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1 EXECUTIVE SUMMARY

Sample make up

- 115 respondents, representing organisations in 31 different countries
- 31% represented medical tourism agencies or facilitators, 26% of respondents represented hospitals and clinics

Views on the market

The respondents believe that:

- The three main destinations for medical travel in terms of patient numbers are **currently** India, Thailand, USA, Turkey, Malaysia and Germany
- The leading destinations for medical travel in terms of patient numbers **in five years' time** will be India, Thailand, USA, Turkey and Malaysia
- The leading destinations for medical travellers in terms of quality and range of services are the USA, Germany, Singapore, India and Thailand
- The most important factors for a medical traveller in choosing a healthcare facility are: the expertise and qualifications of the doctor/dentist, followed by the cost of treatment, and comments and ratings by other patients
- The market for international patients will grow in the next five years at a fairly healthy rate. Few expect a market decline. One in ten expect growth of over 25% per annum
- Cancer treatment will grow the most followed by cosmetic and plastic surgery, dental treatment, infertility treatment and stem cell treatment
- The most significant change over the next five years will be the growth of online second opinion services
- The most significant issues facing the medical travel sector are: lack of reliable information for medical tourists regarding quality, lack of international standards for patient records and lack of insurance products

Services and activity

- Cosmetic and plastic surgery, orthopaedic surgery and dental treatment are the services most commonly offered by the provider organisations participating in the survey
- Arranging accommodation/hotels, airport pickups and offering a 24-hour support line are now commonplace
- Interpreter services are extensively available, most commonly for English, Russian, French, Arabic and German languages
- The majority of hospitals and clinics treated less than 100 international patients in the last 12 months for all three patient types - outpatients, day-case patients and inpatients. Less than 5% treat more than 1,000 international inpatients per annum
- 18% of the providers and agencies reported a decline in international patient numbers over the past 12 months, compared to 15% in 2016. 18% reported no change in numbers. 65% reported a growth in numbers
- Over the next 12 months, only 3% expect their business to decline. More than half expect their