



MEDICAL TRAVEL
WORKSHOP 2018

KRAKOW, POLAND

23 OCTOBER 2018

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Editor in Chief, International Medical Travel Journal

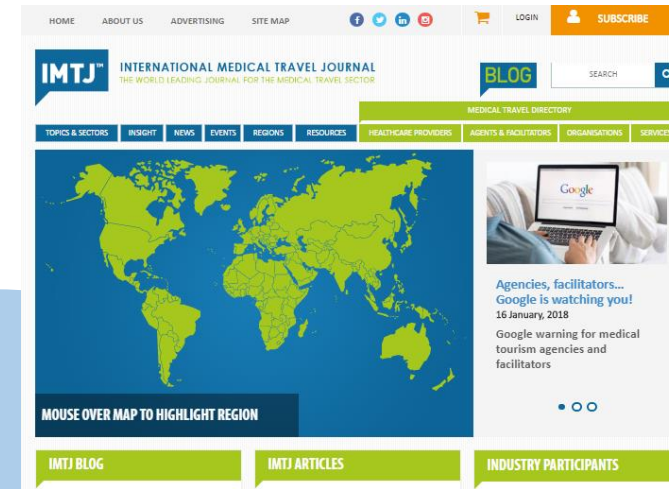
LAINGBUISSON



The screenshot shows the 'Treatment Abroad' website with a search and comparison interface. The header includes navigation links like 'ABOUT MEDICAL TRAVEL', 'OPERATIONS AND PROCEDURES', 'HOSPITALS AND CLINICS', 'AGENCIES', 'MEDICAL TRAVEL SERVICES', 'POPULAR DESTINATIONS', 'COSTS', and 'PATIENT STORIES'. The main content area features a search bar and a 'COMPARE' section with filters for 'I want a:', 'in the following countries:', and 'Include medical travel agencies?'. A sidebar on the right highlights 'Modern functional and efficient Health Unit' and 'More than 3000 surgeries per year'. A banner at the bottom promotes 'Breast Augmentation'.

PATIENT
ACQUISITION

DATA
SOLUTIONS



The screenshot displays the 'International Medical Travel Journal (IMTJ)' website. The header includes navigation links like 'HOME', 'ABOUT US', 'ADVERTISING', 'SITE MAP', and 'SUBSCRIBE'. The main content area features a world map with a 'MOUSE OVER MAP TO HIGHLIGHT REGION' prompt. A sidebar on the right includes a 'BLOG' section with a search bar and a featured article titled 'Agencies, facilitators... Google is watching you!'. The bottom navigation bar includes 'IMTJ BLOG', 'IMTJ ARTICLES', and 'INDUSTRY PARTICIPANTS'.

CONSULTING

MARKET
INTELLIGENCE



The screenshot shows the 'Fertility Treatment Abroad' website with a search and comparison interface. The header includes navigation links like 'About infertility', 'Going abroad for treatment', 'Treatments', 'Clinics', 'Agencies', 'Countries', 'Costs', 'Patient stories', and 'My fertility treatment'. The main content area features a search bar and a 'COMPARE' section with filters for '1 Search', '2 Compare', and '3 Enquire'. A sidebar on the right highlights '2 centers Olomouc / Ostrava' and '20 years of experience'. A banner at the bottom promotes 'Why travel abroad for fertility treatment?'.

AN **INTERNATIONAL** BUSINESS



OBJECTIVES FOR TODAY

- IMPROVE **YOUR UNDERSTANDING** OF THE MARKET
- SHARE **KNOWLEDGE AND EXPERIENCE**
- INCREASE YOUR CHANCES OF **SUCCESS**





