

IMPACT OF THE DEVELOPMENT OF MEDICAL TOURISM FOR THE EUROPEAN HEALTH TOURISM DESTINATIONS. GERMANY – GOOD PRACTICE

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Abstract. This article builds on existing knowledge of the European medical tourism industry and its impact on European health tourism destinations. It explores how medical tourism can be developed for customers and the European tourism industry. Firstly, the authors aim to present the important role of medical tourism for Europe as a continent with a tradition of longevity. Secondly, they aim to showcase Germany as a leading world-renowned tourism destination with an excellent international reputation in the field of medical tourism. Germany is renowned for its high healthcare standards, specialised medical professionals, and cutting-edge medical technology. Thirdly, the rising trend of patients travelling to Central and Eastern Europe, as well as the Baltic countries, for affordable treatments and procedures is further propelling the market, coupled with increased accessibility due to improved transport links and visa policies. Countries such as Hungary, the Czech Republic, Slovakia and Lithuania are emerging as popular destinations thanks to their specialisation in various medical procedures and competitive pricing. The authors' suggestions will enable countries looking to develop medical tourism or seeking new opportunities to offer year-round tourism to develop as sustainable health tourism destinations, such as Bulgaria. These countries will be able to receive know-how from the best European practices. Developing medical tourism enables destinations to retain medical specialists without changing the industry. The aforementioned tourist product is designed to promote the destination, with the intention of showcasing the quality of the medicine, the clinical and hospital infrastructure, and the medical competence of the doctors and medical specialists who provide care to patients. The phenomenon of medical tourism has been shown to exert a multifaceted influence on both social and economic domains, in addition to its impact on the image of the nation.

Keywords: health tourism destination, medical tourism, natural healing, resources longevity, medical competence, innovation, technology.

JEL Classification: I11, I15, I30

1. Introduction

As one of the prevailing megatrends and objectives in life, health exerts a profound influence on all domains of life, various industries, and corporate entities (Zukunftsinstitut GmbH, 2021; Pippirs & Steckenbauer, 2022). Since its inception, medical tourism has been regarded as one of the identified and prospective industries in numerous countries (Cham et al., 2021). Meanwhile, medical tourism – defined as travel undertaken to receive medical treatment, including dental care, cosmetic surgery, elective surgery and infertility treatments (OECD, 2011) – has remained at the forefront of tourism types, with a growth rate of 385% between 2000 and 2017 (UNWTO Report, 2018; Edgar et al., 2024).

Medical tourism, or MT, is a flourishing industry due to better connectivity in terms of transport, information and networks, unmet medical needs, problems with medical insurance, specialised requirements unavailable in certain countries, a cost-conscious middle class and tourism. The global medical tourism market was valued at 53.768 billion USD in 2017 and is expected to reach 143.461 billion USD by 2025, which equates to a Compound Annual Growth Rate (CAGR) of 12.9% between 2018 and 2025 (Roy et al., 2021).

According to sources such as Patients Beyond Borders, there is steady annual growth in medical tourism worldwide, at between 15% and 20%. The European medical tourism market is experiencing

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a significant upturn, driven by a variety of factors. With an anticipated compound annual growth rate (CAGR) of 12.7% over the next four years, the sector is set for robust expansion. This growth can be attributed to several key factors, including the demand for high-quality healthcare services, cost-effective treatment options and shorter waiting times. Europe's advanced healthcare infrastructure and renowned medical specialists are also attracting international patients. The increasing number of people travelling to Eastern Europe for affordable treatments and procedures, coupled with greater accessibility thanks to improved transport links and visa policies, is further fuelling this growth. The countries of Hungary, the Czech Republic and Croatia are popular destinations for medical tourism. This is due to their strategy of integrating medical tourism into their tourism strategies, focusing on specific medical treatments and offering high-quality medical procedures at competitive prices.

