

Review

Charting the Sustainable Course: Navigating the Saudi Arabia Medical and Wellness Tourism Roadmap with Business Model Canvas (BMC)

Thaib Alharethi ¹  and Moaaz Kabil ^{2,3,*} ¹ Faculty of Tourism, King AbdulAziz University, Jeddah 21589, Saudi Arabia; talharethi@kau.edu.sa² Faculty of Urban and Regional Planning, Cairo University, Giza 12613, Egypt³ Doctoral School of Economic and Regional Sciences, Hungarian University of Agriculture and Life Sciences (MATE), 2100 Godollo, Hungary

* Correspondence: moaazkabil@cu.edu.eg

Abstract: Medical and wellness tourism has emerged as a pivotal sector with significant economic implications globally, especially after the COVID-19 pandemic. This study delves into the landscape of Saudi Arabia's medical and wellness tourism, recognizing its importance as a key player in the tourism industry. The study aims to elevate this sector to new heights on the global stage by employing the Business Model Canvas (BMC) as a strategic tool. BMC allows for a comprehensive analysis of the medical tourism industry in Saudi Arabia, breaking down key elements across its nine blocks: key partners, key activities, key resources, value propositions, customer segments, channels, customer relationships, cost structure, and revenue streams. The results of this study shed light on the unique selling proposition (USP) as a crucial strategic step for Saudi Arabia to distinguish itself and enhance its position in the international medical tourism arena. By identifying and maximizing the unique aspects within each BMC block, the study presents a roadmap for Saudi Arabia, navigating the challenges and capitalizing on the potential of the medical and wellness tourism sector. This research serves as a guide, emphasizing the strategic importance of a well-defined business model to shape the future of medical and wellness tourism in Saudi Arabia and establish a prominent global presence.



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1. Introduction

Tourism, with its multifaceted nature, extends far beyond the enjoyment activities, cultural immersion, or human connections, holding the transformative power to change and save lives through the realm of medical and wellness tourism. While various definitions exist for medical tourism, a fundamental one is “the act of traveling beyond one’s country of residence with the intention of obtaining medical treatment” [1]. The significance of this tourism sector lies in its economic value, as evidenced by the projected growth of the Medical Tourism Market. Estimated at approximately USD 84.92 billion in 2024, the market is expected to surge to USD 239.37 billion by 2029, reflecting a Compound Annual Growth Rate (CAGR) of 23.03% from 2024 to 2029 [2]. This growth is attributed to global socio-economic challenges, with individuals naturally seeking improved physical and mental health, commonly referred to as “quality of life” [3,4].

Medical and wellness tourism, from the global perspective, has become an economic driving force, generating millions of USD and becoming intricately interlinked with various national economic sectors. Beyond its apparent role as a conventional recreational tourism sector, it warrants a shift in perspective toward being viewed as a robust business or industry. From a business standpoint, the economic value added (EVA) of medical and wellness tourism is profound. The sector not only contributes significantly to a country’s

GDP but also creates a ripple effect, known as the “economic multiplier effect”, stimulating growth in various related industries [5,6]. Health care providers, hospitality services, transportation networks, and security apparatus are intricately woven into the fabric of this business, fostering a comprehensive ecosystem that extends well beyond the act of travel for medical purposes.

The connection of the medical and wellness tourism sector to the health care industry is particularly noteworthy. As medical tourists seek specialized treatments and services, there is a surge in demand for high-quality medical facilities, advanced technologies, and skilled healthcare professionals. This, in turn, prompts investments and advancements in the healthcare sector, creating a symbiotic relationship that benefits both the medical tourism industry and the overall health infrastructure of a nation [7–9]. Moreover, the interplay between the medical tourism sector and the infrastructure and transportation sectors is undeniable. To cater to the needs of medical tourists, countries often invest in their medical facilities, modern accommodation, and efficient transportation networks. This not only enhances the overall appeal of the destination but also contributes to the broader economic development of the nation. On the international stage, medical tourism fosters diplomatic ties and collaborations, as it appears as an international service trade [10]. Countries that excel in providing world-class medical services become sought-after destinations, attracting individuals from across borders. This cross-cultural exchange not only enhances global connectivity but also facilitates international cooperation in healthcare research and development. From a security perspective, the flow of medical tourists necessitates robust safety measures and protocols [11]. Ensuring the well-being and safety of patients becomes a priority, contributing to advancements in security infrastructure and protocols [12].

2. Literature Review

2.1. Saudi Arabia's Medical and Wellness Tourism Overview

This section aims to provide a thorough and all-encompassing overview of the medical and wellness tourism sector in Saudi Arabia. The primary objective is to address the multifaceted question: What are the potentials and challenges of the medical and wellness tourism sector in Saudi Arabia? Furthermore, we will explore the feasibility of Saudi Arabia emerging as a leading medical tourism destination. If such a possibility exists, what is the first strategic step that should be taken to facilitate and propel its ascent in the global medical tourism market?

In recent years, the medical and wellness tourism sector in Saudi Arabia has undergone substantial evolution, supported by significant government funding and investments in the broader tourism sector. Notable tourism projects such as NEOM city, Red Sea Projects, Qiddiya entertainment city, Amaala, and Al Ula showcase the country's commitment to transforming its tourism industry, “taking it to the next level” [13–15]. This concerted effort to boost the tourism sector has inherently influenced the medical and wellness tourism segment. The government's dedication to enhancing healthcare infrastructure and attracting international visitors has played a pivotal role in shaping the future of this tourism sector.

The historical timeline of medical tourism in Saudi Arabia can be divided into two distinct periods: pre-2016 and post-2016. Before 2016, the primary focus centered on meeting the healthcare needs of the local population. The Kingdom was in the nascent stages of building a robust healthcare infrastructure to ensure access to quality medical services for its citizens. This phase prioritized the development of hospitals, clinics, and medical centers to address the growing health demands of the Saudi population, with an emphasis on providing essential medical services, preventive care, and treatments for common ailments to residents and citizens [16,17]. At this stage, Saudi Arabia's healthcare sector had limited international visibility, and the country was not actively positioning itself as a destination for global patients seeking specialized medical treatments.

The transformative phase began with the launch of Vision 2030 in 2016, signaling a paradigm shift in Saudi Arabia's approach to medical and wellness tourism. Vision 2030

aimed to diversify the economy and revolutionize the healthcare sector, prompting substantial investments to modernize existing facilities and establish prime medical institutions [18]. Subsequent investments and strategic plans focused on elevating the standard of healthcare services and infrastructure to international levels. The country actively sought international accreditations and certifications for its healthcare facilities, aiming to position itself as a hub for advanced medical treatments and wellness experiences. This transition marked the beginning of Saudi Arabia's journey to become an internationally recognized destination for medical tourism, attracting international patients seeking specialized healthcare services and contributing to the nation's economic and social development.

The current state of the medical and wellness tourism sector in Saudi Arabia shows promising developments, indicating the country's aspirations to become a significant player in this global industry. As of 2023, the medical and wellness tourism market in Saudi Arabia is valued at approximately USD 0.16 billion, with expectations of a 22.52% growth by 2029. This market encompasses various medical treatments and services, including orthopedic, gynecological, pediatric, dental, fertility, and cosmetic treatments [19]. Supported by governmental initiatives such as Saudi Vision 2030, the Saudi Arabian General Investment Authority (SAGIA), a branch of the Ministry of Investment and the official investment promotion agency of Saudi Arabia, has provided foreign investors in the healthcare sector with full ownership rights, underscoring the government's commitment to privatize 295 hospitals and reform the healthcare system [19,20].

