

21세기 블루오션, 한의학의료관광활성화를 위한 탐색적 연구

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Abstract

A Study on the Strategies for Stimulating Medical Tourism in Oriental Medicine Blue Ocean of the 21st Century

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1. Objective

This study aims to evaluate the medical tourism structures in countries with prosperous medical tourism industry such as Thailand, Malaysia, Singapore and India in order to propose optimal strategies that can promote the medical tourism in Korea.

2. Methods

All pertinent literature concerning medical tourism directly and indirectly were assessed, and reviews of medical tourism strategies found in various countries were evaluated.

3. Results

Evaluation of related literature reveals that medical tourism is a recent burgeoning industry that has grown in market size considerably in the last five to ten years. Also, it shows that oriental medicine is a highly likely candidate amidst the various medical fields for attraction foreign patients.

4. Conclusion

The Korean government should support and install appropriate legal and administrative bodies in order to attract medical tourists; Korea-specific medical tourism programs (ie. traditional Korean medicine package tours) should be developed in order to attract medical tourists from the western world and the middle-east. In addition, low-price policy of medical tourism is not a proper strategies for the competition against advanced medical tourism destinations such as Thailand, Malaysia, Singapore and India. Differentiated medical tourism package such as oriental medical tourism program rather than provision of low-price policy seems to be more effective strategy for the medical tourism in Korea.

Future studies on strategies for promoting medical tourism should focus on how foreigners recognize traditional Korean medicine, what diagnostic approach might be appealing to them and how the legal system concerning the medical procedures may be altered and modified.

Key Words : Medical Tourism, Oriental medicine, Oriental medical tourism

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I. Introduction

Despite the world economic downturn, medical tourism has emerged as one of the fastest growing market segment. Especially, high cost of treatments in developed countries, such as United States of America(USA) and United Kingdom(UK), have been continually attracting patients from such regions towards alternative cost-effective destinations.¹ It is found that medical tourism is attraction the attention of patients who are faced with long waiting times for specialist appointments, medical screening, diagnostic testing, hospitalization, treatment and/or surgery.

Although the medical technology and service of Korea is in the level of advanced country, medical tourism in the region is in its infancy, compared to that of Thailand, Malaysia, Singapore and India. Fortunately, the government, local councils and cities such as Seoul, Busan, JeJu and Daegu have recently recognized the importance of medical tourism and have made some efforts to stimulate medical tourism industry.

Government has also introduced a new category of medical visa for foreign tourists who visit the country for medical purposes. Apart from this, the government has given permission to the private hospitals to directly seek foreign patients from May 2009 as a part of medical tourism promotion policies.

Therefore this study attempts to evaluate the medical tourism structures in countries with prosperous medical tourism industry such as Thailand, Malaysia, Singapore and India in order to propose optimal strategies that can promote the medical tourism in Korea.

In relation to oriental medical tourism, the oriental medical level of Korea is higher than that of other countries, it has the potential power to attract western people, who have interests in acupuncture and moxibustion as well as Asian.² However, Korea government and oriental hospitals have little attention on potentiality of oriental medical tourism and no interests in creation of oriental medicine environment and development of medical tourism commodity. In addition, despite oriental medicine could occupy im-

portant position in Korean medical tourism industry and the importance of oriental medical tourism, little research has been undertaken on oriental medical tourism. Thus this paper also aims to highlight the importance of oriental medical tourism as an attractive industry in Korea.

II. Concept and the Importance of Medical Tourism

In broad meaning, medical tourism is a combination of cost-efficient personal medical field and public tourism industry. The medical tourism is also highlighted in industry because it is possible to create employment through medical tourism, expect with the additional profit through medical treatment of foreign patients and increase additional profit of tourism industry.

Table 1. Definition and Concept of Medical Tourism

	Definition
Hall (1992)	As a tourism with special meaning, it is a tourism, whose main motive is concerned to health ³
Laws (1996)	It is a leisure activity to leave home in order to improve own health state. ⁴
Gupta (2004)	It is to provide the patient, who needs operation and treatment, with efficient medical service at low cost ⁵
Connell (2006)	Form of tourism that involves medical interventions that are substantial and have long-term effect ⁶
Cho Gu-Hyun (2006)	It is a tourism type that provides patient with medical service, combining tourism activity for the purpose of health improvement as well as medical treatment ⁷

According to scholars and researchers see (Table 1), who assert the concept of medical tourism, it can be identified that medical tourism is a combination of wellness and healthcare coupled with leisure and relaxation which is aimed at rejuvenating a person mentally and physically, drawing away from one's daily routine to a relaxed environment in an exotic location. It also means tourism commercialization that connects tourism to the patient, whose purpose is plastic surgery, aesthetics and health examination.