The market is also benefiting from the growing health and wellness tourism sector. Patients are seeking holistic holiday experiences as part of their treatment and are looking for reasonably priced care. Areas with thriving tourism and hospitality industries might increase their allure as destinations for integrated medical tourism. Patients are increasingly seeking personalised treatment plans that cover pre- and postoperative care, as well as travel preparation, reflecting a recent trend in medical tourism towards a more personalised approach. Technology integration is essential, with telemedicine making it easier for patients to consult doctors in other countries before their medical trip. This change reflects a growing desire for openness and customisation in healthcare services, and supports the full range of offerings needed in the global medical tourism market.

Research problem. How to shape consistent development in medical tourism destinations? *The object of development is medical tourism.* The aim of the research is to review the best practices of European medical tourism destinations, with a focus on Germany, in shaping consistent destination development. The objectives are to examine the concept of medical tourism and to assess the development of medical tourism destinations.

This study employs a *research methodology* based on a systematic and comparative review of scientific literature to enable a comprehensive exploration of the concept of "medical tourism". This approach involves critically evaluating and integrating existing research findings to identify prevailing trends, definitions and theoretical perspectives within the field. Methods of synthesis and generalisation are then used to organise and interpret the data, providing a deeper understanding of the key factors that shape the development of medical tourism destinations.

Additionally, graphical representation techniques are employed to illustrate patterns, relationships and emerging themes visually, thereby enhancing the clarity and accessibility of the theoretical assessment of medical tourism development.

2. Medical Tourism in Europe

2.1. Medical Tourism – Definition

In recent decades, health tourism has emerged as an increasingly important strategic sector, having a significant multiplier effect on regional development, public health, employment, and the economic stability of travel destinations (Vašanicova et al., 2025). When analysing the concept of medical tourism, it is important to consider the structure of health tourism. Health tourism (HT) is an important sector of the tourism industry focused on individuals' physical, mental, and spiritual well-being. HT encompasses subtypes of medical tourism (MT) and wellness tourism (WT) (Pessot et al., 2021; Kulkarni et al., 2024). It is defined as 'the act of travelling to seek specialised or economical medical care, well-being and recuperation of an acceptable standard, with the help of a support system' (Keckley and Underwood, 2008; Rahman et al., 2021). Figure 1 presents the structure of health tourism.

J. Surowiecki (2005) provided a graphic definition of medical tourism: "Instead of the product coming to the consumer, as is the case with cars or sneakers, the consumer goes to the product." The concept of medical tourism was further specified by Md. Nabi et al. (2023) as a mode of service provision in which healthcare providers offer medical consultations and various specialised treatments to foreign patients.

Medical tourism is a distinctive practice within the tourism sector that contributes to international trade in health services (Rodrigues et al., 2017). Over recent years, the medical tourism industry has experienced phenomenal growth, particularly in emerging markets (Chaulagain et al., 2021; Guru et al., 2023).

Medical tourism, also known as medical travel, involves travelling to other countries to receive medical, dental and surgical care. An increasing number of patients are travelling abroad, attracted by more affordable prices, shorter waiting times, higher-quality services and innovative therapies unavailable in their own countries (Medical Tourism Magazine, 2025). They are attracted by more competitive and affordable prices, shorter waiting times, a higher quality of service and innovative therapies that are lacking in their national healthcare systems. Medical tourism encompasses a wide range of services, including routine dental procedures, complex surgical interventions, in vitro fertilisation, orthopaedic surgeries, rehabilitation, and preventive examinations. In most cases, medical

