

## A comparative Analysis and Trends of Top Countries for Medical Tourism Industry to Enhance its Activation in South Korea

Kyung Jae Yoon

<sup>1</sup>Assistant Professor, Department of Digital Business Chinese, Jangan University, Hwasung, Korea  
[leaoyoon@jangan.ac.kr](mailto:leaoyoon@jangan.ac.kr)

### Abstract

Since its inception in 2009, medical tourism in South Korea has continued to progress. Reaching its peak in 2019, the industry experienced a sharp decline in inbound patients after the COVID-19 pandemic in 2020 due to international border closures and a surge in patient numbers. However, from 2021 onwards, there has been a gradual increase in inbound patients. The purpose of this study was to classify the top 12 countries based on the number of actual patients entering the country from 2014 to 2022, using statistics from the Korea Health Industry Development Institute. It also analyzed the changes in the number of foreign patients visiting Korea and the evolving proportion of actual patients compared to short-term visa arrivals on a yearly basis. Through this content, we aim to examine the trends on a country-by-country basis and identify the direction in which the future of South Korean medical tourism should progress. By focusing on healthcare, we intend to pinpoint areas that require attention and improvement, as well as highlight any existing issues. Through modifications and enhancements based on these considerations, we aspire to attract a significant number of foreign patients, thereby promoting South Korea's medical technology on a global scale.

**Keywords:** Medical Tourism, Visa Type, Increase in Number of Actual Patient, Changes in The Number of Patients Visiting Korea

### 1. INTRODUCTION

Since the 2000s, South Korea has experienced the onset of the Hallyu Wave with the global introduction of its cultural contents such as K-POP, movies, and dramas. As interest in Korea has surged, there has been a growing number of tourists eager to witness and experience various cultural and artistic facets firsthand. Particularly, the younger generation exposed to K-POP has demonstrated the influence of Hallyu by mimicking artists' dance moves and music, while famous entertainers have secured robust fandoms in different countries[1]. While facing travel restrictions during the COVID-19 pandemic, there were difficulties in international mobility. However, recent easing measures, coupled with the influence of Hallyu in strategic promotional activities, have led to a recovery in inbound tourist numbers close to previous levels. Additionally, the lifting of restrictions in China has prompted numerous tourists to revisit Korea. Moreover, expanding exchanges with multiple countries have significantly contributed to economic growth, emphasizing the substantial impact on infrastructure development and the domestic tourism industry due to increased tourist demand and industrial expansion. Among the purposes of inbound travel for tourism, various forms of medical

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Corresponding Author: [leaoyoon@jangan.ac.kr](mailto:leaoyoon@jangan.ac.kr)

Tel: +82-31-299-3190

Professor, Dept. of Digital Business Chinese, Jangan Univ., Korea

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tourism, encompassing care, relaxation, and treatment, represent a new field combining medical care and tourism. Presently, the global rise in the elderly population has become a crucial societal concern, sparking considerable interest and necessity in living healthy senior lives. This interest extends beyond receiving benefits solely from one's own culture and healthcare system to seeking overseas journeys for both experiencing different countries and seeking healing and treatment. Furthermore, depending on one's health condition, medical tourism can encompass cultural experiences, shopping, and sightseeing. In recent years, the overall economic growth in Asia, including China and Southeast Asia, has created emerging affluent classes[2]. Some among these populations move to advanced countries with well-developed medical services to access quality healthcare and benefits. The global aging population phenomenon, coupled with the advancement of integrated medical technology, has led to continuous growth in the medical tourism industry. Especially in Asia, this growth is bolstered by an increased awareness of quality healthcare services, prompting populations to travel for medical purposes. Consequently, the scale of the global healthcare and medical services industry is rapidly expanding. Therefore, this study aims to comprehend the status of the domestic medical tourism industry by examining the trends in actual medical tourism patients over the years and the ratio of treatment expenses concerning the number of inbound patients. The objective is to identify key areas and shortcomings that require focus and improvement to attract more medical tourism customers[3]. While previous studies by Han Woo-seok and Kim Jin-kyung [4] encompassed overall medical expense statuses, proportions of actual patients concerning short-term visa arrivals, and average treatment expenses per person from 2009 to 2018, this study primarily focuses on analyzing fluctuations in patient numbers. It differentiates itself by considering the ratio of total inbound patients to actual patients, treatment types concerning the number of actual patients, and additionally incorporates the C-3-3 Medical Tourism Visa introduced from 2014 in the analysis of the ratio of actual patients to short-term visa arrivals, thus providing a distinctive perspective.