MEDICAL TRAVEL
WORKSHOP **2018**

SESSION 1
MEDICAL TRAVEL -
THE GLOBAL PICTURE

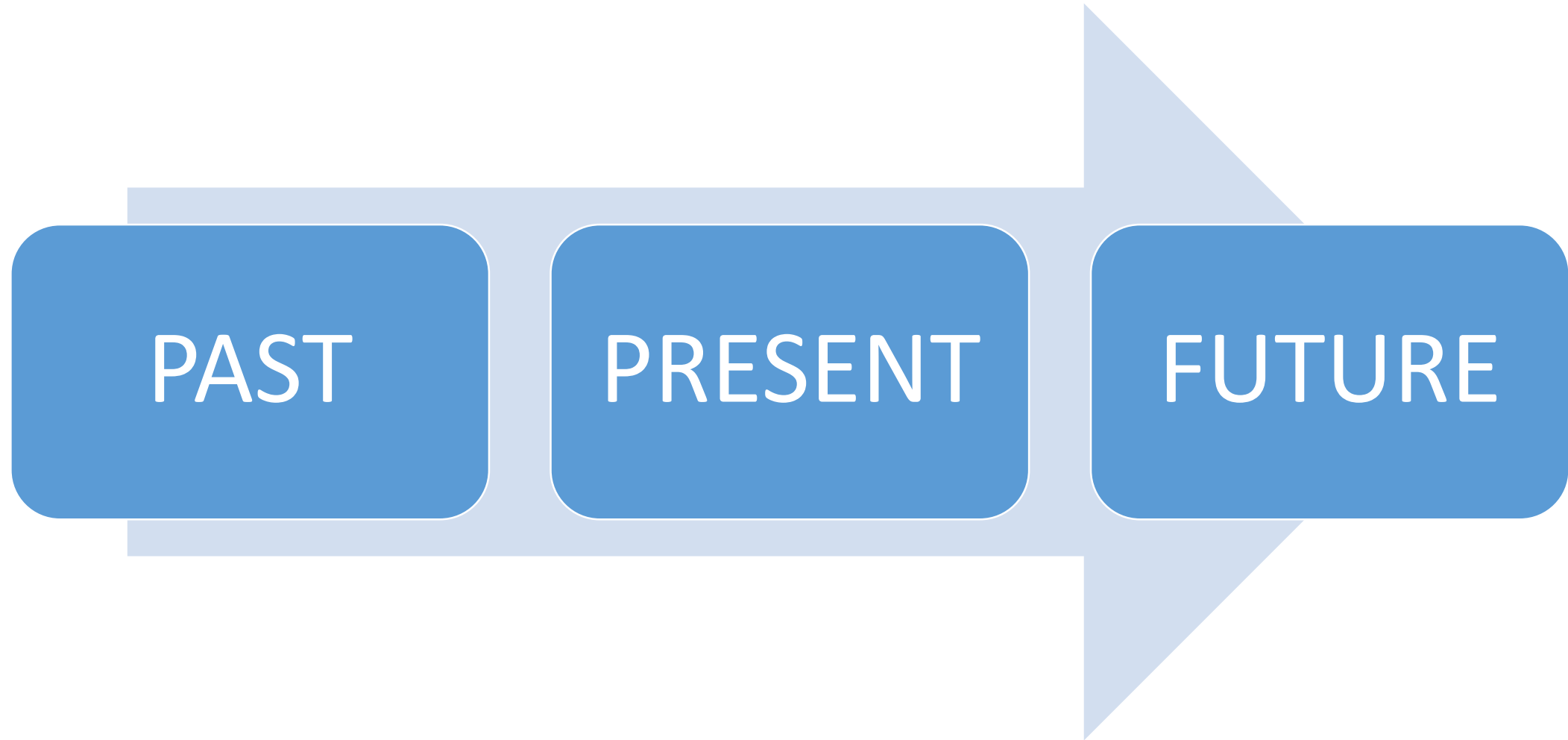
SESSION 2
CREATING A UNIQUE
VALUE PROPOSITION



MEDICAL TRAVEL
WORKSHOP **2018**

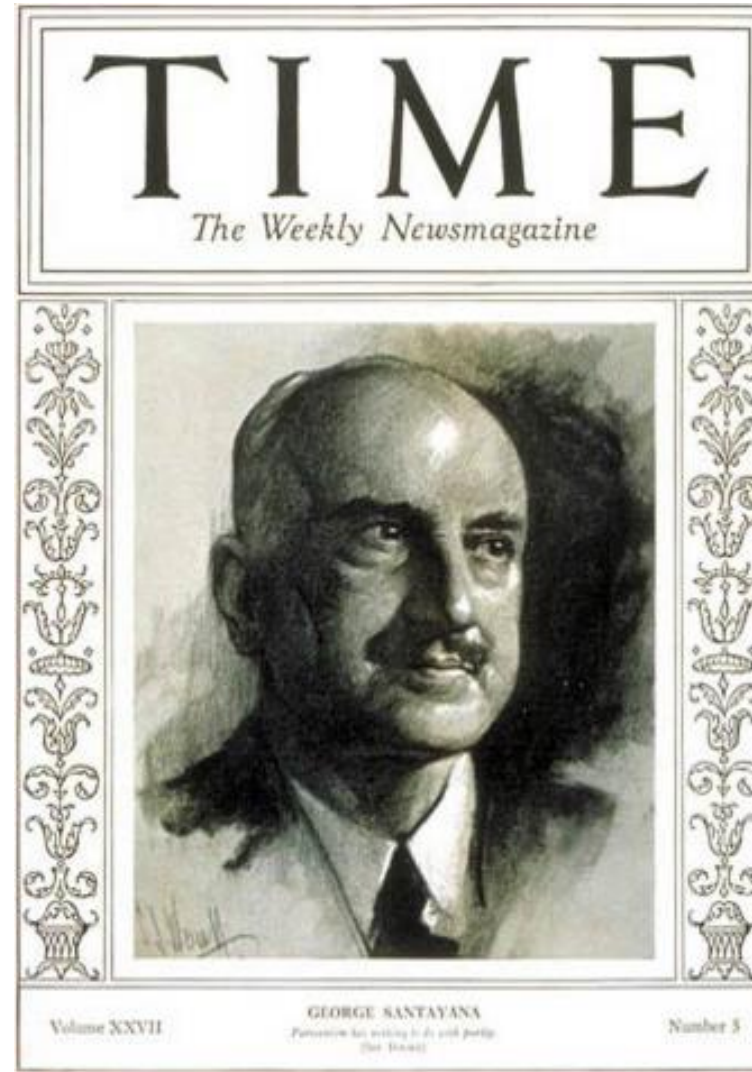
SESSION 1
MEDICAL TRAVEL -
THE GLOBAL
PICTURE

MEDICAL TRAVEL



" Those who do not remember the past are condemned to repeat it. "

George Santayana, *The Life of Reason*, 1905



THE MEDICAL TOURISM “GOLD RUSH”



Bulgaria
Cayman Islands
Costa Rica
Croatia