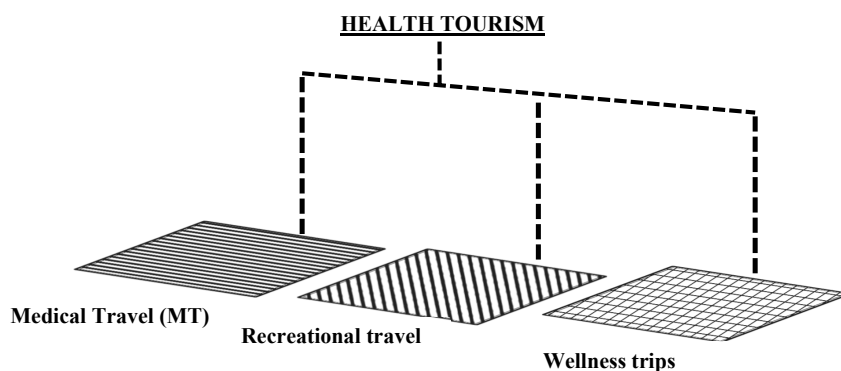


Figure 1. Health tourism structure

tourists are not typical holidaymakers who choose to receive medical treatment simply because it is available; rather, they are patients with significant health concerns for whom the cost of healthcare is the primary concern and the holiday aspect is secondary. Medical tourism is about hospitals, clinics, surgeries, and dealing with health issues (Europe Medical Tourism Market Overview, 2025).

Thanks to its competitive pricing and high-quality services, Europe is a popular destination.

2.2. Market Overview

The medical tourism market is set to experience significant growth, driven by factors such as rising healthcare costs in developed countries, technological advancements in medicine, and the globalisation of healthcare services. Although European healthcare systems usually provide universal health insurance, they have different health baskets. Consequently, many patients receive medical treatment by travelling within the borders of the European Union, either for emergency or elective care. This mobility is facilitated by various mechanisms, particularly the regulation on the application of social security schemes (1708/71) and the Directive on patients' rights in cross-border healthcare (2011/24/EU), as well as co-operation in border regions. Many patients travel abroad to receive treatment when they are unable to find suitable treatment in their own country, cannot afford the services available, have to wait too long, or the necessary technology is unavailable (UNWTO & European Travel Commission, 2018).

The ranking shows that 30% of the top medical tourism destinations are in Europe, including Turkey, which is located between Europe and Asia.

When the tourism industry counts medical tourists, who visit a destination for a week and include an hour-long medical check-up, dental treatment, non-surgical beauty treatment or health check, X-ray, etc., in their itinerary, there are moves in some countries to reach an agreement on how to count them.

Table 1

Top 25 medical travel destinations in the World, ranked by value, 201

Rank country	Value (million USD)
1 United States	3,500
2 South Korea	655
3 Turkey	600
4 Thailand 600	600
5 Germany	575
6 India	450
7 UK	350
8 Malaysia	350
9 Mexico	350
10 Iran	315
11 Jordan	300
12 Taiwan	300
13 UAE	300
14 Poland	300
15 Spain	240
16 Hungary	225
17 Switzerland	175
18 Singapore	150
19 Belgium	150
20 Israel	135
21 Costa Rica	125
22 South Africa	120
23 Brazil	100
24 Czech Republic	30
25 Australia	28
Total:	10,230

Source: IMTJ research- Medical Travel and Tourism – Global Market Report, first edition, 2018

The Medical Tourism Index 2020-2021 report carefully assessed 46 destinations that provided varying levels of medical travel opportunities for international patients. Nine destinations across Europe were assessed against these critical metrics to reveal the best places in Europe to seek medical care.

Based on these indices, MTI 2020-2021 overall ranking for European medical tourism destinations (with their overall scores across the 46 destinations) are (IMTJ, 2016):

- Spain – 72.93;
- United Kingdom – 71.92;
- France – 69.61;
- Germany 69.29;
- Italy – 66.75;
- Malta – 64.75;
- Poland – 64.1;
- Turkey – 63.91.

An interesting fact is that Hungary is not mentioned in the MTI's 2020–21 overall ranking of European medical tourism destinations. The Hungarian medical tourism industry accounts for a large share of European dental tourism: 40% of European medical tourists regularly enter the country in search of various medical services, the majority of whom are from Western Europe. Last year, Hungary began making efforts to change its image as a destination primarily for dental treatment, intensively promoting other medical procedures (IMTJ, 2016).

