation of the SWOT analysis can be traced back to 1952 when it was initially developed within the Corporate Development Planning Department of Lockheed (Puyt et al., 2020).

The SWOT analysis is a strategic planning tool employed to assess the strategic position of an organization and to evaluate strengths, weaknesses, opportunities and threats of a business,

project, or destination (Gurel, 2017). It provides a structured framework and helps to access the internal attributes of the industry and external attributes of the environments that can influence the success or failure of the industry in question (Dyson, 2004). SWOT analysis examines extensively the current situation and acts as an analytical technique to predict the future situation and therefore has a current and future perspective which is useful for destinations to understand their potential and possibilities. By conducting a SWOT analysis, the industry or destination can gain insight into their current position, identify areas for improvement, capitalise on opportunities and mitigate potential threats. It serves as a basis for formulating strategies and making informed decisions to enhance performance and achieve desired goals (Quezada et al., 2019; Benzaghta et al., 2021).

By methodically collecting several answers in each of the four categories, we can distinguish certain aspects that will help assess the industry's market position.

The process is split into internal and external factors. SW of SWOT refers to internal factors that can be influenced and manipulated. OT refers to external factors that can only be reacted to by the subject without the ability to influence them.

SWOT can be a powerful aid for tourism entities to develop appropriate strategies for the destination. Effectiveness of decision making is heavily reliant on considering all internal and external factors that are included in the selected environment (Benzaghta et al., 2021). This research findings are based on relevant qualitative data. We have used a SWOT matrix to create a visual format in which the responses are placed in four quadrants, each representing one aspect of the analysis and allows for the organization and comparison of the information's related to each SWOT element. The matrix helps to summarise and visualise the findings of the SWOT analysis in a clear and organised manner.

The thematic focus is on what is accepted as health tourism in academic literature - the act of traveling from one area of residence to another for either/and medical or wellness care (Kiliçarslan, 2019). The combination of both medical and wellness tourism is adopted to offer a broader picture of the development of travel from one place to another for the purpose of well-being.

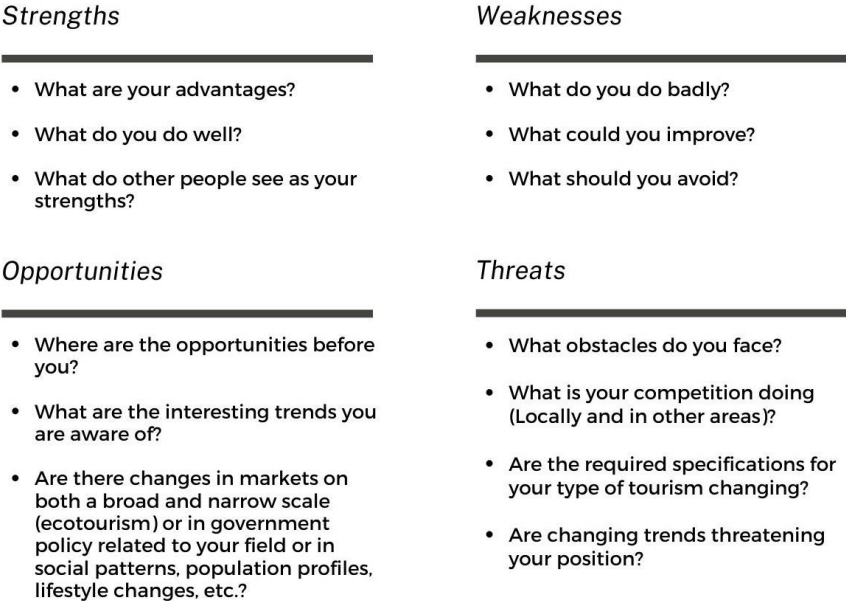
This study excludes the subject of vacationers or expatriates taken ill while abroad and considers only the intent of travel for well-being purposes.

### **3.4 Design of the research instrument**

The interview was sectioned into 3 parts. Section 1 is to identify the stakeholder characterization. Eight questions were asked to the respondents about their names, age, the company they are working for, where the company is located, their position in the company, brief about their educational background and description of their duties in that specific company, how

long they have been working there and the number of employees working in the company. These were asked to get a better understanding and perspective of their response and how it is formed.

The interview questions were based on the SWOT analysis structure as shown in figure 9.



**Figure 9: SWOT analysis based on the following questions.**

Source: Own elaboration

### 3.5 Method and Data Collection

Both primary and secondary sources of data are used in this research work. Primary data was collected through interview questions proposed to stakeholders. Besides this, secondary data is collected from the official website of the Ministry of Tourism, Government of Portugal, Travel and Tourism Competitiveness Index (TTCI) issued by the World Economic Forum (WEF) and different journals and books.

Data was gathered through field observation and interviews with players in the industry. The findings relate to both the use of the SWOT technique as a research method and an evaluation concerning the tourism potential of the Algarve region of Portugal. The components are presented in a simple diagram which is broadened and evaluated in detail as shown in Figure 12.

The methodological discussion consists of two main parts. First, the study area will be described briefly in several of its aspects. In the first part, to provide a context for the case study,

tourism in Algarve, particularly health tourism, is discussed. The second part of the methodology section describes the specific procedures used to gather data for the SWOT analysis.

Multiple factors influence international destination competitiveness and various study findings point to features of determinants and indicators of tourism destination competitiveness that are shared (Dwyer & Kim, 2003). This thesis adopts the findings of those research to develop and determine the attractiveness of Algarve as a health destination.

