



## **TRAVEL & TOURISM**

### **MEDICAL TOURISM: A PRESCRIPTION FOR A HEALTHIER ECONOMY**

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MEDICAL TOURISM:  
**A PRESCRIPTION FOR  
 A HEALTHIER ECONOMY**

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## HIGHLIGHTS

- International spending on medical tourism products and services grew by 358% in nominal terms between 2000 and 2017, increasing from \$2.4 billion to \$11 billion. This growth resulted in spending on medical tourism reaching 1.2% of international visitor spending in 2017 compared to 0.6% in 2000.
- The United States is the largest destination market for inbound medical tourists, with spending reaching almost \$4bn in 2017 and representing nearly 36% of global medical tourism spending.
- Turkey, Thailand, Jordan and Costa Rica are the leading emerging economies in terms of inbound medical tourism spending.
- The United States is also the world's leading outbound medical tourism market, representing 20% of the market, with US citizens spending around \$2.3bn in 2017 on medical tourism services abroad.
- Kuwait is the second largest source market for outbound medical tourism, largely due to its government policy of supporting and financing medical procedures abroad. Nigeria is the third largest source market.
- The most effective policies in supporting and stimulating medical tourism are those that establish the regulation and recognised accreditation/certification of medical practitioners and facilities, provide specific visa support, provide training and skills development, develop and implement targeted marketing strategies, and, attract investment into the sub-sector.

## 1. INTRODUCTION

Over recent years, as the health and social care systems have become strained and expenditures and insurance premiums have risen in a number of countries, consumers have looked for more cost-effective care; in turn leading to the rise in medical tourism<sup>1</sup>. The growth of this niche market<sup>2</sup> has been swiftly identified by medical service providers who have recognised the opportunities to promote access to quality care, safety, privacy, lower cost procedures, and procedures that are not available in patients' home countries.

Medical tourism, referred to as 'health-related personal travel' by the International Monetary Fund (IMF), is defined as the products and services bought by people who travel abroad primarily for medical and health-related reasons. This includes spending on food, accommodation, and local transport – either by individuals, or, at times, funded or even prompted by governments<sup>3</sup>.

Different specialties including cosmetic surgery, dentistry, orthopaedics, cardiovascular procedures, reproductive health and nanotechnology, have also been developed by countries wanting to attract distinct source markets; in turn achieving a competitive advantage. For instance, Hungary has developed a speciality in dentistry, medical tourists head to South Korea for expertise in cosmetic surgery and cardiology, and Mexico is expanding beyond its know-how in cosmetic procedures into orthopaedics<sup>4</sup>.

A growing number of countries are increasingly recognising the opportunities of medical tourism as a catalyst for social and economic development. Bringing together the medical and tourism sectors synergistically not only supports quality education, highly skilled workers, favourable visa policies and accessible and well-developed infrastructure within a country, but also allows for the promotion of a country's attractiveness.

This report seeks to analyse global medical tourism using data from the IMF Balance of Payments dataset, which is also the primary data source used for international Travel & Tourism spending in WTTC's annual economic impact research. Our analysis is based on 115 countries, which have published data on international medical tourism<sup>5</sup>. These countries account for 58% of total global international visitor spending.

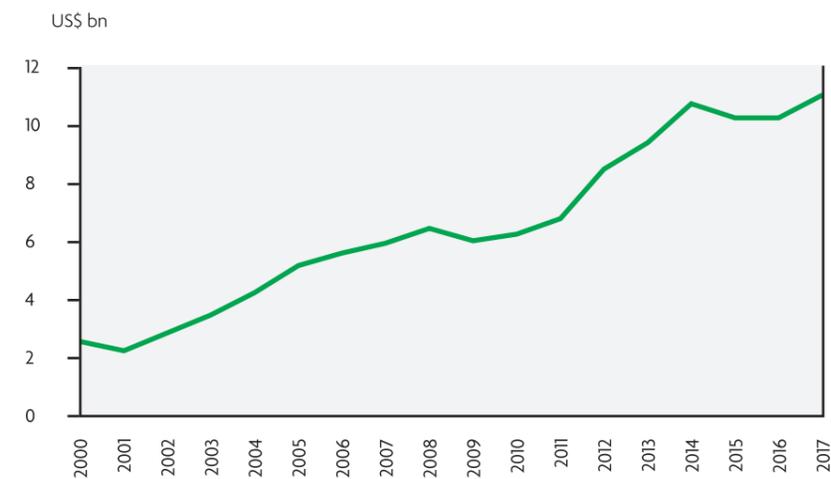
1 European Travel Commission/UNWTO, 2018: Exploring Health Tourism  
 2 Amna Al-Hashar and Ibrahim Al-Zakwani. Oman Medical Journal, 2018: Omanis Traveling Abroad for Healthcare: A Time for Reflection  
 3 As an example, check the NHS: <https://www.nhs.uk/using-the-nhs/healthcare-abroad/going-abroad-for-treatment/going-abroad-for-medical-treatment/>  
 4 More examples of country specialisms can be found on [medicaltourism.com](http://medicaltourism.com)  
 5 For further details on the methodology and definitions, please see Appendix 2