2.3. Market Segmentation in Europe

2.3.1. Dental Treatment

Dental treatments and procedures include implants, orthodontics, and cosmetic dentistry. Dental procedures in the European medical tourism market are expected to register a CAGR of 11.8% from 2023 to 2027. This growth is driven by several factors.

- Competitive pricing and high-quality services.
- Technological advancements /such as digital impressions, laser dentistry, and 3D printing.
- World-class dental clinics, equipped with cutting-edge technology and staffed by highly trained professionals.
- Regulatory standards that ensure patients receive safe and effective treatment.
- Combining travel with Europe's rich cultural heritage, scenic landscapes and renowned gastronomy, alongside high-quality dental treatment.

Most popular dental treatment destinations in Europe: Hungary, Germany, Poland, Czech Republic, Austria, Croatia, Bulgaria, Slovenia, Estonia (European Hospital and Healthcare Federation, 2015).

2.3.2. Fertility Treatments

Medical interventions to assist individuals or couples in achieving pregnancy.

According to data presented on July 9, 2024, at the 40th Annual Meeting of the European Society of Human Reproduction and Embryology (ESHRE) in Amsterdam, women in Europe are receiving more cycles of in vitro fertilisation (IVF) and intrauterine insemination (IUI) (Focus on Reproduction, 2025).

This growth is driven by several factors:

- Competitive pricing and high-quality services.
- Short waiting list.

- Patient friendly legislation /in most of the EU countries such as Spain, Czech Rep., Poland, Bulgaria, Greece, Hungary, Belgium.

The most popular destinations for fertility treatment are Spain (15% of all IVF treatments in Europe), France, Germany, the Czech Republic, the Netherlands, Greece, Poland, Bulgaria, Belgium and Hungary.

2.3.3. Cosmetic Surgery

The European cosmetic treatment market in medical tourism is expected to grow significantly, driven by the desire to enhance one's physical appearance. Competitive pricing, high-quality services, modern clinics and innovative technologies are driving factors for patients choosing a European destination for cosmetic treatment (EuroHealthNet, 2025).

The most popular procedures are liposuction, breast augmentation and facial surgery, as well as non-surgical treatments and injections involving Botox and dermal fillers.

The most popular destinations for cosmetic surgery are Germany, Switzerland, France, Italy, Lithuania, Hungary, Croatia, Slovenia, and Bulgaria.

2.3.4. Cardiovascular Treatment

An increasing number of patients seeking a diagnosis or treatment for heart and vascular diseases are looking for options outside their home countries. Cost-effectiveness, access to specialised care, reduced waiting times, quality assurance and accreditation, postoperative care, insurance coverage, and legal considerations are among the key factors for medical tourists (Healing Travel, 2025). Preferably, European countries with advanced cardiac care facilities and experience. Examples include Germany, France, Belgium, the Netherlands, Hungary, Poland, Bulgaria and Greece (European Medical Tourist, 2025).

2.3.5. Rehabilitation (Including Rehabilitation Using Natural Therapeutic Resources)

Several factors contribute to the growing interest in medical tourism for rehabilitation services (Rehabilitation in the Czech Republic, 2025):

- Quality of care. Patients may seek care abroad in order to access specialised treatments that are unavailable in their city or region.
- Price. Services can be more competitive abroad.
- Patient privacy/secret. Rehabilitation in a foreign country can support patients by keeping them anonymous. For example, rehabilitation for addiction.
- Alternative medicine. Some rehabilitation centres are proposing a combined treatment programme that includes alternative medicines such as Traditional Chinese Medicine (TCM) and Ayurveda.