As a measurement scale of destination competitiveness factors to consider are: i) security and safety: this includes the law and order of a country, safety of luggage, family, women, how tourist grievances are handled, political stability and discipline of the country; ii) maintenance and cleanliness: basic cleanliness and access to basic hygiene such as clean drinking water, clean air, water, noise pollution, access to health hygienic food and healthy ambience. Considering COVID19, regulations to masks, vaccinations, sanitization in hotels and access to sanitary products; iii) Information and communication: language barriers, visa formalities, telecom accessibility, available and accurate information about destination online; iv) infrastructure: accessible roads and transport, airport, rail transport such as inter country travel or travel to neighbouring countries; v) prices: prices of general commodities such as transport, accommodation, food, entrance charges, airfare; vi) facilities: banking and financial system of the country, accommodations quality, medical facilities, etc.; vii) attractions: things to do, shopping facilities, climate conditions, festivals, historical sights, events such as art exhibitions, games, adventurous activities, natural activities, nightlife; viii) relationship between host and tourist: host can include government officials, transport drivers, residents, hospitality of the population, openness in society and attitude of service providers at the tourist places; ix) additional factors influencing the visit: natural resources, quality of tourism infrastructure and accessibility to tourist spots; x) others: begging, cheating in the country, terrorism, corruption level in the nation.

To gathering the relevant information, we conducted interviews. We used this recognised research method for collecting data from a predefined group of respondents, which in this case is the stakeholders involved in health tourism. This consisted of all the players involved such as hotels, travel agencies, hospitals, clinics, and third-party companies that mediate and organize the tourism around this healthcare sector. This allowed us to gain information and insights into the current situation of healthcare in the Algarve. The interview consisted of a list of questions aimed for extracting specific data from a particular group of people. The process involves asking personnel working in the wellness tourism sector within the Algarve region about their experience in this field for information through a questionnaire, which was available both online and the respondents were given the choice to answer on a Zoom call. Research was conducted from February through October in 2022.

The process, as shown in Table 1, involved contacting 81 businesses by email and by phone. The categories that were taken into consideration were: hotels (accommodations), organizers, local travel agents, international travel agents, official tourism sector, hospitals, clinics, and companies that were linked to health tourism in some form. Upon contact the reasoning of the interview was explained and the results were offered as an incentive to take part. When the business agreed to answer the interview questions, they were offered a choice between conducting it over the phone by a researcher or on their own, at their own leisure by receiving the interview questions in their email inbox. The stakeholders were provided a consent form to ensure that the participant is fully informed about their involvement and their rights in the study. Overall, providing a consent form ensures that the participants' position is clearly communicated in an ethical and respectful manner, and upholds their rights and autonomy and helps maintain the credibility and validity of the study. The interview was provided in both English and Portuguese language and the responses were received in both languages and translated to English.

We received responses from 17 stakeholders, mainly Portugal, however spanning across to the Middle East.

The interview questions were divided into two parts: i) Stakeholder characterization/identification; ii) Part two was to gather perspectives to build a SWOT analysis in the Algarve region as a wellness destination.

Table 1 showcases the stages and their descriptions to give a clear overview.

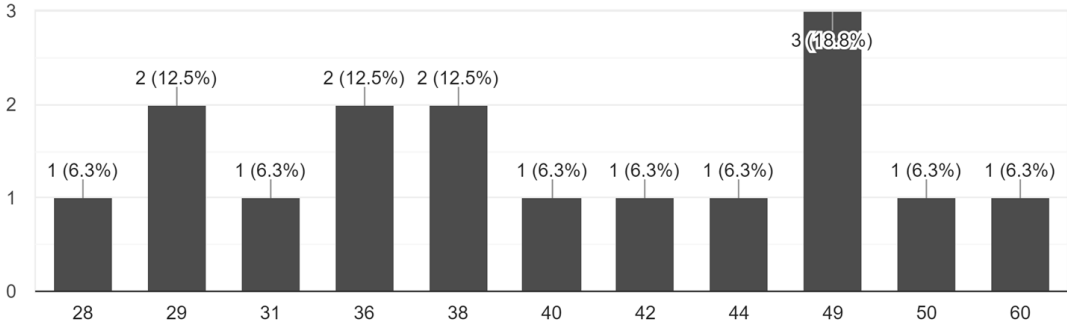
**Table 1: Stages of Methodology and Data Collection**

<b>Stage</b>	<b>Description</b>
Stage 1: Planning	Defining the research objectives and the scope of the SWOT analysis.
	Identifying the internal and external factors to be analyzed
	Determining the desired outcomes and applications of the SWOT analysis
Stage 2: Data collection and literature review	Conducting a comprehensive literature review to gather relevant information
	Identifying and collecting academic articles, books, reports, and other sources that provide insight on the internal and external factors linked to health tourism, medical tourism, wellness tourism and the Algarve.
	Conducting a review on SWOT methodology
	Assessing the credibility and relevance of the literature sources
Stage 3: Data analysis	Identifying and gathering the relevant internal data such as Algarve’s reports and external data such as market research reports, industry analysis, etc.
	Creating a series of interview questions to collect primary updated data from people within the industry
	Utilizing various data collection methods such as contacting stakeholders by phone, email, video calls or in-person meeting to gather qualitative insight
	Once stakeholders were contacted, they were given the option of filling in the form themselves, or by help of the author. This process took 4 months.
	17 responses were collected from relevant stakeholders through the online interview.
Stage 4: Data preparation	Conducting data cleaning and translation
	Analyzing the collected data and literature review to identify patterns and trends
Stage 5: Analysis & Interpretation	Performing a comprehensive SWOT analysis using the collected data
	Identifying and prioritizing the strengths, weaknesses, opportunities, and threats based on the data analysis
	Interpreting the findings to draw actionable insights and conclusions
Stage 6: Reporting & Findings	Summarizing of the SWOT methodology, data collection process and literature review in the research report
	Presenting the SWOT analysis findings and literature review synthesis
	Providing recommendations and strategies based on the SWOT analysis
	Discussion of the limitations and potential implications of the analysis