## **2. THEORETICAL BACKGROUND**

### **2.1 Concept of Medical Tourism**

Medical tourism is a converging field that combines healthcare and tourism, recognized through multifaceted terminologies such as health tourism, health tourism, wellness tourism, and medical tourism [5]. The motivations behind medical tourism can broadly be categorized into domestic and international factors. Domestically, factors include inadequate medical facilities in rural towns, long waiting times, and high costs. Internationally, motivations comprise comparatively lower medical expenses, high-quality medical services, privacy protection, healthcare benefits, opportunities for tourism, and comfortable and pleasant rest compared to one's home country's medical expenses[6]. Medical tourism involves the development and commercialization of valuable resources within the healthcare sector. By providing outstanding domestic medical technologies and services to foreigners, including overseas Koreans, this concept promotes K-Medical on a global scale. Through this, it generates economic profit, contributes to the economy through the development of healthcare service products in a traditional manner unique to our country, and supports national promotion and image-building[7].

### **2.2 Top 12 Countries of Foreign Patients per Year (2014-2022)**

In 2014, the ranking of inbound patients in South Korea was as follows: China, the United States, Russia, Japan, Mongolia, Kazakhstan, Vietnam, United Arab Emirates, Uzbekistan, Indonesia, and Saudi Arabia. The list for 2015 showed China, the United States, Russia, Japan, Kazakhstan, Vietnam, Canada, United Arab

Emirates, Uzbekistan, the Philippines, and Thailand. Last year, Saudi Arabia, previously ranked 11th, fell out of the rankings, while Thailand entered the ranking instead. In 2016, the order was China, the United States, Japan, Russia, Kazakhstan, Mongolia, Vietnam, Canada, Uzbekistan, Thailand, and the Philippines. Notably, the United Arab Emirates entered the rankings for the first time, securing a place, and Thailand ranked 10th, a two-step increase from the previous year. In 2017, the sequence was China, the United States, Japan, Russia, Mongolia, Vietnam, Thailand, Canada, United Arab Emirates, and the Philippines, marking the first appearance of the Philippines in the rankings. In 2018, it was China, the United States, Japan, Russia, Mongolia, Kazakhstan, Thailand, Vietnam, Canada, Uzbekistan, Indonesia, and the United Arab Emirates. Indonesia re-entered the rankings after four years since 2014, while the United Arab Emirates maintained its position steadily since 2016. The ranking in 2019 comprised China, Japan, the United States, Russia, Mongolia, Vietnam, Thailand, Kazakhstan, Indonesia, Canada, Uzbekistan, and the United Arab Emirates. With the onset of COVID-19 in 2020, the rankings were China, the United States, Japan, Russia, Mongolia, Thailand, Vietnam, Kazakhstan, Uzbekistan, the Philippines, Canada, and the United Arab Emirates. In 2021, the order was the United States, China, Vietnam, Mongolia, Thailand, Russia, Kazakhstan, Japan, the Philippines, Canada, Uzbekistan, and Indonesia. A noteworthy observation was the shift in rankings after seven consecutive years of China being the top ranker: the pandemic led to the United States taking the lead, Japan dropping to 8th place from its previously high rank, and Vietnam remarkably rising from the lower ranks to 3rd place. In 2022, the order was the United States, China, Japan, Thailand, Vietnam, Mongolia, Russia, Kazakhstan, Canada, the Philippines, Singapore, and Uzbekistan. Similar to the previous year, the United States remained at the top spot, Japan regained the 3rd position, and Singapore entered the rankings at the 11th position, having not been within the rankings before.

