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?

- **ORTHOPEDICS**
  - Hips, Knees, Back and Spine

- **DENTAL TREATMENT**
  - Implants, Veneers, Crowns

- **PEDIATRIC**
  - All Services

- **REHABILITATION & GERIATRIC**
  - Acute and Chronic Conditions, Geriatric Care

- **HEART PROCEDURES**
  - Angioplasty, Bypasses, Valve Replacements, Stem Cell

- **TRANSPLANTS**
  - Liver, Kidney, Lung

- **INFERTILITY TREATMENTS**
  - IVF, Fertility, Hormonal Disorders

- **COSMETIC SURGERY**
  - Face Lifts, Breast Implants, Corrective

- **BARIATRIC SURGERY**
  - Lap Band, Gastric Bypass, Gastric Sleeve

- **TELEHEALTH & SECOND OPINIONS**
  - All Services

- **ALTERNATIVE**
  - Acupuncture, Preventative, Homeopathy, Indigenous

- **STEM CELL TREATMENTS**
  - Alzheimer’s, ALS, Parkinson’s, Paralysis, Heart
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

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
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

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.
A Global Platform for the Healthcare Ecosystem

PROTECT YOUR COUNTRIES BRAND – no one else will
A Private Hospital in Tijuana, Mexico was the source of multiple infections for Medical Tourism Patients

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.
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

Cosmetic surgery: 'Extreme makeover' death sparks coroner's warning to medical tourists

**Key points:**

- Inquest hears Leigh Aiple should not have undergone so many surgeries
- Mother says she could see "aging 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"
Police Bust US$145 Million Medical Tourism Scam In China

South China Morning Post
Two Women Share Nightmare Medical Tourism Tale

Two women share nightmare medical tourism tale

Choose a Topic

July 19, 2013

Two women share nightmare medical tourism tale

The American Society for Aesthetic Plastic Surgery
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

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

**Regions**

- **Americas**
- **Europe**
- **Asia**
- **Middle East / Africa**
## European Destinations Ranking

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

<table>
<thead>
<tr>
<th>Dimension 1</th>
<th>Destination Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. United Kingdom</td>
<td>77.30</td>
</tr>
<tr>
<td>2. Germany</td>
<td>67.50</td>
</tr>
<tr>
<td>3. France</td>
<td>66.88</td>
</tr>
<tr>
<td>4. Italy</td>
<td>66.47</td>
</tr>
<tr>
<td>5. Spain</td>
<td>65.96</td>
</tr>
<tr>
<td>6. Poland</td>
<td>62.87</td>
</tr>
<tr>
<td>7. Malta</td>
<td>57.58</td>
</tr>
<tr>
<td>8. Turkey</td>
<td>50.83</td>
</tr>
<tr>
<td>9. Russia</td>
<td>49.96</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dimension 2</th>
<th>Medical Tourism Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Italy</td>
<td>73.01</td>
</tr>
<tr>
<td>2. France</td>
<td>71.92</td>
</tr>
<tr>
<td>3. United Kingdom</td>
<td>70.38</td>
</tr>
<tr>
<td>4. Germany</td>
<td>70.32</td>
</tr>
<tr>
<td>5. Spain</td>
<td>69.23</td>
</tr>
<tr>
<td>6. Malta</td>
<td>67.34</td>
</tr>
<tr>
<td>7. Turkey</td>
<td>66.60</td>
</tr>
<tr>
<td>8. Poland</td>
<td>65.17</td>
</tr>
<tr>
<td>9. Russia</td>
<td>59.94</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dimension 3</th>
<th>Quality of Facilities and Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Germany</td>
<td>77.88</td>
</tr>
<tr>
<td>2. United Kingdom</td>
<td>76.94</td>
</tr>
<tr>
<td>3. France</td>
<td>74.86</td>
</tr>
<tr>
<td>4. Italy</td>
<td>70.94</td>
</tr>
<tr>
<td>5. Spain</td>
<td>69.69</td>
</tr>
<tr>
<td>6. Malta</td>
<td>64.01</td>
</tr>
<tr>
<td>7. Poland</td>
<td>63.35</td>
</tr>
<tr>
<td>8. Russia</td>
<td>61.15</td>
</tr>
<tr>
<td>9. Turkey</td>
<td>61.04</td>
</tr>
</tbody>
</table>

©2019 Medical Tourism Association. All rights reserved.
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.
Republic of Korea 2008-2018

Success stats for Republic of 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.

From Zero to Second in the entire region and also became globally known as a trusted healthcare destination.
Republic of Korea Visitors By Nationality

In 2018 alone, foreign patients from 190 countries visited the Republic of 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 the Republic of 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 the Republic of 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
Medical Tourism Ministerial Summit
October 15 you are all invited
Thank You

www.MedicalTourismAssociation.com

Jonathan Edelheit
CEO and Founder, Medical Tourism Association

Tuscany Center, 8845 North Military Trail – Suite 300
Palm Beach Gardens, FL 33410

+1 561-544-7123
JEdelheit@GoGHR.com