

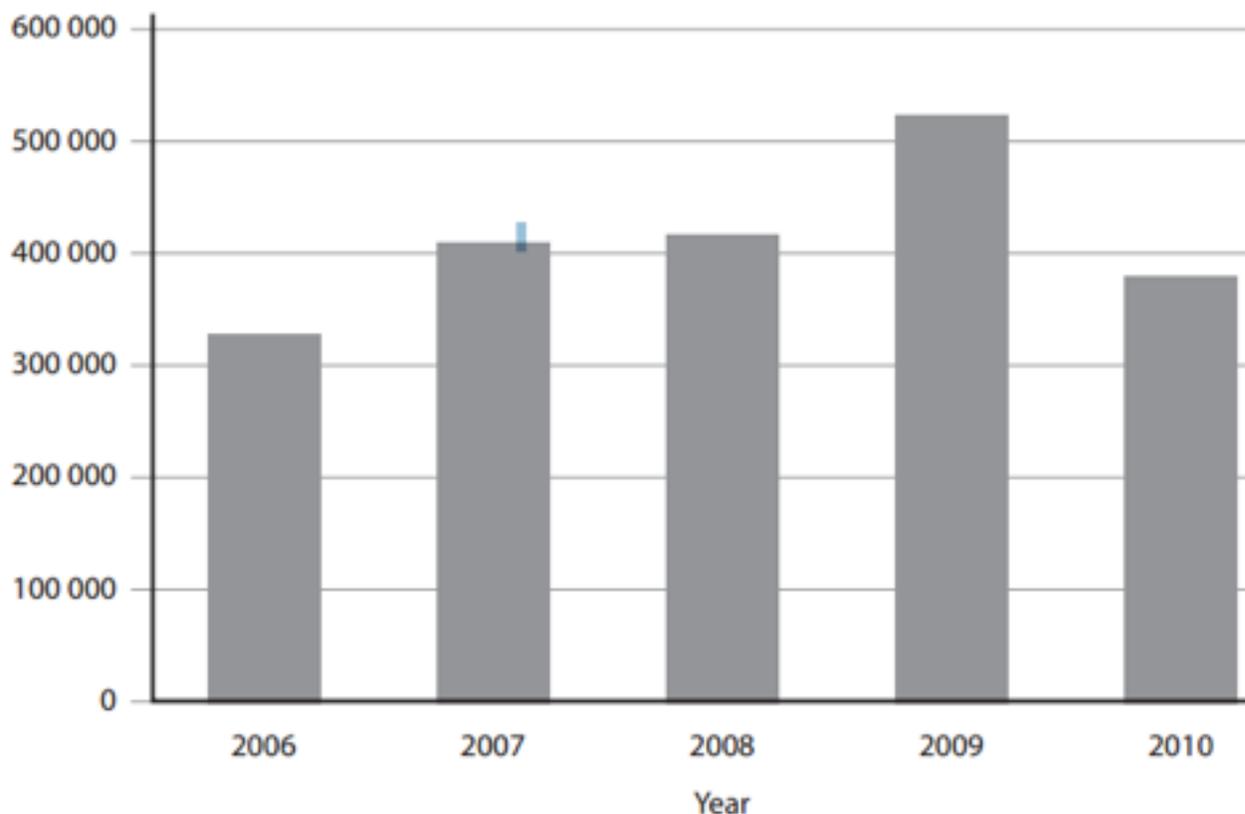
Medical Tourism and Healthcare Statistics From Around the World

Africa

South Africa

- East and West African medical travelers spend more in South Africa than any other traveler (including those from the North) and are generally middle-class Africans seeking specialist diagnosis and treatment. ¹
- The average length of stay for medical tourists from Europe is 8 nights. The average length of stay for medical travelers from countries neighboring South Africa, on the other hand, is lower than 4 nights... ²
- The total annual spend by medical travelers in South Africa amounts to over 128 million US dollars. ³
- The number of medical tourists to South Africa increased from 327,000 in 2006 to over 500,000 in 2009. ⁴

Figure 2: Number of Medical Migrants to South Africa, 2006-2010



Source: South Africa Annual Tourism Reports, 2008-2011

Tunisia

- 155,000 foreign patients went to Tunisia in 2013 according to health minister Mohamed Salah Ben Ammar. European patients also visit Tunisia, mostly for health tourism and holidays at hotels providing spas and medical centers in their facilities. ⁵

Asia

- The number of medical tourists traveling to Asia is expected to surpass 10 million by 2015 with Thailand, India and Singapore expected to control more than 80% market share. ⁶
- The medical tourism market in Asia is anticipated to post a CAGR of around 22% during 2014 to 2018, says RNCOS in its latest report Asian Medical Tourism Market Outlook 2018.⁷

India

- According to the Indian High Commission, Indian hospitals received 18,000 Nigerians on medical visas in 2012, 47% of the Nigerians were in India to receive medical treatment and spent approximately \$260 million USD.⁸
- According to Chief Operating Officer of Apollo Hospitals, the number of international patients visiting the hospital has been increasing by 20 percent every year. They provide medical care to 400 to 500 people from European countries, Malaysia, Singapore, Sri Lanka and the Middle East in a year.⁹
- From the year 2009 to 2011 the number of medical tourists in India has grown by 30%. It is estimated that by the year 2015, India will receive nearly half a million medical tourists annually.¹⁰

