

TABLE OF CONTENTS

REPORT AUTHOR	ii
INTRODUCTION	iii
LIST OF TABLES	ix
1. MEASURING GLOBAL MEDICAL TOURISM	1
1.1 Problems in measurement	1
1.2 Medical travel definition	2
1.3 Why migration alters figures	2
1.3.1 International Migrant Stock 2019, UN DESA	3
1.3.2 Implication for medical travel measurement	3
1.4 Why countries overstate medical traveller numbers	4
1.5 Should distance and country definitions matter?	5
1.5.1 England, Britain, UK?	5
1.5.2 USA islands and inter-state medical travel	5
1.5.3 Adopting tourism industry definitions also brings problems	5
1.6 Factors affecting medical tourism global growth	7
1.6.1 Changes to supply have a long lead time in healthcare	8
1.6.2 Price transparency decreases medical tourism	9
1.6.3 Build-it-and-they-will-come model may not boost overseas demand	9
1.6.4 Take the doctors and treatments to the country: a growing option	9
1.6.5 Diaspora market may not have long-term potential	10
1.6.6 What attracts a tourist may not persuade a medical traveller	10
1.6.7 Offering treatment not available in target countries may not be sustainable	10
1.7 IMTJ Medical Travel Climate Survey 2019	10
1.7.1 Views on the market	11
1.7.2 Services and activity	11
1.7.3 Challenges	11
1.7.4 Marketing	12
1.8 Other sources as indicators of medical tourism market development	13
1.8.1 World Travel & Tourism Council	13
1.8.2 The World Tourism Organisation and European Travel Commission 'Exploring Health Tourism' Report 2018	14
1.8.3 European Parliament report on health tourism	16
1.8.3.1 Health tourism definitions	16
1.8.3.2 Market statistics	16
1.8.3.3 Other findings in the paper	16
1.8.3.4 EU policies for health and medical tourism	16

1.8.4	European Regional Development Fund (ERDF)	17
1.8.4.1	Austria, Slovakia and the Czech Republic	17
1.8.4.2	Franco-Belgium healthcare cooperation	18
1.8.4.3	Greek-Bulgarian cross-border health tourism	18
1.8.4.4	Poland health tourism project	18
1.8.5	Global medical price trends 2019 (Willis Towers Watson)	18
1.8.5.1	Prices rises and medical travel	20
1.8.6	UNWTO: World tourism reports (2018 and 2019)	21
1.8.6.1	UNWTO World Tourism Barometer 2018	21
1.8.6.2	UNWTO International Tourism Highlights	21
1.8.6.3	UNWTO World tourism barometer H1 2019	22
1.8.7	ITB Berlin: IPK World Travel Monitor, March 2019	23
1.8.7.1	Terrorism and travel safety	24
1.8.7.2	2019 forecast	24
1.8.8	European travel data (Eurostat, 2017)	25
1.8.9	European Travel Commission (European Tourism Trends & Prospects 2018)	25
1.8.10	European Union tourism trends (WTO and EC 2018)	26
1.8.11	Asia tourism trends	26
1.8.11.1	China outbound and inbound travel	27
1.8.12	Gulf travel	29
2.	GLOBAL MEDICAL AND HEALTH TOURISM REVENUE	31
2.1	Medical tourism revenue	31
2.2	Health and wellness tourism revenue	31
2.2.1	Global wellness tourism numbers (Global Wellness Institute)	31
2.2.2	Health and wellness tourism revenue potential (Global Wellness Institute)	32
2.2.3	World wellness revenue by sector type (Global Wellness Institute)	34
3.	IMTJ COUNTRY PROFILE CASE STUDY: INDIA	37
3.1	India medical tourism profile	37
3.2	Inbound medical and health tourism numbers	38
3.3	Medical tourism revenue	39
3.4	Where medical tourists come from	39
3.5	Target markets	41
3.6	Medical tourism visas	41
3.7	Why medical and health tourists go to India	42
3.8	Hospitals and clinics in medical tourism	42
3.9	Medical and health tourism promotion	43
3.10	Medical tourism regulation	44