## 2. ANALYSIS OF MEDICAL TOURISM

### 2.1 MEDICAL TOURISM ACROSS THE WORLD

In 2017, international spending on medical tourism services totalled nearly US\$11 billion, up from US\$2.4 billion in 2000; amounting to an average annual growth of around 9% in nominal terms and a total growth of 358% between 2000 and 2017. Spending on medical tourism has grown as a share of total international visitor spending from 0.6% in 2000 to 1.2% by 2017.<sup>6</sup>

Chart 1: International spending on medical tourism services, 2000-17



OF EVERY US\$100 SPENT BY INTERNATIONAL VISITORS ON MEDICAL TOURISM GLOBALLY, US\$36 IS SPENT WITHIN THE USA

### 2.2 INBOUND MEDICAL TOURISM SPENDING

**The United States** is the largest destination market for inbound medical tourism spending, bringing in almost US\$4bn in 2017. The USA accounts for 36% of global medical tourism spending and 1.9% of total inbound tourism spending in the country.

**France** follows in second place with tourists spending US\$0.8 billion for medical purposes in 2017, which amounts to 1.3% of total inbound tourism spending in the country.

**Turkey, Thailand, Jordan and Costa Rica** are also among the largest countries in terms of total inbound medical tourism spending; evidence that medical tourism brings benefits not only to developed countries but also to emerging and developing economies across continents.

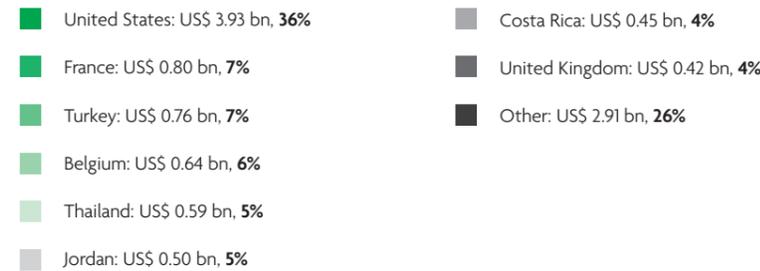
**Turkey's** strong performance has been supported by sustained government investment into the healthcare sector, low-cost services, well-educated personnel<sup>7</sup>, and focussed marketing campaigns. A total of 500,000 foreign patients were treated in Turkey in 2018<sup>8</sup>, with strong growth expected over the coming years. Similarly, the government in **Thailand** has aimed to make the country a global centre for medical tourism through investment initiatives including tax exemptions for investment into new health facilities<sup>9</sup>.

The aforementioned six countries, together with **Belgium** and the **United Kingdom**, contributed nearly three quarters of total global medical tourism spending in 2017, indicating that this niche market is dominated by a small number of destination markets.

6 Spending on medical tourism as a share of total international visitor spending refers to 115 countries analysed  
 7 For more information visit: <https://europeanbusinessmagazine.com/business/medical-tourism-boosting-turkeys-economy/>  
 8 For more information visit: <https://www.aa.com.tr/en/turkey/turkey-seeks-to-be-health-tourism-epicenter-minister/1552832>  
 9 Medical tourism in Thailand, cross-sectional study, 2015: <https://www.who.int/bulletin/volumes/94/1/14-152165/en/>

