



Medical Tourism 2020+

The Future of Medical Tourism

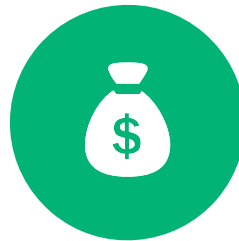


Jonathan Edelheit, JD
Chairman & Co-Founder,
Global Healthcare Resources,
Medical Tourism Association

How **Big** is The Industry?



Medical Tourism
Market Will Reach
\$125 Billion by 2021



\$68 Billion was Spent
on Medical Tourism
in 2016



14 Million people
traveling
worldwide

Why Do **People Travel?**



Quality



Affordability



Accessibility



Availability



A MORE IN DEPTH LOOK AT THE REASONS



More informed
and savvy
consumers
accessing health
online



Long waiting
periods to
acquire
healthcare



Need for
more
affordable
healthcare



Need for higher
quality healthcare
or services
unavailable at
home



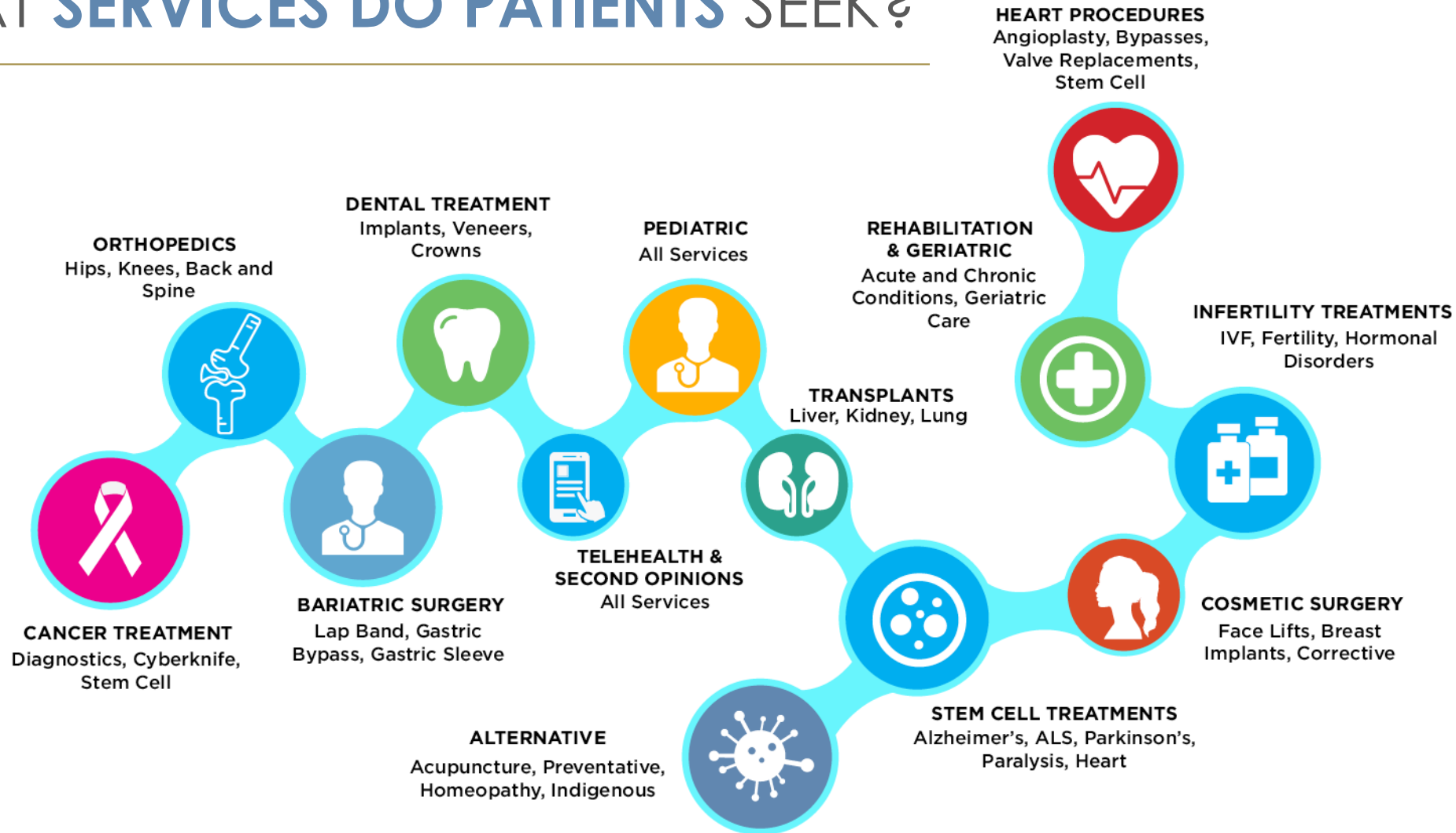
Availability of
transparent, bundled &
flat fee pricing attractive
to traveling patients



