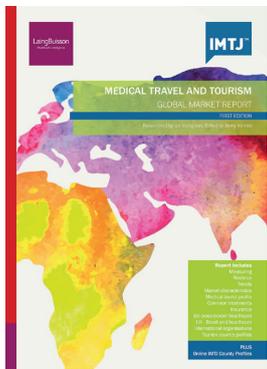


Unique global oversight of an international market

Global medical tourism is increasing annually. The countries thought of as suppliers of medical tourists – the US, China, Russia and the Gulf nations - are turning the tables and becoming major destinations. What is changing rapidly is each country's share of the total market, and the nature of medical tourists that they are attracting.

This new report discusses the dynamics of medical tourism, providing insights into the supply chain, business models, products and the targeted consumer, and how the rise of medical tourism portals is having an effect. The report includes an additional section on the impact of Brexit on cross border healthcare from the UK.



Reasons to buy

Trying to keep up-to-date with the ever-changing world of medical tourism is a challenge for every destination and healthcare provider involved in the international patient business.

Organisations must refine their medical tourism strategy in response to a changing market. To do that, they need to know the latest on which countries are doing well or badly, who is going where, the treatments they are seeking, why they are going there, and how political, economic, social and technological change are impacting the medical tourism market.

The Medical Travel and Tourism global market report provides extensive insight into what is happening now, and what the future trends may be. In addition to the report, purchase includes online access to IMTJ's constantly updated Country Profiles: a unique database giving a high end overview of healthcare systems and services while also listing up to date statistics on population, healthcare workforce, healthcare expenditure/provision/activity and the values of both inbound and outbound medical tourism.

Who is the report for

- C-suite professionals working in healthcare markets around the world
- Hospital and clinic groups operating internationally
- Travel agents
- Banks and other financial institutions
- Investors and private equity
- Insurers
- National government policy-makers
- Lawyers
- Policy advisors
- Think tanks
- Management consultants

What the report includes

- Overview
- International Medical Tourism
- Global Figures
- Top 20 Medical Tourism Destinations
- Top 25 Outbound Sources
- Top 20 Health and Wellness Destinations
- International, Regional and Domestic Market Commentary
- Agencies and Facilitators
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Office for
National Statistics

Chosen provider of independent sector healthcare market data to the UK Government

Market definition

- An international medical tourist is someone who goes from where they live to another country solely for the purpose of healthcare or health treatment
- The act of travelling to other countries to obtain medical, dental and surgical care
- The provision of private medical care, in collaboration with or without general tourism, for patients who are travelling to other countries to obtain surgical and other forms of specialised treatment
- Medical tourism is about hospitals, clinics and surgery, it is not about wellness or enhancing health (i.e. wellness tourism)

Key trends

- The greater proportion of medical travel is regional or domestic within a country
- Many medical tourists do not seek out the cheapest destination
- The top three European destinations are also the most expensive ones
- Much medical tourism is for cosmetic, fertility or dental treatment
- There are more failed medical tourism projects than successes
- Many countries have stopped promoting medical tourism
- Many trade associations and medical tourism agencies have now disappeared

US\$10-15bn

Annual value of medical tourism

5.5m

Annual medical tourists worldwide



Value patients

- Travelling from developed nations where healthcare is expensive and health insurance limited
- Often uninsured or underinsured
- Often seeking procedures not covered by state funding or insurance, including: weight loss surgery, dentistry and cosmetic surgery

Most commonly sought treatments

Cosmetic surgery

- labiaplasty
- liposuction
- face lifts
- breast/buttock augmentation

Assistive Reproductive Technology (ART)

- IVF
- gender selection
- commercial surrogacy

Dental surgery

Cancer care

Addiction treatment

Eye laser surgery

Obesity/weight loss surgery

Organ transplants

Sex change operations

Stem cell treatment



Access patients

- Travelling from places where availability and quality of healthcare services are limited
- Many originate from countries with less developed healthcare systems unable to meet the rapidly rising demands of their newly affluent populations



Quality patients

- Travelling to find exceptional, specialty care, including the latest therapy or innovative treatment protocol
- Looking for the most respected physicians; the best outcomes; or the highest level of service and care
- Frequently seeking critical care and are not as limited by cost considerations as other medical travellers

Top ten medical tourism destinations

by value, US\$m

USA	3,500
South Korea	655
Turkey	600
Thailand	600
Germany	575
India	450
UK	350
Malaysia	350
Mexico	350
Iran	315

Top ten medical tourism destinations

by numbers in, 000k

Malaysia	900
USA	500
South Korea	365
Thailand	350
Dubai	350
South Africa	300
Taiwan	300
Germany	255
Mexico	250
Turkey	200

Top ten medical tourism outbound/sources

by numbers out, 000k

Indonesia	600
USA	500
China	500
Italy	400
Germany	200
UK	144
Lesotho	140
Dubai	120
Libya	100
Bangladesh	80

In its latest healthcare market report **LaingBuisson** takes a global view on medical travel and tourism in a major study designed to present a truthful picture of a much misunderstood and reported industry



Debunking the myths

an objective view of the international medical travel market

LaingBuisson has launched the first edition of its Medical Travel and Tourism global market report.

The UK's most trusted supplier of healthcare data, and approved provider of data on the independent healthcare sector to the UK government's Office for National Statistics makes sense of a sector that has been subject to much exaggeration and misinformation.