**Table 1. Main parameters**

Ranking/ Year	2014	2015	2016	2017	2018	2019	2020	2021	2022
1	China	China	China	China	China	China	China	USA	USA
2	USA	USA	USA	USA	USA	Japan	USA	China	China
3	Russia	Russia	Japan	Japan	Japan	USA	Japan	Vietnam	Japan
4	Japan	Japan	Russia	Russia	Russia	Russia	Russia	Mongolia	Thailand
5	Mongolia	Kazakhstan	Kazakhstan	Mongolia	Mongolia	Mongolia	Mongolia	Thailand	Vietnam
6	Kazakhstan	Mongolia	Mongolia	Kazakhstan	Kazakhstan	Vietnam	Thailand	Russia	Mongolia
7	Vietnam	Vietnam	Vietnam	Vietnam	Thailand	Thailand	Vietnam	Kazakhstan	Russia
8	Canada	Canada	Canada	Thailand	Vietnam	Kazakhstan	Kazakhstan	Japan	Kazakhstan
9	UAE	UAE	Uzbekistan	Canada	Canada	Indonesia	Uzbekistan	Philippines	Canada
10	Uzbekistan	Uzbekistan	Thailand	UAE	Uzbekistan	Canada	Philippines	Canada	Philippines
11	Indonesia	Philippines	Philippines	Uzbekistan	Indonesia	Uzbekistan	Canada	Uzbekistan	Singapore
12	Saudi Arabia	Thailand	UAE	Philippines	UAE	UAE	UAE	Indonesia	Uzbekistan

[8] Korea Health industry Development Institut

### 3. RESEARCH METHODOLOG

This study selected 12 countries based on the statistics of actual patients who visited domestic medical institutions among foreign visitors to Korea from 2014 to 2022, reported by the Korea Health Industry Development Institute[8], and the immigration policy statistics from the Ministry of Justice's Immigration & Foreigners Policy [9]. The reason for setting the starting point from 2014 is that the C-3-3 visa for medical tourism purposes entering the country began to be recorded by the Ministry of Justice's immigration investigation starting from that year. The selection method for countries was based on the total number of

foreign patients entering Korea from 2014 to 2022, determining the ranking of countries from 1st to 12th in descending order of the highest numbers. The aim is to compare the proportion of actual patients to the total number of foreign patients visiting Korea and to analyze the distribution of medical treatments based on the number of actual patients relative to the total number of treatments provided.

**Table 2. Changes in the number of patients visiting Korea**

year ranking	2014	Number of entrants	2015	Number of entrants	2016	Number of entrants	2017	Number of entrants	2018	Number of entrants
1	China	79,481	China	99,059	China	127,648	China	99,837	China	118,310
2	USA	35,491	USA	40,986	USA	48,788	USA	44,440	USA	45,213
3	Russia	31,829	Russia	20,856	Japan	26,702	Japan	27,283	Japan	42,563
4	Japan	14,336	Japan	18,884	Russia	25,533	Russia	24,859	Russia	27,185
5	Mongolia	12,803	Kazakhstan	12,567	Kazakhstan	15,010	Mongolia	13,872	Mongolia	14,042
6	Kazakhstan	8,029	Mongolia	12,522	Mongolia	14,789	Kazakhstan	12,566	Kazakhstan	12,987
7	Vietnam	3,728	Vietnam	5,316	Vietnam	8,746	Vietnam	7,447	Thailand	8,998
8	Canada	2,943	Canada	3,206	Canada	4,123	Thailand	6,137	Vietnam	7,532
9	UAE	2,633	UAE	2,946	Uzbekistan	4,103	Canada	3,966	Canada	4,098
10	Uzbekistan	1,904	Uzbekistan	2,634	Thailand	3,933	UAE	3,384	Uzbekistan	3,915
11	Indonesia	1,630	Philippines	2,410	Philippines	3,686	Uzbekistan	3,253	Indonesia	3,270
12	Saudi Arabia	1,184	Thailand	2,286	UAE	3,562	Philippines	3,116	UAE	3,034