# 4. RESULTS AND DISCUSSIONS

## 4.1 Descriptive analysis – stakeholders’ characterization

Age (Idade):  
16 responses



**Figure 10 Age of the respondents**

Source: Own elaboration

The participants in the study operated exclusively online or both online and offline, depending on the nature of their services. The job titles of the respondents varied, encompassing researchers (10), marketing executives (3), travel agents (5), spa personnel (1), directors (2) and front-office manager (1).

Our primary objective was to gather insights from industry professionals who directly interact with travellers and possess expertise in assessing Algarve as a health destination. As a result, the respondents had diverse job titles and educational backgrounds. Their educational attainment ranged from individuals without higher education (4) to those holding bachelors (3), masters (5), or doctoral degrees (5). The fields of study represented among the respondents included marketing, IT, business, Tourism, microbiology, and architecture. The duties they are elected for are within the tourism industry however such as teaching, researching, management, marketing, branding, sales, and tour guides. Their experience varied from 1 year to 28 years in the same company that they were reporting from. Some of the companies employed 3 people up to 2000 employees.

#### a. Algarve's Tourist Appeal

The second section was divided into 2 parts. In the first part, respondents were asked to provide detail about their perspectives for each question by allowing open-ended answers. The initial question sought the respondents' expert opinion on the significance of health tourism in the Algarve region. 88.2% of respondents agreed that it is an important part of Algarve.

One respondent stated:

*"Very important. We have a very aging population and with seasonal stressing periods because of our sun and beach tourism dependency, that makes our work very seasonal."*

This possibly refers to the worldwide aging population. 2 respondents' opinion different from the others, one respondent who was an international travel agent based elsewhere was not familiar with many tourists requesting Algarve for health tourism and another voiced his opinion that this type of tourism has yet to be exploited by the region stating:

*"This tourism still has little significance in the region. In my opinion, hotel units have not yet realized the importance that the senior tourism segment associated with wellness tourism can have. people over 50 have high economic level and are very interested in this product, namely in low season. hotels do not work this product in the way they should."*

Next, participants were requested to assess the degree of tourist appeal associated with the Algarve region in comparison to other regions of Portugal, based on their expert insights. The responses varied, some acknowledged that while the Algarve is an alluring destination within Portugal due to sun and sea, some agreed it is popular however second place after Madeira or Lisbon and some stated that Algarve is yet to reach its potential in comparison to other cities.

One respondent emphasised that in comparison with their other branches, the Algarve branch is the most visited for the given reasons:

*"We offer three locations in Portugal and Algarve is the most popular because of its climate and beaches."*

One pointed out that it depends on the age of the travellers. One respondent who disagreed, stated:

*"Low, this is why we have seen the tourism from other areas of Portugal growing more than the Algarve. The Algarve remains focused on the sun and sea, many of the hotels close part of the year, and do not*

*invest in indoor pools, spa's or offer packages with associated cultural services. The current tourist with money is looking for new experiences, getting to know the local communities, having contact with nature. Even the Algarve's wine, which is gaining market share, is not available in most hotels or restaurants in the region. Casa Santos Lima, will launch the 1st sparkling wine in the region, and it probably sells much more wine from the Algarve abroad than in the region. It is difficult, for example, to find one of their wines for sale here. ToR wine has some publicity, but their production is so small that it can hardly be used on a large scale to promote as a product from the region. this is just one example may other can be given if we think on how the interior of Algarve is promoted."*

One respondent said that Portugal is a choice often by adventurous frequent travellers, who are usually driven by cultural aspects and therefore tend to favour other cities in the country.

#### b. SWOT analysis of the Algarve region's health tourism (SWARHT)

In the second segment of section 2, we delved into the SWOT Analysis of the Algarve region as a health destination. By posing five targeted questions to the respondents, we aimed to acquire valuable insights that would enable us to construct a comprehensive SWOT analysis for the Algarve regions' positioning as a health-focused locale.

By question 3 of the second segment, the respondents were asked directly about the 4 SWOT questions of strengths, weaknesses, opportunities, and threats they see in the Algarve region.

The first SWOT question focused on identifying the strengths of the Algarve region. Once again, the questions are open ended to encourage the respondents to answer with as much details as they have. One of the factors which most respondents recognized as a strength was the warm climate and beach access. The rest included natural landscapes, sport activities, spiritual and relaxing options available, quality of the hotels and spas, healthy food, affordable prices, European standards, density, English language, mountains, rural activities, year-round wellness activities, security, international airport, private spas and hotels, nightlife and that it is family friendly.