Cyprus
Czech Republic
Estonia
Ethiopia
France
Germany
Hungary
India
Indonesia
Iran

Italy
Jamaica
Korea
Latvia
Lithuania
Luxembourg
Malaysia
Malta
Mauritius
Mexico
Philippines
Poland
Portugal

Romania
Slovakia
Slovenia
Spain
Thailand
Turkey
UAE
Etc...
Etc...

BELIEVING THE HYPE!

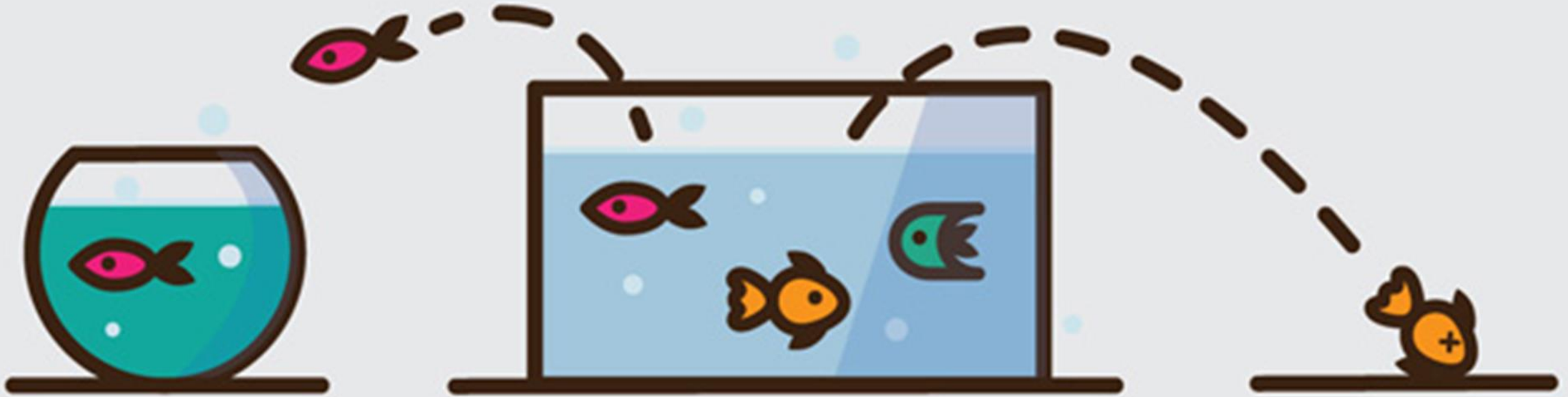
“An estimated 11 million health care consumers pumped US\$438.6 billion into local and national economies overseas this year alone – that’s 14 per cent of the world’s tourism dollars.”