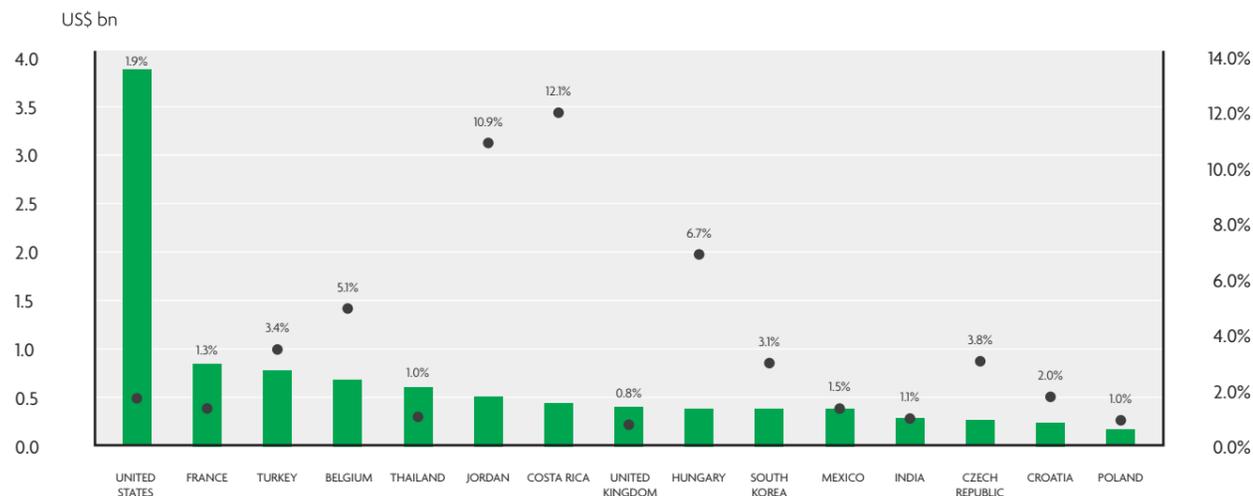


**Chart 2: Where do international medical tourists spend the most?**  
Inbound medical tourism spending, 2017, in US\$ bn and % share of world's total



**Chart 3: Top 15 largest countries - inbound medical tourism spending, 2017 data (source: IMF)**

- Inbound medical tourism spending (US\$ bn)
- Inbound medical tourism spending as a share of total inbound travel spending (%)



OF EVERY US\$100 SPENT BY INTERNATIONAL TOURISTS IN COSTA RICA AND JORDAN, US\$12 AND US\$11 RESPECTIVELY IS SPENT ON MEDICAL TOURISM SERVICES

When examining medical tourism spending as a share of total inbound spending, developing and emerging countries rank highest with **Iran, Jordan and Costa Rica** in the top spots. **Iran's** last available data, however, is for the year 2000, when 18% of total inbound tourism spending was related to medical services. While these figures are likely to have changed considerably, Iran's strength in this area is in part due to the low cost of medical services, well-qualified personnel and active government support. In 2017, it was reported that Iran has signed agreements with 13 countries in the region to facilitate medical tourism in the country<sup>10</sup>. Medical services account for 12% and 11% of inbound tourism spending

<sup>10</sup> International Medical Travel Journal, 2017: Record health tourism numbers for Iran: <https://www.imtj.com/news/record-health-tourism-numbers-iran/>

ACTIVE GOVERNMENT SUPPORT, SMART MARKETING STRATEGIES, STRONG INVESTMENT AND WELL-QUALIFIED PERSONNEL ARE ESSENTIAL FOR THE DEVELOPMENT OF MEDICAL TOURISM

in **Costa Rica** and **Jordan** respectively; a result of government focus and strong investment into the sub-sector. In Costa Rica, as with a number of other destinations that actively promote this tourism niche, many travel companies offer “sun and surgery” packages, overtly marketing its medical services to attract international tourists to the country<sup>11</sup>.

**India**, which currently ranks 12th in terms of inbound medical tourism spending, has strong governmental policies supporting medical tourism, including the introduction of ‘medical visas’ and targeted marketing campaigns<sup>12</sup>, all of which help drive an increasing number of medical tourists to the country.

### 2.3 ORIGIN MARKETS FOR MEDICAL TOURISM

In addition to being the world's top inbound medical tourism destination, **the United States** is also the world's leading outbound medical tourism market. US citizens spent around US\$2.3bn in 2017 on medical services abroad, particularly in North America and Latin America. While the USA accounts for 20% of global outbound spending on medical tourism, this amounts to 1.7% of the total US outbound Travel & Tourism expenditure. Even though US citizens spend a significant amount abroad for medical services, this sub-sector provides a net benefit to the country's GDP, with the revenue from inbound medical tourism exceeding the outbound spend by US\$1.6bn in 2017.

**Kuwait** is the second largest origin market for outbound medical tourism, largely due to its government policies which support medical procedures abroad. While the share of outbound medical tourism spend as a proportion of overall outbound spending is 12.7% for the country; the government is in the process of implementing new regulations to significantly reduce outbound medical tourism and privatise healthcare<sup>13</sup>.

The strong outbound medical tourism spending in **Nigeria**, the third highest spending origin market for medical tourism, is driven by a booming population and a domestic health system which is under pressure as a result of rising demand<sup>14</sup>. Nigeria's outbound medical tourism spending represents a 13.5% of residents' total tourism spending abroad.

In **Oman**, outbound medical tourism spending accounts for 21% of total outbound spending. This is the result of reported long delays in public healthcare facilities domestically, and a high cost of private medical services. Omanis are also drawn to foreign countries' leisure facilities which are offered alongside healthcare treatments by some providers<sup>15</sup>.

