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Global Buyers Survey allows us a look into the trends and habits of medical travelers. What are they interested in? What drives them to choose a destination? What are their expectations? Out of the results of this survey and our previous surveys conducted comes the Global Buyer’s Report.

The methodology of this report included a sampling of 1110 prequalified global buyers of services. Global buyers are defined individuals or companies that either refer patients to healthcare destinations or are involved in the selection of healthcare providers for the networks offered to traveling patients. The demographic and geographic sampling was diverse, yet the responses weighed heavily from buyers in the MENA nations, United States and Asia managing patients predominantly emanated from MENA, UK, Germany, and the United States. These patients traveled to the same destinations listed in addition to India, Turkey and Thailand. Latin America took the largest percentage of countries of new interest to the surveyed buyers including Colombia, Argentina, and Costa Rica where nations like Turkey, India and Lebanon dropped in rank from interest. Safety and quality control were cited of major drivers for destination selection.

A surprising 51 percent of patients spend USD $10,000-50,000 and 16 percent spending USD $50,000-100,000, much higher than previously estimated, an fact likely attributable to the fact that 50 per cent of the patients care surveyed for the study was paid through insurance or government coverage versus 40 per cent self-pay. Prior studies reflect the largest volume of patients consuming dental and cosmetic services whereas this study reflects 72 percent traveling for orthopedics and oncology that likely contributed to the higher per patient spend.

This Brief represents a snapshot. The full 2016-2017 Global Buyers Report assists your company in better understanding your target market and corporate “buyer”, how to recognize your program’s expectations and which direction to take your business to meet the corporate buyer needs.

Some other areas we delve into are current industry trends, industry challenges and opportunities and then how each region around the world looks in regards to medical travel. Some of the more industrious countries are even highlighted and discussed in order to give you inspiration and encouragement. Rest assured, the buyer agree with 49 percent of buyers seeing the medical travel industry is growing at an average pace where a shocking 29 percent see it growing at a fast pace.
The medical tourism industry stakeholders historically defined medical tourism as the process of traveling outside one's local area of residence for the purpose of receiving medical services. This excluded emergent care and unplanned care for illness sought by travelers as well as wellness complementary to medical services. For this latter point, consider acupuncture services in advance of IVF treatments or other complementary and alternative medicine (CAM).

Due to increasing activities across the domestic and international healthcare industries as well as the manner in which the purchase of services is trending, the movement of all patients for all reasons certainly falls under medical travel. You will also hear people referring to destination health, health excellence, excellence medicine, medical value travel and other terms in relationship to people traveling for healthcare services. The basic difference between many of these terms has been “elective” or “non-elective” services.

However, the line between these terms is diminishing due in most part to the demand, drivers and the payer/consumer being similar as well as the similarity in infrastructure and services needed to serve.

In recent years, we see the increase in movement of healthcare organizations to “internationalize” their brand or services for an expanded consumer base, often crossing borders and cultural competencies. The Medical Tourism Association (MTA) recognizes the management of these services as “International Patient Services,” irrespective of whether a patient travels abroad. The appropriateness of services, cultural competency of delivery and expectations of the consumers are the same, as is the consumer’s willingness to recommend the provider to another. This leaves little to no difference between a medical travel and medical tourism program.

Therefore, medial tourism (MT) or medical travel can be measured by the economic impact appropriately documented to include each consumer and payer category to meet the realities of these individual markets around the world. The combination of the spending at a health center, combined with wellness complementary to health and tourism/travel, plus the hospitality, travel and per diem spending associated with this trip, is in fact the true economic impact of the industry.

MEDICAL TOURISM
v. MEDICAL TRAVEL
Industry Size
Statistics vary on the size of the industry. According to one study by J. Connell, “Numbers are complicated by diaspora patients, expatriates within countries, short term drop-ins, spa visitors, purchasers of pharmaceuticals and friends and relatives accompanying patients.” Additionally, the study states that since most governments do not record official data on MT visitors and independently verified data is not released by hospitals, it is difficult to discern the true industry size.  