year ranking	2019	Number of entrants	2020	Number of entrants	2021	Number of entrants	2022	Number of entrants	Ranking	Country
1	China	162,868	China	31,084	USA	28,889	USA	44,095	1	China
2	Japan	68,411	USA	18,004	China	28,021	China	43,923	2	USA
3	USA	58,358	Japan	14,077	Vietnam	10,829	Japan	21,757	3	Japan
4	Russia	29,897	Russia	6,246	Mongolia	9,145	Thailand	20,408	4	Russia
5	Mongolia	17,918	Mongolia	6,102	Thailand	7,287	Vietnam	14,665	5	Mongolia
6	Vietnam	15,133	Thailand	6,047	Russia	6,412	Mongolia	14,148	6	Kazakhstan
7	Thailand	14,162	Vietnam	5,586	Kazakhstan	3,484	Russia	9,616	7	Vietnam
8	Kazakhstan	13,424	Kazakhstan	3,102	Japan	3,305	Kazakhstan	7,290	8	Thailand
9	Indonesia	5,716	Uzbekistan	1,585	Philippines	2,660	Canada	4,718	9	Canada
10	Canada	4,996	Philippines	1,426	Canada	2,333	Philippines	4,568	10	Uzbekistan
11	Uzbekistan	4,194	Canada	1,127	Uzbekistan	2,039	Singapore	3,772	11	Philippines
12	UAE	4,089	UAE	794	Indonesia	1,542	Uzbekistan	3,345	12	UAE

## 4. EMPIRICAL ANALYSIS

### 4.1 Proportion of Actual Patients Compared to Short-Term Visa Entrants

The number of short-term visa entrants was calculated for each country based on the total visas issued, including visa exemptions for entry into Korea, tourist visas (B-1, B-2), short-term visit visas (C-3), medical tourism visas (C-3-3), and visas estimated for medical and tourism purposes. The statistics were derived from the Ministry of Justice's Immigration & Foreigners Policy Headquarters data on short-term visa entrants. The increase in the number of actual patients showed Thailand with the highest rate (50%), followed by China (40%), Japan (30%), and Uzbekistan (18%). Before the COVID-19 pandemic in 2020, the United Arab Emirates showed the highest proportion at 39.4% in 2017, while Kazakhstan recorded 37.0% in 2016. Post the COVID-19 pandemic, Mongolia exhibits the highest proportion at 86.1% in 2021, followed by Kazakhstan (85.0%) and Thailand (83.1%). Though the actual increase in the number of actual patients isn't remarkably

high, countries like the United Arab Emirates, Kazakhstan, Mongolia, and Russia consistently maintain a double-digit percentage share. When examining the number of treatments by type relative to the number of actual patients, for inpatient care, the United Arab Emirates holds the largest share at 21.3%, followed by Thailand at 14.6%, Vietnam at 11.1%, Kazakhstan at 11.0%, Russia at 10.5%, Uzbekistan at 9.2%, Mongolia and the United States at 8.8%, the Philippines at 8.4%, China at 6.8%, and Japan at 4.3%. Conversely, lower percentages were observed with Japan at 4.3%, China at 6.8%, the Philippines at 8.4%, and the United States and Mongolia at 8.8%. For outpatient care, Japan had the highest proportion at 95.7%, followed by the Philippines at 91.6%, the United States at 91.4%, and Mongolia at 91.2%. Subsequently, Uzbekistan at 90.8%, China at 90.6%, Russia at 89.5%, Kazakhstan at 89.0%, Vietnam at 88.4%, Thailand at 85.4%, and lastly, the United Arab Emirates at 70.7%. Canada was excluded from inclusion due to the absence of available data.

**Table 3. Pro portion of actual patients compared to the number of short-time visa enterants by year (%)**

country/ year	China	USA	Japan	Russia	Mongolia	Kazakhstan	Vietnam	Thailand	Canada	Uzbekistan	Philippines	UAE
2014	1.8	5.9	0.7	17.8	21.0	33.0	4.4	0.3	2.8	7.5	1.5	22.8
2015	2.4	6.7	1.1	14.6	16.2	34.5	5.2	0.7	3.1	8.5	1.7	26.1
2016	2.3	7.0	1.2	14.2	18.5	37.0	4.8	1.0	3.2	10.6	2.1	26.4
2017	3.5	6.4	1.2	11.7	13.8	28.2	3.1	1.4	3.1	7.8	1.4	39.4
2018	3.4	5.8	1.5	11.3	12.9	25.9	2.2	1.8	2.8	8.4	1.0	22.0
2019	3.4	6.8	1.8	10.7	16.1	27.9	3.6	2.7	3.3	4.5	1.2	24.5
2020	6.4	14.6	3.0	13.5	27.6	38.7	15.4	9.3	6.4	22.9	3.1	42.0
2021	61.6	18.6	62.5	70.0	86.1	85.0	72.6	83.1	46.5	74.8	7.5	46.6
2022	37.5	10.7	7.5	26.2	23.5	27.6	14.0	11.6	7.7	33.3	4.5	27.0
Increase in number of actual patient	40	7	30	4	1	-2	14	50	12	18	13	2

[9] Number of short-term visa entrants: Immigration and Foreigner Policy Headquarters of the Ministry of Justice.