Kazakhstan

- In December 2014, the Ministry of Health and Social Development announced that 832 foreign nationals were treated in the public-private National Medical Holding clinics in 2013. Most foreign patients, 260, came from the U.K., followed by the U.S. with 111, Kyrgyzstan with 51, Turkey with 50, Russia with 44, and others from Bulgaria, Sri Lanka, the Philippines and 23 other countries. The numbers include foreigners working in Kazakhstan, so it is unclear how many actually travelled to Kazakhstan for care and how many simply chose to receive care in Kazakhstan rather than leave. ¹¹
- The most popular services provided to foreign patients in 2013 were microsurgical removal of spinal herniated discs, in-vitro fertilization, heart valve surgery and treatments for uterine fibroids and adenomyosis. ¹²

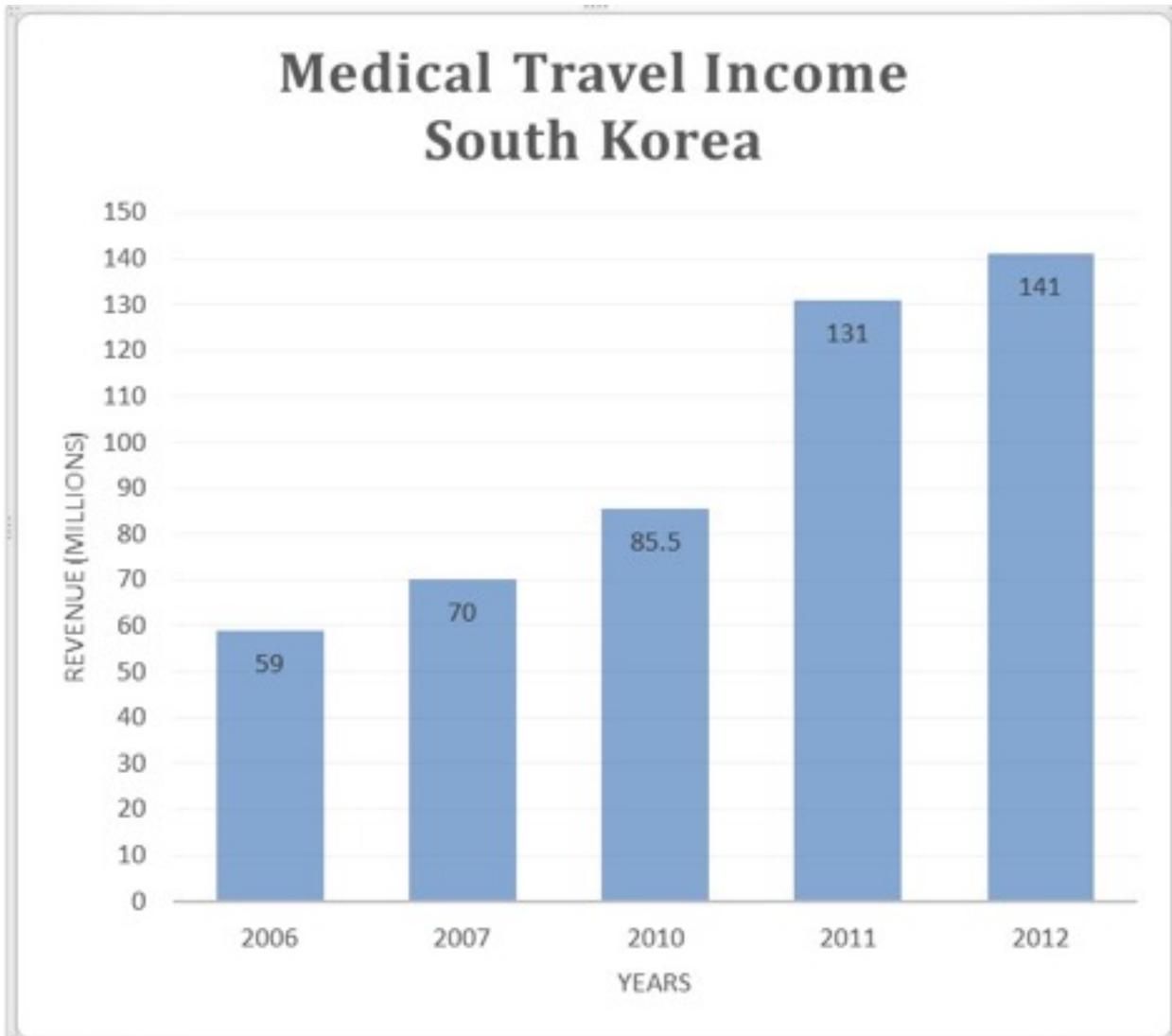
Korea

- According to the Ministry of Health and Welfare, 210,000 non-Korean patients from 191 nations received medical treatment in Korea in 2013. This is an increase of 32.5 percent from the 159,464 in 2012, and is a 3.5-fold increase over 2009's figures. ¹³
- By nationality, 57,075 Chinese patients were treated in Korea in 2013, followed by 32,750 Americans, 24,026 Russians, 16,849 Japanese and 12,034 Mongolians. Most of all, the number of inbound Russian patients increased by nearly 46 percent in 2013 over the previous year. The number

of inbound UAE patients to Korea more than doubled, from 342 in 2012 to 1,151 in 2013¹⁴