There is much contention behind valuing the worth of this industry. Visa recently misquoted the global MT sector as worth USD 439 billion. However, that number was hotly debated to the point where Visa retracted their report and admitted they had not have its own calculations to provide.  

Some stats provided by Visa are found below as well as an industry estimate by Medical Tourism Association.

Visa estimates 11 million tourists travel each year for medical care. This is 3-4% of the world’s population. Patients Beyond Borders provides a more conservative estimate of the industry’s worth at USD 45.5-72 billion with 14 million travelers spending approximately USD 3,600-7,600 per medical visit. This figure includes travel and/or medically related expenses. The Medical Tourism Association estimated at USD 100 billion merely by calculating the estimated annual growth proposed by Deloitte in 2008.

Patient Demographics
A 2015 MTA Medical Tourism Patient Survey found that nearly 27% of patients had previously traveled to a foreign country to receive medical care. Most of the travelers were female and all were between ages 45 and 64. The majority were White/Caucasian. All were American. Additionally, they were all college educated with 50 percent having household incomes between USD 50,000 and 100,000. Additionally, 50 percent of them had health insurance.

These patients require a savings of between USD 4,900 and 8,600 USD to pursue medical tourism as an option. Patient safety is the most important factor in choosing a destination and 20 percent stated they were willing to air travel one to five hours to reach their medical destination. They are mainly motivated by cost savings (61%) then quality (21%).
Conclusion

The Medical Tourism industry has a promising future. Visa feels it will grow 25 percent each year. Deloitte expects medical traveler numbers to increase 35 percent annually. Currently, Americans make up the largest number of medical tourists but China is expected to surpass them by 2025. While much work is to be done in defining the metrics for measuring medical tourism, collaboration amongst stakeholders is the key to its sustainability.

In order to meet the demand, this industry needs to set some foundational and core principles right away. For example, setting standard medical facility and physician certifications is encouraged.

There are multiple opportunities for every company on the Value Chain. From the Medical Tourism Broker and Facilitator to the medical facility to the travel agent, growth and profit are available. This report highlights three important target markets for those focused on the traveling patient. The Baby Boomers are living longer and demanding better health as they age. The current primary Medical Tourism market of women ages 45 to 64 can be cultivated, and the Millennials who are soon to be the world’s most populous generation are also interested and most open to the concept of traveling for health care.

To develop these groups into clients for your business requires knowing the client’s journey. This journey should be understood from the minute the patient identifies the need for medical care until she is back home and recovering. Then, where does your business fit into this journey.

Even if the medical traveler is not your end client, understanding where your own client fits into this journey enables you to be of better service and value to him.

Every region of the world has medical tourism success stories to share and be inspired from. India has been most prolific in publishing case studies and best practices. These global patient experiences may be worthy an investment of your time to read and learn from. It is common knowledge Southeast Asia has been the most aggressive and successful in their endeavor to attract medical tourists as six of the world’s top ten medical tourist destinations lie in that region.

Other destinations are still in the beginning phases of development giving companies opportunity to partner with them. Sri Lanka and Puerto Rico are two examples of this.

The service this industry provides is a noble one. It is making people healthy, whole and happy again thus is worth the effort to develop and grow. If we work together we certainly will find our way there successfully.
GLOBAL BUYERS SURVEY RESULTS
Q1. What is your organization type?

Almost 38 percent of the survey respondents were Medical Tourism Facilitators. A Medical Tourism Facilitator is a company that offers referral services and care coordination for a patient who is looking outside of his or her borders for medical care. Insurance companies were second at 16.4 percent with travel agents and insurance agents/consultants/brokers tying at 13 percent for third highest respondents.

- **37.7% Medical Tourism Facilitator**
- **16.4% Insurance company**
- **14.8% Other**
- **13.1% Travel Agent**
- **13.1% Insurance agent/consultant/broker**
- **3.3% Referring physician**
- **1.6% Employer/HR Manager**

Q2. In which country are you based?