Another perspective on the current state of the medical and wellness tourism sector in Saudi Arabia concerns its marketing strategies. Despite recent government attention to this sector, a review of the literature, including official government documents, reports, and academic work, highlights persistent obstacles to its enhancement [16,17,19]. One such challenge lies in the fragmented and traditional marketing approaches prevalent in the medical tourism sector. For instance, medical facilities in the country often showcase their state-of-the-art equipment, advanced medical procedures, and renowned healthcare professionals through individual promotional materials [16,21]. However, there is a lack of an official or comprehensive portal or framework to centralize this information. This fragmented approach hampers the dissemination of accurate and standardized information to potential medical tourists. While leading hospitals like King Faisal Specialist Hospital & Research Center (KFSH&RC) and King Abdulaziz Medical City (KAMC) maintain informative websites and social media profiles, smaller healthcare facilities rely on traditional advertising methods like brochures, billboards, and local events [17,19]. This lack of a centralized platform results in inconsistencies in the information provided by different healthcare providers, leading to confusion among potential patients. Furthermore, the absence of a comparative guide comparing the medical sector in Saudi Arabia and other leading medical tourism destinations, such as Thailand, Singapore, and India, limits the exposure of the medical tourism sector in Saudi Arabia [16,17,22]. To address these marketing challenges and unlock the sector's full potential, there is an urgent need for the adoption of innovative and targeted marketing approaches. Emphasizing the country's unique offerings and focusing on its unique selling points (USPs) in the medical tourism domain could attract international patients and propel the sector towards growth and success.

Accordingly, what are the potentials that can lead the medical and wellness tourism in Saudi Arabia? There are various potentials, but we can summarize and merge them into the following five core ones. The first potential is the advanced healthcare infrastructure and facilities supported by significant government financial initiatives and investments. These encompass various medical cities, hospitals, medical research and development centers, health insurance providers, and specialized medical tourism clusters, such as King Fahd Medical City and King Faisal Specialist Hospital. For instance, according to the Joint Commission International (JCI), there were 111 JCI-accredited organizations in Saudi Arabia in 2023, reflecting the robustness of this sector at present [23].

The second potential lies in the recent notable enhancement of medical services in Saudi Arabia, reaching standards akin to those in the United States. This achievement is

particularly evident in specialized medical services, where the Kingdom has made remarkable strides, fostering an environment of excellence that rivals global benchmarks. Their commitment to excellence not only matches but, in certain areas, surpasses benchmarks set by leading international counterparts [22]. Furthermore, Saudi Arabia has demonstrated a stringent commitment to pharmaceutical standards, akin to, if not exceeding, the scrutiny applied by the United States Food and Drug Administration (FDA). For example, the performance of the Saudi Program for the Separation of Conjoined Twins, which has successfully conducted more than 50 surgical separations of conjoined twins, is considered an internationally recognized feat in this medical service and treatment.

The third potential is cultural and historical attractions, where Saudi Arabia is augmented by its rich cultural and historical attractions. Beyond the realm of healthcare, the country offers a diverse tapestry of experiences for tourists. Visitors can explore historical sites such as Al-Ula, immersing themselves in the rich heritage of the region [21]. This cultural dimension adds a unique allure, attracting tourists seeking a holistic experience that seamlessly integrates medical treatments with cultural exploration.

The fourth potential for the medical and wellness tourism sector in Saudi Arabia lies in fostering collaborations and partnerships within the global healthcare ecosystem. Saudi Arabia can leverage international partnerships with leading healthcare institutions, research centers, and wellness organizations. Collaborative efforts can facilitate knowledge exchanges, technology transfers, and the implementation of best practices, further elevating the quality of medical and wellness offerings in the country [16,22,24].

The fifth core potential on this list underscores the Kingdom's strategic geographical location and accessibility. As previously mentioned, medical tourists often seek high-quality medical services at lower prices and with shorter waiting times. Saudi Arabia's location is instrumental in reducing the costs associated with the medical tourism journey. Positioned at the crossroads of Asia, Europe, and Africa, the country offers accessibility to a vast and diverse global audience. This strategic advantage is illustrated in Figure 1, depicting the flight time approximations for Saudi Arabia. The country's geographic location enables it to connect to Europe (an increasingly influential outbound medical tourism market) and the African continent (an established and historically active outbound medical tourism market), both falling within the 6–8-h range [25].

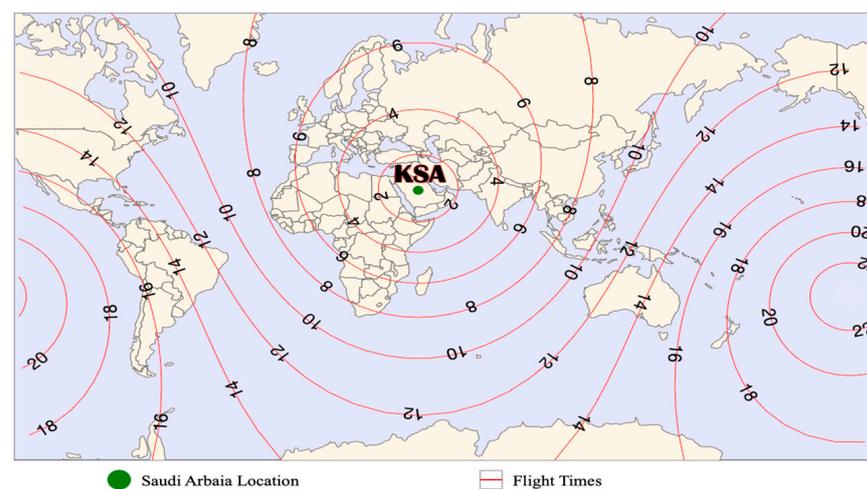


Figure 1. Approximate flight time map—strategic geographical advantage of Saudi Arabia for the medical and wellness tourism sector. Source: Author, adapted from [25].

In addition to these detailed potentials for the medical and wellness tourism sector in Saudi Arabia, there are other potentials that can be summarized, including the streamlined visa processes and travel logistics, robust data security, and patient privacy measures. Despite these unique characteristics, the sector has seen limited success in attracting medical tourists, with Saudi Arabia ranking 39 out of 46 as a medical tourism destination according

to the Medical Tourism Index [26]. This question naturally directs our attention to the challenges faced by the medical and wellness tourism sector in Saudi Arabia.

The medical and wellness tourism sector in Saudi Arabia, despite its promising potentials, encounters several challenges that have impeded its success. These challenges present significant hurdles that need to be addressed for the sector to thrive and establish itself as a leading destination for medical tourism. One notable challenge revolves around Saudi Arabia's image in the global medical and wellness tourism market. Historically, the country has been perceived more as a source than a destination in this market. Thousands of Saudi citizens travel abroad annually for various medical purposes. For instance, the Saudi Health Ministry reports that around 2,400 Saudi patients sought treatment in countries like the United States, UK, Germany, and China [27,28]. While this number may not seem substantial, it impacts the country's overall image in the global medical market as both a source and destination. Essentially, the following question arises: why would international patients choose Saudi Arabia for medical treatment if the country's own citizens seek medical care elsewhere?

This primary challenge brings attention to another critical issue, which is the necessity for extensive and unprecedented promotion and marketing efforts to reshape and enhance Saudi Arabia's visibility as a medical tourism hub. Despite having an advanced healthcare infrastructure and high-quality medical services, the lack of comprehensive marketing strategies has hindered the sector's ability to attract a significant number of medical tourists. Building awareness and promoting the unique offerings of Saudi Arabia in the global medical tourism market is crucial to overcoming this challenge [29].