MEDICAL TOURISM ACCOUNTS FOR A LARGE SHARE OF TOTAL OUTBOUND TOURISM SPENDING IN A NUMBER OF SMALL DEVELOPING ECONOMIES

<sup>11</sup> Turner, L., National Center for Biotechnology Information, U.S. National Library of Medicine: “Medical tourism” and the global marketplace in health services: U.S. patients, international hospitals, and the search for affordable health care: <https://www.ncbi.nlm.nih.gov/pubmed/20799670>

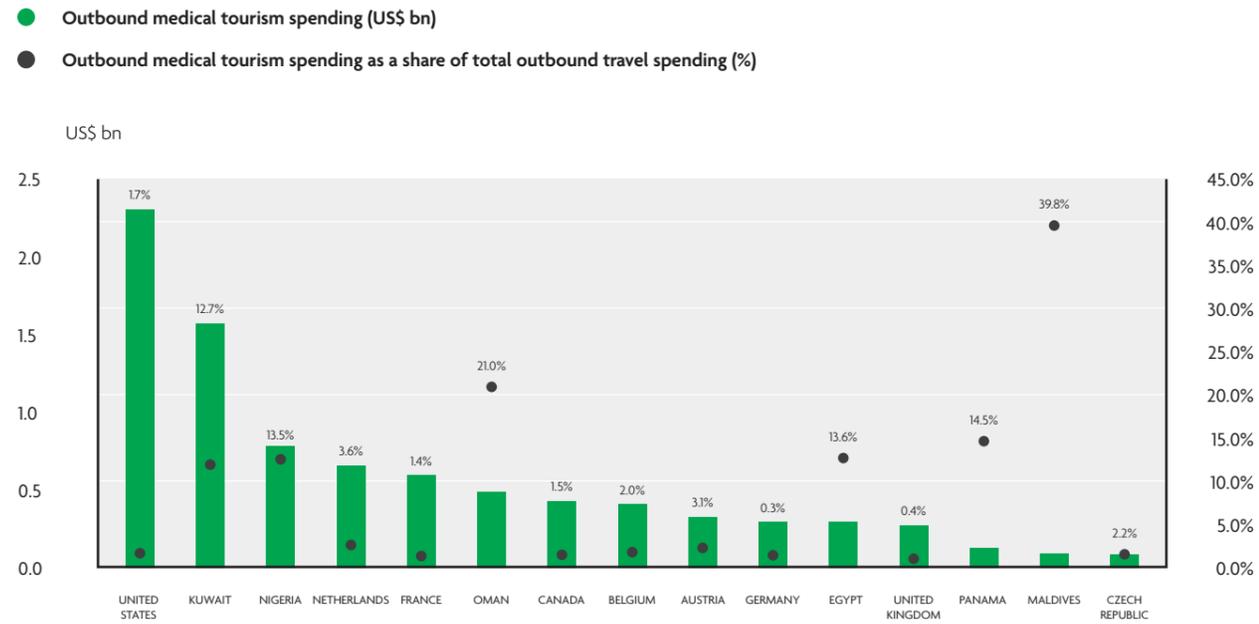
<sup>12</sup> Source: India Brand Equity Foundation (IBEF), 2019: Healthcare

<sup>13</sup> International Medical Travel Journal, 2016: New measures will reduce Kuwaiti medical tourism: <https://www.imtj.com/news/new-measures-will-reduce-kuwaiti-medical-tourism/>

<sup>14</sup> Timothy, G et al., European Journal of Business and Management, 2014: Balancing Demand, Quality and Efficiency in Nigerian Health Care Delivery System: <http://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.685.2504&rep=rep1&type=pdf>

<sup>15</sup> Amna Al-Hashar and Ibrahim Al-Zakwani. Oman Medical Journal, 2018: Omanis Traveling Abroad for Healthcare: A Time for Reflection

Chart 4: Top 15 largest countries - outbound medical tourism spending, 2017 data<sup>16</sup> (source: IMF)



While medical tourism has been characterised as patients from high-income countries travelling abroad to access cheaper care in low and middle-income countries; a more complex market model is emerging, with an increasing number of tourists from emerging and developing countries travelling abroad for medical purposes<sup>17</sup>. In fact, for a number of small developing countries, medical tourism accounts for a large share of total outbound tourism spending; including **Eswatini, Maldives** and **Bermuda**, where 66%, 40% and 36% of total outbound expenditure relates to medical tourism products and services.

The **Maldives'** large share of medical tourism is the result of a 2012 government policy of Universal Health Care (UHC), which is a comprehensive benefit package that includes subsidised treatment abroad for services unavailable in the country. The result was immediate; within one year of the implementation of the scheme, \$11.6 million was spent by the government to treat patients abroad with 276,000 citizens (84% of the population) benefitting from the scheme<sup>18</sup>.

<sup>16</sup> Data for Kuwait, the Netherlands and Canada is from 2015  
<sup>17</sup> Medical tourism in Thailand, cross-sectional study: <https://www.who.int/bulletin/volumes/94/1/14-152165/en/>  
<sup>18</sup> Understanding medical travel from a source country perspective: a cross sectional study of the experiences of medical travelers from the Maldives: <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC6010160/>



### 3. POLICIES SUPPORTING MEDICAL TOURISM

A growing number of governments around the world are recognising the benefits that medical tourism can bring to their economies and are increasingly lending their support to this sub-sector. The policies that best support and stimulate medical tourism include those that are part of the overall tourism strategy of the country, and those that are integrated within the broader Travel & Tourism sector. National and regional governments have an important role to play in the development, management and prioritisation of such policies.