Privacy in
undergoing
medical
treatments



WHAT SERVICES DO PATIENTS SEEK?



Medical Tourists Spend **5-10 X** More than Normal Tourists

They bring family members
and spend 2 to 3 weeks in
country





Who Leads The Medical Tourism Initiative In A Country

Typically the Ministry of Tourism

The Medical tourism market has

CHANGED

over the last 13 years

More than **60 countries** are actively promoting Medical tourism and marketing/branding their destinations.

When our association started they were maybe **10 to 15 Medical tourism facilitators** around the world.

**Now there's over 1,000
in China alone.**



PAST Profile

of Medical Tourism Buyers

- Only Medical Tourism Facilitators
- Alternative flow of patients – cash paying consumers

VS

FUTURE Profile

of Medical Tourism Buyers

- Insurance companies, referring physicians
- hospitals
- travel agents
- medical tourism facilitators, assistance
- air ambulance companies
- ministries of health and governments
- employers who cover the healthcare cost for their employees

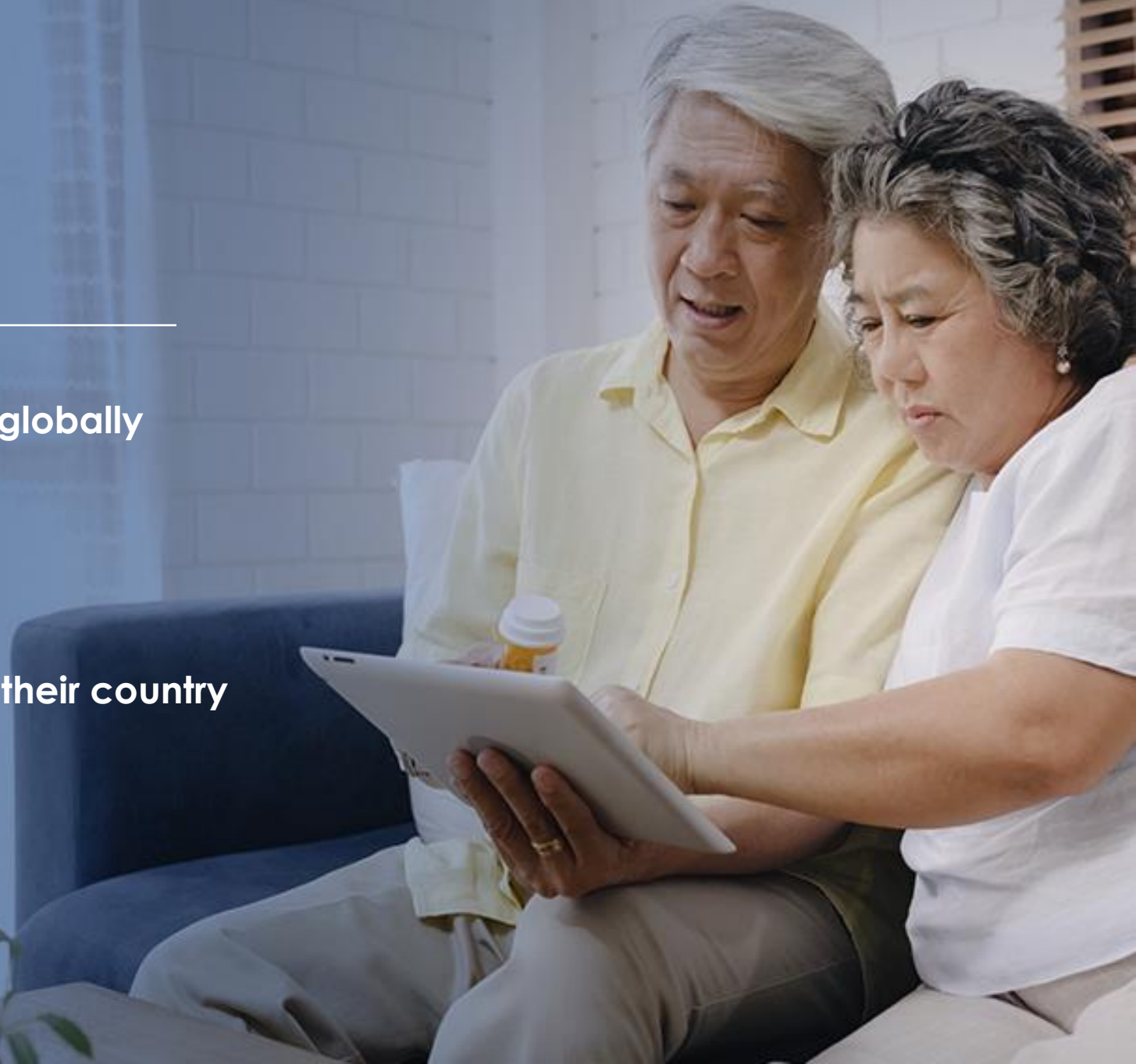
A woman is lying in a dental chair, wearing a blue protective bib. She has a pained expression, with her mouth wide open and her hands raised to her face. A dentist, wearing white gloves, is using dental pliers on her teeth. The background is a clinical setting with white walls and medical equipment.