[8] Number of foreign patients: Korea Health Industry Development Institute Statistics on International Patients in Korea by year.

#### 4.2 Number of Treatment Types in Relation to the Number of Actual Patients

The breakdown of treatment types in relation to the number of actual patients reveals that in terms of hospitalization, the United Arab Emirates holds the highest proportion at 21.3%, followed by Thailand at 14.6%, Vietnam at 11.1%, Kazakhstan at 11.0%, Russia at 10.5%, Uzbekistan at 9.2%, Mongolia and the United States at 8.8%, the Philippines at 8.4%, China at 6.8%, and Japan at 4.3%. Conversely, the lower percentages are observed with Japan at 4.3%, China at 6.8%, the Philippines at 8.4%, and the United States and Mongolia at 8.8%. For outpatient care, Japan had the highest proportion at 95.7%, followed by the Philippines at 91.6%, the United States at 91.4%, and Mongolia at 91.2%. Subsequently, Uzbekistan at 90.8%, China at 90.6%, Russia at 89.5%, Kazakhstan at 89.0%, Vietnam at 88.4%, Thailand at 85.4%, and lastly, the United Arab Emirates at 70.7%. Canada was not included due to the absence of available data. An analysis of the data suggests that in the case of the United Arab Emirates, which sees a significant proportion of hospitalized patients, there is a higher ratio of patients entering for surgery and critical treatment. In contrast, Japan, being geographically adjacent to Korea, appears to attract patients for minor and less severe procedures rather than critical medical cases.

**Table 4. Number of patients by treatment type compared to the number of actual patients(%)**

year country		2014	2015	2016	2017	2019	2020	2021	2022	Average
China	Admission	5490(6.9)	7454(7.5)	8674(6.8)	8518(8.5)	8730(8.5)	6410(3.9)	2300(7.4)	1691(6.0)	2486(5.7)
	Outpatient	6890(86.7)	83970(84.8)	105688(82.8)	91319(91.5)	109580(92.6)	156458(96.1)	28784(92.6)	26330(94.0)	41437(94.3)
USA	Admission	3.421(9.6)	4.003(9.8)	3.906(8.0)	3.829(8.6)	3.450(7.6)	3.399(5.8)	2.386(13.3)	2.436(8.4)	3.569(8.1)
	Outpatient	32.070(90.4)	36983(90.2)	44882(92.0)	40611(91.4)	41763(92.4)	54959(94.2)	15618(86.7)	26453(91.6)	40.526(91.9)
Japan	Admission	803(5.6)	738(3.9)	771(2.9)	1039(3.8)	2501(5.9)	1872(2.7)	602(4.3)	155(4.7)	1009(4.6)
	Outpatient	13533(94.4)	18146(96.1)	25931(97.1)	26244(96.2)	40062(94.1)	66539(97.3)	13475(95.7)	3150(95.3)	20748(95.4)
Russia	Admission	4425(13.9)	2522(12.1)	2354(9.2)	2780(11.2)	2455(9.0)	2329(7.8)	618(9.9)	676(10.5)	1047(10.9)
	Outpatient	27404(86.1)	18334(87.9)	23179(90.8)	22079(88.8)	24730(91.0)	27568(92.2)	5628(90.1)	5736(89.5)	8569(89.1)
Mongolia	Admission	1673(13.1)	1271(10.2)	1181(8.0)	1314(9.5)	1095(7.8)	1181(6.6)	487(8.0)	711(7.8)	1112(7.9)
	Outpatient	11130(86.9)	11251(89.8)	13617(92.0)	12558(90.5)	12947(92.2)	16737(93.4)	5615(92.0)	8434(92.2)	13036(92.1)
Kazakhstan	Admission	993(12.4)	1615(12.9)	1533(10.3)	1598(12.7)	1273(9.8)	1255(9.3)	353(11.4)	335(9.6)	777(10.7)
	Outpatient	7036(87.6)	10952(87.1)	13477(89.7)	10968(87.3)	11714(90.2)	12169(90.7)	2749(88.6)	3149(90.4)	6513(89.3)
Vietnam	Admission	435(11.7)	436(8.2)	799(9.1)	816(11.0)	825(11.0)	974(6.4)	883(15.8)	1567(14.5)	1825(12.4)
	Outpatient	3293(88.3)	4880(91.8)	7947(90.9)	6631(89.0)	6707(89.0)	14159(89.0)	4703(84.2)	9262(85.5)	12840(87.6)
Thailand	Admission	177(14.6)	410(17.9)	457(11.6)	1522(24.8)	1074(11.9)	985(7.0)	728(12.0)	1535(21.1)	2209(10.8)
	Outpatient	1034(85.4)	1876(82.1)	3476(88.4)	4615(75.2)	7924(88.1)	13177(93.0)	5319(88.0)	5752(78.9)	18199(89.2)
Canada	Admission									
	Outpatient									
Uzbekistan	Admission	252(13.2)	254(9.6)	3578.7(8.7)	305(9.4)	243(6.2)	254(6.1)	158(10.0)	271(13.3)	214(6.4)
	Outpatient	1652(86.8)	2380(90.4)	3746(91.3)	2948(90.6)	3672(93.8)	3940(93.9)	1427(90.0)	1768(86.7)	3131(93.6)
Philippines	Admission	260(12.8)	194(8.0)	257(7.0)	264(8.5)	187(7.3)	238(7.1)	165(11.6)	212(8.0)	252(5.5)
	Outpatient	1764(87.2)	2216(92.0)	3429(93.0)	2852(91.5)	2358(92.7)	3099(92.9)	1261(88.4)	2448(92.0)	4316(94.5)
UAE	Admission	715(27.2)	695(23.6)	730(20.4)	713(21.1)	599(19.7)	772(18.9)	158(19.9)	130(19.4)	307(21.3)
	Outpatient	1918(72.8)	2251(76.4)	3832(79.6)	2671(78.9)	2435(80.3)	3317(81.1)	636(80.1)	539(80.6)	1132(78.7)