As destinations work towards developing their medical tourism sub-sector, the following elements should be considered as governments develop their strategies and policies:

- **Establishing smart regulation and recognised accreditation/certification of medical practitioners and facilities**
- **Developing enabling visa facilitation policies which support the development of this sub-sector**
- **Defining the skills gap and developing trainings to enhance the talent**
- **Designing and implementing targeted marketing strategies**
- **Creating the financial incentives to attract investment into the sub-sector**

#### REGULATION AND ACCREDITATION SCHEMES

To ensure the quality of medical services and attract foreign tourists, a number of destinations have established recognised regulation and accreditation of medical practitioners and facilities. In **Mexico** for instance, plastic surgeons who meet the required quality standards are certified by the Mexican Board of Plastic Surgery and belong to the Mexican Association of Plastic Surgeons. This ensures not only the quality of services but also reduces the chance of surgical procedures going wrong and the consequent risk of bad publicity. The Mexican state of **Baja California** is the first in the country to implement a public policy on Health and Wellness, aiming to promote health tourism in a responsible manner, protect patients' rights and to ensure that all providers of health services are certified<sup>19</sup>.

At the international level, the **Joint Commission International (JCI)** is one of the leading international health care accreditation organisations, which works to improve patient safety and the quality of health care by offering education, publications and advisory services. In more than 100 countries, JCI partners with hospitals, clinics, academic medical centres, health agencies, government ministries and academia to promote rigorous standards of health care<sup>20</sup>. **Thailand** and **Turkey**, two of the largest medical tourism destinations for international tourists, have 68 and 43 JCI accredited healthcare institutions, respectively.

#### VISA FACILITATION

Select destinations have introduced medical visas to ease the travel process for medical tourists. For instance, **India's** Ministry of Tourism has developed a policy focusing on medical tourism, and as part of it, a new category of 'medical visa' has been introduced. At present, tourists from more than 160 countries can apply for a medical e-visa, pay a fee online, and receive their electronic visa before travelling to India<sup>21</sup>. The number of Foreign Tourist Arrivals (FTAs) in India on a medical visa reached 495,056 in 2017; 15.9% higher than in 2016 (427,014 arrivals) and more than double that of 2015 (234,000 arrivals)<sup>22</sup>.

19 For more information visit: <https://www.bajahealthtourism.com/>

20 For more information visit: <https://www.jointcommissioninternational.org/>

21 For more information visit: <https://www.ivisa.com/india-medical-visa-application>

22 Source: India Brand Equity Foundation (IBEF), 2019: Healthcare

According to the Indian Ministry of Tourism, the top five international source markets for medical tourism in 2017 included Bangladesh, Afghanistan, Iraq, Oman and the Maldives<sup>23</sup>.

The government of **South Korea** also recognised the importance of medical tourism and introduced a medical visa, which is available to tourists wishing to receive medical services in the country from a registered healthcare provider ("facilitator")<sup>24</sup>. Similarly, in **Iran**, the government has introduced a medical visa for those international travellers that have already received an approval letter from one of the authorised medical centres<sup>25</sup>.

#### TRAINING AND SKILLS DEVELOPMENT

Governments have recognised that a highly skilled medical workforce contributes not only to a better functioning domestic healthcare system but is also more likely to attract foreign visitors for medical procedures, thereby increasing spend into the national economy. As such, there has been an increased focus on the training and skills development of medical practitioners in many destinations around the world. With service quality, staff reliability, responsiveness, and empathy shown to have a positive impact on patient satisfaction<sup>26</sup>, it is important to train the workforce to be better not only at medical skills but also at customer service.

National and international accreditation bodies such as the Mexican Association of Plastic Surgery, Institute of Hospital Quality Improvement & Accreditation of Thailand<sup>27</sup>, JCI and many others provide health care organisations with the tools and resources to achieve the continued learning, quality improvement and accreditation success.<sup>28</sup> In **Turkey**, the Association for Evaluation and Accreditation of Medical Education Programs has been established to improve the quality of medical education by providing the evaluation and accreditation for undergraduate medical courses<sup>29</sup>.

The Certified Medical Travel Professional (CMTF), launched in 2012 and managed by Global Healthcare Accreditation, is a training programme and certification that provides participants with a comprehensive overview of the medical tourism industry, latest trends, best practices, key stakeholders and business models. In the **UK**, the Medical Tourism Association (MTA) and Online Travel Training (OTT) have signed a partnership agreement with a goal to educate and engage the country's travel agents in medical tourism. The agreement customised the Certified Medical Tourism Professional (CMTF) certification programme for the UK's travel trade professionals through OTT<sup>30</sup>.

