

# Consumer Satisfaction and the Principles of its Formation in the Latvia Health Care Market

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**Abstract**—Consumer satisfaction is a key aspect of business success, as it directly affects consumer loyalty, promotion of cooperation, as well as company recommendations and positive feedback. It refers to the extent to which the products, services and experiences offered by a company meet or exceed consumer expectations and needs. Consumer satisfaction is influenced by various factors, which can mostly be considered subjective. Researchers have developed several customer satisfaction metrics that can help companies improve and promote successful business. The aim of the study is to assess consumer satisfaction with the Latvian healthcare system. To achieve the set research objective, the theoretical part was analysed using the monographic or descriptive method, while the primary data was obtained through a survey. The study provides an understanding of the feasibility of medical tourism in the Latvian economy. The results of the study will provide an opportunity to understand the feasibility of medical tourism in Latvia.

**Keywords**—Medical tourism, customer satisfaction, customer satisfaction measurement, business.

## I. INTRODUCTION

Medical tourism has become a global pillar of healthcare, with an estimated value exceeding US\$100 billion and growing by 15% to 25% per year [1]. The medical tourism industry was valued at US\$47 billion in 2024 and is projected to reach over US\$111 billion by 2029 [2]. The World Tourism Organization defines medical tourism as a type of tourism activity that involves the use of evidence-based medical resources and services (both

invasive and non-invasive), including diagnosis, treatment, prevention and rehabilitation [3].

Medical or health tourists are those who travel to a country other than their home country for medical or health-related purposes. To improve the accessibility of health tourism services, the Latvian Ministry of Health has developed an action plan aimed at promoting the export of health services. This specific plan was drawn up for the period from 2024 to 2027, and includes as its main basic directions: promoting the country's economic growth; promoting the growth of health care services exports; improving the quality of health care services; promoting the recognition of Latvia's image in the field of health care services exports; promoting the return of medical professionals to Latvia; promoting the retention of medical professionals in the country in the field of health care; promoting a regulatory ecosystem favourable to the export of health care services [4].

Like Latvia, both neighbouring countries are also working diligently on medical tourism export promotion services. Popularizing this sector can provide significant improvements in the growth of the country's overall economy, as well as ensure the growth of the specific area. In the Republic of Lithuania, the Ministry of Economy and Innovation is the state institution responsible for formulating state policy in the field of tourism, resort development, as well as resort areas. This institution also implements international cooperation functions in the field of tourism. The Ministry defines the following as its main objectives: identification of tourism development

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priorities; development of competitive tourism products; reduction of tourism seasonality; increase in the total number of tourists [5].

The Estonian national tourism policy is managed by the Ministry of Economy and Communications. The Estonian tourism policy defines the following as its main objectives: increasing the international competitiveness of Estonian tourism; increasing the export of tourism services; strengthening the added value of tourism enterprises [6].

The study is conducted with the aim of comparing health tourism trends in the Baltic States in order to find out whether this service is positioned as available to any medical tourist who plans to come to a particular country to receive healthcare or wellness services of interest to them. The countries included in the scientific article are analysed considering economic factors, tourism statistical data, as well as previously conducted research in the specific sector.

Research objective: to assess the advantages of the Latvian medical tourism sector compared to other Baltic countries. To achieve the goal, the following tasks were set: 1) to characterize the theoretical aspects of medical tourism services and the Baltic States; 2) to evaluate the services of the medical tourism sector in the Baltic States; 3) to conduct a comparative analysis of the advantages of the medical tourism sector in Latvia compared to the other Baltic countries. To implement the goal, the available theoretical basis on medical tourism was analysed using the monographic or descriptive method, as well as data from official statistical databases were compared using secondary data analysis. Research period: The study covers the period from 2021 to 2024. The study will provide an understanding of the opportunities and prospects of Latvian medical tourism.

## II. MATERIALS AND METHODS

Medical tourism is one of the tourism trends, the main goal of which is to provide a person, considering medical indications, with qualified full-fledged treatment outside the country of residence [7]. The authors distinguish three groups of medical tourism, namely, domestic tourism, outbound tourism and inbound tourism (see Figure 1).