One respondent referred:

*"The main strengths of the Algarve as a health and wellness tourist destination is its mild climate and the warmest water of Atlantic Ocean, comparing to other parts of the country. It is literally the all-year-round wellness destination, with a modern and effective international airport. A great variety of sport activities for all ages and fitness levels also adds to the Algarve region high score."*

The second SWOT question was regarding the weaknesses of the Algarve's health tourism. Two respondents mentioned mobility, accessibility, and infrastructure as limitations for the Algarve region.

Other weaknesses were mobility and accessibility of the destination, infrastructure, poor marketing strategies, not sufficient pull factors, lack of quality treatments, language barrier, lack of investment in the natural resources, lack of qualified wellness professionals, three respondents pointed that influx of other tourist type which prevent Algarve entry into a health destination, lack of quality hotels and spas, lack of investment from public sector, lack of health services and expensive accommodation during peak season. Respondents also stated that awareness campaigns are required for stakeholders by the public sector on the importance and potential for health tourism so that it may spark new and innovative reaction. The opinions indicated that investment was only from the private sector.

One respondent said:

*“Lack of serious campaigns promoted by the region to this segment. The region continues to promote mostly sun and sea, and some golf, nothing more. The RTA must play a leading role here. Training for hoteliers to understand the potential of the market. Associated with wellness, comes a public with environmental concerns, who want to have contact with nature, want safe bike paths, want to reduce their ecological footprint during their holidays”.*

As stated here, the respondents feel that awareness campaigns for stakeholders emphasising importance and potential for wellness tourism would be beneficial for the region and its position in health tourism. Once again, this statement lightly points our lack of infrastructure, which is necessary for the type of crowd that is associated to wellness tourism, these being such as environmental concerns, safe bike paths, attempts to reduce ecological footprint.

One respondent said:

*“Not many people want to go to Europe for sun, beach, and average spa treatments. Improvement in the wellness treatments can benefit and see higher tourism. Language barrier may be one.”*

Another comment, translated from Portuguese indicated that the low number of available health services, poor quality of public health services (CHUA), and high housing prices may be a factor and it was also pointed out that Portugal is relatively less accessible than other European countries and might not be the preferred choice if the traveller wants to visit other places also.

One common weakness mentioned was the climate, which is both a strength and a weakness. Algarve is considered a seasonal destination as the year turns towards cooler months. Respondents said it is a seasonal destination and therefore this is a limiting factor for the region, although one respondent pointed out that this does not necessarily have to be a limitation for the health tourism.

The follow up question delves into the external factors of the industry in the Algarve region, asking what the respondents identify as opportunities of health tourism in the region. The common response that the region can benefit from more marketing and exposure. Respondents felt that health tourism will tackle seasonality of the region and help the local community to benefit from more tourism. One respondent suggested that solving the problem of seasonal tourism will help to retain professionals in the region.

On a similar note, one said:

*“An opportunity presents if the government decides to improve the national health sector, which will become more attractive to health professionals from all over and benefit from the incoming doctors and other professionals from the Algarve medical school.”*

One respondent replied in Portuguese saying:

*“Mais formação, mais actividades, maior oferta” (translated: More training, more activities, more offer) and another requested for specialised institutions capable of health tourism.*

One respondent said:

*“The great business opportunity of this segment shall be all kinds of businesses described in answers to point 4, plus senior residences projects development, with special treatments programs. And also, school holidays camps for several weeks or 1-2 months for kids, with all sport and wellness activities and programs”.*

Other suggestions were given such as promoting Algarve as a health tourism destination to markets with spending power and meshing various forms of tourism such as caravan tourism and *Volta ao Algarve* (a cycling tour) which can be intertwined with wellness tourism. As well as industry leader intervention.

Last question in reference to SWOT, is the question about foreseen threats to Algarve's health tourism, and respondents voiced their opinion on the incapacibilities of the authorities, lack of funds invested into health tourism, war and political changes within the EU, climate, regulations towards complementary and alternative medicine (CAM), tourist preference for other types of tourism, conflict of interest by key players within Algarve, stronger competition from neighbouring countries, disruption of airport operations, ecological disruptions, lack of necessary policies, inaccessibility, environmental threats and over tourism.

One respondent is quoted saying:

*“The incapacity of local authorities to solve the accessibility and mobility problems because they require a big public investment and the debility of our small and medium enterprises that characterise our economical and seasonal activities.”*

And another stated that other forms of tourism may override health tourism. And one respondent said that they see conflict of interest between organisations to be an issue, particularly regions with competitive leverage such as Andalusia.

Another responded that the lack of vision on the part of investors in the hotel industry in the Algarve region is hindering progress. She stated that the investors tend to think that it is more profitable to work 6 months and close 6 months and then complain about the difficulty of finding and retaining employees. She suggested that the sector should diversify to combat seasonality and that wellness tourism might be the solution to it. Another respondent said that lack of appropriate policies to support the modernization of concepts and procedures in the health area.

The final question of the interview asked how their opinion on what they observe to be necessary development strategy policies the territory can implement to assert and stand out as a health destination on an international level. Respondents suggested improved public health services (modernize infrastructure, improve/reform policies, and increase the number of health professionals), awareness and promotional campaigns, better communication and incentives between companies, stronger effective partnerships, better offers for tourists, trains connecting to other European countries and further investment in health tourism is necessary while others stated that the country, including Algarve is well publicised and can continue as it currently is.

One responded stated that at the time of replying to the interview a new collaboration had been approved for Algarve Biomedical Centre (ABC) that will see regional funds allocated for research and application development of wellness tourism in the Algarve region, in which it will include integrating aging and rejuvenation solutions.