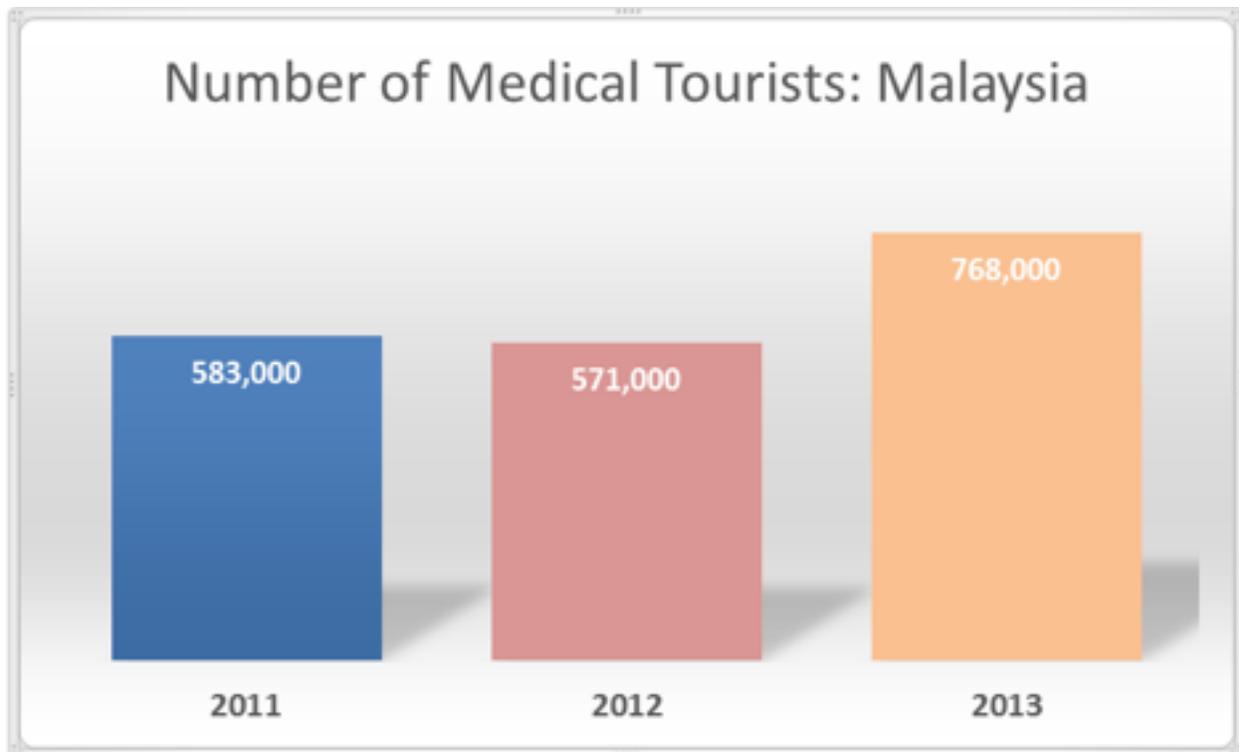
- The Middle East, with an annual growth rate of 5.8 percent, is the fastest growing outbound tourism market in the world. Saudi Health Attaché, has been working with the MTA, Korea Tourism Organization and affiliated hospitals and clinics to connect Muslim patients with procedures and treatments in Jeju, which boasted 1,650 foreign patients in 2013. 19.3% of medical tourism arrivals are from the Middle East and 20.1% are from GCC arrivals, numbers were increased due to all efforts made by Korean healthcare facilities to accommodate these patients. ¹⁵
- The type of treatments most commonly sought by medical travelers to Korea are internal medicine procedures, including problems with the digestion and circulatory systems. They accounted for 68,453 patients, making up 24.4 percent of last year's medical tourists. Some 28,135 patients, or 10 percent, came for general health check-ups, while 25,101 people, or 9 percent, had dermatological treatments for skin problems. A total of 24,075 patients, 8.6 percent, sought cosmetic surgery, while 15,899 patients, or 5.7 percent, used Seoul's gynecological services. ¹⁶
- The South Korean government is setting aside as much as \$4 million a year to help promote the medical tourism industry, which is dominated by plastic surgeons. It expects one million medical tourists a year by 2020, up from 211,218 last year, with Chinese travelers representing the largest segment ¹⁷
- A recent study by the International Society of Aesthetic Plastic Surgery estimated that South Korea had the highest rate of cosmetic surgery per capita of any country in the world¹⁸
- The number of health travel patients from the Middle East rose 237 % to 1151. 350 were sent to Korea by the Dubai government under an agreement between the two countries. Korea aims to receive up to 1000 patients from Dubai via the government in 2013, having already treated 290 between January and April. ¹⁹
- It is forecasted that by 2015, South Korea will attract more than 300,000 medical tourists ²⁰
- The Korea Health Industry Development Institute reported in 2012 that 159,464 patients from 188 countries visited Korea in 2012, 32,503 of those patients were Chinese ²¹
- South Korea's medical travel income came in at \$59 million in 2006 but has increased steadily on the back of the advancement of medical technology and regional governments' efforts to attract overseas patients. The income gained steadily from \$69.8 million in 2007 to \$89.5 million in 2010. The comparable figures for 2011 and 2012 were \$131 million and \$149 million.²²
- In the 2010 Statistics on International Patients in Korea Report showed that 81,789 foreign patients traveled to Korea, 32.4 percent came from the U.S. (4,829 were U.S. Army patients), 19.4 percent Chinese, 16.8 percent Japanese and 7.7 percent Russian²³

http://mobile.nytimes.com/2014/12/24/business/international/plastic-surgery-tourism-brings-chinese-to-south-korea.html?module=Search&mabReward=relbias%3Aw%2C%7B%221%22%3A%22RI%3A10%22%7D&_r=1&referrer



Malaysia

- The number of healthcare travelers coming from the GCC countries to Malaysia had increased from 10,000 in 2012 to 11,000 in 2013 while medical travelers from Oman had increased from 1,000 in 2012 to 1,300 in 2013²⁴
- The medical tourism industry in Malaysia generated approximately 20 million USD in revenue in 2013.²⁵
- There has been an increase of medical tourists coming to Malaysia from 583,000 in 2011, 671,000 in 2012 to 768,000 in 2013. ²⁶
- Medical tourism and healthcare travel in Malaysia increased 8 fold in 2011 compared to 2003.²⁷