#### TARGETED MARKETING STRATEGIES

Some countries have effectively focused on the promotion of medical tourism to foreign visitors. Strategies include the promotion of specific specialties such as dentistry, cosmetic surgery, cardiovascular procedures, etc., while targeting specific source markets. Some governments have also created special organisations to facilitate and promote medical tourism.

In **Malaysia**, healthcare has been recognised as one of the 12 national key economic areas, and as such the government has

23 Please see the CNN article: <https://edition.cnn.com/2019/02/13/health/india-medical-tourism-industry-intl/index.html>

24 For more information visit: <http://www.mymedholiday.com/country/south-korea/article/182/south-korea-visa-requirements-for-medical-tourists>

25 For more information visit: <https://www.getiranvisa.com/iran-visa/iran-visa-types/>

26 World Applied Sciences Journal 10 (Special Issue of Tourism & Hospitality): 24-30, 2010: Service Quality and Patients' Satisfaction in Medical Tourism

27 For more information visit: <https://www.ha.or.th/EN/Home>

28 For more information visit: <https://www.jointcommissioninternational.org/store/>

29 For more information visit: <http://tepdad.org.tr/en>

30 For more information visit: <https://www.traveldailynews.com/post/uks-first-dedicated-medical-tourism-travel-trade-training-and-booking-platform>

identified medical tourism as an important sub-sector for the national economy. It established the Malaysia Healthcare Travel Council (MHTC), which facilitates and promotes the healthcare travel industry of the country by coordinating industry collaborations and building valuable public-private partnerships, both domestically and abroad. Its main goal is to create a seamless end-to-end healthcare journey experience for all visitors<sup>31</sup>. The MHTC seeks to attract not only the citizens of Indonesia, its core market, but also higher spending medical tourists from other countries<sup>32</sup>. The MHTC has opened offices in Indonesia, Myanmar, Vietnam and China and continues to strengthen its network.

**India's** Ministry of Tourism has taken several steps to promote the country as a medical and health tourism destination. The Indian Healthcare Federation, a non-governmental organisation, has prepared an online hospital guide, while brochures and other publicity materials have been widely circulated for promotion in target markets. Medical tourism has also been promoted at various international events such as the World Travel Market (WTM) in London, and ITB Berlin. Moreover, under the marketing strategy of the Ministry of Tourism, the Marketing Development Assistance Scheme (MDA) provides financial support to approved tourism service providers.

In **South Korea**, the government certifies medical tourism providers ('official facilitators') and lists their details in the promotional guidebook. The Ministry of Health and Welfare jointly with the Ministry of Culture, Sports and Tourism operates the medical tourism information centre at the Incheon international airport in Seoul for the convenience of foreign tourists who may want to book medical procedures and additional tourism services after arriving in the country<sup>33</sup>. Moreover, Incheon City and Incheon Tourism Corp. have selected China, Russia, Central Asia and Southeast Asia as the four major strategic markets and are pursuing a targeted marketing strategy for each region<sup>34</sup>. South Korea's marketing strategies have focused on select destinations and districts within **Seoul**. One example is Gangnam district, which has become well-known for its medical tourism, particularly for cosmetic surgery procedures<sup>35</sup>. The South Korean government has worked closely with private sector partners, notably, the LOTTE City Hotel Mapo in Seoul, whose parent company is WTTC Member **LOTTE Group**. The LOTTE City Hotel works in partnership with the major hospitals and clinics in South Korea<sup>36</sup>, providing services and special benefits to medical tourists, and thereby supporting the country's medical tourism.

The Government of **Portugal**, in collaboration with a WTTC Destination Partner **Turismo de Portugal**, announced the launch of #Brelcome Health, a campaign specifically developed for the UK tourists planning to visit the country for health treatments. With the UK being one of the largest source markets for Portugal, the campaign is part of the wider tourism initiative aiming to reaffirm Portugal's ongoing commitment to UK citizens, irrespective of the Brexit outcome. As part of the campaign, Portugal will offer high quality health care services to UK

citizens at three of the country's largest private healthcare providers - Lusiadass, CUF and Hospital da Luz. In addition, the 'Portugal Health Passport' has also been launched, offering tourists premium health care services (both emergency care and preventive medicine)<sup>37</sup>.

In the **United Arab Emirates (UAE)**, in **Abu Dhabi**, WTTC Member company **Etihad Airways** (the emirate's principal airline), and Cleveland Clinic Abu Dhabi, the multi-specialty hospital, have signed an agreement. This, the first of its kind in the region between an airline and medical services provider, will see the two organisations collaborate to promote Abu Dhabi as a leading medical tourism destination. As part of the agreement, Etihad will offer medical travel packages to key markets around the world, delivering a single solution for booking flights, accommodation and medical treatments at the clinic. The collaboration was announced in October 2019 as part of both companies' support for Abu Dhabi's wider strategy to become a leading centre for medical tourism, which was announced earlier this year by Abu Dhabi's Department of Health and WTTC Destination Partner, the **Abu Dhabi Department of Culture and Tourism**<sup>38</sup>.