Popular destinations for rehabilitation services:

- Germany is widely recognised for its high-quality healthcare system and specialised rehabilitation treatments. Notably, the first Post-COVID rehabilitation programme in Europe was launched at a clinic in Bad Sulza, Thuringia.
- France is known for its strong healthcare system and is home to the oldest mental health clinic in Europe, located at the Saujon balneology resort.
- Luxembourg offers rehabilitation services at Mondorf Domaine Thermal – Les Thermes, a well-established centre combining medical care and thermal therapies.
- The Czech Republic and Slovakia have a large number of specialised rehabilitation centres where patients undergo post-stroke rehabilitation, as well as treatment for musculoskeletal and nervous system injuries and sleep disorders.
- Other popular destinations offering high-quality rehabilitation services include Italy, Slovenia, Lithuania, Bulgaria and Croatia.

3. Germany – Good Practice

Germany has been identified as the leading nation in Europe for medical tourism in 2023, achieving a substantial market share of 18.4%. This offers a profitable opportunity for the country to further develop its medical tourism industry. Germany's advanced healthcare infrastructure, renowned medical specialists, and high-quality healthcare services position it as an attractive destination for international patients seeking treatment.

3.1. Healthcare System – Short Overview

As of September 27, 2024, the Federal Statistical Office reports a total of 1,874 hospitals. This statistic demonstrates that in 2023, there were approximately 428,500 medical professionals employed in Germany, which represents an increase compared to the previous year, when the number was 421,300. The most recent statistics from the German Medical Association (Bundesärztekammer) indicate a record number of non-German medical professionals practising in the country. A significant proportion of these foreign-born doctors hail from other EU nations or Middle Eastern countries. The largest contingents are from Syria (6,120), followed by Romania (4,668), Austria (2,993), Greece, and Turkey.

The German healthcare system is widely regarded as one of the most advanced in the world. The product offers a wide range of options and extensive coverage. It is evident that residents have a plethora of options at their disposal when seeking health insurance, with a wide variety of packages available to suit different financial capacities and medical requirements.

Health insurance is mandatory by law. Another important feature of the German healthcare system is that it is not necessary to have a German health insurance plan. Healthcare in Germany is financed through a mandatory contribution system that provides free healthcare for all via health insurance funds. Health insurance in Germany is divided between state and private financing models.

Compulsory health insurance (Gesetzliche Krankenversicherung, GKV) covers around 88% of the population. It is mandatory for everyone with a gross monthly income of less than 5,062 EUR. Private health insurance schemes can provide comprehensive healthcare for those who opt out of GKV or supplementary coverage for those who remain in it. People with a gross income of more than 5,062 EUR per month are insured by private health insurance funds (PKV).

Hospitals in Germany are grouped into three main types:

- Public hospitals (Öffentliche Krankenhäuser), run by local authorities, cities and provinces.
- Voluntary non-profit hospitals (Frei gemeinnützige Krankenhäuser), run by churches or non-profit organisations such as the German Red Cross.
- Private hospitals (Privatkrankenhäuser) operate as free commercial enterprises.

3.2. Germany – Leading Destination for Medical Tourism in Europe

Germany is one of the most popular destinations for medical tourism in Europe. According to data from the International Medical Travel Journal (IMTJ), 255,000 international patients from 177 countries choose Germany for treatment each year. The majority of medical tourists come from the Middle East, the UAE, Saudi Arabia, Eastern Europe, the UK, the Netherlands and the USA.

The key factors Germany to be a preferable destination from the patients are the following:

- Innovative technologies. Germany is a frequently chosen destination for medical tourism in Europe, owing to its utilisation of cutting-edge developments in the domains of diagnostics and treatment. Germany allocates the most substantial budgetary resources of any European nation for the advancement of medicine.
- European and German certificates that approve high level of medical services. It is imperative to note that all German hospitals are subject to rigorous scrutiny in order to ascertain their adherence to the stipulated demands of the European Union. Consequently, patients can have the assurance that the treatment is administered in accordance with the most stringent European standards.

Clinical trials. German medical practitioners are involved in scientific research with the aim of identifying

new treatment options for severe diseases such as cancer (Think Europe, 2025).