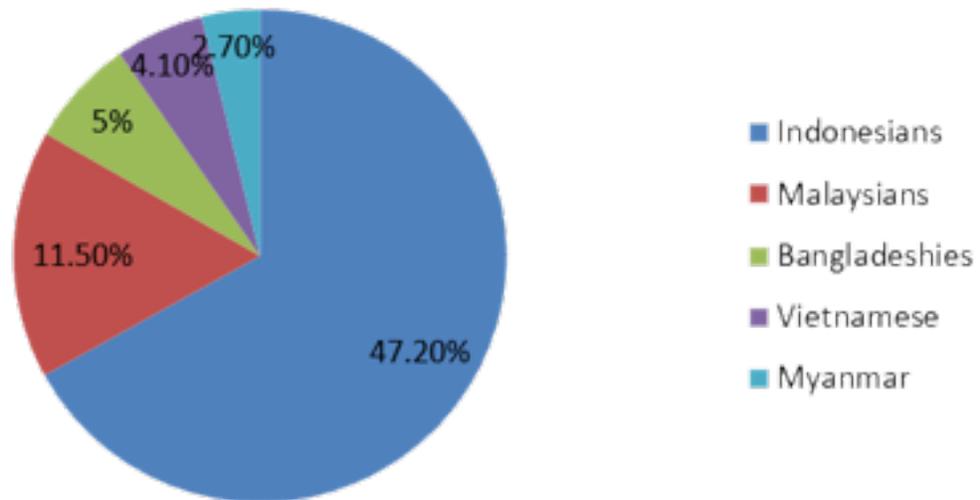
Philippines

- The medical tourism and healthcare tourism market in the Philippines is expected to grow with a CAGR of 9% for the period of 2012 – 2015.²⁸

Singapore

- Singapore medical tourist arrivals are expected to be more than 1 Million by 2015. ²⁹
- Singapore medical tourism market is anticipated to grow at a CAGR of around 30% during the forecast period 2013-2017 says RNCOS in its latest research report.³⁰
- Singapore was ranked second out of 48 countries in Bloomberg's 2013 ranking of healthcare systems. ³¹
- In Singapore there are about 25 medical institutions with more than 9,600 doctors, 1,500 dentists, and 29,000 nurses catering to international patient services, as of 2012. ³²
- In 2011, medical expenditure generated from travelers in Singapore was S \$980 million, a 14 per cent year-on-year increase over 2010. ³³
- According to Singapore's Ministry of Health and the Singapore Tourism Board, in 2011 Indonesians accounted for 47.2%, with Malaysians second at 11.5%, followed by Bangladeshis (5%), Vietnamese (4.1%) and Myanmar (2.7%) of medical tourists. ³⁴
- Ranked sixth out of 191 countries in the world and best healthcare system in Asia by World Health Organization (WHO) in 2000. ³⁵

Percentage of medical travelers to Singapore in 2011 by region



Thailand

- Health and wellness tourism revenue in Thailand is expected to reach 3.11 billion USD by 2017. ³⁶
- Thailand earned \$4.31 billion in revenue from medical tourism in 2013, after averaging 15 percent increases a year across the past decade. However, that figure is clearly in danger following a 15 percent drop in arrivals at Bangkok's international airport during the first quarter. ³⁷
- About 26.7 million visitors arrived in Thailand in 2013, an increase from the previous year, the Department of Export Promotion reported. About 2.5 million of those travelers came for health tourism or medical tourism reasons. ³⁸
- Tourism accounts for as much 10 percent Thailand's gross domestic product – or \$35 billion annually. Although travel to Thailand's beaches and islands was holding up before the coup – as, indeed, it did after the army last seized power in 2006 – the Department of Tourism said the overall number of visitors still dropped 4.9 percent in the first four months of the year. ³⁹
- In 2012 the Ministry of Public Health, Thailand and the Kasikorn Research Center found that 2,530,000 international patients traveled to Thailand for treatment, the top five nationalities were; Japan, U.S., UK, GCC and Australia. Revenues generated from medical tourism were approximately 4 Billion USD. ⁴⁰
- Thailand is the leader in medical tourist arrivals holding more than 40% share in Asia medical tourist arrivals in 2011. Its medical travel and health travel market is also expected to more than double by 2015 from its current market in 2011. ⁴¹