III. Medical Tourism Destination Analysis

As mentioned, over the past decades, Asia has been the preferred medical tourism destination for many foreigners seeking less expensive but high-quality medical treatments. This increase is partially due to high medical costs in western countries such as the USA and UK.

For 2005, it was analyzed that approximately 19 million patients visited other countries for medical treatment.⁸

In Asian region, Thailand, India and Malaysia are favorites among medical tourists mainly because of the significantly cheaper health care, which can cost as little as 10 percent of comparable care in the USA and UK but still provide quality treatments by medical experts who have been trained in the US, UK, and other western countries (Table 2).

Particularly, Thailand is well known for its warm and generous hospitality in addition to its well-educated medical community. Bangkok's Bumrungrad Hospital, whose pa-

tient-base is 50 percent foreign nationals, was the first to receive Joint Commission International (JCI) Accreditation in Asia. Additionally, medical tourism is not only popular in Bangkok but also other cities in Thailand with a high concentration of foreign tourists. Hospital, where Japanese and Middle Eastern nationals make up a significant portion of the inpatient list, is now present in major centers like Pattaya, Hua Hin, and Phuket region.

Malaysia is also a great destination for medical tourism due to its highly efficient medical staff and modern health-care facilities as well as its engaging relaxing beaches. It is fast becoming a competitor for some of the most popular medical tourism destinations, India and Thailand.^{9,10}

India is one of the most popular medical tourism destination with high medical level and low medical cost. Indian private medical centers excel in all medical treatments and a large number of foreign patients are visiting India for Orthopaedic surgery, Obesity surgery, Cosmetic surgery, Neurosurgery and host of other treatments.¹¹ Recently, Dubai constructed the medical city to occupy medical tour-

Table 2. Current Status of Asian Medical Tourism

Country	State
Thailand	<ul style="list-style-type: none"> • It estimates 40% of foreign tourists as medical tourists and selects and nurtures medical tourism that combines tourism and medical service as core industry of country. • Thailand's low cost and scenic beaches and attractions have enabled it to become the largest medical tourism market in Asia. • Thailand government and medical centers minimize the inconvenience of communication by constructing the web-site of 14 language versions including Korean. • It constructs reliance by acquiring certificate about hospital facility and medical team level from International Hospital Accreditation Institution.
India	<ul style="list-style-type: none"> • India offers vast range of medical treatments, from simple dental procedures to the complex cardiac surgeries. • Patients can save 60%-95% of their treatment costs by undergoing treatment in India. • The Indian medical tourism market is expected to generate over US\$ 2.5 Billion in revenues by 2012
Singapore	<ul style="list-style-type: none"> • Healthcare costs are relatively high in Singapore as compared to Thailand, Malaysia and India. However, the country boasts of an infrastructure and medical resources that in some cases are even better than those in the west. • Hospitals improve quality of medical service by constructing network with international medical institute and university. • Singapore government establishes Bio-Medical industry policy through 'Singapore Medicine' and improves concerned regulation and law.
Malaysia	<ul style="list-style-type: none"> • Malaysia government encourage the hospitals to participate in international medical treatment EXPO. • The medical equipments in most of these hospitals are state-of-the-art. • Malaysia is a great destination for medical tourism due to its highly efficient medical staff and modern healthcare facilities as well as its engaging golf tourism destination.

ism market of Middle East, which is flowing into Asian market. It has made an effort to invite skilled German medical team from Guam in order to reinforce the weakness of price competitiveness. For Lebanon, many doctors are emphasizing the medical technologies learned in advanced countries.

To sum up, reasons that countries including Thailand, Malaysia, India and Singapore have a high reputation of medical tourism is that they make an effort to provide patients with medical treatment and rest at the same time by nurturing distinguished field on the basis of discriminated price policy.