**Côte d'Ivoire** has prioritised medical tourism after quantifying its potential benefits. The country's tourism strategy 2025, which is just starting, consists of nine reforms, one of which is health. The government is working on positioning its largest city Abidjan as a regional hub for accessible and quality healthcare. To support medical tourism, Côte d'Ivoire is planning to develop hospitality services to meet the international market needs, collaborate with travel agencies to create medical packages and sign agreements with health insurance companies of neighbouring countries. By 2025, Côte d'Ivoire aims to welcome 40,000 international patients per year, which is forecast to lead to an increase in 20,000 new jobs and USD\$118 million in direct and indirect contributions to national GDP<sup>39</sup>.

### ATTRACTING INVESTMENT INTO THE SUB-SECTOR

To support the development of medical tourism, ongoing investment into this sub-sector is needed. For instance, in **Turkey**, the government has supported the sub-sector by building the infrastructure, such as hospitals, and providing financial incentives to attract private investment. The Ministry of Commerce as well as the Ministry of Treasury and Finance have provided incentives such as tax reductions to companies investing into the medical sector. One recent example of private investment is the establishment of Acibadem Altunizade Hospital in **Istanbul**, by Acibadem Healthcare Group, with its strategy focused on increasing revenues from medical tourism<sup>40</sup>.

In 2014, the **emirate of Dubai** in the **UAE** unveiled the Dubai Medical Tourism Strategy, under the responsibility of the Dubai Health Authority (DHA), to develop and implement policies that improve the quality of healthcare services and encourage investment into the sub-sector<sup>41</sup>. To support the strong growth of medical tourism, which already grew from 107,000 in 2012 to 326,000 patients in 2016, the DHA continues to roll out its 12-year master plan (announced in 2013<sup>42</sup>), which includes the creation of 40 primary healthcare centres and three new hospitals<sup>43</sup>.

It is important to acknowledge the **contribution of the private sector** to the development of medical tourism. Examples of larger, private, sector-led investment into medical and health facilities include Nicklaus Children's Hospital in Miami (formerly Miami Children's Hospital), Baylor University Medical Center in Dallas, and Cancun Health City. While the two US hospitals are well established centres for patient care, medical training and research, the Cancun Health City is currently under construction. Once completed, the site will be home to a large medical tourism complex which will also provide hotels, shopping centres, convention centres, spas, housing areas, office buildings and areas for scientific research<sup>44</sup>.

31 Research for TRAN Committee – Health tourism in the EU: a general investigation, 2017, and Malaysia Healthcare Travel Council: <https://www.mhtc.org.my/>  
 32 Research for TRAN Committee – Health tourism in the EU: a general investigation, 2017  
 33 International Medical Travel Journal, 2019: New Centre for Foreign Patients at Incheon Airport: <https://www.imtj.com/news/new-centre-foreign-patients-incheon-airport/>  
 34 International Medical Travel Journal, 2018: Korean Medical Tourism Centre Opens in Russia: <https://www.imtj.com/news/korean-medical-tourism-centre-opens-russia/>  
 35 For more information visit: <http://medicaltour.gangnam.go.kr/main.do?lang=en>  
 36 For more information visit: <https://www.lottehotel.com/mapo-city/en/hotel-offers/partnership/affiliates.html>

37 For more information visit: <https://www.traveldailynews.com/post/turismo-de-portugal-launches-brelcome-health-campaign-aimed-at-british-tourists> and <https://www.visitportugal.com/en/content/brelcome>  
 38 For more information visit CAPA: <https://centreforaviation.com/members/direct-news/etihads-first-partnership-deal-to-promote-abu-dhabi-medical-tourism-499445>  
 39 Côte d'Ivoire, Ministère du Tourisme: Sublime Côte d'Ivoire, Stratégie touristique ivoirienne 2025  
 40 For more information visit: <https://www.dailysabah.com/business/2017/03/21/acibadem-group-opens-22nd-hospital-with-200m-investment>  
 41 For more information visit: <https://www.dha.gov.ae/en/HealthRegulation/pages/dubaimedicaltourismprogram.aspx>  
 42 For more information visit: <https://gulfnnews.com/uae/health/the-state-of-the-uaes-health-2016-11658937>  
 43 For more information visit: <https://www.visitdubai.com/en/business-in-dubai/why-dubai/news-and-insights/medical-tourists-healthcare-industry>  
 44 For more information, please check Travel Weekly article: <https://www.travelweekly.com/Mexico-Travel/Insights/Medical-tourism-on-the-rise-in-Cancun>

## 4. CONCLUSION

Medical tourism has become an important niche market over recent years, supported by various government policies and private sector initiatives across the world. Countries have recognised the opportunities that medical tourism brings as a catalyst for social and economic development and its potential to support quality education, highly skilled workers, favourable visa policies, promotion of a country's attractiveness, and well-developed infrastructure within a country. As more governments recognise these benefits and develop strategies and policies for this sub-sector, WTTC expects that with the right policies, support and regulation, medical tourism can continue to grow across developed and emerging economies.