“...according to the Medical Tourism Association (MTA).”

EXPONENTIAL GROWTH?



HIGH CHURN RATE





“So....
What mistakes have they made?”

1. Believing the hype

2. Lack of a clear strategy

3. Putting promotion, price and place before product



THE MARKET... HOW BIG IS IT?

\$5 BILLION?

\$38 BILLION?

\$65 BILLION?

\$100 BILLION?

\$400 BILLION?



THE HONEST ANSWER

**NO ONE
KNOWS!**



WHY?

BECAUSE

- NO AGREED DEFINITION
- DIFFERENT WAYS OF COUNTING



WHO IS A MEDICAL TOURIST?



MEDICAL TOURIST?



AYMAN
From Qatar
went to Boston
for heart
surgery,
funded by his
government.

MEDICAL TOURIST?



MATILDA
From Sweden,
made two visits
to Poland for
dental implants.

MEDICAL TOURIST?



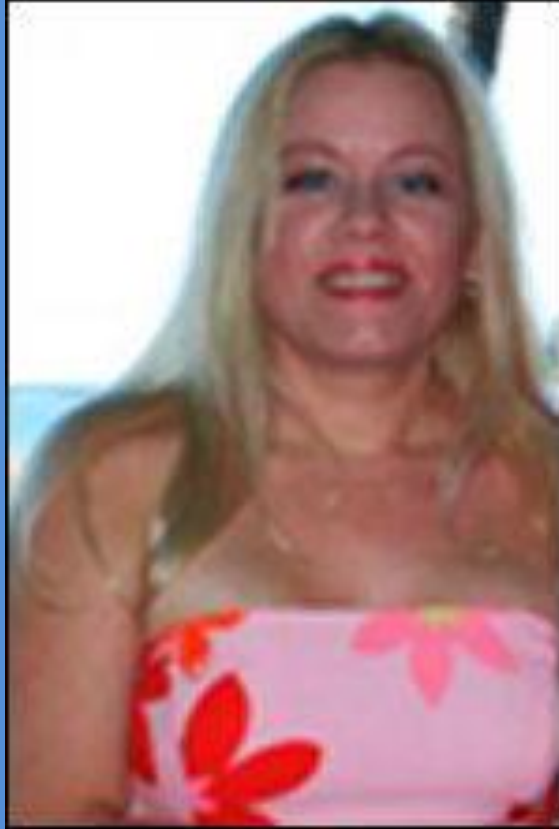
BILL AND SUE
Went from the
UK to Czech
Republic for IVF

MEDICAL TOURIST?



ADA
From
Germany,
Broke her leg,
on holiday in
Morocco

MEDICAL TOURIST?