How has the **Patient Market Changed?**

Previous patient:
**skeptical of traveling
abroad for healthcare.**

Current and Future Patients

- Awareness of the quality of healthcare globally
- More savvy
- Very open to traveling abroad
- Believes innovation happening outside their country



**False Statistics.
Fake Research.
Fake Buyers.**



**6 Billion Medical
Tourists**

**\$15 Million USD
Industry**

**Iran Draws A Record 600,000
Medical Travelers In Four
Months**



Tawuniya and Aetna
Form

Strategic Alliance



Examples



80% of a XA's insurance policies in Africa covering cross-border Medical Tourism



Aetna, CIGNA, AXA all having Medical Tourism benefits



Insurance like Daman having elite plans that covers you anywhere in the world with even variations on the US.

Medical Tourism Case Study

HSM saved about \$20 million. + in healthcare costs in the past 5 years by sending employees to Costa Rica.

Employees who traveled to Costa Rica or India received a bonus check for at least \$2,500 from HSM, or up to 20 percent of the savings the company enjoyed in insurance costs

Close to 250 of HSM's employees have traveled abroad for medical tourism procedures.





PROTECT YOUR COUNTRIES BRAND

– no one else will

A Private Hospital in Tijuana, Mexico was the source of multiple infections for Medical Tourism Patients

Health & Science



They went to Mexico for surgery. They came back with a deadly superbug.



The Tijuana outbreak, which included one death, prompted the Centers for Disease Control and Prevention to issue an unusual warning, urging travelers to avoid surgery at Grand View Hospital, linked to eight of the infections, until Mexican authorities confirmed its safety.






FDA Shuts Down Two Stem Cell Clinics In the U.S.

The U.S. Food and Drug Administration is seeking to shut down two stem cell clinics, one in Florida and one in California, citing the "serious and permanent harm" they have caused.

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FDA Moves to Shut Down 2 Stem Cell Clinics

After patients are harmed, the agency turns to the courts to stop unregulated treatments

by Kathleen Fifield, AARP, May 15, 2018 |  Comments: 1



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Private Hospital in China Shut Down after dozens of Patients Given Fake HPV Vaccines



A private hospital on Hainan Island has been forced to shut down operations after local authorities found it gave fake human papillomaviruses (HPV) vaccines to dozens of patients, including at least one pregnant woman.