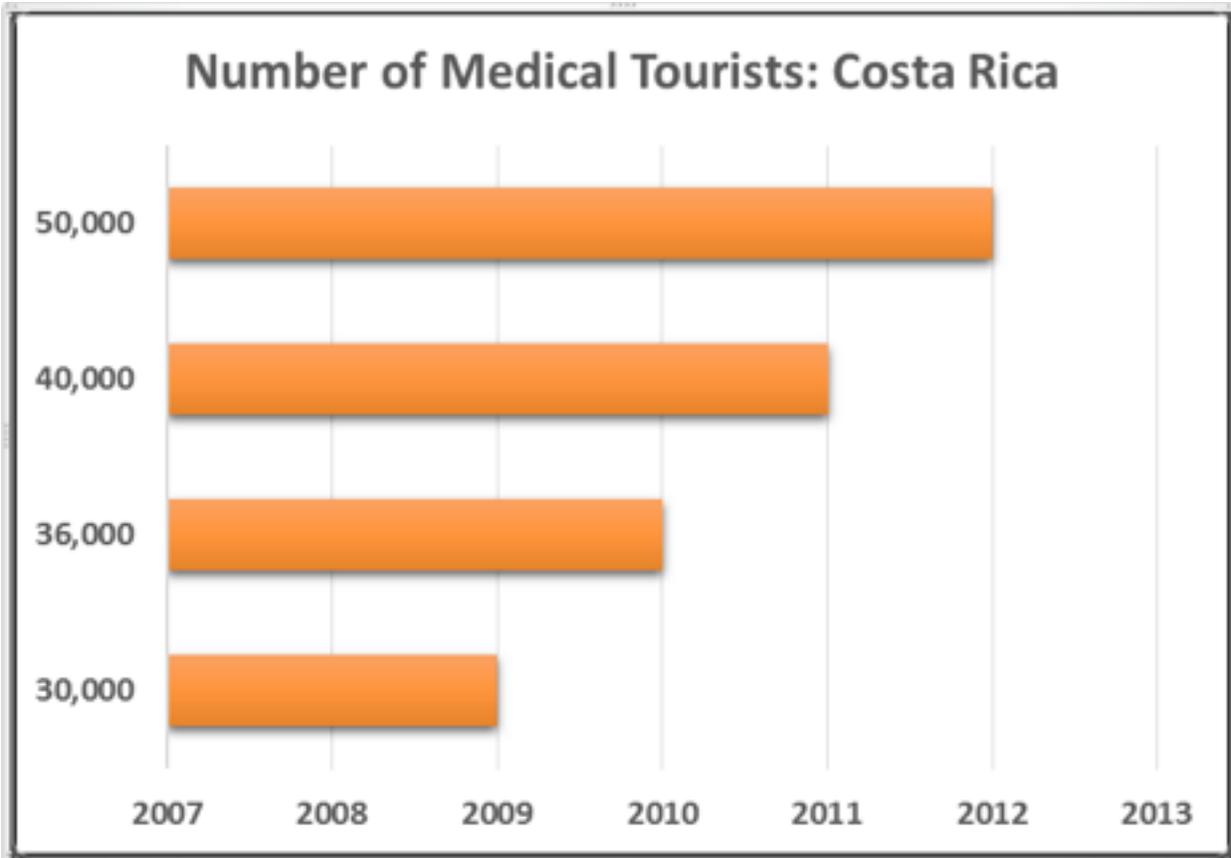
Taiwan

- In 2013, Taiwan hosted more than 200,000 medical travelers who sought medical tourism treatments and in 2014 Taiwan's medical tourism industry is expected to pump over 400 million USD into the economy.⁴²
- Taiwan medical tourism has become one of the biggest attractions for mid to high income Chinese tourists. The country's medical tourism and healthcare tourism market is expected to increase at 7% CAGR from 2012 to 2015. ⁴³
- A 2012 report from the Taiwan Ministry of Health and Welfare found that more than 60,000 medical tourism patients traveled to Taiwan for healthcare the previous year, with 50 percent of patients coming from mainland China. The report also noted that the most popular procedure was a full health exam.⁴⁴

Central America & the Caribbean

Costa Rica

- Costa Rica is looking to boost its numbers to 100,000 medical tourists in 2014.⁴⁵
- Data from the Council for International Promotion of Costa Rica Medicine (PROMED) shows that in 2012, Costa Rica attracted nearly 50,000 medical tourists (mostly from the U.S. and Canada) and each one spent an average of \$7,000. Close to half of these medical travelers were said to be dental, followed by orthopedics, weight loss surgeries, gynecology and plastic surgery. Medical tourism generated some \$338 million in revenue for the country that year, PROMED reported.
- Approximately 40,000 medical tourists visited Costa Rica in 2011, compared to 36,000 in 2010 and 30,000 in 2009. Most of them are American and Canadian, according to the country's tourism institute, I C T.⁴⁶



Guatemala

- By 2012, Guatemala projects capture over 5,000 medical travelers and the generation of \$35 million in income by the medical tourism sector. The sector's goal is to reach 20,000 healthcare travelers by 2015. ⁴⁷

Europe

France

- The healthcare system in France is of such a high caliber that the World Health Organization (WHO) ranked it as the number 1 healthcare system in the world. ⁴⁸

Germany

- Health and wellness tourism constant value sales are projected to increase at a low average annual rate of 1% over the forecast period to reach EUR4.6 billion by 2017 - almost EUR120 million higher than in 2012. ⁴⁹
- Medical tourism earns German hospitals and doctors roughly €1 billion (\$1.35 billion) in annual revenues. In 2011, 82,854 foreign patients were treated in Germany on an inpatient basis and about 123,000 on an outpatient basis. Russians make up the largest group of non-European Union patients in Germany, with about 6,000 receiving inpatient treatment each year. ⁵⁰
- Figures from the German Federal Statistical Office and the Bonn-Rhine-Sieg University of Applied Sciences indicate that treatments were provided to over 77,000 inpatients from 178 countries in 2010. ⁵¹

Hungary

- Health and wellness tourism was one of the two categories which led Hungarian tourism in 2013 in terms of value growth, and was a trend setter.⁵²
- Health and wellness tourism is expected to grow by a 2% value CAGR at constant 2013 prices over the next several years. Within that, medical tourism will increase by a 3% value CAGR and spas by a 2% value CAGR at constant 2013 prices.⁵³

Spain

- In 2012 21,868 international visitors went to Spain to for various health treatments, spending in total EUR 12.1 million, according to data provided by Turespana.⁵⁴
- María Luisa Mesa, the head of the health division of Andalusia's Business Confederation, says around 600,000 visitors head to the region each year in search of private healthcare, and of those, 70 percent are return visits.⁵⁵