In the classification of medical tourism offered by certain authors (see Figure 1), domestic medical tourism is mentioned as one of the types of medical tourism. Within the framework of this type of tourism, people living in one country travel to another city or region to receive medical services [8]. The reason for this may be the desire to receive the services of more qualified specialists or some specific diagnostic examinations that are not available in the region from which they are traveling – small towns or rural regions. This classification also distinguishes outbound and inbound medical tourism, which is associated with the provision of planned medical and diagnostic services to patients outside their country of residence. Outbound medical tourism is aimed at treating a patient abroad, which may be due to the need for immediate access to medical treatment, wider availability of medical institutions, as well as the lack of medical services or low-quality treatment, as

well as less qualified service providers in the patient's country of residence [9]. Inbound medical tourism, on the other hand, is aimed at attracting foreign patients to provide them with medical care [7]. For the most part, the indications for both inbound and outbound medical tourism are practically the same, people travel in search of more affordable, higher-quality or unavailable medical or diagnostic services in their home country.

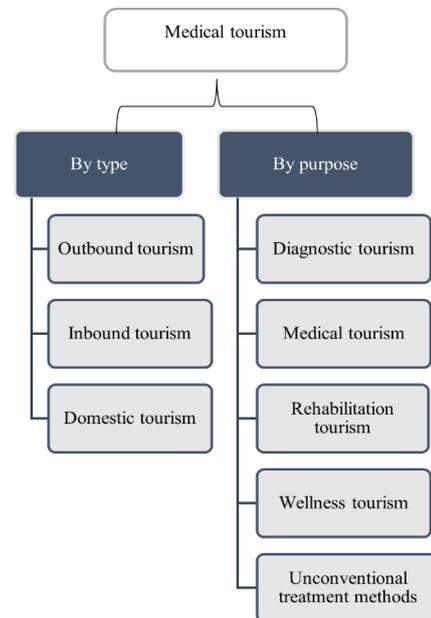


Fig. 1. Classification of medical tourism [7].

Medical tourism is classified according to the purpose of receiving medical services into diagnostic, treatment, rehabilitation, wellness and alternative medicine tourism [7]. Diagnostic medical tourism includes services intended to identify certain diseases, as well as to confirm or deny unclear diagnoses. The most common diagnostic examinations that medical tourists choose to undergo are imaging examinations, such as magnetic resonance imaging, computed tomography examinations, and positron emission tomography. The latest publicly available information from the Health Statistics Database shows that 2,557 medical tourists came to receive diagnostic services in Latvia in 2022 [10]. A type of medical tourism with the aim of receiving treatment is most often carried out by patients who have already been diagnosed with a disease. Such patients travel to another country or region to receive the necessary services related to therapeutic technologies or surgical intervention methods. In contrast, the rehabilitation direction of tourism is aimed at restoring lost body functions that have occurred because of injuries, strokes, paralysis and other pathological processes [7]. Wellness tourism focuses on and generally improving the health and well-being of the body. This type of tourism can include various SPA treatments, massages, healthy eating programs, as well as active leisure activities. The main goal of wellness tourism is to reduce stress and fatigue, as well as promote overall well-being. The final type of medical tourism in this classification is medical tourism for non-traditional

treatment methods. The most common alternative treatment methods include acupuncture or needle therapy, phytotherapy or herbal therapy, homeopathy, as well as chiropractic or manual therapy [11]. It is important to note that non-traditional treatment methods are often not based on scientific evidence and therefore may be associated with certain risks.

#### *A. CHARACTERISTICS OF THE HEALTH TOURISM INDUSTRY IN THE BALTIC STATES*

The medical tourism industry focuses on patients and clients who come from abroad to receive the desired medical and health-improving services.

The Tourism Law of the Republic of Latvia defines health tourism as one of the types of tourism aimed at improving the general condition and well-being of the body, as well as prevention, diagnostics, treatment and rehabilitation, using, among other things, natural healing resources [12]. Latvia as a medical tourism destination is attractive to foreign patients both with the level of modern medical services and with lower prices, compared, for example, with Central Europe - Germany, Switzerland or Austria. Another important advantage is the possibility of relatively quickly making appointments with specialists, as well as for various examinations.

The latest data publicly available in the Health Statistics Database show that in the medical tourism sector in Latvia in 2022, preventive services were provided most often, followed by diagnostic and therapeutic services [10]. The main countries from which medical tourists have travelled have been European Union member states, as it is relatively easier for patients from these countries to arrive in Latvia than for citizens of third countries.