Cosmetic Surgery: 'Extreme Makeover' Death Sparks Coroner's Warning To Medical Tourists



The screenshot shows the ABC News website with the article "Cosmetic surgery: 'Extreme makeover' death sparks coroner's warning to medical tourists". The article is by consumer affairs reporter Sarah Feneworth, updated 18 Dec 2017, 4:44am. A video placeholder indicates the video has expired. The article text describes the death of Leigh Aiple, a 31-year-old woman who paid over \$35,000 for a plastic surgery package in Malaysia. Less than 24 hours after returning to Melbourne, she was dead. The coroner, Grace Westworth, investigated the care and treatment at the Beverly Wilshire Clinic in Kuala Lumpur, finding it fell well below Australian standards. Ms Westworth told the ABC, "I don't want anyone else to risk it."

Key points:

- Inquest hears Leigh Aiple should not have undergone so many surgeries
- Mother says she could see "gaping holes" in her son's body the day of his arrival back in Australia
- President of the Australian Society of Plastic Surgeons says doctors should have treated Mr Aiple as "high-risk"

RELATED STORY: Cosmetic doctors could soon be banned from calling themselves 'surgeons'

TOP STORIES:

- Australian military aircraft targeted with lasers in South China Sea
- Liberal's Chisholm victory faces legal challenge over alleged dirty tactics
- A taxi driver woke up to find a machete buried in his chest, and his partner holding the handle
- 'Blindfolded, embarrassed, violated': Rapper Iggy Azalea rails against nude photo leak
- 'It's a mess': Tornadoes leave trail of destruction and injuries across Ohio
- China's dominance of Asia-Pacific increasing thanks to Trump, report suggests
- Road trip rapist gets 10 years' jail for month-long kidnapping ordeal
- Millennials better off with a home in retirement than a big super balance, says think tank
- 'Last throw of the dice': Rescued Australian climber was on fourth attempt to climb Everest
- 'Those kids were something else': Tributes flow for children killed in crash
- 'Unprecedented' move to scrap a federal seat could limit WA's election influence
- 'There's no sense of joy': Thousands raised for Courtney Harmon's funeral

Police Bust US\$145 Million Medical Tourism Scam In China

 **South China Morning Post**





Two Women Share Nightmare Medical Tourism Tale



The American Society
for Aesthetic Plastic Surgery

Choose a Topic

- Age-Related Issues
- Anti-Aging News
- Body Contouring News
- Breast Surgery News
- Cosmetic Medicine News
- Dermal Fillers
- Facelifts
- Laser Procedures
- Facial Aesthetic Surgery News
- Integrative
- Lifestyle
- Plastic
- Rejuvenation
- Sleep
- Stress Relief
- Patient Safety
- Plastic Surgery News
- Psychological Issues
- Skin Procedure News

Archives

- This Year
- May 2018
- April 2018
- March 2018
- February 2018
- January 2018

Two women share nightmare medical tourism tale

July 15, 2018



Two women recently shared the tale of their medical tourism nightmare.

Orlando's KABC 11 News recently reported on a story of two women who took a trip to Mexico in hopes of saving on plastic surgery costs. Their excitement at finally getting the breast augmentation and tummy tuck they were hoping for quickly turned to fear and disappointment when disaster and her name Ornela shared their story with the news station in hopes of discouraging others from seeking out dangerous medical tourism offers.

The Tijuana disaster

Ornela was frustrated with the way her body looked after she shed 130 pounds. Many people who lose weight in a short amount of time choose to undergo tummy tuck surgery to help tighten the skin around the abdomen.

Ornela and her friend, who was looking forward to undergoing a breast augmentation and tummy tuck as part of a Mommy Makeover. When the two women saw an offer for discount plastic surgery in Mexico, they thought the price was too good to turn down.

In a YouTube video taken at Jerusalem Hospital in Tijuana, the women's excitement is palpable. But once the procedure was over, the women changed their tune.

"Immediately after the bandages were removed, and I took a look in the mirror at my breasts, I had skin hanging out of the incisions," Ornela told the news station.

Two weeks later, both women were experiencing medical issues that required treatment at a hospital. Ornela said when doctors examined her, they weren't certain she was going to survive the procedures needed to solve her medical problems.