LINDA
Went to a
health and
wellness spa
in Hungary

2. Lack of a clear strategy

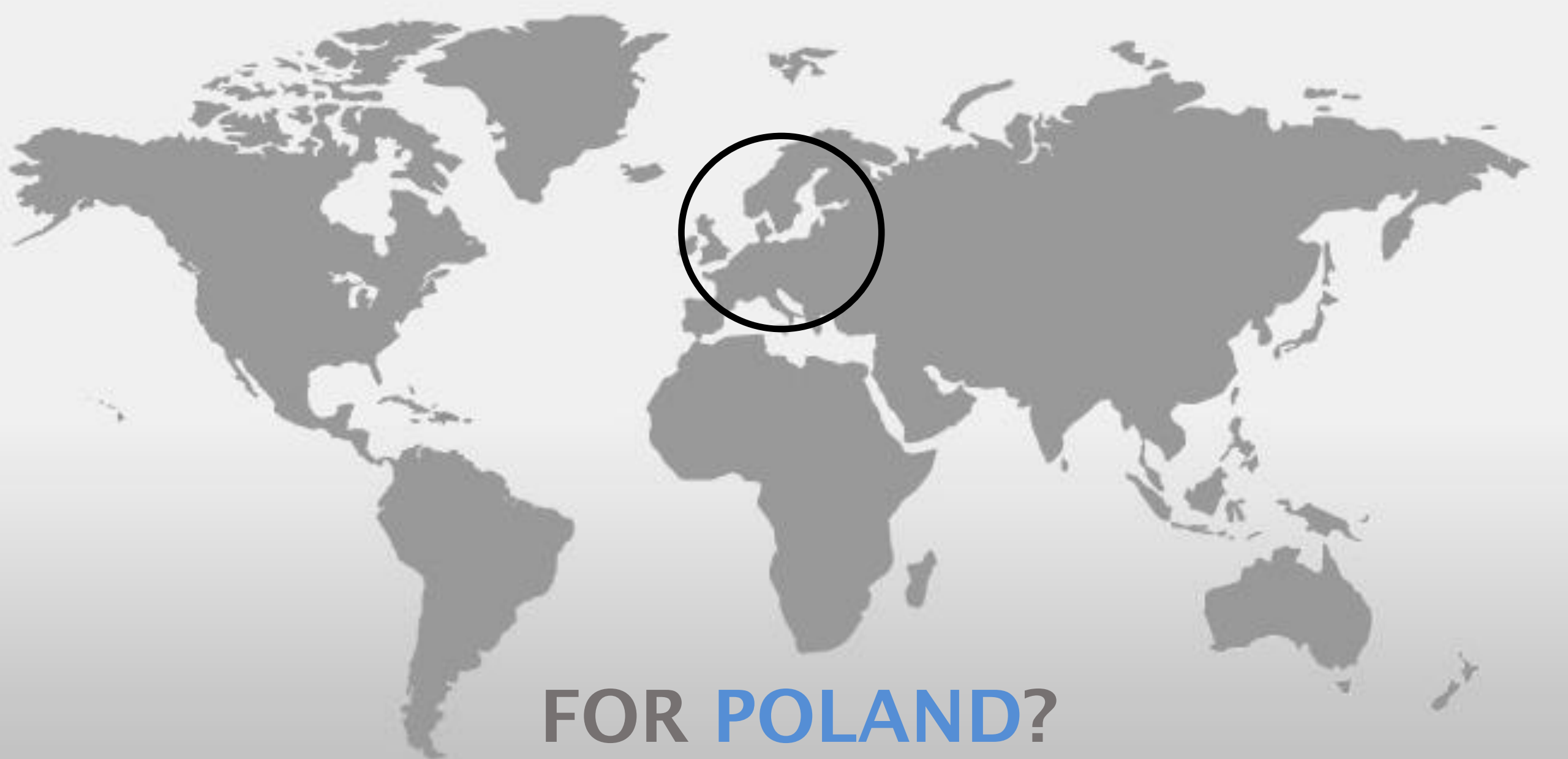