Furthermore, there are inherent cultural and perception challenges that the sector faces. Saudi Arabia, despite its modernization efforts, may be perceived by potential medical tourists as a conservative destination. Overcoming these preconceived notions and promoting the cultural and historical attractions alongside the medical services is crucial for attracting diverse demographics of medical tourists. This challenge is compounded by intense competition from Asian neighboring countries in the medical and wellness sector [22,24]. Countries such as Oman, Turkey, Taiwan, and Thailand have established robust offerings, presenting formidable competition. These nations have strategically positioned themselves as leading medical tourism destinations, showcasing diverse attractions, advanced medical facilities, and competitive pricing.

Another significant challenge facing the medical and wellness tourism sector in Saudi Arabia lies in the stringent regulations governing pharmaceutical standards within the country. Saudi Arabia maintains rigorous standards for the production, distribution, and importation of pharmaceutical products, ensuring the safety, efficacy, and quality of medications available to its populace [30]. While these regulations are essential for safeguarding public health and maintaining the integrity of the healthcare system, they can pose challenges for medical tourists seeking specialized treatments or medications not readily available in their home countries. Foreign patients may encounter delays or difficulties in accessing certain pharmaceuticals due to the stringent approval processes required for their importation and use within Saudi Arabia [31]. As a result, healthcare providers and facilities catering to medical tourists must navigate complex regulatory requirements to ensure compliance while striving to meet the diverse healthcare needs of their international clientele [32]. This regulatory landscape underscores the importance of strategic planning and collaboration between healthcare providers, regulatory authorities, and other stakeholders to address these challenges and enhance the overall experience for medical tourists seeking treatment in Saudi Arabia.

Finally, attracting professionals to the medical tourism sector in Saudi Arabia is another multifaceted challenge requiring strategic solutions. Establishing a skilled and diverse healthcare workforce is crucial, not only in terms of medical expertise but also in understanding the cultural needs of international patients. Fostering an environment that encourages collaboration and knowledge exchange at a global scale is essential, involving networking opportunities, continuous education, and exposure to high-tech medical prac-

tices [16,24]. Streamlining licensing procedures, offering competitive compensation, and ensuring a supportive work environment through favorable policies are key components of this. The creation of initiatives focused on professional development, research opportunities, and the integration of technological advancements further positions Saudi Arabia as an appealing destination for healthcare professionals. Comprehensively addressing these factors is vital to overcome the challenge of attracting and retaining skilled professionals in the medical tourism sector in Saudi Arabia.

To enhance the potential and address the challenges encountered by the medical tourism sector in Saudi Arabia, a comprehensive and strategic approach is imperative. This strategic approach should begin by viewing medical and wellness tourism in Saudi Arabia through the lens of a business or industrial framework. By transitioning from ambitious theoretical backgrounds and analyses to practical, on-the-ground, pragmatic actions, this article advocates for the utilization of a business model to form a strategic framework for the medical and wellness tourism sector in Saudi Arabia. This shift in perspective aims to facilitate the translation of conceptual ideas into actionable strategies, fostering the sector's growth and competitiveness in the global market.

2.2. Strategic Role of the Business Model in Saudi Medical and Wellness Tourism Sector

As previously mentioned, the medical and wellness tourism sector distinguishes itself from other tourism sectors through its more business-centric nature, aligning closely with industry practices rather than focusing solely on entertainment and enjoyment. This distinction is particularly pronounced given the significant and targeted efforts by the Saudi Arabian government to boost the tourism sector, including substantial funding and investments. Given this context, examining the medical and wellness tourism sector in Saudi Arabia necessitates a business-oriented perspective. Utilizing business models to chart the course for this specific tourism sector is not only beneficial but also imperative to enhance and optimize its development. This subsection aims to address the question of how business models can contribute to the improvement of the medical and tourism sector in Saudi Arabia.

The conceptual core of a business model functions as a comprehensive blueprint, delineating how an organization generates, delivers, and captures value. Essentially, the business model is reliant on defining methods to enhance the productivity of any organization, firm, economic institution, or industry through sustainable and actionable models with clear and precise steps [33]. These steps are often referred to as action plans or half-baked plans, representing a shift from theoretical foundations to a practical framework.

Although business models, particularly the Business Model Canvas (BMC), were originally conceived as business tools, they have transcended their original function in recent years and emerged as widely utilized research methodologies in academia, spanning various fields, including tourism studies. One of the primary reasons for this is their simplicity and accessibility as a research methodology, especially for review articles [34]. Unlike traditional research methodologies that may require specialized knowledge or training, the BMC offers a user-friendly approach that can be easily understood and applied by researchers from diverse backgrounds. Its visual nature, with its nine interconnected blocks, facilitates the clear and concise representation of complex concepts, making it particularly appealing for researchers seeking to communicate their findings in a comprehensible manner. Furthermore, business models (e.g., BMC), with their holistic perspective, enable researchers to analyze multifaceted phenomena comprehensively [34]. By examining various components of a system or industry within the framework of the BMC, researchers can gain insights into the interplay between different elements and their collective impact on outcomes. This integrative approach aligns with the interdisciplinary nature of many research fields, including tourism studies, where phenomena often transcend traditional disciplinary boundaries [35,36].

In tourism studies, for example, researchers have utilized the BMC to analyze and understand the dynamics of tourism destinations, hospitality businesses, and tourist ex-

periences. For example, scholars such as Grande and Camprubi (2024) [37], Kabil et al. (2023) [38], Zoumpoulidis et al. (2021) [39], and Strulak-Wójcikiewicz et al. (2020) [40] have employed the BMC to map out key elements such as customer segments, value propositions, and revenue streams. Through their research, they identified opportunities for innovation, optimization, and sustainable growth within various sectors of the tourism industry. Additionally, the BMC has been instrumental in guiding strategic decision-making and policy formulation by providing a structured framework for evaluating the viability and potential of tourism initiatives and interventions [38].

Regarding business model definitions, the interpretation of these definitions varies based on the perspective through which they are viewed. Scholars, researchers, and companies have contributed to this discourse, resulting in a diverse array of definitions reflecting unique insights and priorities. These business model definitions can be broadly categorized into three main groups. The first category encompasses definitions providing a general overview of business models and how they contribute to creating, selling, and delivering value to customers. An example of this category is Jonas Hedman and Thomas Kalling's definition, which characterizes a business model as "how a company provides value to customers and transfers payments to profit" [41]. The second category focuses on presenting the complex concept of a business model and outlining its fundamental elements. David J. Teece, for instance, defines a business model as "a useful framework to link ideas and technologies to economic outcomes" [42]. The third category concentrates on presenting definitions of business models based on an analysis of real companies (Dell, Toyota, Xerox, etc.). Henry Chesbrough, for example, defines a business model as "a logic of how an organization creates, delivers, and controls value and how money is earned in a company" [43]. This study will focus on the main concept underlying the various definitions of a business model, which revolves around how organizations add value and derive benefits for customers. This perspective is particularly pertinent to medical and wellness tourists in the context of this study.