There were signs, they said, that the clinic in Tijuana was legitimate. The facility looked in a city mall, didn't look like the pictures of the hospital the women saw on the Internet. On top of that, they said they learned that plastic surgery procedures were being performed around the clock.



GLOBAL HEALTHCARE ACCREDITATION

Global Healthcare Accreditation (GHA) is an independent accrediting body that validates patient experience and excellence of care received by patients /consumers who travel for medical care and wellness services.

GHA encompasses **accreditation, certification, training, advisory services, and network access for**

- Healthcare Organizations
- Wellness Facilities
- Hospitality and Real Estate Properties
- Governments
- Employers
- Insurance Companies
- Third Party Administrators
- Brokers, Agents & Benefits Consultants
- Travel Providers

Accredited Hospitals





Regional Market Opportunities

China Market Opportunities

Over **600,000** medical tourists outbound **per year** for:

- Executive Checkups (diagnostics)
- Cancer
- IVF
- Heart and Transplants
- Cosmetic



GCC Market Opportunities

- Cancer
- Orthopedics
- Heart, Transplants and
- other major medical procedures

Opportunities for GCC:

- Hospital Partnerships
- Physician Training
- second opinion
- Medical Tourism



Medical Tourism Isn't Easy



Challenge #1: Getting your Destination or Facility Noticed

How do
they
find you?



Patients Please Come...

Hope alone
won't bring
you
patients





Getting healthcare consumers to trust you



Consumers will not travel for healthcare unless they have complete trust in your organization



Buyers will not give you a second look unless they are sure you offer high quality healthcare services and can deliver an outstanding patient experience



2016 Global Medical Tourism Index Rank

1. Canada	76.62	16. Dubai	67.54	31. Morocco	59.77
2. UK	74.87	17. Jamaica	67.17	32. Turkey	59.49
3. Israel	73.91	18. Thailand	66.60	33. Jordan	57.02
4. Singapore	73.56	19. Philippines	66.40	34. Russia	57.01
5. India	72.10	20. Taiwan	66.28	35. Oman	56.90
6. Germany	71.90	21. Argentina	65.37	36. Tunisia	56.78
7. France	71.22	22. Brazil	65.22	37. Kuwait	52.69
8. South Korea	70.16	23. China	64.78	38. Saudi Arabia	52.43
9. Italy	69.50	24. Poland	63.79	39. Bahrain	51.99
10. Colombia	69.48	25. Abu Dhabi	63.65	40. Lebanon	49.92
11. Spain	68.29	26. Malta	62.97	41. Iran	36.00
12. Japan	68.00	27. South Africa	62.20		
13. Panama	67.93	28. Egypt	60.92		
14. Costa Rica	67.67	29. Mexico	60.70		
15. Dominican Republic	67.58	30. Qatar	60.07		

Americas

Europe

Asia

Middle East / Africa

European Destinations Ranking

Ranking
Based on
**MTI's 3 Main
Dimensions**









Dimension 1 Destination Environment



2. Germany	67.50	
3. France	66.88	
4. Italy	66.47	
5. Spain	65.96	
6. Poland	62.87	
7. Malta	57.58	
8. Turkey	50.83	
9. Russia	49.96	









Dimension 2 Medical Tourism Industry



2. France	71.92	
3. United Kingdom	70.38	
4. Germany	70.32	
5. Spain	69.23	
6. Malta	67.34	
7. Turkey	66.60	
8. Poland	65.17	
8. Russia	59.94	

Dimension 3 Quality of Facilities and Services



2. United Kingdom	76.94	
3. France	74.86	
4. Italy	70.94	
5. Spain	69.69	
6. Malta	64.01	
7. Poland	63.35	
8. Russia	61.15	
9. Turkey	61.04	

Cost Rica Case Study

Medical Tourism Costa Rica statistics from the Costa Rican Health Chamber, PROMED:



In 2016 Costa Rica welcomed
70,000 Medical Tourists



Up from 25,000 in 2008; 30,000 in 2009
36,000 in 2010; 48,000 in 2011.