GLOBAL HEALTHCARE



IT'S LOCAL... **NOT GLOBAL**



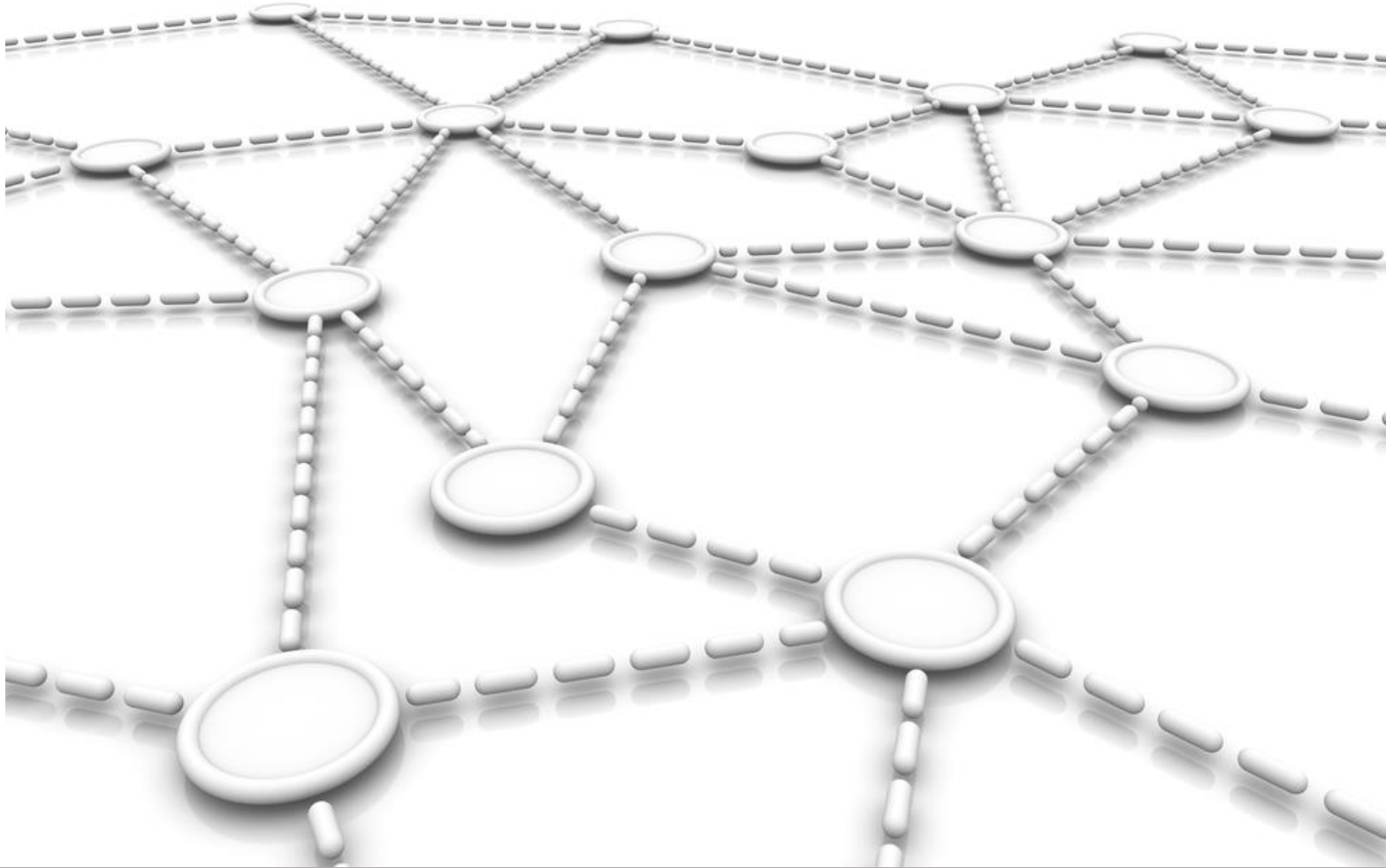
FOR POLAND?