Middle East

Dubai

- According to Alpen Capital Investment Banking, UAE's medical tourism sector is growing strongly and reached \$1.69 billion in 2013. Dubai Healthcare City (DHCC) is one of the largest healthcare tourist destinations in the region. According to DHCC, they handled around 500,000 patients in 2011, 20% of which were medical tourists.⁵⁶
- Healthcare spending in the UAE is expected to reach 11 billion USD by 2015, while medical tourists are set to cross the 20 million mark for the same period.⁵⁷
- The Dubai Health Authority has its eyes set on attracting 500,000 medical tourism patients a year and plans to build 22 hospitals, boosting the national economy by up to Dh2.6 billion (700 million US) by 2020. Achieving that ambitious goal would make Dubai a major center for medical tourism in time for when the United Arab Emirates territory hosts World Expo 2020.⁵⁸
- Dubai has 2,518 health facilities and more than 70 percent of hospitals have international accreditations.⁵⁹
- Due to the medical tourism initiative and its implementation, the sector generated \$1.6 billion (Dh5.8 billion) for Dubai in 2012.⁶⁰
- In 2012, an estimated 107,500 medical tourists came for treatment at Dubai's 23 hospitals, five day surgery facilities and 1,181 clinics. The figure is growing at a compound a rate of 15 percent, according to Dubai Health Authority. At the Dubai Healthcare City (DHCC) about 15 percent of the total patients are medical tourists. In 2013, DHCC catered to 1 million patients, up from 400,000 in 2010.

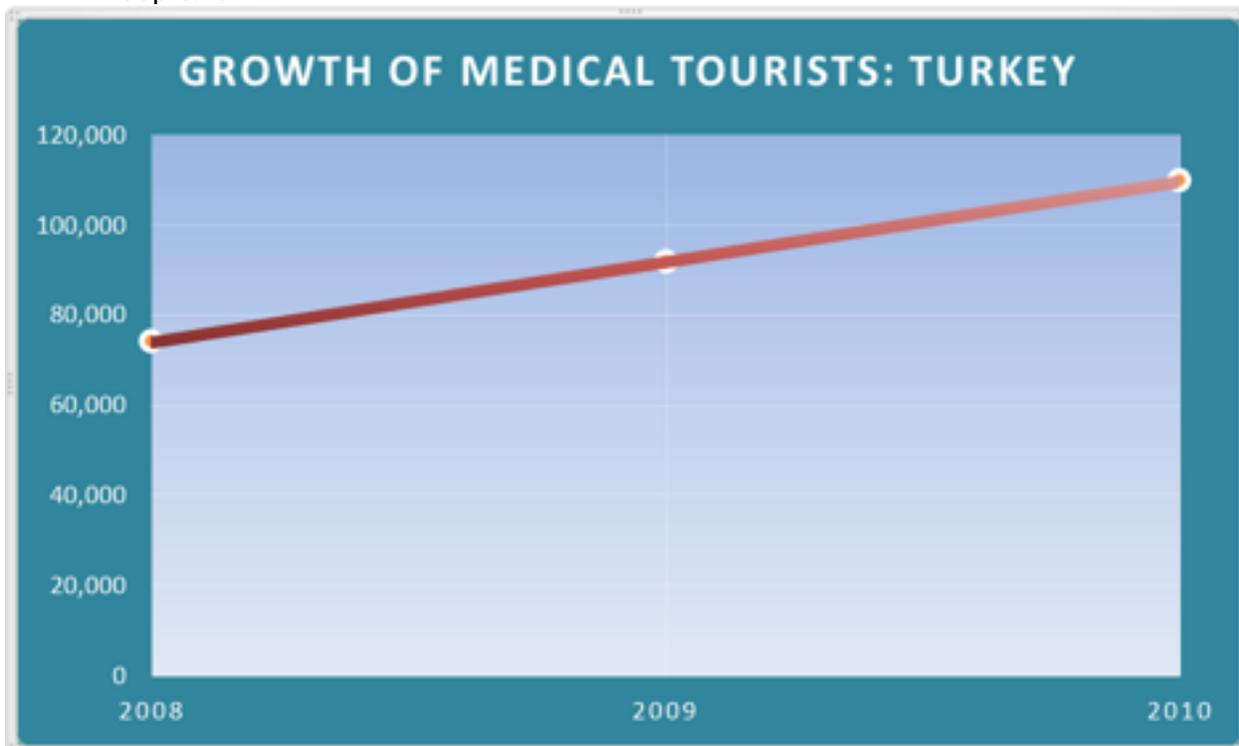
Jordan

- Jordan has 64 private hospitals that treated 250,000 non-Jordanians in 2013.⁵⁶¹
- According to the International Medical Travel Journal in Jordan there was an influx in 2012 of some 250,000 patients accompanied by 500,000 friends or relatives, generating more than \$1bn in revenues.⁶²

- In 2010 around 90% of Jordan’s medical tourists came from the MENA region,” said Dr Awni Al Bashir, president of the Private Hospitals Association (PHA). ⁶³

Turkey

- Turkey’s the Ministry of Health expects medical tourists to increase from 270,000 in 2012 to 500,000 in 2015, and to 2.0 million by 2023.⁶⁴
- Every year 130,000 people travel to Turkey for treatment with another 250,000 coming for thermal tourism, rehabilitation and services for the elderly, as reported by Anatolia news agency. ⁶⁵
- According to a study by Turkey’s Health Tourism Department of the Health Ministry’s Basic Health Services General Directorate and the Gazi University faculty of commercial and tourism education, the number of health tourists coming to Turkey for medical treatment has been increasing regularly for the past three years. While 74,093 patients came to Turkey in 2008, there were 91,952 in 2009 and 109,678 last year. The total number of patients who came to Turkey in the past three years is 275,723. Among those patients, 94 percent received treatment in private hospitals while 6 percent went to public hospitals. ⁶⁶