3.11	Advertising regulation	45
3.12	Patient safety regulation	45
3.13	Medical and health tourism financial incentives	46
3.14	Links with airports and airlines and railways	46
3.15	Surrogacy tourism	47
3.16	Transplant tourism	47
3.17	Promotional organisations	48
3.17.1	National Medical and Wellness Tourism Board	48
3.17.2	Kerala Medical Value Travel Society	48
3.17.3	Maharashata Medical Tourism Promotion Council	48
4.	HEALTH AND WELLNESS TOURISM TRENDS	49
4.1	Health and wellness tourism trends (Health and Fitness Travel)	49
4.2	Global Wellness Trends Report 2019 (Global Wellness Summit)	49
4.3	Spa trends in the USA (International SPA Association - ISPA)	50
4.3.1	(ISPA) 2017 U.S. Spa Industry Study	50
4.3.2	(ISPA) 2018 U.S. Spa Industry Study	51
4.3.3	Medical spas in the USA (American Med Spa Association - AmSpa)	51
4.4	Global Wellness lifestyle real estate and communities	53
5.	CHARACTERISTICS OF THE MEDICAL TOURISM MARKET	55
5.1	Medical tourism flows	55
5.1.1	Medical tourism flows are increasingly regional	55
5.1.2	Domestic medical tourism should not be underestimated	55
5.2	Medical tourism agents	56
5.2.1	Role of the agent	56
5.2.2	Risks: medical travel agency failures, fraud and scams	57
5.2.2.1	Satori World Medical, USA	57
5.2.2.2	EcuMedical Resources International, Canada	58
5.2.2.3	Planet Hospital, USA	59
5.2.3	Medical tourism agency regulation and the law	59
5.2.4	Agency relationships with overseas hospitals	60
5.3	Medical tourism advertising, videos and social media	60
5.3.1	Advertising regulation	60
5.3.1.1	Advertising regulation in UK	61
5.3.2	Social media and fake reviews	61
5.3.2.1	Online reviews	61
5.3.2.2	International Consumer Protection and Enforcement Network	61
5.3.2.3	South Korea cosmetic surgery fake reviews	62

5.3.3	Use of video	62
5.4	Other regulations and laws affecting medical tourism businesses	62
5.4.1	Price regulation	62
5.4.2	EU Professional liability insurance requirements	63
5.4.3	EU Package Travel Directive	63
5.4.4	European standards on cosmetic surgery	64
5.4.5	European standards on non-surgical medical procedures	65
5.5	Treatment safety and medical negligence	65
5.5.1	Safety	65
5.5.2	Thailand cosmetic surgery case study	66
5.5.3	Legal recourse	66
5.6	Healthcare apps and comparison sites	66
5.6.1	The rise of healthcare apps	67
5.6.2	Evolving impact of medical price comparison sites	67
5.6.3	Cleverer use of pricing	68
5.6.4	Lessons from insurance comparison sites: take customer reviews seriously	68
5.6.5	Site fees will come from bookings, not advertising	68
5.7	Other medical tourism market providers	69
5.7.1	Airlines	69
5.7.2	Hotels	69
	5.7.2.1 Emerging hotel-hospital/healthcare partnerships	70
	5.7.2.2 Hotel supply as a limiting factor for inbound medical travel	70
5.7.3	Medical cruise and wellness tourism	71
5.7.4	Travel agencies and tour operators	71
5.8	Quality control: the issue of accreditation	72
5.8.1	Growth of international accreditation	72
5.8.2	International accreditation: is it important for customer choice?	73
6.	THE MEDICAL TOURIST	75
6.1	Defining a medical tourist	75
6.2	Motivation to become a medical tourist	75
6.3	Cultural sensitivity	75
6.4	LBGT market potential	76
6.4.1	ITB Berlin 2018	76
6.4.2	Gay Travel Index	76
6.4.3	Out Now – 2018 LGBT spend on travel	76
6.4.4	Importance of social media	77
6.4.5	Legal and safety concerns	78

6.5	Muslim and Halal sector opportunity	78
6.5.1	Crescent Rating of Halal tourism	79
6.5.2	Global Economic Impact of Muslim Tourism: 2017-2020 (Salam Standard)	79
6.5.3	International trips by Muslims (World Travel Monitor, ITB Berlin 2019 and IPK International)	79
6.6	Tailoring services to the over 60s	80
6.6.1	Government policy must shift	80
6.6.2	Inventing new ways of living	81
6.6.3	Realigning health systems	81
6.7	Carers: an overlooked segment	81
6.8	Influence of security and terrorism	81
6.9	Unfounded potential in uninsured Americans	82
6.10	Risks with 'high profile' medical tourists	82
6.11	IMTJ Medical Tourist Survey 2019	83
6.11.1	Demographics	83
6.11.2	Destination	83
6.11.3	Funding and travel arrangements	84
6.11.4	Drivers for travel	85
6.11.5	Patient experience	85
6.11.6	Expenditure	85
6.11.7	Communication	86
6.11.8	Follow up care and support	86
7.	MEDICAL TOURISM SERVICES: COMMON TREATMENTS	87
7.1	Addiction treatment	87
7.2	Reproductive care and birth tourism	87
7.2.1	Reproductive care and surrogacy	87
7.2.2	Surrogacy	87
7.2.2.1	Cambodia	87
7.2.2.2	India	88
7.2.2.3	Mexico	88
7.2.2.4	Nepal	88
7.2.2.5	Thailand	89
7.2.3	Birth tourism	89
7.2.3.1	Chinese outbound birth tourism tensions	89
7.3	Cancer/Oncology	90
7.3.1	Proton beam therapy	90
7.4	Cosmetic surgery	90
7.4.2	Cosmetic surgery market: ISAPS survey	92