Based on studies of outbound and inbound flows of people seeking treatment abroad, LaingBuisson estimates that the annual number of medical travellers worldwide amounts to 5.5 million and the value of medical travel expenditure is US\$10-15 billion. The report and the accompanying online subscription package (IMTJ Country Profiles) also show that countries claiming leadership in the sector, are rarely among the leaders in this market.

Medical travel has grown strongly during the 21st century. Cosmetic, fertility and dental treatments are among the most popular with medical travellers. The factors driving this upsurge in medical travel include the high cost of healthcare in industrialised nations; the ease and affordability of international travel; and improvements in technology and standards of care in many countries around the world.

It is not a sector without controversy. Ethical issues arise around the sale of organs for donation in poorer countries. Also, there are questions around people returning home with infections or creating burden on their domestic health services

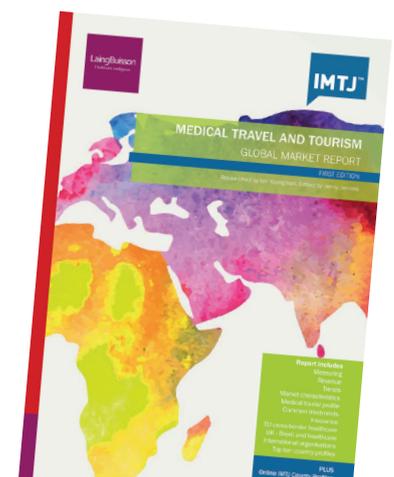
FACTORS DRIVING AN UPSURGE IN MEDICAL TRAVEL INCLUDE THE HIGH COST OF HEALTHCARE IN INDUSTRIALISED COUNTRIES AND IMPROVEMENTS IN TECHNOLOGY

owing to complications resulting from surgery overseas.

Demand for medical treatment overseas continues to grow. Among the key trends identified by this report are that many medical tourists do not seek out the cheapest destination and the top three European destinations are also the most expensive. Also, one-time suppliers of medical travellers such as the US, China, Russia and the Gulf nations are now becoming key destinations.

Report author, Ian Youngman, said: 'This report sheds light on how medical travel and tourism works. It considers which countries are doing well and badly; who is going where and why; what

treatments are they seeking; and how political, economic, social and technological changes are impacting the market. We also focus on how Brexit could affect cross-border healthcare from the UK. It cuts through the hype you frequently see on the websites of national authorities seeking to attract more patients, and it puts to rest statistics which, when you boil them down, suggest an incredible expenditure per head – a far cry from the pursuit of value for money that is often associated with medical travel.'



Medical Travel and Tourism
- first edition
£1,350 for (+VAT) for Printed Hard Copy, Multi-user Digital PDF and Excel file **PLUS** online access to IMTJ Country Profiles

Available from
laingbuisson.com

IMTJ™ Country Profiles

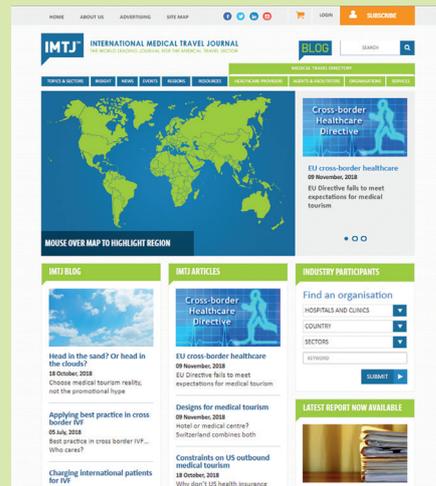
IMTJ gathers information about healthcare, health insurance systems and medical tourism around the world. IMTJ Country Profiles enable you to find out all you need to know about the state of medical tourism in a specific country, and access the latest news, articles, information and statistics relating to inbound and outbound medical travel for that country.

The IMTJ Country Profile data and medical tourism statistics are available to all

purchasers of the LaingBuisson Medical Travel and Tourism Global Market Report. To log in visit imtj.com/all-countries/

Profile headings

- Healthcare Systems
- Facts and Figures
- Industry Participants
- Healthcare Insurance
- Medical Tourism
- Events



Journal



Accurate, real-time insights

HealthcareMarkets international

Healthcare Markets *International* is an independent monthly publication focused on bringing readers news, interviews and in-depth articles covering industry trends, policy, politics and regulation, technology innovation, cross border best practice, M&A, financial results, investor views, investment cases and people news. HMi incorporates medical travel news and data from the International Medical Travel Journal.

- Real-time breaking news online
- Commentary from the sector's leading trade associations including the IFC, Asian Development Bank, L.E.K. Consulting and Bain & Co.
- Searchable daily news by subject, sector and geography tags
- Data on major international hospital groups and international PE deals
- Discount on LaingBuisson conferences

Conference



#1 Networking event



The IMTJ Summit is a high-level event aimed at senior decision makers involved in the medical tourism and international patient market.

Previously in Madrid, Croatia, Athens and now Berlin, this conference of 300+ delegates is *the* leading opportunity to network and learn about the medical travel sector.

The Summit also incorporates the IMTJ Medical Travel Awards, the IMTJ-Temos Marketplace exhibition, and the ninth annual Temos International Meeting.

1st - 3rd December 2019
Seminaris CampusHotel Berlin
Germany

Patient Acquisition



Find patients online

Treatment Abroad was the first medical tourism portal for people seeking information on cosmetic surgery, dentistry, infertility treatment and hospital treatment abroad.

Find patients by advertising on this site which receives over 1 million visits a year due to its high levels of natural organic traffic driven by its content and long track record.

 1 million patient visits

 36% growth in traffic

 4,000 patient phone calls

 5,000 patient enquiries

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