Another respondent said:

*“The development strategies to assert/stand out at international level shall be incentives programs with simplification of taxation scheme and / or tax exemption programs for developers in hotelier segment, in agricultural segment, service providers and local smaller businesses. And growing of high-level professional trainings and education in wellness and medical segments are extremely important for this area.”*

Based on the analysis of the empirical results, figure 11 was designed.



**Figure 11: SWOT analysis of the Algarve region's health tourism**

Source: Own elaboration

## 4.2 Discussion of the results

To gain competitive advantage in any industry, three fundamental strategic approaches: cost leadership, differentiation and focus can be applied to products or services, according to Porter's Generic Strategies Model (Porter, 2008).

Cost leadership may be the only leading competitive advantage according to a study, as globalisation has created a commonality in service and quality of treatments worldwide (Ushakov et al., 2019). It has also been the primary focus of many successful health tourism destinations such as India and Thailand can be a competitive advantage for Portugal to gain market share considering it is a less expensive country than. The effectiveness of this strategy lies in its geographic position as it can gain market share from other European countries who are able to use EU healthcare even

outside their own countries and it is geographically close to the United States of America that is home to over 42 million uninsured people (Ridic et al., 2012).

In particularly health tourism, destinations must hire competent and specifically experienced professionals to plan conscious approaches in the framework of long-term “visionary competitive strategies to implement at the early stages to ensure successful and sustainable future as a health tourism destination. For Portugal to make its place in the Health Tourism sector it needs to place emphasis on some key steps such as : focus on marketing studies, give importance to standardization and accreditation, medical tourism platform should be initiated through both public and private support: The PHP aims to achieve this structure however it is a biased platform for only involved stakeholders and not objective, establish audit and develop the trust systems in government-sponsored projects, establish the integrative systems, promote subcontractors in the medical tourism, prepare the national master plan of medical tourism (PHP, 2022).

A clear vision can mitigate issues of over tourism and other obstacles that may result in a short-lived health tourism career of a destination. Health tourism is a sensitive market, especially after the COVID19 pandemic which affected many people’s views of countries by the way the governments chose to handle the pandemic regarding health and hygiene safety and accessibility to healthcare. Cyclical and improvisation will not prove sufficient and may taint a destinations reputation long-term.

Meanwhile, Portugal has created programs like Golden Visa to drive foreign investments into the country and help develop the country’s economy and so health tourism may be an important sector to focus on as it can attract large scale investments, and wealthy expats.

The competitiveness of Algarve’s global tourism discussed above is based on secondary data. Above is a SWOT analysis of health tourism in Algarve based on interpretations of the tourism industry in Algarve as well as more focused research on the health sector which exists in conjunction with tourism of the region.

During the research we identify that CUF is no longer an active participant of the PHP however it has not been removed from the website or digital media.

One of the weaknesses discussed often by the interviewed professionals was lack of promotional and marketing for the Algarve region to tackle seasonality and to encourage travellers to choose Algarve as a destination. Travel agents outside of Portugal pointed out that their clients were not familiar enough with the Algarve region and they themselves didn’t seem well informed about this destination. Due to the importance of the health tourism industry on destination economy, governments are taking more active roles in marketing and promotion of the emerging health tourism, this is evident in successful medical tourism destinations such as Singapore, Thailand, and Malaysia (Smith et al., 2009).

The industry aims to create professional standards for both quality and safety involved in health tourism (Sandberg, 2017). While individuals travel to prioritize their well-being, it is crucial that they don't compromise safety in pursuit of cost-effective or easily accessible healthcare. Hence, travellers must remain informed about the quality benchmarks of the healthcare establishments where they are undergoing treatment. After-care is an important element of patient satisfaction, which includes while they are still in the destination where they received treatment and also upon returning to their home country (Snyder & Crooks 2012). Difficulties may also emerge when individuals seeking treatments prohibited in their home country lack access to adequate information about their treatment destination. This situation is particularly relevant in cases like abortion tourism, where obtaining such information could potentially involve legal violations (Behrmann & Smith, 2010). Hence, the implementation of standardization can mitigate the risks associated with incorrect treatments. The increasing popularity of health tourism has brought about the proliferation of misleading advertisements and unsupported claims by unscrupulous entities in the field. This issue arises from the lack of industry-wide coordination, as each participant strives to compete and market their services independently (Chakravarthy & Deepthi, 2008).

Some organizations have emerged to improve patient safety and quality control by offering education, publications international accreditation and certification such as Joint Commission International (JCI) which actively accredited healthcare in Portugal and over 100 countries, through rigorous standards of care to achieve peak performance. JCI sends a team to re-review hospitals at 3-year intervals to ensure upkeep of standards according to their manual for medical institutions (Joint Commission International, 2020). Key components for creating safer health care services for any destination is focus on quality maximization and risk minimization. It is crucial for destinations that strive for a sustainable future in health tourism to uphold high quality and safety standards. This can be achieved by mandating organizational framework for stakeholders that operate in the health services sector by assessing the quality, identifying risk and acknowledge issues that can potentially arise and to ensure the subjects in question remain vigilant. To do this, destinations can implement laws for stakeholders or professionals to have External Quality Assessment (EQA). This involves a trusted third party to assess quality control, in which it has the potential for increasing information flow and transparency between organizations. Various EQA models exist such as Statutory inspections (including licensing), public sector educational programs for training and testing private providers, industry-based assessments: ISO certification and evaluation. Accreditations of services and healthcare providers verify for authenticity and quality of the services provided.