Prices regulated by the government. The financial obligations associated with medical treatment in Germany are regulated by state authorities, thereby ensuring that medical tourists do not incur expenses that exceed those of the local population (Instituto Bernabeu, 2025).

- The reputation of the German health insurance system.
- The high quality of the Germans doctors, nurses and the clinical staff.
- A high level of medical technology, advanced technical innovations and state-of-the-art treatment options.
- The good care of the medical staff.
- The presence of strict hygiene measures in German hospitals.
- Transparency of treatment results and overall follow-up care.
- The quality in the brand “Made in Germany”.
- Doctors who speak foreign languages, including the foreign-born doctors.
- Excellent transport network (airports, railways, highways).
- Good geographical location.

Top specialties for treatment in the Germans hospitals, popular among the international patients (Doctors in Germany):

- Oncology/cancer treatment.
- Cardiology and cardiovascular diseases.
- Neurosurgery and neurology.
- Orthopedics.
- Ophthalmology.
- First class medical checkups.
- Rehabilitation.

Major medical institutions, including the German Heart Center, Charité – University Hospital Berlin, and the Vivantes and Helios hospital groups, have implemented specialised services designed to address the needs of international patients. These services include multilingual support, culturally competent liaison staff, and designated comfort facilities. Berlin has emerged as an increasingly significant destination for medical tourism. The city’s healthcare infrastructure comprises more than 130 clinics, 70 rehabilitation facilities, and approximately 140,000 hotel beds, which collectively contribute to its strong position in medical care, research, and innovation (Statistisches Bundesamt (Destatis), 2025). International patients represent an important target group for medical institutions due to a range of economic, organisational, and strategic factors.

Germany is among the first countries in the world to offer rehabilitation programmes for patients “after recovery from COVID-19” (The Clinic Centre of Bad Sulza).

Germany is home to a plethora of spas, health and wellness resorts, and rehabilitation centres, many of which have been offering treatments for centuries. Germany is visited by millions of tourists each year, with many visiting therapeutic baths, health spas, and wellness resorts that offer a full range of treatments (post-corona recovery: ESPA forum).

4. Conclusions

Medical tourism can be defined as the provision of medical care and co-operation with the tourism industry, with medical interventions aimed at achieving long-term results. It is a process involving travel (*whether nationally or internationally*) to receive medical, dental, or surgical care, and it encompasses the application of evidence-based medicine. Voluntary (*organised*) travel to receive planned treatment services, which are combined with recreation and visiting tourist sites, is also categorised as medical tourism. The main motive for travel is the medical aspect (*purchase of biomedical services*).

The present assessment underscores Germany’s advanced stage of development and its prominent position within the European and global medical tourism landscape. Germany has consolidated its status as a principal destination for cross-border healthcare services, as evidenced by the following factors: a highly developed healthcare infrastructure, a substantial concentration of qualified healthcare professionals, and rigorous compliance with European Union quality and safety standards. The integration of advanced medical technologies, state-regulated pricing mechanisms, and a multilingual, culturally diverse workforce – combined with an extensive range of medical specialties spanning oncology, cardiology, neurosurgery, and rehabilitative care – render Germany particularly attractive to heterogeneous international patient cohorts originating from the Middle East, Europe, and other regions. Concurrently, the nation’s advanced transport infrastructure, internationally recognised engineering standards, and robust health insurance framework further substantiate its reputation as a dependable and superior medical tourism destination.

Furthermore, Germany’s trajectory exemplifies broader structural transformations in the evolution of medical tourism destinations, illustrating how sustained investment in healthcare infrastructure, workforce development, regulatory alignment, and patient-centred service provision can generate a significant competitive advantage. The incorporation of wellness, rehabilitation and long-standing spa traditions demonstrates an integrated, holistic approach to treatment and recovery that goes beyond conventional clinical care. In light of the projected growth in demand for cross-border healthcare, Germany is a prime example of evidence-based policy and practice, showcasing how medical tourism can be promoted in a sustainable, innovative, and patient-centred manner.

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