Spending by medical tourists in 2016 amounted to **\$485 million.**



- A medical tourist **spends up to seven times more** than an ordinary tourist, about \$7,000.
- The medical tourism sector supports **20,000 jobs**.
- 42% of procedures are dental, 10% cosmetic, 22% other surgeries, 16% preventive medicine and other medical spending 10%.

Cost Rica Case Study

CCSVI treatment to relieve symptoms for Multiple sclerosis



500 Patients



\$10,000 / Procedure



\$5 Million

over 12 month period between 1 medical tourism facilitator and Clinica Biblica

After 12 month period, other competitors emerged around globe and became FDA approved in US and patients got treatment locally.

South Korea 2008-2018

Success stats for south Korea based on MOHW.

The Ministry of Health and Welfare (MOHW, Minister Neunghoo Park).



Attracting **380,000**
medical travelers in 2018

↑ 17.8%
increase from 2017

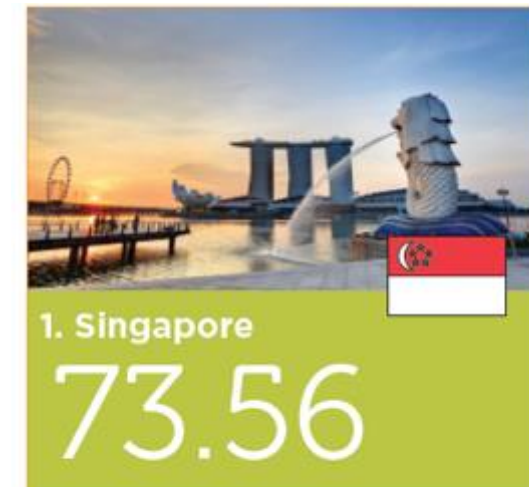


2.2 Million
foreign patients in 10 Years

*Foreign patients: a patient of a foreign nationality who does not reside in (nor register as a foreigner or report a residence in) the Republic of Korea, and does not receive treatment as the insured or their dependents of the National Health Insurance.



2017



2.	South Korea	64.76	
3.	India	63.26	
4.	Japan	62.69	
5.	Philippines	61.44	
6.	Taiwan	60.81	
7.	China	59.42	
8.	Thailand	56.40	

From Zero
to Second
in the entire
region and
also became
globally
known as a
trusted
healthcare
destination

South Korea Visitors By Nationality

In 2018 alone, foreign patients **from 190 countries** visited Korea for treatment. Chinese patients accounted for the largest share, followed by patients from the United States, Japan, Russia, and Mongolia.



The number of patients visiting Korea rose in most countries, and significantly **increased in Japan, Southeast Asian countries including Thailand and Indonesia, and Uzbekistan.**



However, the share of patients from the Middle East such as the United Arab Emirates (UAE) **declined 4.8% year-on-year.**



Middle East. The number of Middle Eastern patients slightly **decreased from 7,238 to 6,888 (a 4.8% decline)**, and this trend prevailed in UAE patients with a 10.3% decrease year-on-year.

Russia & Central Asia. The number of patients from Uzbekistan and Russia **increased 20.4%** (3,253 to 3,915) and 9.4% (24,859 to 27,185), respectively, compared to 2017. Internal medicine* and check-up centers were the main purpose of their visits.

China. A total of **118,310 Chinese patients visited Korea in 2018**. This figure is an **18.5% increase** from the previous year, bouncing back to the level before 2017 when the THADD deployment had an impact on the attraction of foreign patients. In fact, the number stood at 127,648 in 2016.

Southeast Asia. The number of patients from Thailand and Indonesia **surged 46.6%** (6,137 to 8,998) **and 37.1%** (2,385 to 3,270), respectively, seemingly thanks to the popularity of the Korean Wave in the region.

Japan. The share of Japanese patients **remarkably increased from 27,283 in 2017 to 42,563 in 2018**, showing the biggest **rise of 56%**.

* (Internal medicine) 11 internal medicine departments including nephrology, hemato-oncology, endocrinology and metabolism, rheumatology, cardiology, respiratory, allergy and clinical immunology, and gastroenterology



WORLD MEDICAL TOURISM &
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October 15 you are
all invited**

Thank You

www.MedicalTourismAssociation.com

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