As health tourism grows, so do concerns for the quality and safety of the abroad medical care services due to the lack of robust clinical governance arrangements and quality procedures in organizations which act as a medium to ensure tourists are getting quality care (Zahir, 2001).

The concerns regarding training, qualifications, motivations, and competence of healthcare professionals have resulted in independent accreditation schemes to ensure health tourists, particularly medical tourists receive what they want and avoiding potential conflicts of interest. Accreditation schemes are subject to the result required. They are based on results of the best available research and subject to change. Three categories are of interest for the medical tourism market: 1) Providing stamp of approval of the quality and safety of the product they are selling to the public 2) Access to potential funding. In some countries accreditation schemes are an entry way into governmental programs. 3) Travelers select the business according to the accreditation and the business also has an opportunity to advertise their accredited status.

Another weakness frequently pointed out was lack of professionals in the Algarve's health tourism. This has been an ongoing issue in Portugal, with records showing that 21.6% of health professionals presented moderate burnout and 47.8.% burnout in 2011 and 2013 (World Health Organization, 2018). It has been evident since then that a reform in retaining staff and motivating them is necessary (Ribeiro et al., 2014) and yet it seems to still be a challenge therefore boosting health tourism may be helpful to decelerate or reverse the emigration of specialized healthcare professionals and practitioners (Hopkins et al., 2010). Promoting the growth of the medical tourism industry can serve as a strategic approach to mitigate the international emigration of healthcare professionals, especially specialists. Empirical evidence from Thailand suggests that medical graduates, who have obtained specialized medical degrees overseas, are increasingly opting to remain in their home country due to the lucrative and fulfilling opportunities offered by the domestic medical tourism sector (Pocock & Phua, 2011).

A weakness of the industry is that despite the increasing significance of the trade and health nexus on a global scale, trade and health policy negotiations often take place independently of each other, such as health worker migration and cross border consumption of health services. There exist apparent contradictions between the aims of promoting and safeguarding public health and the pursuit of economic gains through trade. (Fidler et al., 2009). To become a member of the World Trade Organization (WTO), countries must comply with numerous legally binding obligations, which involve eliminating both tariff and non-tariff barriers on goods and services. The WTO's formal governance structure is established through its legally binding trade agreements and compulsory legal dispute resolution mechanism. This legal framework grants the WTO greater authority to ensure compliance compared to the World Health Organization (WHO), which primarily operates as an advocacy organization. Unlike the WTO, the WHO does not impose legal obligations on its members and relies on non-binding agreements, lacking a compulsory dispute resolution mechanism. As a result, the WHO faces limitations in enforcing compliance with its agreements in cases of non-compliance (Pocock & Phua, 2011).

The market is segmented in services that comprise of in-country transport, lodging, food and beverage, wellness activities and shopping among others (Wellness Tourism Market, 2021).

Market segmentation identifies the market audience for this niche tourism, and it includes selection of the segmentation criterion/base, grouping of respondents, and profiling and managerial assessment of the usefulness of the market segments (Dolnicar, 2019). The market segmentation variables in tourism are often divided into different categories (Swarbrooke & Horner, 2007) such as geographical (e.g. region), socioeconomic (e.g. occupation, income), demographic (e.g. age, gender, nationality), psychographic (e.g. lifestyle, attitudes, opinions and personality) and behavioural (e.g. loyalty, purchase occasion, benefits, user status, attitude) and a category specific to tourism in which criteria includes variables like purpose of travel, travel motivations, and benefits received from the travel (Dimitrovski & Todorović, 2015; Koh et al., 2010)

### **4.3 Main findings and contributions of the research**

As health tourism combines two vast sectors; medical and wellness, it is crucial to create policies that will assist the two to blend seamlessly and to complement each other, to provide a more pleasant experience for the tourist and to benefit the stakeholders and community.

#### **Phase 1:**

Assess the market. Assess the regions current state of health tourism—including stakeholder perspectives, feelings, opinions, and experiences—to understand their social, economic, and environmental needs. Identify potential levers (e.g., accommodation, food & beverage (F&B), government expenses, tax) that can affect their presence as a catalyst to tourism. It is crucial to also assess the destinations position in the global market. Use internal and public data sources, including stakeholder and community opinion to create profiles of the target markets, extracting valuable insights. Using this data identify the potential foundational changes that can potential further develop health tourism such as data infrastructure, training, reporting, interventions.

#### **Phase 2:**

Define the vision. Involve organizational leaders and key stakeholders to gather input and incorporate their perspectives to shape and define the vision of Algarve's health tourism and meanwhile keeping all involved updated of changes and progress to evaluate the effectiveness and ineffectiveness of various approaches or strategies. During this phase aim to utilize tools such as data infrastructure, reporting, interventions, and training to synchronize with leadership on the organizations vision goals, ambitions, and reasons for pursuing and then utilizing this alignment to

establish specific priorities for the progression of health tourism. Majority of the respondents indicated their desire for exposure to improve business.