In addition, exploring the intricate dynamics of medical and wellness tourism entails a multifaceted approach that necessitates the integration of diverse models and theories. This study delves into the complexities of the medical tourism sector in Saudi Arabia, aiming to illuminate its strategic imperatives. By employing the Business Model Canvas (BMC) as a foundational framework, the study seeks to unravel the complexities of this sector and shed light on its strategic potential. To achieve this, a synthesis of theoretical perspectives is employed to inform the analysis and understand the various relations between the different BMC modules and blocks. For example, Institutional Theory plays a pivotal role in this analysis, providing insights into the regulatory, cultural, and institutional factors that shape stakeholder behavior within the medical tourism ecosystem [44]. By providing an understanding the institutional context in which medical tourism operates, the BMC facilitates the identification of key stakeholders and their roles within the system, thereby aiding in the development of strategies that align with regulatory frameworks and cultural norms [45].

Furthermore, Customer Relationship Management (CRM) Theory offers valuable perspectives on patient-provider interactions, service quality, and patient satisfaction in medical tourism contexts [46]. When integrated with the BMC, CRM principles provide a framework for understanding how value is created and delivered to patients throughout their medical tourism journey. This enables the identification of opportunities to optimize patient experiences and cultivate long-term relationships between patients and healthcare providers [47,48]. Additionally, Stakeholder Theory informs the exploration of the diverse interests and perspectives of stakeholders involved in the medical tourism sector [49]. When combined with the BMC, Stakeholder Theory helps identify the interdependencies between various stakeholders and BMC blocks such as customer segments, value propositions, and channels. This facilitates the development of inclusive and sustainable medical tourism strategies that create value for all stakeholders while aligning with the overall business model [50–52]. Through the synthesis of these theoretical perspectives and empirical

insights, this study aims to advance understanding of the medical tourism sector and offer actionable recommendations for industry stakeholders and policymakers. By illuminating the strategic imperatives and interdependencies within the sector, it seeks to contribute to its sustainable development and growth in Saudi Arabia and beyond.

In the context of Saudi Arabia's medical and wellness tourism, the business model becomes the guiding framework that strategically aligns resources, processes, and goals to elevate the nation's healthcare and wellness offerings to a global standard. The strategic role of a business model as a tool for investigating, analyzing, and developing the medical tourism sector in Saudi Arabia can be summarized into four core pillars that form the foundation of the business model concept, as depicted in Figure 2. These pillars serve as a comprehensive framework, guiding the systematic enhancement and growth of the medical tourism industry in the country.

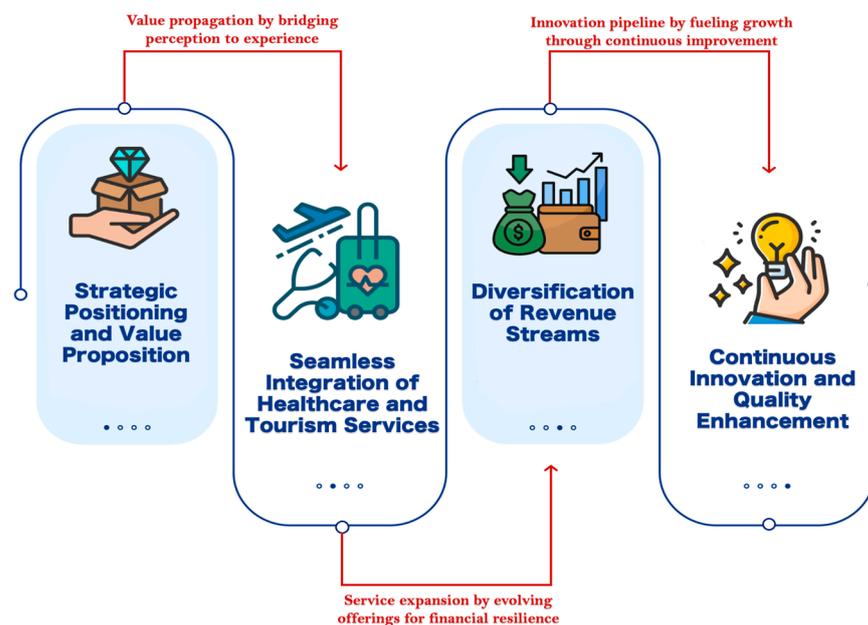


Figure 2. The four pillars illustrating the strategic role of business models in advancing medical and wellness tourism in Saudi Arabia. Source: Author, 2024.

The first pillar focuses on strategically positioning Saudi Arabia within the global medical tourism landscape. It involves crafting a compelling value proposition that communicates the unique offerings and advantages the country provides to medical tourists. This includes highlighting advanced medical facilities, renowned healthcare professionals, advanced technologies, and a harmonious blend of traditional and modern healthcare practices [17]. The business model guides the development of a clear and attractive value proposition that sets Saudi Arabia apart as a premier destination for medical tourism.

The second pillar emphasizes the seamless integration of healthcare and tourism services in Saudi Arabia. This involves creating a well-coordinated ecosystem that connects medical facilities, wellness centers, travel agencies, and hospitality services [24]. The business model facilitates the development of efficient channels and collaborations, ensuring a smooth and holistic experience for international patients/tourists. This pillar aims to enhance the overall journey of medical tourists, making it convenient, enjoyable, and stress-free.

The third pillar focuses on diversifying revenue streams within the medical tourism sector. Beyond traditional healthcare services, the business model encourages the exploration of additional avenues such as wellness programs, post-treatment care packages, telemedicine services, and collaborations with insurance providers [16,24]. Diversification ensures financial resilience and sustainability, making the medical tourism sector in Saudi Arabia adaptable to changing market dynamics.

The fourth pillar underscores the importance of continuous innovation and quality enhancement. This involves staying at the forefront of medical advancements, adopting advanced technologies, and introducing innovative healthcare and wellness solutions. The business model guides the strategic allocation of resources and investments to foster a culture of innovation, ensuring that Saudi Arabia remains a leader in providing high-quality medical and wellness services.

For the previously mentioned reasons, this study considers the business model a transformative step for the medical and wellness tourism sector in Saudi Arabia, shifting from theoretical ideas to a more managerial scientific method and action. This approach involves testing hypotheses and applying ideas in the real world, subsequently refining strategies based on practical outcomes when necessary.

3. Materials and Methods

This study will employ a qualitative research method involving the review and analysis of secondary data collected from diverse sources. These sources include databases, reports (from the private sector), articles, books, government documents, opinions from consultants in this sector across various robust media channels, and previous research that delves into the medical and wellness tourism sector in Saudi Arabia. Additionally, the study will utilize the Business Model Canvas (BMC) as a visual strategic management and entrepreneurial tool [53,54]. The BMC aids in creating a visual representation of key components that contribute to the creation and functioning of the medical and wellness tourism sector in Saudi Arabia.

The Business Model Canvas (BMC) is a visualization tool designed to manage, develop, describe, and analyze business ideas. It is considered an economic strategic management tool. Introduced in 2010 by Alexander Osterwalder and Yves Pigneur in their influential book "Business Model Generation" [43], it has become a widely adopted methodology. The BMC has revolutionized not only the business landscape but also various industries and activities that aspire to move beyond theoretical ideas and concepts and take practical steps forward.

The Business Model Canvas (BMC) is a large, visual chart that consists of nine building blocks, each representing a fundamental aspect of a business model. These nine blocks of BMC can be categorized into three main groups: operational blocks, strategic blocks, and market value blocks [41,43,53]. The first group is the operational blocks, which focus on outlining the fundamental elements required for the successful operation of the medical and wellness tourism sector in Saudi Arabia. These operational blocks include key partners, key activities, key resources, and the cost structure, presented within the blue block boundaries in Figure 3. The blue arrows represent the relationships between these operational blocks. For example, partners establish the key activities of the medical tourism sector in Saudi Arabia, which in turn present the value proposition of this tourism sector. Similarly, the key resources block represents the key assets that partners use and also affects the value proposition. The final block of these operational ones is the cost structure, which is calculated by the key partners and affects the value proposition block [17,34,39,53].