The Latvian medical tourism industry is largely coordinated by the Latvian Health Tourism Cluster, which has been operating since 2012. This association unites both Latvia's leading clinics and hospital professionals to promote the expansion of the medical tourism market by providing high-quality and affordable services to both local and foreign patients [13]. Currently, the organization unites more than 60 members, both from the state and local governments, as well as from the private medical sectors. The main defined goals of the Latvian Health Tourism Organization are:

- to promote the development and adoption of regulatory enactments regulating resorts in the Republic of Latvia.
- to develop and expand the activities of resort towns in the Republic of Latvia.
- to represent and defend the general interests of members in the public and private sector institutions of Latvia, as well as in other organizations operating in the tourism, medical, and especially health tourism sectors.
- cooperate with Latvian and foreign partners, as well as participate in the preparation and implementation of international projects.
- promote the export of medical products and health services.

- develop innovative health and health tourism products [14].

Republic of Lithuania Medical tourists are offered services such as plastic surgery, orthopaedics, vascular surgery, dentistry, as well as SPA and rehabilitation. Medical tourism services in Lithuania are offered by 89 companies that provide various types of services, ranging from serious treatment manipulations to wellness-promoting procedures.

The Lithuanian medical tourism cluster LITCARE has been operating in Lithuania since 2013, which, like the Latvian Health Tourism Cluster, unites both private and public organizations that provide medical services, including dentistry services, as well as SPA and wellness services [15]. The organization defines as its main goal the promotion and development of medical tourism exports, as well as strengthening Lithuania's competitiveness in the international market [16]. The cluster also promotes cooperation between Latvian and Estonian medical tourism professionals by jointly organizing conferences and exhibitions of both international and local importance. The Republic of Estonia has become an important medical tourism destination, especially in the neighbouring countries of the Baltic region, as well as in Scandinavia and the Nordic countries. Foreign patients have been coming to Estonia since the 1980s to receive various types of medical and wellness services [17]. The Estonian healthcare system is well regulated, and its medical institutions are equipped with modern technology. Competitive prices for medical procedures, as well as high standards of care, have attracted international patients looking for affordable and high-quality healthcare services. The Estonian medical tourism cluster Medicine Estonia supports its members in promoting the export of medical services [17]. The organization's main strategic goals include:

- promoting international recognition and the number of medical tourists.
- improving the diversity and quality of health tourism products and services.
- improving the professionalism and qualifications of medical workers.
- positioning health tourism companies, as well as taking a leading role in the Estonian healthcare system.
- sustainable development of the efficiency of health tourism companies [18].

All Baltic States have established medical tourism clusters, which aim to promote the industry, strengthen cooperation between industry players and attract foreign patients. The Baltic States offer a wide range of medical services, from diagnostic and preventive services to complex surgical operations, however, patients should carefully compare various factors, including service prices, when choosing a place to be treated, to make an informed decision.

#### *B. RESEARCH RESULTS*

Medical tourists choose to receive medical services outside their home country mostly because of more affordable prices and shorter lines. The author compares

the availability of medical tourism in the Baltic States according to three different aspects: physical accessibility, economic accessibility, and availability of specialists.

Physical accessibility (transport). Although the Baltic States are in the northern part of Europe, air traffic to these countries is well developed. The main airports are in the capitals, namely Riga, Tallinn and Vilnius, but smaller airports are also located in Palanga and Kaunas in Lithuania, as well as Tartu in Estonia. Riga Airport is considered the main air traffic hub in the Baltics [19]. This is also evidenced by the data published by the World Economic Forum (WEF) in 2024, which indicates that in the analysis of the Travel and Tourism Development Index, Latvia was awarded 3.08 out of 7 points, which is the highest result, precisely in the air transport infrastructure sector, ranking it in first place among the Baltic countries [20]. Lithuania received 2.94 out of 7 points in the same sector, while Estonia only 2.83 out of 7 [20]. The 20 airlines operating at Riga Airport provide connections to more than 100 European and Asian destinations [19]. In total, Riga Airport served 6.63 million passengers in 2023, Vilnius Airport also served around 6 million passengers, and Tallinn Airport served a total of 8,764 passengers.

By train from Riga, you can go to Vilnius in Lithuania, as well as to the border town of Valga in Estonia. Trains run from Vilnius to Warsaw in Poland, as well as to Riga in Latvia. From Tallinn, you can go by train to Valga, then change trains to go further to Latvia. At the level of the Baltic States, bus transport is much more accessible, as well as cheaper, compared to train transport. Data published by the World Economic Forum in 2024 indicate that in the analysis of the Travel and Tourism Development Index, Latvia was awarded 3.75 out of 7 points, Lithuania received 4.47 out of 7 points in the same sector, while Estonia received the highest rating of 4.63 out of 7, specifically in the land and port infrastructure sector [20]. Estonia is the only one of the Baltic countries with well-developed sea transport, namely, it is possible to reach Helsinki in Finland, Stockholm in Sweden, as well as the Åland Islands by ferry from Tallinn.