### **Phase 3:**

Create a strategic plan outlining the organization's future direction by combining inputs from Phase 1 and 2 into comprehensive priorities and actionable initiatives. These priorities and initiatives encompass short and long-term objectives, and aim to develop health tourism in the region. Decision makers in the industry should be directed by quantitative data. Entities should leverage data and technology to gain insights into areas that require action, continuously track the success of their initiatives, and expand the scale. Currently Portugal is seeing a shift in investment during the first quarter of 2023, seeing a notable decline of 36% in investment turnover reaching €239.5 million, which can be attributed to increasing concerns over the prevailing macroeconomic conditions. However, despite these apprehensions, the market's confidence in its underlying fundamentals remains strong, as evidenced by a substantial number of significant transactions that are currently in advanced stages and anticipated to be concluded in the second and third quarters. Despite the stability of yields, it is anticipated that further increases will occur in 2023 (CBRE, 2023). These changes in the environment must be considered while strategizing the future of health tourism in the Algarve.

Like the case of three successful medical tourism destinations, Thailand, Singapore, and Malaysia, it would be important to identify their processes. It is also essential to enhance the collection of data on medical tourist flows as well as the utilization and accessibility of health systems by local consumers to address the compatibility of policies promoting medical tourism and universal coverage. This improved data collection will provide valuable insights into whether these policies can be effectively reconciled (Pocock & Phua, 2011).

## 5. CONCLUSION

This study contributes to the need for more microstudies such as the determinants of tourist spending or tourist decision making which may provide further insight to behavioural and motivational aspects, providing a clearer understanding of destination pull attraction.

It is important to point out that governments focus on health tourism can possibly drain the resources for citizens (Turner, 2007; Pennings, 2007) and it is vital to proceed with awareness and learn from similar situations which strained other destinations public healthcare system such as in Thailand, following the influx of health tourism (Pachanee, 2006; Wibulpolprasert & Pengpaibon, 2003).

According to a study by the Health Tourism Worldwide and the Wellness Tourism Association which conducted a series of in-depth on-line interviews with 131 industry representatives (from 25 countries) and with 59 academia representatives (from 24 countries) identify the most important of the six pillars of wellness being physical, occupational, spiritual, emotional, intellectual, social. The survey indicates an imbalance of focus on the pillars, particularly the social pillar (GWI, 2021) and it would be beneficial for tourism boards and stakeholders to consider and evolve each pillar (Puczkó & Dimon, 2021).

Understanding the health tourism landscape is critical for a destination to better strategize for driving change and establishing a healthy community which is impacted positively by tourism. Our research concludes that stakeholder perspectives show that many see the strong connection between diversity of offerings to tackle multiple barriers it now faces, and the region will also benefit from inclusion of all sectors in order to have potentially successful outcome for the future of Algarve as a tourist destination.

The tourism board can work toward systemic change through a strategy that places health at the center and expands across three domains: the organization, the offerings, and the community. Industry players can take specific actions in all these domains to meaningfully advance health tourism in the region.

It is crucial to formulate policies to provoke investors to target health tourism and devise marketing strategies that specifically address the utilization of the Algarve region and its' seasonality, as this factor plays a significant role in enhancing the effectiveness of health tourism.

The stakeholders have internal knowledge about what is happening in the Algarve region and their opinion, although not statistical, yet is through day-to-day experience is crucial in getting an over scope of what the tourism landscape is in the Algarve for health tourism. As noted, the strengths and weaknesses of medical tourism were stated and often common between respondents. Respondents emphasized the effectiveness of promotional activities and exposure through marketing mediums which should be prioritized as the region already has capacity and facilities. However due to the weakness of seasonality, some months there is no influx of tourists and

therefore this causes lack of business and consequently inability to retain the professionals suitable for health tourism.

## 5.1 Limitations and Future Research

The pandemic triggered a decline in worldwide economic progress and put substantial pressure on the healthcare system, including Portugal. The policy response eased the shock and sped up national recovery however, the crisis has made its mark and increased poverty and inequality. Portugal GDP growth is set to decline from 6.7% (2022) to 1% (2023) and projected to 1.2% (2024), a significant and drastic change in the country's economy (Portugal Projection Note OECD Economic Outlook November 2022, 2022) which must be mitigated by early policies that will strengthen the health and labour market. Furthermore, for sustainable growth in the industry the long-term vision must implement new strategies. Apart from the tourists' preference towards unique experiences, emotions, cultural information, and active participation (Cabeça et al., 2020) the travellers are inclined towards personalized packages, which according to a survey, 81% of stakeholders understand to be competitive in the tourism market they must create personalized packages (Intent & Travolution, 2019). According to the tourism company, We Are Marketing, 69% of travellers will be more loyal to a service provider that personalises their experiences. Another important aspect to consider is the use of technology for the tourism industry (Ascolese & Llantada, 2019). The digital revolution will give rise to innovative solutions such as E-Health and other digital services that can expand the potential of healthcare into new dimensions and interlink seamlessly with sectors beyond health and tourism. Technology is an important component for destinations to implement for health tourism. It is used to enhance the process of pre- and post-operative care, in both medical and customer service perspectives (Medical Tourism Magazine, 2020).

Augmented Reality (AR) and Virtual Reality (VR) are making their way into the tourism industry for both during the planning and decision-making process giving travellers the option of visually seeing and experiencing the location before deciding (García, 2021). Booking.com conducted a survey in which 36% of respondents said they prefer virtual reality when they are deciding for an unknown destination (Booking.com, 2020). Humanized interfaces which use voice commands, are also becoming more intuitive and interactive making them a growing part of the planning process. The Internet of Things (IoT) also known as 'smart devices' is the digital connection between devices and implemented as 'smart destinations', 'smart cities', 'smart hotel rooms' or 'smart restaurants. All these new technologies are fundamental for innovation and emphasis on people-centred health policies (Castro e Melo & Faria Araújo, 2020) that can be integrated into travel experiences providing even further personalized travel opportunities and it is important and wise for destinations and stakeholders to consider into their health travels.