The second group of blocks is strategic blocks, which focus on outlining the overarching strategy and key customer-related aspects of the medical and wellness tourism sector in Saudi Arabia [39,55]. This strategic group of blocks includes customer relationships, customer segments, channels, and revenue streams, presented with green block boundaries in Figure 3. The relationships between them are represented by red arrows. For example, the value proposition block affects the customer relationships block through presenting the value offered by medical and wellness tourism services and their influences on the establishment and maintenance of customer relationships. Also, the customer relationships block affects the customer segments through targeted marketing strategies and tailored medical services, aligning offerings with the diverse healthcare needs and preferences of different medical tourist segments. Additionally, the channel blocks affect the value proposition through the delivery of tailored services and offerings, while also influencing the

customer segments blocks by determining the accessibility and reach of services targeted at specific demographics within the medical tourism sector in Saudi Arabia. Finally, the customer segments represent the medical tourists that directly present the main revenue to the revenue streams block, and this revenue is used as an asset to add more value proposition for the medical tourism sector in Saudi Arabia [16,53,55].

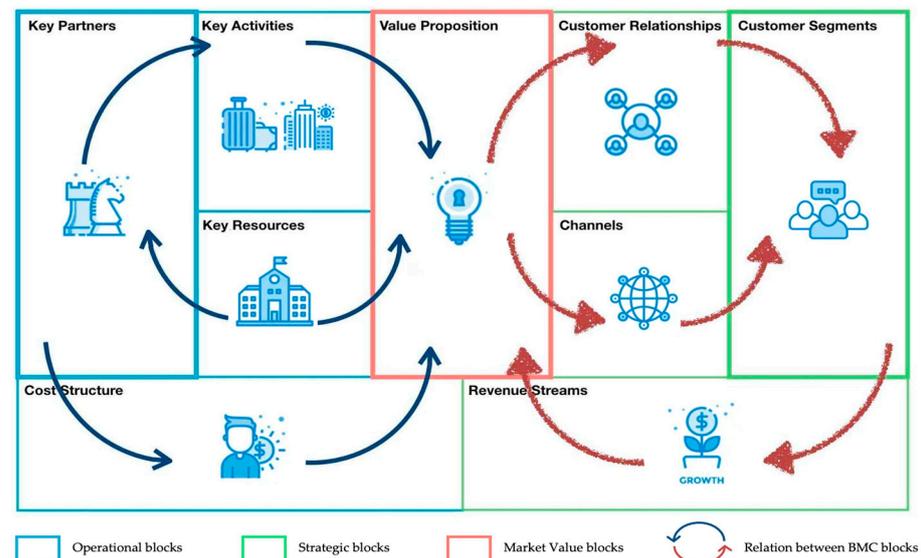


Figure 3. The basic concept of the Business Model Canvas (BMC) with its nine essential blocks. Source: Author, based on [43].

The third and final group of blocks is market value blocks, which contain only the value proposition block and are represented by the red block boundary in Figure 3. This value proposition block is the core of the medical tourism sector in Saudi Arabia and is affected by almost all the other BMC blocks [19,53,55]. Figure 3 presents the basic concept of the Business Model Canvas (BMC) and its nine blocks.

These nine blocks of BMC also can be categorized into three distinct areas: feasibility, desirability, and viability [56]. Each area encapsulates specific dimensions that are critical for the successful development and sustainability of a business model.

First is the feasibility area, a critical domain that lays the groundwork for the operational and collaborative aspects of the medical and wellness tourism in Saudi Arabia. This BMC area comprises three fundamental building blocks: key partners, key activities, and key resources. The first block, key partners, concentrates on identifying and addressing the key actors and suppliers that play pivotal roles in the medical and wellness tourism sector in Saudi Arabia. The second block in this area is key activities, focusing on outlining the core tasks and processes that unfold during the medical tourist journey in Saudi Arabia. The third block, key resources, directs attention to addressing the critical assets, expertise, and technologies that represent the backbone of the medical and wellness tourism industry in Saudi Arabia [54,56].

Second is the desirability area, dedicated to elements that directly address the customer-centric aspects of medical and wellness tourism in Saudi Arabia, ensuring its services resonate with and meet the needs of the target local and international medical tourists. This BMC area comprises four essential blocks: value proposition, customer segments, channels, and customer relationships. The first block, value proposition, is focused on addressing the reasons behind tourists choosing Saudi Arabia as their preferred medical and wellness tourism destination. The second block, customer segments, concentrates on addressing the diverse types of customers that choose medical and wellness tourism in Saudi Arabia. The third block, channels, explores the various methods and platforms through which the medical and wellness tourism sector in Saudi Arabia delivers its value proposition, reaching and engaging with identified customer segments (medical tourists). The final

block in this BMC area is customer relationships, examining the type of interactions and connections the Saudi medical and wellness tourism sector establishes with its customers and medical tourists [43,57].

Thirdly, the BMC viability area, which centers on the financial sustainability and overall economic health of the medical and wellness tourism sector in Saudi Arabia. This BMC area addresses critical elements that contribute to the profitability and longevity of the sector. The viability area comprises two main blocks: cost structure and revenue streams. The first block, cost structure, zeroes in on addressing the details of the costs associated with running the medical and wellness tourism sector in Saudi Arabia. This encompasses both fixed and variable expenses, providing insights to assess the financial health and sustainability of the sector. The second block is revenue streams, shedding light on how the medical and wellness tourism sector generates income for the country by delivering its value proposition to medical tourists and diversifying its sources of revenue [55].

Table 1 provides a detailed explanation of the three core areas of BMC and the main block in each pillar, as well as the main question that should be answered in each block, representing the core of the business model canvas for medical and wellness tourism in Saudi Arabia.

Table 1. Main questions representing the conceptual prototype of the Business Model Canvas for the medical and wellness tourism sector in Saudi Arabia.

No.	BMC Block	Main Question(s)
Feasibility Area: Can We Deliver It (Medical and Wellness Tourism)?		
1	Key Partners	What are the partnerships in healthcare, wellness centers, and other stakeholders that contribute to the medical and wellness tourism sector in Saudi Arabia?
2	Key Activities	What are the core tasks and processes during the medical tourist journey in Saudi Arabia, and how can they be optimized for a seamless experience?
3	Key Resources	What assets, expertise, and technologies are essential for the success of medical and wellness tourism sector in Saudi Arabia?
Desirability Area: Do Customers/Medical Tourists Want It?		
4	Value Proposition	Why would medical tourists choose Saudi Arabia over other destinations, and what unique benefits does our medical and wellness tourism sector offer?
5	Customer Segments	Who are the different types of customers for medical and wellness tourism in Saudi Arabia, and how can services be tailored to meet their specific needs?
6	Channels	Through which methods and platforms can we effectively communicate and engage with medical tourists, promoting our offerings and services?
7	Customer Relationships	What types of interactions and connections can be established with medical tourists to enhance their satisfaction and overall experience?
Viability Area: What Is It Worth (Medical and Wellness Tourism)?		
8	Cost Structure	What are the detailed costs associated with running the medical and wellness tourism sector in Saudi Arabia, including both fixed and variable expenses?
9	Revenue Streams	How does the medical and wellness tourism sector generate income, and what strategies can diversify revenue streams, ensuring financial sustainability?