The number of incoming tourists in 2021, which is the latest publicly available data, was twice as high in Lithuania as in Latvia (see Table 1). In this particular year, 948,000 international tourists arrived in Lithuania, bringing in 585 million USD in tourism spending. In 2021, only 478,000 international tourists arrived in Latvia, generating a total of 751 million USD in revenue, while in Estonia, 808,000 tourists arrived in this particular year, contributing 901 million USD to the economy. According to this summary, tourists who arrived in Latvia spent more money on tourism spending than tourists who arrived in Lithuania.

The target markets for Latvian medical tourism are the United Kingdom, Ireland, Norway, Sweden and Germany. Most often, medical tourists from these countries choose Latvia as a medical tourism destination, as it is easily accessible by air. On average, the flight duration from these countries to Latvia is no longer than 2.5 to 3 hours. Statistical data show that in 2022, 2,811 patients from the United Kingdom, 1,659 patients from Germany, and 390

patients from Sweden chose Latvia as a medical tourism destination [10]. Lithuania defines Germany, Poland, the United Kingdom, and the Scandinavian countries as its target market countries. Medical tourists from Poland and Germany can easily reach Lithuania both by air and by traveling by land by bus or their own private car. The flight duration from Poland, Germany, as well as from the United Kingdom and Sweden, does not take longer than 1.5 to 2 hours. However, Estonia, which is located further north than the other Baltic states, is defined as a medical tourism destination by the Scandinavian countries. It is easy to get to Estonia from the Scandinavian countries by air or water. The average travel time by air is 1 hour and 20 minutes, but by ferry the travel time can be up to 15 hours.

TABLE 1 COMPARISON OF DESCRIPTIVE ECONOMIC ACTIVITY DATA IN THE BALTIC STATES [1]

Indicator	Baltic States		
	Latvia	Lithuania	Estonia
Population, 2023	1 883 008	2 857 279	1 365 884
GDP per capita, 2023 (EUR)	26 600	32 500	30 700
International tourist arrivals 2021	478 000	948 000	808 000
Tourist expenditure 2021 (EUR million)	751	585	901
Competitiveness index - GCI (2024)	59.13	69.89	68.17
Global competitiveness rank (2024) *	45	30	33
Travel and tourism development index rank (2024) **	65	44	36
Current health expenditure per capita, 2021 USD, PPP Total	3153	3432	3258,78
Government	2 186,00	2 305,00	2 481,98
Private (out-of-pocket)	851.00	1035	719,34
Standard VAT rates (%)	21	21	22
Medicines and medical equipment for personal use (%)	12	5	9
Transport (passenger transport) (%)	12	9	9
Hotel accommodation (%)	12	9	9
Restaurants and food services (%)	21	9	9
Number of doctors per 10,000 population, 2022	34	51	34
Gross monthly salary of a doctor	1 619	1 466	2 709

\*Rating out of 67 countries in 2023

\*\*Rating out of 119 countries in 2023

Economic accessibility. It is known that most people choose to go for medical services abroad, because it is often possible to save costs in this way, as well as to get to certain specialists faster. This choice is influenced by both the country's total income per capita and how much the country spends on health in general. If a country has lower wages and less is spent on health, then medical services are also cheaper. Lower health expenditures per capita in the target country can be a significant factor influencing patient choice. Low medical care costs, which are usually associated with a lower gross domestic product, as well as low administrative costs, increase the availability of

medical care. Of the Baltic countries, Latvia is characterized by a lower GDP per capita than the other two Baltic countries, as evidenced by data from 2023. Estonia is in second place with a GDP per capita of 30,700 EUR, however, Lithuania is in the lead among the Baltic countries with a GDP per capita of 32,500 EUR. Part of the price of medical tourism services is made up of value added tax (VAT), which is the highest in Estonia at 22% according to the standard rate, however, if we apply it to tourism-related services, such as accommodation, restaurant and catering services, as well as transport services, then in these sectors the VAT is lower for both Estonia and Lithuania compared to Latvia (see Table 1).