7.4.3	Cosmetic surgery risks	93
7.4.3.1	Brazilian buttock lift (BBL) risks	93
7.4.3.2	Cosmetic surgery aftercare issues	94
7.4.3.3	Mental health screening before cosmetic surgery	94
7.4.4	Cosmetic surgery standards	94
7.5	Dental travel/tourism	95
7.5.1	Dental tourism and New Zealand	95
7.5.2	Dental tourism risks: warnings from Australia	96
7.6	Elderly care: expatriates and convalescence travel	97
7.7	Eye care	97
7.7.1	Eye care safety	97
7.8	Obesity and diabetes treatment	98
7.8.1	Diabetes treatment	98
7.9	Organ transplants	98
7.9.1	Living donor care	99
7.9.2	Organ transplants regulation: Europe	99
7.9.3	Organ transplants regulation: global	99
7.9.3.1	China	99
7.9.3.2	Chile	100
7.9.3.3	Colombia	100
7.9.3.4	Egypt	100
7.9.3.5	Israel	101
7.9.3.6	Japan	101
7.9.3.7	Norway	101
7.9.3.8	Pakistan	101
7.9.3.9	Philippines	101
7.9.3.10	Taiwan	101
7.9.3.11	Turkey	101
7.9.3.12	United Kingdom	101
7.9.4	Organ transplant problems: three case studies	102
7.9.4.1	Costa Rica	102
7.9.4.2	Egypt	102
7.9.4.3	India	103
7.10	Sex change tourism	103
7.11	Spas and wellness	104
7.11.1	Spa and wellness definitions	104
7.11.1.1	Spa definitions: Visit Britain	104
7.11.1.2	Spa definitions: International SPA Association (ISPA)	104

7.11.1.3	Spa and wellness definitions: Wellness Tourism Association (WTA)	105
7.12	Sports medical tourism	106
7.13	Stem cell treatment	106
7.13.1	Treatment risks	107
7.13.2	Regulation across countries	107
7.13.2.1	USA	107
7.13.2.2	India	108
7.13.2.3	Switzerland	109
7.13.2.4	Canada	109
7.13.2.5	Costa Rica	110
7.14	Traditional Chinese Medicine (TCM)	111
7.14.1	TCM principles	111
7.14.2	Global growth of TCM	112
7.15	Traditional Korean Medicine (TKM)	112
8.	MEDICAL TOURISM AND INSURANCE	113
8.1	International health insurance exclusions	113
8.2	Travel insurance restrictions and fraud	113
8.3	Medical tourism insurance	114
8.3.1	Further: Critical Advantage	114
8.3.2	Medigo: Globalcover	115
8.3.3	SecurityTrust International: MediVISA	115
8.4	Medical negligence and insurance	116
8.4.1	Medical negligence and medical complications insurance	116
8.4.1.1	Custom Assurance	117
8.4.1.2	Sure Insurance Services	117
8.4.2	Stem cell insurance	117
8.4.2.1	CellPlan	117
8.4.3	Cosmetic surgery insurance	117
8.4.3.1	beautyprotect	118
8.5	Health insurance for spa treatments	118
8.6	Insurers as medical travel agents	118
9.	EU CROSS-BORDER HEALTHCARE TRAVEL	119
9.1	The EU cross-border healthcare directive	119
9.1.1	EU cross-border healthcare in EFTA countries	120
9.2	Official EU patient information about cross-border healthcare	120
9.2.1	EU cross-border healthcare directive	120
9.2.1.1	What scale of cross-border healthcare are we talking about?	121