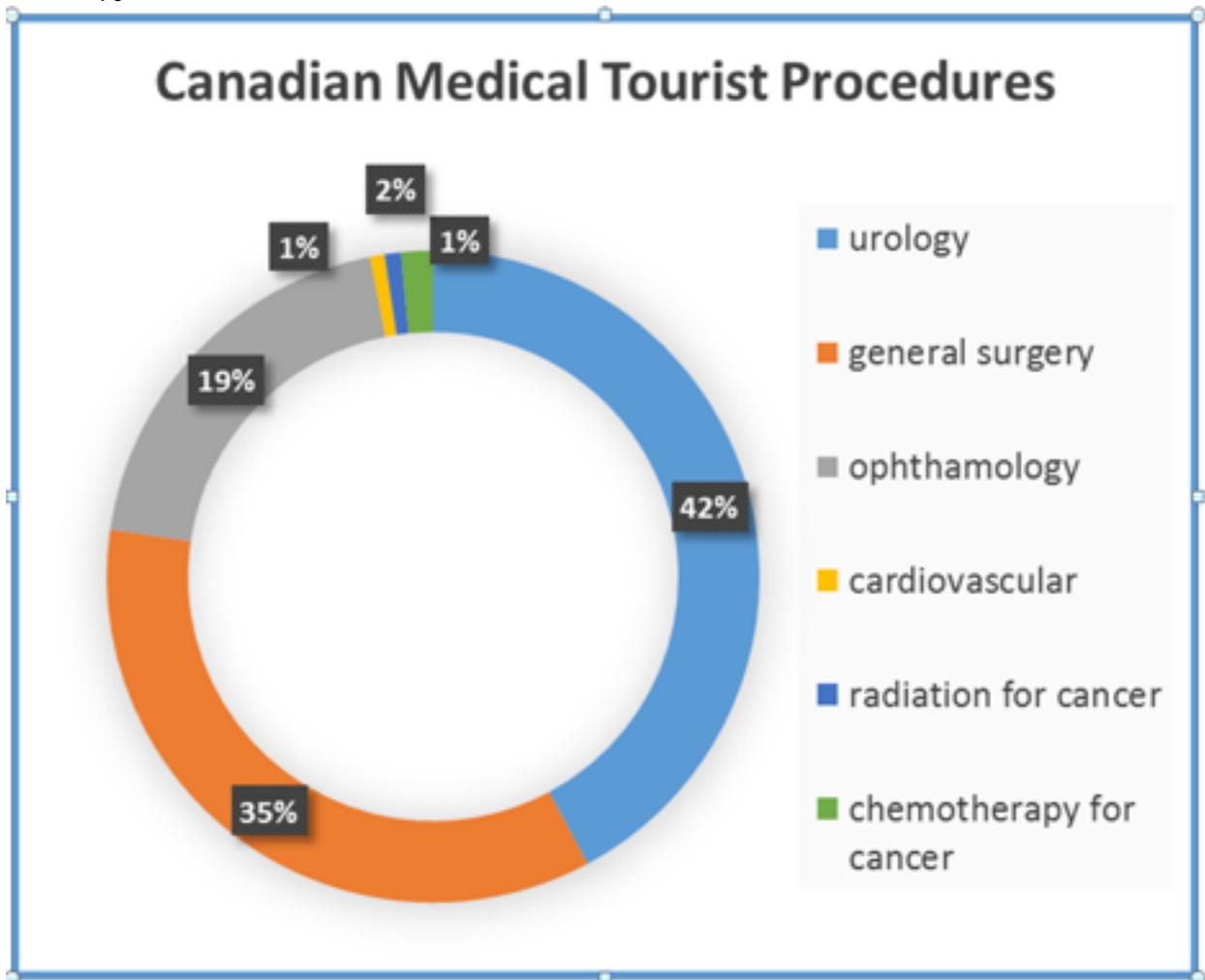
North America

Canada

- According to the Frasier Institute, in 2013, almost one per cent of patients in Canada were estimated to have traveled for healthcare abroad, the same as in 2012. Putting these numbers together with data on the number of procedures performed in Canada from the Canadian Institute for Health

Information reveals that a conservatively estimated 41,838 Canadians received treatment outside the country in 2013. ⁶⁷

- Among the 12 medical specialties, the largest numbers of patients receiving care outside Canada were estimated for urology (6,635), general surgery (5,537), and ophthalmology (3,083). Patients were less likely to be receiving cardiovascular surgeries (114), radiation treatment for cancer (127), and chemotherapy for cancer (249) in another country. ⁶⁸
- The University Health Network signed a consulting contract with Kuwait that has been worth \$30 million over the last three years, said the health network's vice-president Gillian Howard. Over the same period, its member hospitals also earned \$20.5 million from treating 380 foreign patients. ⁶⁹
- The network of four downtown Toronto hospitals has treated 380 foreign patients since 2011, 81 of whom were Libyans recovering from battlefield injuries brought to Canada through an agreement with Ottawa. Most of the rest came from the Caribbean or the Middle East for cancer and cardiac care. ⁷⁰



Mexico

- Mexico's Secretary of Tourism said that almost 12 million international visitors arrived in Mexico in 2013, 6.5 million of the visitors were from the U.S.⁷¹
- According to "Why International Medical Tourism is Growing", a 2013 article from D Magazine, the Mexican government expects the number of U.S. medical tourists to reach 650,000 by 2020.⁷²