26 percent of the survey respondents were based in the United States. U.A.E was second at almost 10 percent. The MENA countries accounted for almost 28 percent of those who responded to this survey.

- **Top 3 Countries**
  - U.S.A 26.2%
  - United Arab Emirates 9.8%
  - Canada 4.9%
- **Other Responses**
  - Kuwait 4.9%
  - China 3.3%
  - Denmark 3.3%
  - Egypt 3.3%
  - Iran (Islamic Republic of) 3.3%
  - Nigeria 3.3%
  - Russian Federation 3.3%
  - Ukraine 3.3%
  - Albania 1.6%
  - Bahrain 1.6%
  - Barbados 1.6%
  - Botswana 1.6%
  - Other Responses 59.1%
Q3. Please choose the countries where your patients are from/where they live and reside?

27.7 percent of the survey respondents’ patients live in the U.S.A. Almost 16 percent are from the United Arab Emirates. Close behind and in third place are residents of the United Kingdom. Of note is that 50 percent of this group live and reside in the Middle East.

Top 7 Countries

- **U.S.A**: 27.7%
- **United Arab Emirates**: 15.8%
- **United Kingdom**: 12.4%
- **Egypt**: 12.0%
- **Oman**: 12.0%
- **Germany**: 10.1%
- **Kuwait**: 10.0%
Q4. Please select TO which country(ies) are your clients/patients travelling for medical care?

40 percent of the patients are traveling to the United States for their medical needs. Germany is in second place at 16 percent with Turkey in third at 12 percent. India and United Kingdom are close behind at around 10 percent.
Q5. What is the most common reason that the clients/patients that you work with choose to leave their home country and travel abroad for healthcare?

Almost half of the patients who leave their home to receive medical care do so because they feel they can receive higher quality healthcare in another country. 22 percent travel outside their borders because the cost of healthcare in their own country is too high.

According to The Commonwealth Fund, the United States has the most expensive healthcare prices in the world. For example, a bypass surgery in the U.S. costs approximately $75,000. The second highest country is Australia at $42,000.

To receive higher quality healthcare than is available in the patients home country
The cost of healthcare in their home country is too high
The treatments that this seek are not available in their home country
The quality of the healthcare in their home country is too low
The wait time to receive treatment in their home country is too long

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>To receive higher quality healthcare than is available in the patients home country</td>
<td>46.0%</td>
</tr>
<tr>
<td>The cost of healthcare in their home country is too high</td>
<td>22.0%</td>
</tr>
<tr>
<td>The treatments that this seek are not available in their home country</td>
<td>18.0%</td>
</tr>
<tr>
<td>The quality of the healthcare in their home country is too low</td>
<td>10.0%</td>
</tr>
<tr>
<td>The wait time to receive treatment in their home country is too long</td>
<td>4.0%</td>
</tr>
</tbody>
</table>

Q6. How do patients choose which hospital/healthcare provider to go to?

54 percent of the patients are referred to a health care provider by a Medical Tourism Facilitator/insurance company or the government. 16 percent are referred by a physician. 22 percent of patients are self-directed finding a provider either by doing Internet research or via word of mouth.

<table>
<thead>
<tr>
<th>Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical Tourism Facilitator/Insurance Company or Government makes the recommendation or selection</td>
<td>54.0%</td>
</tr>
<tr>
<td>Referring Physician</td>
<td>16.0%</td>
</tr>
<tr>
<td>Word of Mouth</td>
<td>12.0%</td>
</tr>
<tr>
<td>Internet Research</td>
<td>10.0%</td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
</tr>
</tbody>
</table>
Q7. Please select all the procedures the medical travelers go abroad for:

Of the buyer surveyed 72 percent of patients travel abroad for Orthopedic/Spine procedures or Oncology/Cancer treatment. A 2015 cancer research study estimates 1 in every 2 people will be diagnosed with cancer at some point in their life. The main reason cited is because we are living longer and the risk of cancer increases with age. Treatment is working though as our survival rate has doubled over the last 40 years.¹ This should bring hope to those providers who are treating this disease.