Source: Author, 2024.

4. Results and Discussion

The primary outcomes of this article aim to address the questions outlined in Table 1 and visualize them within the nine blocks of the Business Model Canvas for the medical tourism and wellness sector in Saudi Arabia. These blocks are named key partners, key activities, key resources, value propositions, customer segments, channels, customer rela-

tionships, cost structure, and revenue streams. These nine blocks are presented in Figure 4 and elaborated upon in the subsequent points.

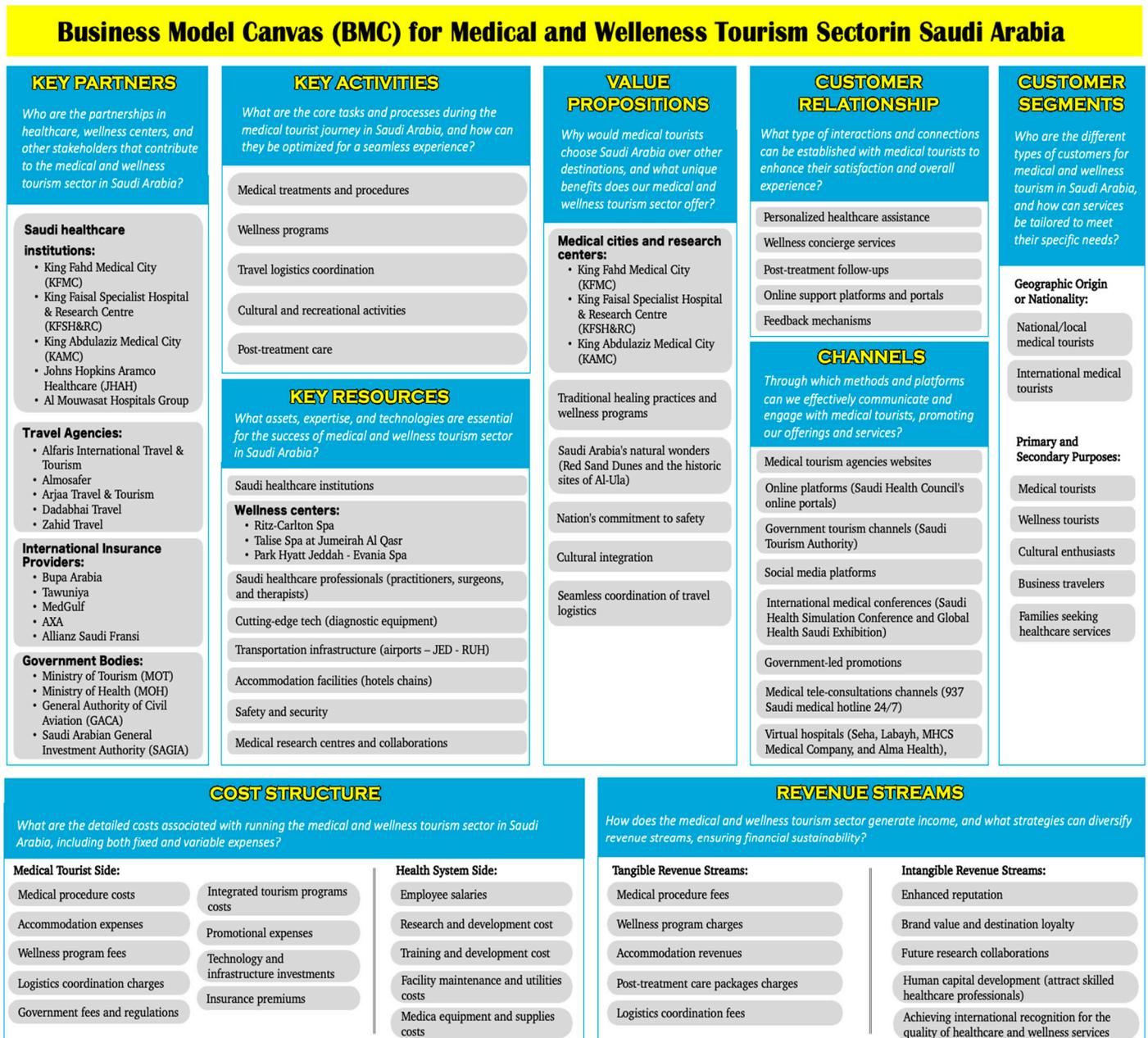


Figure 4. The final version of the Business Model Canvas (BMC) for the medical and wellness tourism sector in Saudi Arabia. Source: Author, 2024.

The key partners block represents the primary actors in the tourism and wellness sector in Saudi Arabia, which play a pivotal role in shaping the landscape and enhancing the overall experience for both domestic and international visitors. These partners can be categorized into four groups: Saudi healthcare institutions (e.g., King Fahd Medical City (KFMC), King Faisal Specialist Hospital & Research Centre (KFSH&RC), King Abdulaziz Medical City (KAMC), Johns Hopkins Aramco Healthcare (JHAH), and Al Mouwasat Hospitals Group), travel agencies (e.g., Alfaris International Travel & Tourism, Almosafer, Arjaa Travel & Tourism, Dadabhai Travel, Dulaiman Travel, Zahid Travel, and Zamil Travel) (according to the World Travel Awards, 2023), international insurance providers (e.g., Bupa Arabia, Tawuniya, MedGulf, AXA Cooperative Insurance, Allianz

Saudi Fransi, and SAICO), and government bodies (e.g., Ministry of Tourism (MOT), Ministry of Health (MOH), General Authority of Civil Aviation (GACA), and Saudi Arabian General Investment Authority (SAGIA)). These entities contribute to the infrastructure, regulation, promotion, and coordination of the medical and wellness tourism sector in Saudi Arabia, making them key partners in its development and success.

The key activities block outlines the core tasks and processes during the medical tourist journey in Saudi Arabia, aiming to optimize the experience for both domestic and international visitors. These activities include medical treatments and procedures (e.g., specialized surgeries, orthopedic procedures, and cosmetic and plastic surgeries), wellness programs (e.g., spa treatments, traditional healing practices, and lifestyle modification programs), travel logistics coordination (e.g., customized itineraries, transportation services, accommodation arrangements, language support services, and travel insurance assistance), cultural and recreational activities (heritage tours, traditional art and cultural festivals, and shopping experiences), and post-treatment care (e.g., rehabilitation services, follow-up appointments, telemedicine services, wellness education, and support groups).

The key resources block in Saudi Arabia's medical and wellness tourism sector encompasses critical assets such as Saudi healthcare institutions, wellness centers (e.g., Ritz-Carlton Spa, Talise Spa at Jumeirah Al Qasr, and Park Hyatt Jeddah—Evania Spa), skilled Saudi healthcare professionals (e.g., practitioners, surgeons, and therapists), advanced tech (e.g., diagnostic equipment), transportation infrastructure (national and international airports—JED—RUH), accommodation facilities (hotels chains), safety and security, and medical research centers and collaborations.

The value proposition block in Saudi Arabia's medical and wellness tourism sector is shaped by a unique set of offerings that distinguish it as a premier destination for health-conscious travelers, for example, medical cities and research centers (e.g., King Fahd Medical City and King Faisal Specialist Hospital & Research Centre). Additionally, the integration of traditional healing practices and wellness programs further enhances the overall value proposition. Saudi Arabia's natural wonders, including the Red Sand Dunes and the historic sites of Al-Ula, contribute to a holistic experience for medical and wellness tourists. The nation's commitment to safety, cultural integration, and the seamless coordination of travel logistics adds layers to the value proposition, making it an all-encompassing and attractive destination for those seeking high-quality healthcare combined with unique cultural and recreational experiences.