IV. Medical Tourism Promotion Strategy in Korea

Medical level of Korea is not inferior to that of advanced countries. Moreover, it is also recognized that Korea has a sufficient potential ability for medical tourism with the price competitiveness.¹² However, the medical tourism is not stimulated yet when compared to that of other Asian countries.

Fortunately, Korea new government initiatives to promote the country as a medical tourism hub and fuel the growth in the Korean medical tourism industry.

Despite the gloomy outlook for the world economy, medical tourism industry in Korea has witnessed an impressive growth of more than 55% in 2008 over the same period last year. Ministry of Welfare also launches Council for Korean Medicine Overseas Promotion, which is a civil governmental institute consisting of 34 Korean medical organizations, held local presentation for Korean resident in LA and performed Korean medical treatment experience event for the people concerned to medical tourism and local autonomies are displaying joint medical tourism marketing with various medical associations and local university hospitals.

The Seoul Metropolitan Government opened a support center for medical tourism to attract foreigners with the desire to have plastic surgery. It also designated

Gangnam-gu as a cosmetic surgery specialized district and has a plan to establish systematic frame for activating medical tourism by establishing Seoul Tourism & Marketing Co., Ltd. and hospitals and clinics are establishing plans to attract foreign patients actively.¹³

It is found that among medical treatment fields, the cosmetic surgery has the highest interest in the attraction of foreign visitors. Currently, the stimulation of medical treatment is being prepared by organizing 'Seoul Medical Tourism Activation Council' consisting of 24 medical organizations concentrated on plastic surgery and 7 travel agencies including JaU Tour.

Local hospitals such as International Cheongshim Hospital, Woorideul Hospital and Plastic Surgery Town are actively supporting medical tourism by fully using their characteristics.

V. Status of Medical Tourism Activity of oriental Medicine in Korea

As Korea has unique health-care resources such as Korean oriental medicine, traditional food and superior modern medical treatment resources, it has a potential value of economic and cultural commodity in international market.

When considering that main field of medical tourism belongs to non-emergency or optional operation field, it is possible to commercialize oriental medical tourism for foreigners with plastic surgery and skin care.

According to recent study on foreign tourists, cosmetic surgery, dental treatment, and oriental medicine have a high possibility to achieve success in the attraction of foreign patients when Korea actively promotes medical tourism. In addition, after interviewing the people who experienced medical tourism, reveals that the satisfaction level of oriental medicine was second highest next to medical skin care.

Since Korean Hospital Kyunghee University began 'Oriental medical health tour' business in the early 2000's and it has provided foreign language services such as

English, Japanese and Chinese for the staff engaged in medical treatment for foreigners. In addition, it has performed "Sasang constitution" examination program and advertised oriental medicine package program consisting of oriental medicine tea experience and traditional food experience for Japanese.¹⁴

Dongguk University Oriental Hospital, which was appointed as the first hospital for 'Health Tour to Korea' of Korean Health Industry Development Institute, manufactured 'Thousand Year Old City Gyeongju Oriental Medicine Health Tour' program and has performed live blood analysis, "Sasang constitution" examination, meridian diagnosis and aroma experience and has provided Gyeongju historical site tourism at the same time.

Jaseng Hospital of Oriental Medicine provides oriental medical services such as acupuncture and moxibustion.

Conmaul Gyeongju Oriental Hospital offers a one-night-two-day health tour program in which patients can be received both Korean and western health tests, oriental medical treatment, as well as enjoying the spas and sightseeing in Gyeongju. This hospital is famous for the venue, a Korean traditional house, and has a spacious garden.

Chorakdang in Ulju, Ulsan offers one-night-two-day or two-night-three-day health tour program in which visitors can receive oriental medicine consulting and medical treatments using yellow mud as well as herbal baths. Visitors can relax in a small, traditional house made from yellow mud and also enjoy sightseeing in nearby Gyeongju.

In spite of Oriental hospital's effort to attract foreign patients, however, the commercialization effort should be improved when compared to western medicine.

VI. Discussion

As service industry is considered as an important factor for improving national competitiveness in the 21st century, Korean government announced that they would have more interests in and activate medical tourism. Moreover, the government established the goal to attract about 0.1 million foreign patients to Korea by 2012. Therefore, the medi-

cal organizations such as Hanyang University Medical Center, Catholic University St. Mary's Hospital and Ajou University Hospital have made efforts to attract foreign patients and activate medical tourism.¹⁵

However, the medical tourism of Korea is later than that of rival countries such as Thailand, Singapore and India, Korea needs to characterize and specialize medical tourism brand by developing medical tourism commodity on the basis of advantages such as oriental medicine, health diagnosis and plastic surgery.