United States

- According to a 2014 report by the Organization for Economic Cooperation and Development (OECD), the U.S. spends almost 17 percent of its gross domestic product on healthcare that's more than any of the 34 OECD countries.⁷³
- In 2013, around 900,000 Americans traveled overseas for treatment, according to Patients Beyond Borders.⁷⁴
- It is estimated that the medical tourism market size is USD 38.5-55 billion, based on approximately eleven million cross-border patients worldwide spending an average of USD 3,500-5,000 per visit, including all medically-related costs, cross-border and local transport, inpatient stay and accommodations. We estimate some 1,200,000 Americans will travel outside the US for medical care this year (2014).⁷⁵
- In 2013, Nerd Wallet Health analyzed data from the U.S. Census, Centers for Disease Control, the federal court system and the Commonwealth Fund and found that:
- 56 million Americans under age 65 will have trouble paying medical bills
 - Over 35 million American adults (ages 19-64) will be contacted by collections agencies for unpaid medical bills
 - Over 15 million American adults (ages 19-64) will use up all their savings to pay medical bills
 - Over 11 million American adults (ages 19-64) will take on credit card debt to pay off their hospital bills
 - Nearly 10 million American adults (ages 19-64) will be unable to pay for basic necessities like rent, food, and heat due to their medical bills
- Over 16 million children live in households struggling with medical bills
- Despite having year-round insurance coverage, 10 million insured Americans ages 19-64 will face bills they are unable to pay
- 1.7 million Americans live in households that will declare bankruptcy due to their inability to pay their medical bills
 - Three states will account for over one-quarter of those living in medical-related bankruptcy: California (248,002), Illinois (113,524), and Florida (99,780)
- To save costs, over 25 million adults (ages 19-64) will not take their prescription drugs as indicated, including skipping doses, taking less medicine than prescribed or delaying a refill
- Marketing manager for the international department of the Miami-Dade County's Jackson Health System said the public hospital serves an average of 2,500 international patients a year.⁷⁷
- According to the Lung Institute, a private pulmonary practice in Tampa, Florida, 40% of their patients, come from outside Florida, including patients

from Alabama, Mississippi, Tennessee, Georgia, Canada, the United Kingdom, the Philippines and South Africa.⁷⁸

- Due to the changes of healthcare reform, the Deloitte Center for Health Solutions reported that 60 percent of doctors surveyed revealed they are likely to retire earlier than planned, perhaps, within the next 1-3 years creating a shortage of doctors.
- Josef Woodman, CEO of Patients Beyond Borders, estimates that in 2012, 400,000 Americans crossed international borders for dental care. For 2013, they project a growth rate of approximately 20 percent.⁷⁹
- According to Deloitte consulting services, 875,000 Americans were medical tourists in 2010.⁸⁰
- In 2010 the U.S. Department of Commerce awarded the University HealthSystem Consortium a \$500,000 grant to research medical care exports as part of the National Export Initiative.⁸¹
- Deloitte estimates that as many as 1.6 million Americans could be traveling in 2012 for Medical Tourism spending billions of dollars.⁸²
- In 2009 the Council of Economic Advisers projected that the healthcare sector will comprise of 34% of GDP in the U.S. by 2040.

Oceania

Australia

- Tourism Research Australia from the Australian Government reported that more than 10,000 medical travel patients flew into the continent in 2013 pumping more than \$26 million into the national economy. ⁸³
- Health and wellness tourism in Australia grew by 15% in 2013, a significant increase from the 5% value growth experienced in 2012.⁸⁴

New Zealand

- Health and wellness tourism in New Zealand is expected to increase in constant value at a CAGR of 3% over the 2013-2014 period. This is set to be a superior performance to the 1% constant value CAGR registered in the category over the previous years.⁸⁵

South America

Argentina

- Medical tourism led H&W growth in 2013, with current value sales in the area increasing by almost 50% to reach \$90 million USD. According to the Tourism Office, tourists that arrive in Argentina to receive medical treatment spend five times more than leisure tourists.⁸⁶
- Medical tourism will lead growth over the forecast period, with the area having a projected constant 2013 price value CAGR of 12% due to promotional efforts by the Tourism Office and the private sector to position Argentina amongst the main options for medical treatment in Latin America.⁸⁷
- Tax authorities in Argentina estimate that health tourism is a significant source of income for local cosmetic surgeons, as this type of treatment accounts for the majority of the estimated 1,000 foreigners in Argentina every month for surgery of all types ⁸⁸

Brazil

- The local medical tourism industry claims that Brazil has grown from 48,000 foreign patients in 2005 to 180,000 in 2009, and that numbers are growing by 30% every year. ⁸⁹

Colombia

- According to the Medellin Healthcare Cluster, twenty-four percent of the medical and healthcare travelers that visit the Medellin Health City in Medellin, Columbia are from the U.S.
- According to the Medellin-based cluster group of Medicine and Dentistry and the Cali Chamber of Commerce, 18,000 people sought out health tourism in 2010. 10,000 of those people were foreigners, mainly from Curacao, Aruba, Suriname, the United States, and Spain⁹⁰

MTA Official Quotes for Media/Press

Scott Edelstein, a healthcare counselor from US-based law firm Squire, Sanders and Dempsey, forecasted that the value of global medical tourism would rise to 100 billion dollars in 2012 from 60 billion dollars in 2006.

“Travelling abroad for medical care and health services, referred to as medical travel and health tourism is an age-old practice in all parts of the world. In today's global economy, it makes sense for an informed consumer to consider high quality, cost-effective care choices beyond borders. And for the host country and healthcare service provider, there are significant benefits from engaging in medical tourism including a favorable economic multiplier effect.” – **Vivian Ho, Chief Development Officer**

“ Medical Tourism is one of the fastest growing segments of healthcare throughout the world. Patients are more educated than ever and are going online to research information and are traveling to where they can get the best quality care at an affordable price. Medical Tourism also allows patients access to medical care or treatment that isn't available in their home country.” - Jonathan Edelheit, CEO of Medical Tourism Association™

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