The customer segment block in Saudi Arabia's medical and wellness tourism sector is carefully tailored to cater to a diverse range of health-conscious travelers seeking specialized treatments and holistic well-being experiences. These customers can be categorized as national/local and international medical tourists or can be categorized based on whether the primary and secondary purpose of visiting Saudi Arabia is related to medical and wellness goals, for example, international medical tourists seeking advanced treatments at institutions like King Fahd Medical City and King Faisal Specialist Hospital. Wellness tourists are drawn to holistic experiences and spa retreats that integrate traditional healing practices. Cultural enthusiasts explore historic sites such as Al-Ula, while adventure-seekers engage in activities like desert safaris and exploring the Red Sand Dunes. Business travelers benefit from the seamless coordination of travel logistics and world-class accommodations like The Ritz-Carlton, Riyadh. Families seeking healthcare services, luxury wellness travelers, and those requiring post-treatment care find tailored offerings at facilities like Al Mouwasat Hospitals Group, Park Hyatt Jeddah, and Assila Hotel, Riyadh.

The channels block in Saudi Arabia's medical and wellness tourism sector delineates the various methods and platforms through which services are delivered, ensuring effective communication and engagement with identified medical tourist segments. These channels include medical tourism agencies' websites, the various online platforms (e.g., Saudi Health Council's online portal for medical tourism inquiries), government tourism channels (e.g., Saudi Tourism Authority), social media platforms (e.g., Instagram, Twitter, and Facebook), international medical conferences (e.g., the Saudi Health Simulation Conference and Global

Health Saudi Exhibition), government-led promotions, medical tele-consultation channels (i.e., 937 Saudi medical hotline 24/7), virtual hospitals (e.g., Seha, Labayh, MHCS Medical Company, and Alma Health), advertising and marketing campaigns, and media (e.g., local press and TV). These channels collectively contribute to the promotion and accessibility of, and increase engagement with, medical and wellness tourism services in Saudi Arabia.

The customer relationships block in Saudi Arabia's medical and wellness tourism sector emphasizes creating meaningful interactions and connections with visitors to ensure a positive and satisfying experience. These include personalized healthcare assistance, wellness concierge services, post-treatment follow-ups, platforms and portals providing online support, and feedback mechanisms (e.g., patient reviews and suggestions). These customer relationship strategies and entities collectively contribute to the overall satisfaction and well-being of medical and wellness tourists, fostering a positive image and encouraging repeat visits and recommendations.

The cost structure block in Saudi Arabia's medical and wellness tourism sector outlines the various expenses associated with delivering healthcare and wellness services. These costs can be categorized into two main aspects: the medical tourist side and healthcare system side. The medical tourism side include costs such as medical procedure costs (for the different medical interventions), accommodation expenses, wellness program fees, logistics coordination charges (e.g., charges for organizing medical travel, ensuring seamless transportation and accommodation arrangements), insurance premiums, government fees and regulations, integrated tourism programs costs (i.e., enhancing the overall medical tourism experience), promotional expenses, and technology and infrastructure investments (e.g., cutting-edge facilities for medical treatments). The healthcare system side include costs such as employee salaries, research and development cost, training and development costs, facility maintenance and utilities costs, incentives for healthcare institutions, medical equipment and supplies costs, quality assurance programs costs, and technology integrations costs.

The final block, revenue streams, outlines the various sources of income generated through the delivery of healthcare and wellness services sector in Saudi Arabia. These revenues can be tangible and intangible revenues. The tangible revenue streams include medical procedure fees, wellness program charges, accommodation revenues, post-treatment care packages charges, logistics coordination fees, and insurance revenue. The intangible revenues from the medical tourist journey in Saudi Arabia include enhanced reputation, brand value and destination loyalty, future research collaborations, human capital development (i.e., attracting skilled healthcare professionals), and achieving international recognition of the quality of healthcare and wellness services in Saudi Arabia. The subsequent Figure 4 illustrates the nine blocks of the proposed BMC along with their respective details.

By delving into the distinct nine blocks of the Business Model Canvas (BMC) within the context of the medical and wellness tourism sector in Saudi Arabia (encompassing key actors, key resources, key activities, value propositions, customer segments, customer relationships, channels, cost structure, and revenue streams) this tourism sector can transition from theoretical analysis to practical implementation. The core concept of the strategic approach for developing and enhancing the medical and wellness tourism sector in Saudi Arabia revolves around focusing on Unique Selling Propositions (USPs) [58,59]. This strategic concept allows the sector to leverage its potential and address challenges effectively. Unlike traditional marketing strategies that often rely on broad appeals to attract customers, USPs offer a more targeted and differentiated approach to promoting medical tourism services. By identifying and highlighting the unique strengths, advantages, and value propositions of Saudi Arabia's medical tourism sector, stakeholders can effectively differentiate themselves from competitors and attract discerning international patients [60].

USPs allow Saudi Arabia to showcase its distinctive features and competitive advantages in the global medical tourism market. Whether it's state-of-the-art medical facilities, renowned healthcare professionals, cutting-edge technologies, or specialized treatment options, emphasizing these unique attributes can help Saudi Arabia carve out a niche and

position itself as a preferred destination for medical tourists seeking high-quality care and personalized experiences.

Moreover, focusing on USPs enables stakeholders in the medical tourism sector to tailor their marketing messages and services to meet the specific needs and preferences of target patient groups [61]. By understanding the unique demands and expectations of different patient demographics, such as medical tourists from neighboring Gulf countries, expatriate communities, or international travelers seeking specialized treatments, Saudi Arabia can develop tailored USPs that resonate with each segment and drive patient engagement and satisfaction.

Furthermore, leveraging USPs can foster strategic partnerships and collaborations between healthcare providers, tourism agencies, and other stakeholders within the medical tourism ecosystem [59–61]. By aligning their efforts around shared USPs, stakeholders can pool resources, expertise, and networks to create integrated and compelling medical tourism packages that offer comprehensive solutions and seamless experiences for international patients.

Figure 5 illustrates the strategic concept derived from reviewing and analyzing the medical and wellness tourism sector in Saudi Arabia. In this approach, the medical and wellness tourism sector in Saudi Arabia should prioritize the specific needs of medical tourists, particularly international tourists, along with the inherent potential of the sector in Saudi Arabia. By concentrating efforts on the potential of this tourism sector and steering clear of direct competition, the medical and wellness tourism sector in Saudi Arabia is poised to emerge as a premier medical tourism destination on the global stage.