9.2.1.2	What about the existing legislation in this area (Regulations on social security)?	121
9.2.1.3	What is the added benefit of this legislation?	121
9.2.1.4	When would anyone need prior authorisation from a national authority?	121
9.2.1.5	Can this authorisation be refused?	122
9.2.1.6	How much will they be reimbursed after receiving a treatment abroad?	122
9.2.1.7	Can people seek healthcare abroad if the treatment is not available in their country?	122
9.2.1.8	Do people need to pay for cross-border treatment upfront?	122
9.2.1.9	How can people be sure that the treatment received abroad will be followed up properly on return home?	122
9.3	Impact of the directive on cross-border flows	122
9.3.1	Politics	123
9.3.2	Choice of EU hospital or clinic	123
9.3.4	Reimbursement	123
9.3.5	European Reference Networks and treatment authorisation	124
9.4	Data on EU cross-border flows	125
9.4.1	EU cross-border healthcare 2016 and 2017 data	125
9.4.1.1	Observations on cross-border flows	127
9.4.1.2	Missing or incomplete numbers	127
9.4.2	European Commission 2018 report	128
9.4.2.1	Directive awareness and developments	128
9.4.2.2	Barriers to cross-border healthcare growth	128
9.4.2.3	Cross-border Healthcare Directive: medical travel with prior authorisation	129
9.4.2.4	Cross-border Healthcare Directive: medical travel without prior authorisation	129
9.4.2.5	Cross-border patient mobility remains between neighbouring countries	129
9.4.3	European Court of Auditors 2018 audit	130
9.5	The EHIC and medical tourism	130
APPENDIX 1. INTERNATIONAL ORGANISATIONS		133

LIST OF TABLES

Table F1	Top medical travel destinations ranked by value, 2020	iv
Table 1.1	Top 50 global medical travel destinations	6
Table 1.2	Top 45 outbound medical tourism sources	7
Table 1.3	Top 40 health and wellness destinations	8
Table 1.4	Global medical trends: Healthcare benefit cost growth, 2017–2019	19
Table 1.5	Global and Asia Pacific medical trends: Healthcare benefit cost growth, 2017–2019	20
Table 2.1	The top 25 wellness tourism destinations by numbers, 2017	33
Table 3.1	India medical tourism facts and figures, 2020	37
Table 3.2	Inbound medical and health tourism	38
Table 3.3	Tourist arrivals on medical visas	39
Table 3.4	Sources of medical tourists to India	39
Table 3.5	Source countries for medical visas	40
Table 3.6	UK patients to India	41
Table 6.1	Spend by LGBT residents by country, 2018	77
Table 6.2	Spend by top treatment type, 2019	85
Table 7.1	Popular cosmetic surgery procedures, USA and UK, 2018	91
Table 7.2	Total cosmetic surgery procedures and surgeons by country, 2017	92
Table 7.3	Percentage of cosmetic surgery patients from other countries, 2017	93
Table 9.1	Number of patients using EU cross-border healthcare by country, 2016 and 2017	126

Subscribe now...

IMTJ™

INTERNATIONAL MEDICAL TRAVEL JOURNAL
THE WORLD LEADING JOURNAL FOR THE MEDICAL TRAVEL SECTOR



The number one source of news, views and insight into medical travel

www.imtj.com

It's not easy for destinations, hospitals, clinics and businesses involved in the international patient business to decide where to target their marketing efforts. Finding trustworthy market data to guide your strategy is a challenge.

Instead of spending hours trawling the internet to find the data you need, buy a Country Subscription to International Medical Travel Journal and get the information you need in seconds. At IMTJ, we collect information about international patient flows. We analyse and question the data. We remove the hype and do our best to make sense of it. We look at who is going where, the treatments they are seeking, why they are travelling and how political, economic, social and technological changes are impacting the patient flow.

SIGN UP TODAY

at www.imtj.com

For less than \$50 per month, you can become an **IMTJ Country Subscriber** and reap the benefits of:

- In-depth profiles on medical tourism in over 180 countries
- Articles from industry experts that will change your thinking
- The bi-weekly IMTJ e-newsletter, highlighting the latest opportunities in medical travel
- A medical travel directory that covers hospitals, clinics, agencies, and facilitators across the world
- Discounts on IMTJ conferences and workshops

SUBSCRIBE NOW

+44 (0)1442 817817

imtj.com/subscribe-imtj

LIST OF FIGURES

Figure 1.1	Business perception on factors influencing choice of healthcare facility, 2019	12
Figure 1.2	Key areas of marketing spend, 2019	13
Figure 2.1	Wellness tourism trips by region (millions), 2017	32
Figure 2.2	Wellness revenue by sector type 2017	34
Figure 4.1	US spa types in 2019	52
Figure 6.1	Patient perception on factors influencing choice of healthcare facility, 2019	84