In the medical tourism sector, the author analysed the prices of five services – breast implants, tummy tuck, bariatric surgery, hip replacement, and rhinoplasty (see Table 2). The prices of the most popular surgical services in the Baltic region do not differ significantly, however, it should be noted that the costs of hip replacement surgery in Latvia are cheaper compared to the other Baltic countries. However, the costs of rhinoplasty or nose surgery are cheaper in Lithuania. Comparing the prices of these specific services, it can be concluded that the costs of these services in Estonia are slightly more expensive compared to the other Baltic countries, but still relatively lower, such as in other Scandinavian countries.

TABLE 2 AVERAGE PRICES FOR THE SERVICE IN THE BALTIC STATES [1]

Service (EUR)	Latvia	Lithuania	Estonia
Breast implants	3 800/ 4 600	3 050/3 895	4 290/5 290
Abdominoplasty	4 000/5 600	3 100/3 958	3 690/ 4 590
Bariatrics	3 380/ 4 980	5 450/6 960	3 500/ 6 150
Hip replacement	2 812/ 3 500	6 340/8 098	5 600/ 6 400
Rhinoplasty	3 400/4 500	2 050/3 767	3 500/ 5 500

For Availability and quality of specialists. Comparing all three Baltic countries, the largest population in 2023 was in Lithuania, Latvia is in second place, but Estonia has the lowest population level. Accordingly, the number of doctors per 10,000 inhabitants is also the largest in Lithuania – 51 (see Table 1). Studies show that Estonia, Latvia and Lithuania have consistently been among the leaders of the European Union countries in terms of the number of doctors per 10,000 inhabitants, however, over 30 years, the number of doctors in Latvia decreased by 1.65 doctors, while in Estonia the number increased by 3.63 doctors, in Lithuania by 5.34 doctors per 10,000 inhabitants, this is associated with a decrease in the population in all three countries [21].

Medical tourists, when choosing a country to go to receive a service, highly value quality service. When choosing to receive treatment abroad, the patient is looking not only for more favourable prices, but also for high professional standards, as well as safe and reliable services. A quality service includes not only a successful treatment outcome, but also a kind attitude, clearly understandable information about the treatment process and possible risks, as well as support after treatment. A study conducted by the

Medical Tourism Association in 2024 emphasizes the quality and standards of medical safety for foreign patients. In the survey conducted, more than half of the participants indicated that they were worried about traveling to another country due to factors such as quality of care, safety, and distance [1]. All three Baltic countries position themselves in the medical tourism market as safe and offer high-quality standards for treatment and wellness procedures.

For the convenience of medical tourists, medical tourism clusters operate in each of the Baltic countries, which provide patients with more convenient communication with both the chosen clinic and specialists. The Latvian Health Tourism Cluster unites more than 60 members, which are state, municipal and regional hospitals, as well as private clinics, rehabilitation centres, resort hotels, as well as travel agencies and educational and research institutions [13]. The main area of activity of the cluster is the promotion of cooperation between industry specialists and organisations to make medical tourism services more accessible to both the residents of their own country and foreign tourists. The Lithuanian medical tourism cluster LITCARE has become a well-known partner among health tourism professionals in countries such as Latvia, Estonia, Ukraine, Azerbaijan and Kazakhstan. It is also reported that the cluster is entering the markets of countries such as the UK, Israel, Norway, Sweden, Germany and the USA [16]. The Estonian medical tourism cluster The Medicine Estonia cluster, like the other medical tourism clusters in the Baltic States, unites industry companies and specialists that provide services in treatment, diagnostics, research and further education. The cluster also takes care of advertising its services and various marketing activities to attract medical tourists.

The Baltic States are positioned as an attractive and accessible destination for medical tourists, offering a wide range of high-quality medical services. The region's attractiveness is promoted by a good geographical location, which ensures easy accessibility, as well as experienced specialists working with the most modern technologies. Medical tourism clusters, in close cooperation with healthcare institutions and representatives of the tourism industry, provide integrated solutions that simplify the receipt of medical services and improve the overall patient experience.

### III. CONCLUSIONS

- Health tourism is a growing industry worldwide, including in the Baltic States, which can be attributed to competitive prices compared to Western European countries.
- By promoting closer cooperation between the Baltic States, it is possible to attract new, qualified specialists in the field of health tourism, thus increasing the overall quality of services.
- The study has practical significance, which will allow Latvian medical organizations to understand the prerequisites and development prospects necessary for starting medical tourism.

- The average costs of surgical services in the Baltic States do not differ much, therefore, medical tourists have equal opportunities in all the Baltic States.
- Changes in the number of doctors may be related to the financing of the healthcare system, physician migration, demographic changes, as well as other socio-economic trends.

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