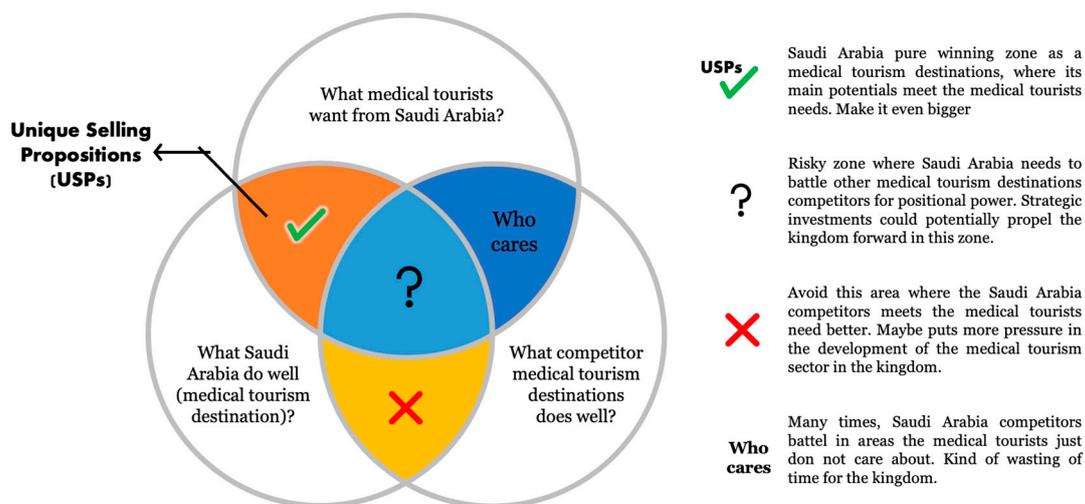


Figure 5. The strategic concept of developing medical and wellness tourism in Saudi Arabia using the Unique Selling Propositions (USPs). Source: Author, 2024.

5. Conclusions

Health-related tourism, including medical and wellness tourism, constitutes a unique travel pattern with substantial economic implications for nations globally. Saudi Arabia stands as a nation where the medical tourism sector has not fully harnessed its potentials and future opportunities to position itself on the global stage as a premier destination for medical and wellness tourism in the international market. This review study aims to provide a comprehensive overview of the medical and wellness tourism landscape in Saudi Arabia, delving into its current status, potential avenues for growth, and the key factors shaping its trajectory toward recognition as a distinct tourism sector both regionally and internationally. The Business Model Canvas (BMC) serves as a strategic tool to enhance this sector in the country, utilizing its nine unique building blocks. Implementing the BMC for medical and wellness tourism in Saudi Arabia offers a comprehensive insight into the framework of activities within this tourism sector and their diverse chains for

value creation. Simultaneously, BMC provides a practical and transparent approach to understanding the various elements of the medical and wellness tourism pattern in Saudi Arabia and their interrelationships.

The primary outcomes derived from the Business Model Canvas (BMC) analysis underscore Saudi Arabia's robust potential across various dimensions. The key partners and key resources, notably the high-quality healthcare institutions, along with essential elements like transportation infrastructure, accommodation, travel agencies, and international insurance providers, highlight the nation's strength. These aspects also manifest in the value propositions block, showcasing Saudi Arabia's unique healthcare system, which is interwoven with diverse tourism resources, presenting a novel avenue to enhance the medical tourist experience. However, gaps and weaknesses in Saudi Arabia's aspiration to become a global medical destination surface in the channels block of the BMC. The marketing aspect appears weak, positioning Saudi Arabia more as a source than a destination for medical tourism. Addressing this challenge requires innovative and unprecedented marketing strategies to transform the country's image. The study further indicates that the strategic focal point for advancing the medical tourism sector in Saudi Arabia lies in emphasizing Unique Selling Propositions (USPs). Instead of classical marketing approaches, USPs, as a strategic approach, can elevate the industry and the tourism sector to new heights in the global medical tourism market. Additionally, one of the key findings of this study is presenting the BMC as a research methodology rather than solely a business model. This study underscores the growing trend among academics to utilize BMC as a research methodology to dissect complex industries, such as the medical tourism sector, which interact with various economic sectors, such as healthcare systems, transportation, hospitality, insurance, security, and regulatory bodies.

The study findings have significant implications not only for the medical tourism sector in Saudi Arabia but also for similar tourism destinations worldwide. By leveraging the strategic framework proposed using the Business Model Canvas (BMC), countries aspiring to develop or enhance their healthcare tourism sectors can derive several key implications. Firstly, the identification of critical elements within the BMC, such as value propositions, customer segments, and revenue streams, provides a blueprint for creating sustainable business models. This highlights the importance of strategic partnerships, resource optimization, and service customization to meet the diverse needs of medical tourists while ensuring long-term economic viability. Secondly, the emphasis on fostering strong customer relationships underscores the significance of delivering exceptional experiences and building trust to drive repeat visits. By prioritizing customer satisfaction and engagement, destinations can cultivate loyalty and sustainably grow their healthcare tourism market. Finally, the study's findings underscore the broader implications for sustainable development in healthcare tourism. By aligning business strategies with environmental, social, and economic sustainability goals, destinations can not only enhance their global competitiveness but also contribute to the overall well-being of their communities and ecosystems. Overall, this study offers actionable insights that can inform policymaking, industry practices, and academic research aimed at advancing sustainable healthcare tourism worldwide.

Similar to most review studies, this research has some limitations. Firstly, this review study primarily relies on secondary data sources, including the academic literature, government reports, and expert opinions, to review the medical tourism sector in Saudi Arabia and propose a strategic framework using the Business Model Canvas (BMC). While these sources provide valuable insights, comprehensive and up-to-date data on the medical tourism sector in Saudi Arabia are limited. As a result, there may be gaps in the understanding of certain aspects of the sector, and the findings may not fully capture recent developments or emerging trends. Secondly, as a review study, this research does not include primary data collection efforts, such as surveys or interviews with key stakeholders. Without direct engagement with stakeholders, there may be limitations in understanding their perspectives, challenges, and opportunities within the medical tourism sector, which

could be considered a limitation of this study. Thirdly, another limitation pertains to the generalizability of the findings. While the BMC framework offers a structured approach to analyzing business models, its application in the context of the medical tourism sector in Saudi Arabia may vary based on factors such as cultural nuances, agricultural, regulatory environments, and healthcare system dynamics. Thus, the findings of this study may not be directly applicable to other contexts without careful consideration of these contextual factors.

While this study provides insights into the current state, potentials, and challenges of the medical and wellness tourism sector in Saudi Arabia, there are avenues for future research that could contribute to a deeper understanding and further development of this dynamic industry. Firstly, an in-depth examination of the role of government policies and regulations in shaping the medical and wellness tourism landscape in Saudi Arabia would be instrumental. Exploring how policy frameworks can be optimized to attract more international patients and foster collaborations with global healthcare institutions could be an insightful direction. Secondly, an exploration of the evolving preferences and expectations of medical tourists, both local and international, would provide valuable guidance for stakeholders in the sector. Understanding the factors influencing the choice of destination, the significance of cultural and wellness aspects, and the impact of digital technologies on the decision-making process could shape more targeted strategies. Thirdly, delving into the experiences and feedback of past medical tourists in Saudi Arabia would offer a qualitative dimension to the understanding of the sector. This could involve conducting surveys, interviews, and case studies to capture the nuances of patient satisfaction, identify areas for improvement, and highlight success stories. Finally, an analysis of the collaboration potential with other sectors, such as hospitality, transportation, and technology, could shed light on how to create an integrated and seamless medical tourism ecosystem in Saudi Arabia. Investigating how partnerships across industries can enhance the overall patient experience and contribute to the success of the sector would be a valuable avenue for exploration. By addressing these future research avenues, scholars, policymakers, and industry stakeholders can collectively contribute to the continued growth and success of the medical and wellness tourism sector in Saudi Arabia.

In conclusion, our study underscores the strategic imperatives of the medical tourism sector in Saudi Arabia and provides a roadmap for enhancing its competitiveness and sustainability. By addressing the key pillars of this tourism sector and understanding their relationships and interlinked bonds, stakeholders can work towards realizing the full potential of medical tourism as a driver of economic growth and development in the region.

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