As limitations, it is important to mention that there is a disruption of valid data available due to lack of accurate studies and instead replaced by anecdotes, brokerage claims and theoretical conjectures (Hopkins et al, 2010; Galinos et al., 2010). Official figures are frequently deemed flawed due to incorrect data collection, as some hospitals inflate figures by counting the number of patient visits rather than the number of individual patients (Youngman, 2009; Pollard, 2010). This causes a problematic state in market share estimates and revenue (Heung et al., 2011).

It is important for academicians to conduct research that effectively merges the contrasting elements of "healthcare" and "tourism". The study conducted by Fetscherin and Stephano (2016) is among a small number of research endeavors that have formulated, in which they constructed a measuring tool referred to as a "medical tourism index. This index comprises of four elements, namely, the country environment, the tourism destination, the costs associated with medical tourism, and the facility and services provided (Fetscherin & Stephano, 2016). Meanwhile, the tool is designed to assess the appeal of a country. as a medical tourism destination and not necessarily the experiential feedback from medical tourists themselves (Ghosh & Mandal, 2018).

It is important to mention that further development in tourist motivational behaviour is necessary to indicate whether Algarve can continue to grow its full potential as a health tourism destination.

To further study this niche market and its future in the Algarve region we suggest a strategic plan, a roadmap that defines the goals and desired outcome by laying out the way to it, including the steps and milestones needed to achieve the desired result. The roadmap can be a useful communicative tool for stakeholders and the government, similar to the Rotterdam's International Advisory Board (IABx) which looks at ways to mitigate tourism problems by an open conversation with stakeholders (Nientied & Toto, 2020). We suggest a roadmap to create a set of recommendations focused on studying and defining our competitive positioning, communicating, and promoting the cluster and finally regulating, controlling, and evaluating the performance of all stakeholders.

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## Health Tourism: SWOT Analysis of the Algarve region

### Consent to take part in research.

- I..... voluntarily agree to participate in this research study.
- I understand that even if I agree to participate now, I can withdraw at any time or refuse to answer any question without any consequences of any kind.
- I understand that I can withdraw permission to use data from my interview within two weeks after the interview, in which case the material will be deleted.
- I have had the purpose and nature of the study explained to me in writing and I have had the opportunity to ask questions about the study.
- I understand that participation involves multiple questions in regard to my professional experience in the field of tourism.
- I understand that I will not benefit directly from participating in this research.
- I understand that all information I provide for this study will be treated confidentially.
- I understand that in any report on the results of this research my identity will remain anonymous. This will be done by changing my name and disguising any details of my interview which may reveal my identity or the identity of people I speak about.
- I understand that disguised extracts from my interview may be quoted in the *dissertation*.  
*Potentially used in conference presentation, published papers etc.*

- I understand that if I inform the researcher that myself or someone else is at risk of harm they may have to report this to the relevant authorities - they will discuss this with me first but may be required to report with or without my permission.
- I understand that under freedom of information legalisation I am entitled to access the information I have provided at any time while it is in storage as specified above.
- I understand that I am free to contact any of the people involved in the research to seek further clarification and information.

Nasim Hekmat, Masters degree student – nona.hekmat@gmail.com  
 Joana Quintela, Assistant Professor - joana.quintela@gmail.com  
 Jorge Marques, Assistant Professor - jorgem@mail.upt.pt

*Signature of research participant*

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Signature of participant

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Date

*Signature of researcher*

I believe the participant is giving informed consent to participate in this study.

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Signature of researcher

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Date

## ANNEX 2 - Interview Script (EN)

Name (Nome):
Age (Idade):
Name and location of the organization in which you work (Nome e localização da organização onde trabalha):
Job title/Function (Cargo e função):
Please indicate your education and training area (Por favor, indique a sua escolaridade e área de formação):
Brief description of your duties in the context of the organization/business areas (Breve descrição das suas funções no contexto da organização/áreas de negócio):
How long do you work in this organization? (Há quanto tempo trabalha nesta organização?)
How many employees work on this organization? (Quantos funcionários trabalham nesta organização?)
1. How would you describe the importance of wellness tourism for Algarve region?(Como descreve a importância do turismo de saúde bem-estar para a região do Algarve?)
2. How would you describe the level of tourist attractiveness of Algarve region, comparing to other regions of Portugal? (Como descreve o nível de atratividade turística da região do Algarve, em comparação com outras regiões de Portugal?)
3. What are the main strengths of the Algarve as a health and wellness tourist destination? (Quais são as principais forças do Algarve como destino turístico de saúde e bem-estar?)
4. What are the main weaknesses for the Algarve as a health and wellness tourism destination? (Quais são as principais fragilidades do Algarve enquanto destino turístico de saúde e bem-estar?)
5. Please identify the opportunities of this segment for the Algarve territory. (Por favor, identifique as oportunidades deste segmento para o território algarvio)
6. Please identify the threats that may exist for the development of this segment in the Algarve. (Por favor, identifique as principais ameaças que podem existir para o desenvolvimento deste segmento no Algarve)
7. In this context, what development strategies / policies do you think are still necessary for this territory to assert/stand out at international level? (Neste contexto, que estratégias/políticas de desenvolvimento considera ainda necessárias para que este território se afirme/destaque a nível internacional?)
Email Address

## Health Tourism: SWOT analysis of the Algarve Region