Especially, Korea needs to develop technology continuously, absorb model of advanced countries and attract interest by emphasizing low-price in order to be the medical tourism hub. India, Singapore and Thailand could be centers of medical tourism because many patients visited from various countries as their low treatment cost and high-level medical treatment and service became famous verbally.

Now, Korea needs to make the best effort for activating medical tourism and securing competitiveness in medical fields, which have high medical levels and high potential powers for attracting foreign patients. Among them, oriental medicine field has a high value-added and attracts the interest of Asian people including Japanese and Chinese because of the effect of Korean wave. Due to famous people, celebrities of USA have high interests in acupuncture and cupping, it is expected that it will have a high development potential power and competitiveness.

Recently, some of local autonomous entities make an effort to activate oriental medical tourism by leading the creation of oriental medicine town. However, it is more important to pay attention to improving software by benchmarking success reason and strategies of the countries, whose medical tourism is developed, rather than develop hardware like creation of oriental medicine center.

For the purpose, several things should be prepared and improved. At first, exclusive interpretation team should be organized to improve inconvenience of foreign patients. For example, Bumrungrad Hospital of Thailand provides the interpretation team that can use more than 14 languages. One hospital located in Bangkok possesses 70 in-

terpretation staffs and all hospital staffs can speak English.

Korean oriental medicine field needs the interpretation that can systemize oriental medicine tourism basically in order to communicate foreign patients and reconsider their satisfaction level. Furthermore, it is necessary to develop various medical tourism commodities and support marketing effort by referring to Indian case that developed program on the basis of traditions such as Yoga and Ayurveda.

For Koran Oriental medicine, because "Sasang Constitutional typing" program, which is based on four different constitutions(Tae-yangin, Tae-eumin, So-yangin, So-eumin) is discriminated from traditional Chinese medicine, it is expected that it has an abundant growth potential as a unique oriental medical tourism commodity. It is necessary to develop various medical tourism commodities such as half the morning health examination commodity of Thailand and medical tourism commodity of India combining Ayurveda, Yoga and Taj Mahal tourism and make active marketing effort through fair to attract foreigners. In addition, it is hard to achieve success in medical tourism only with effort of medical team, hospital and clinic. Korea government has to recollect that foreign patients visit country for both purposes of medical treatment and tourism. Thailand provides medical tourists with great satisfaction by performing the advertisement 'We will establish treatment schedule and accommodation and travel schedule of tourist site' on a large scale.

Government should make an effort for developing oriental medical tourism by recollecting that main hospitals of Singapore provide airport transfer service and hotel reservation service and develop medical tourism commodity through the collaboration with travel agency. Moreover, Korea needs to open one-stop oriental medical tourism service center from the macroscopic viewpoint and provide patients and carer with general services such as immigration control support, guide of specialized oriental hospital for foreigner, interpretation support, consulting support, accommodation reservation, tourism commodity guide and reservation, medical treatment support after homecoming.

Finally, the future study for activating oriental medi-

cal tourism needs to research how foreigners recognize oriental medicine and what diagnostic field they have interests in and consider the regulation like medical law more thoroughly.

VI. Conclusion

This study suggests follows for stimulating medical tourism in the future by reviewing the cases of successful medical tourism destinations for the purpose to activate Korean oriental medical tourism, grasping success reason and surveying the current state of Korean medical tourism.

1. Currently, countries are recognizing the importance of medical tourism and accessing to the developmental direction from the various aspects. Korean government should support and install appropriate legal and administrative bodies in order to attract medical tourists.
2. Korea needs to preoccupy the advantage of medical tourism by developing unique oriental medical system, "Sasang constitution" in order to attract medical tourists from the western world and the middle-east.
3. Low-price policy of medical tourism is not a proper strategies for the competition against advanced medical tourism destinations such as Thailand, Malaysia, Singapore and India. Differentiated medical tourism program such as traditional Korean medicine package tours rather than provision of low-price policy seems to be more effective strategy for the medical tourism in Korea.
4. It is essential to solve language problem and reconsider developmental direction urgently.

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