60 percent of medical travelers seek Cosmetic/Plastics/Aesthetic surgeries or treatments. In 2014, over 20 million cosmetic procedures were performed globally. At 20 percent (4.1 million procedures), the United States performed the most. Given the cost of these procedures can be reduced by 40-60 percent by seeking the same treatment outside this country, there is much opportunity for other countries interested in marketing to this group. Eyelid surgery is the top procedure sought with liposuction close behind.
Q8. What is the average cost of a medical procedure that you refer overseas?

51 percent of the procedures cost between $10,000 and $50,000 with a little over half of that number falling into the $10,000 to $20,000 range. Over 16 percent of the treatments cost between $50,000 and $100,000.

- 26.5% $10,000 - $20,000
- 24.5% $20,000 - $50,000
- 18.4% $5,000 - $10,000
- 16.3% $50,000 - $100,000
- 8.2% Under $5,000
- 6.1% $100,000+

Q9. How do your clients/patients pay for their medical travel?

40 percent of the patients are self-pay. 30 percent have insurance to cover the expenses, while 20 percent have government assisted benefits plans or assistance.

- 40% Individual self-pay
- 30% Insurance company pays
- 20% Government pays
- 10% Other
Q10. On average, how much time do they spend overseas?

Almost 80 percent of the patients spend between one and four weeks abroad for their procedure. This number is almost evenly split between those who spend 1-2 weeks and those who spend 2-4 weeks at their destination. 11 percent spend more than four weeks abroad.

With this knowledge, the local organization who is trying to develop a medical tourism industry can create a strategy that ensures the patient and her traveling companions entire stay is considered. This might include lodging, meals and transportation. This also continues the economic impact of a medical traveler being far greater than the average tourists.

A smart choice for the local hospitality providers is the WellHotel® Training & Certification for Hotels & Resorts. This training certifies hospitality providers that cater to medical travel guests ensuring the local health and wellness community provides the best possible patient experience.

Q11. Do they bring typically a family member or companion with them?

86 percent of patients do bring family members with them on their medical travel trips. Almost 75 percent of that group brings one companion with them and the rest travel with 2-3 family members or companions.

If so, how many?

<table>
<thead>
<tr>
<th>Number of Companions</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>74.4%</td>
</tr>
<tr>
<td>2</td>
<td>23.3%</td>
</tr>
<tr>
<td>3</td>
<td>2.3%</td>
</tr>
</tbody>
</table>
Q12. What is the primary characteristic that you look for in a healthcare provider when you are deciding where to send your patients?

77.6 percent of respondents choose their healthcare provider based on either the doctor or hospital’s background, experience and reputation. The cost of the procedure comes in last with only 4 percent considering that a primary choice.

- **44.9%** Doctor/physician background, experience & reputation
- **32.7%** Hospital background, experience & reputation
- **14.3%** Accreditation
- **4.1%** Cost of procedure
- **4%** Cost of procedure
Q13. What is the primary characteristic that you look for in a country/destination when you are deciding where to send your patients?

The safety of the destination is paramount in the respondent’s eyes with 63 percent choosing this option when deciding where to send their patients. Tourism attractions and similar language/culture are also considered important when choosing appropriate destinations.

A common theme found in the Other Responses answers was Ease of Travel. The survey respondents expect their patients to be able to travel without too much difficulty.

Other Responses 16.3%

- Appropriate match to client requirements
- Comfort
- Ease of travel and quality of clinical care
- Ease of travel to get there
- Level of doctors, no language barriers
- Medical facilities
- Regulations

63% SAFETY

Tourism Attractions

Similar Language/Culture

10.2%

10.2%
Q14. Do you do conduct site visits to the hospitals and healthcare providers in your network? 