## 5. ACKNOWLEDGMENTS

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## 6. APPENDICES

### APPENDIX 1: MEDICAL TOURISM DATA TABLES

Table 1: Top 25 countries in inbound medical tourism spending

	COUNTRY	INBOUND MEDICAL TOURISM SPENDING (US\$ MN)	INBOUND MEDICAL TOURISM SPENDING AS % OF TOTAL INBOUND SPENDING	DATA REFERENCE YEAR
1	United States	3,930	1.9%	2017
2	France	800	1.3%	2017
3	Turkey	763	3.4%	2017
4	Belgium	636	5.1%	2017
5	Thailand	589	1.0%	2017
6	Jordan	504	10.9%	2017
7	Costa Rica	451	12.1%	2017
8	United Kingdom	420	0.8%	2017
9	Hungary	417	6.7%	2017
10	South Korea	415	3.1%	2017
11	Mexico	315	1.5%	2017
12	India	305	1.1%	2017
13	Czech Republic	265	3.8%	2017
14	Croatia	218	2.0%	2017
15	Poland	127	1.0%	2017
16	Canada	127	0.8%	2015
17	Vietnam	122	4.0%	2009
18	Armenia	115	10.3%	2017
19	Iran	90	18.0%	2000
20	Netherlands	84	0.6%	2015
21	Tunisia	79	6.1%	2017
22	Luxembourg	76	1.8%	2015
23	Brazil	73	1.3%	2017
24	Philippines	69	1.0%	2017
25	Greece	62	0.4%	2017

Table 2: Top 25 countries in outbound medical tourism spending

	COUNTRY	OUTBOUND MEDICAL TOURISM SPENDING (US\$ MN)	OUTBOUND MEDICAL TOURISM SPENDING AS % OF TOTAL OUTBOUND SPENDING	DATA REFERENCE YEAR
1	United States	2,320	1.7%	2017
2	Kuwait	1,569	12.7%	2015
3	Nigeria	783	13.5%	2017
4	Netherlands	678	3.6%	2015
5	France	600	1.4%	2017
6	Oman	492	21.0%	2017
7	Canada	444	1.5%	2015
8	Belgium	409	2.0%	2017
9	Austria	334	3.1%	2017
10	Germany	300	0.3%	2017
11	Egypt	295	13.6%	2017
12	United Kingdom	270	0.4%	2017
13	Panama	133	14.5%	2017
14	Maldives	121	39.8%	2017
15	Czech Republic	120	2.2%	2017
16	Armenia	120	9.4%	2017
17	Libya	94	5.8%	2016
18	Luxembourg	91	3.3%	2015
19	Bermuda	91	35.8%	2017
20	Albania	85	6.0%	2017
21	Mexico	85	0.8%	2017
22	Algeria	85	14.6%	2017
23	Sweden	82	0.7%	2010
24	South Korea	80	0.3%	2017
25	Philippines	66	0.5%	2017

## APPENDIX 2: METHODOLOGICAL NOTE

For the purpose of this report, medical tourism refers to 'health-related personal travel' by the International Monetary Fund (IMF), and to the products and services bought by people who travel abroad for medical and health-related reasons. This includes spending on food, accommodation, and local transport – either by individuals, or, at times, funded or even prompted by governments<sup>45</sup>, when the primary purpose of travel is to receive health or medical services.

Data on international health-related travel services is sourced from the IMF Balance of Payments dataset, which is also the primary data source used for international Travel & Tourism spending in WTTC's annual economic impact research. Data on inbound and/or outbound medical tourism spending is available for 115 of the 185 countries covered by the WTTC Travel & Tourism economic impact research. It is important to note that for most countries in this analysis, data is only available for a short time series or for a single year, making countries' comparisons across years difficult to achieve.

Inbound medical tourism spending data is available for ten of the T20 economies – Brazil, Canada, France, India, Italy, South Korea, Mexico, Turkey, UK and USA. This means that analysis of medical tourism has not been possible for several major economies, including China, Germany and Japan.

Our research has focussed solely on international medical tourism due to the lack of published data on domestic medical tourism in Tourism Satellite Accounts (TSAs).

Other papers exploring health tourism, such as, from the European Travel Commission/UNWTO (2018)<sup>46</sup> and the Research for TRAN Committee – Health tourism in the EU (2017)<sup>47</sup> go into greater detail on the conceptualisation of health tourism.



45 <https://www.nhs.uk/using-the-nhs/healthcare-abroad/going-abroad-for-treatment/going-abroad-for-medical-treatment/>

46 European Travel Commission/UNWTO, 2018: Exploring Health Tourism

47 Research for TRAN Committee – Health tourism in the EU: a general investigation, 2017



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