[8] Korea Health Industry Institute Statistics

## 5. DISCUSSION

Korea's medical tourism, initiated on the foundation of excellent domestic medical professionals and advanced medical technology, began substantially with the 2009 revision of the Medical Act and the implementation of the Act on the Overseas Expansion of Medical Services in 2016, demonstrating steady growth until a sharp decline after the 2020 COVID-19 pandemic. However, a gradual recovery trend has emerged since 2021. Utilizing statistics from the Korea Health Industry Development Institute on foreign patient visits from 2014 to 2022, combined with data on short-term visa entrants from the Ministry of Justice's Immigration & Foreigners Policy, the study selected the final 12 countries. The proportions of actual patients concerning the number of entrants ranked Thailand as the highest, followed by China, Japan, and Uzbekistan, while Kazakhstan ranked the lowest, and Mongolia and the United Arab Emirates exhibited lower rankings.

## 6. CONCLUSION

Implications drawn from this study to revitalize medical tourism suggest diversifying visa types and

promoting the attraction of patients with severe illnesses. As observed in the research, although health check-ups and outpatient cases are high, inpatient cases exhibit lower ratios compared to outpatient cases. Particularl[10]. Therefore, attracting severe patients and those requiring long-term care could positively impact the image of medical institutions and the country[11]. Secondly, while an increase in patients entering Korea for physical health improvements through treatments and procedures is essential, developing programs and expanding spaces for medical tourists seeking mental and physical stress relief, promoting unique aspects of our culture not found in other countries, and providing opportunities for mental and physical healing could be crucial. This approach may help restore mental well-being and attract medical tourists back to Korea for recovery purposes[12]. Thirdly, considering the stringent entry measures in various countries due to COVID-19, active promotion and marketing efforts by the government, local authorities, and relevant institutions are vital to regain the momentum of attracting medical tourists. Collaboration between medical institutions and the government, implementing policies to secure foreign patients, providing reasonable and updated medical expenses, state-of-the-art equipment, and excellent medical services, are essential to not only return to pre-pandemic levels but also to compete favorably with other countries in the field of medical tourism.

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