63 percent of the survey respondents definitely conduct site visits to the hospital or healthcare provider they are considering referring their patients. Almost 29 percent will sometimes conduct a site visit.

Q15. Do you require the hospital to provide any special VIP Services? 

This is a question which asked the Respondent to check all answers that applied. A resounding 62.5 percent of them expected the hospital to provide some type of translation services.

Over 31 percent considered interpreters a requirement for their patients. Along the same lines, 21 percent also expected translated documentation and 10 percent wanted translated signage.

Special meal preparation, a concierge, and detailed explanation of procedures and costs were also desired.

Other 25%
- Post-operative long term housing
- On site concierges
- Explanations of medical services
- Special client requests
- Detailed billing
Q16. What issues have you had with hospitals you have referred patients too?

This is a question which asked the Respondent to check all answers that applied. 44.9 percent of the respondents had issues with slow response times from hospitals. Difficulty communicating and poor patient experience came in second and third for hospital issues.

<table>
<thead>
<tr>
<th>Issue</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Slow response times</td>
<td>44.9%</td>
</tr>
<tr>
<td>Difficulty Communicating</td>
<td>34.7%</td>
</tr>
<tr>
<td>Poor Patient Experience/VIP experience</td>
<td>24.5%</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>16.3%</td>
</tr>
<tr>
<td>Poor Quality outcomes</td>
<td>14.3%</td>
</tr>
<tr>
<td>“Stealing” the patient from your company and dealing directly with the patient without your organization’s involvement</td>
<td>14.3%</td>
</tr>
<tr>
<td>Refusing to pay the promised commission</td>
<td>12.2%</td>
</tr>
<tr>
<td>Not complying to Patient Privacy Laws</td>
<td>2.0%</td>
</tr>
</tbody>
</table>
Q17. Are there any new countries or regions you would consider sending patients to or are planning to in the future?

This is a question that allowed the Respondent to check all answers that applied. Columbia came in at #1 for this question with 17 percent of respondents stating they would consider sending their patients to this Latin American destination. Close behind is Germany at 15 percent. Israel and Argentina tie for third place at 13 percent. Additional Latin American countries in consideration were Costa Rica, El Salvador and Brazil.
Q18. Are there any countries that you have stopped sending patients too?

This is a question that allowed the Respondent to check all answers that applied. 26.7 percent of survey respondents state they no longer send their patients to Turkey. India, Lebanon, Libya, Saudi Arabia and Tunisia all tied for second place as destinations providers and referrers no longer send their patients.

Countries Dropped

- Turkey: 26.7%
- India: 13.3%
- Lebanon: 13.3%
- Libya: 13.3%
- Saudi Arabia: 13.3%
- Tunisia: 13.3%
- Other: 6.8%
Q19. Do you feel the medical tourism industry is growing?

On a very positive note, 98 percent of respondents felt the medical tourism industry was growing. 49 percent felt it was growing at an average pace while almost 29 percent felt it was growing at a fast pace.
Q20. Do you expect your business to have an increase in the number of patients it sends overseas over the next couple of years?

In the next couple of years, 86 percent of respondents expected their business would send more patients overseas for procedures. This same group was quite optimistic with 35.7 percent stating their business would increase 11 to 19 percent. 

28.6 percent felt their business would grow 1 to 10 percent and 19 percent felt it would increase 20 to 30 percent.

If so, can you tell us what % you think your business will increase?

<table>
<thead>
<tr>
<th>Percentage Increase</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 to 10%</td>
<td>28.6%</td>
</tr>
<tr>
<td>11 – 19%</td>
<td>35.7%</td>
</tr>
<tr>
<td>20 – 30%</td>
<td>19.0%</td>
</tr>
<tr>
<td>over 30%</td>
<td>16.7%</td>
</tr>
</tbody>
</table>

85.7% YES

I don’t know

2.1% NO
Endnotes


4. Medical Tourism Index


2016-2017
GLOBAL BUYERS SURVEY
BRIEF

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