**“I DON’T KNOW THE
KEY TO SUCCESS...**

**BUT THE KEY TO
FAILURE IS TRYING TO
PLEASE EVERYBODY”**



THE MEDICAL TOURISM MARKET



TWO WAY TRAFFIC



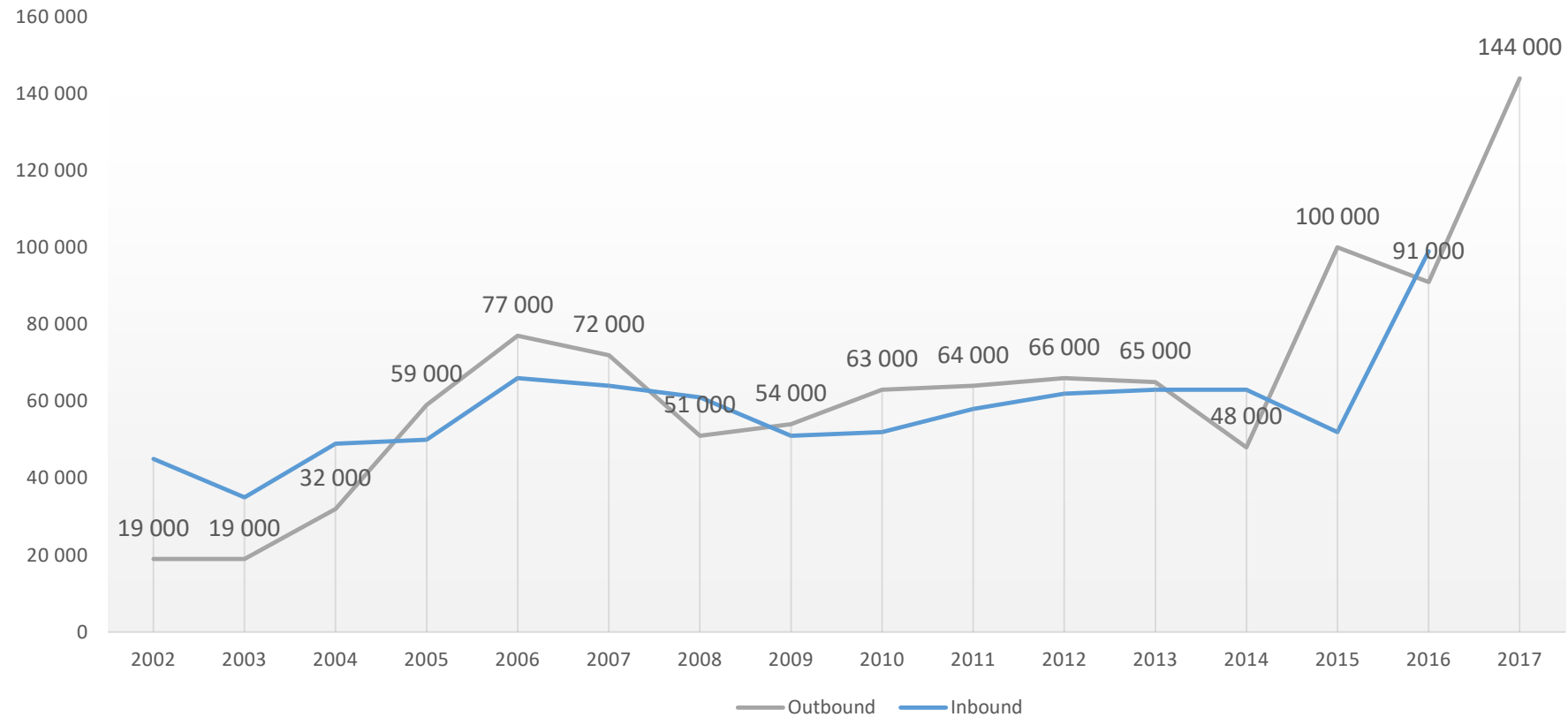
UK MEDICAL TOURISTS

- INTERNATIONAL PASSENGER SURVEY
- 1 IN 20 TRAVELLERS



UK-MEDICAL TRAVELLERS

UK medical tourists: IPS data



A CHANGING MARKET



EXAMPLE:
THE CHANGING
NATURE OF MEDICAL
TRAVEL IN THE GCC

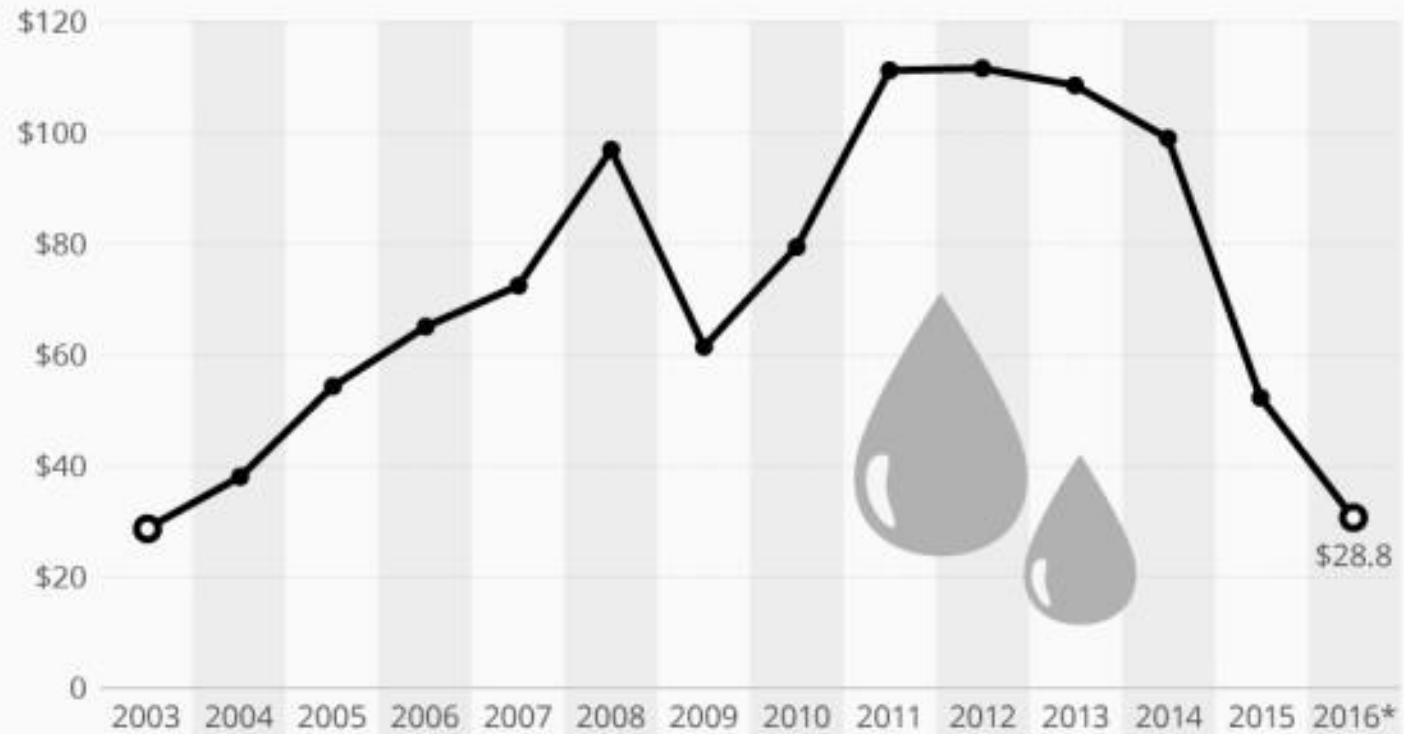
**WHAT'S
CHANGED?**



OIL PRICE

UK Brent Crude Oil Price Annually 2003-2016

Average annual UK Brent crude oil price in U.S. dollars per barrel



@StatistaCharts

* Preliminary

Source: Opec / IEA

THE HUFFINGTON POST **statista**

GCC: MARKET CHANGE

OIL PRICE FALL →→→

1. REDUCED GOVERNMENT SPEND
2. COMPULSORY HEALTH INSURANCE
3. LOCAL INVESTMENT IN HOSPITALS





[Home](#) > [News](#) > [Mandatory health insurance for Omanis and expatriates](#)

MANDATORY HEALTH INSURANCE FOR OMANIS AND EXPATRIATES

26 September 2016

CURRENT TAGS:

COUNTRY: [India](#), [Oman](#), [Thailand](#)

TOPICS: [Insurance](#)

Compulsory health insurance will reduce outbound medical tourism. Oman government plans to make health insurance mandatory for both Omanis and expatriates.



Compulsory health insurance will help residents and citizens of Oman to **enjoy better medical services in the Sultanate.**

The aim is to **get a better spread of patients between private and public hospitals.** Public hospitals and clinics are overloaded with patients, which ultimately affects the quality of service and

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ADD A NEWS ITEM

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Publish for FREE on IMTJ.

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RELATED NEWS

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Business

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Legal Clinic

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OVERSEAS TREATMENT CASES DOWN BY 80PC

🕒 2 weeks ago

KUWAIT CITY, Sept 20, (KUNA): The Health Ministry revealed Wednesday that the number of Kuwaitis seeking medical treatment abroad down by 80 percent in first quarter of 2017. The ministry revealed that the number of cases was at 2,927 cases compared to the same period in 2016, which was at 13,352 cases. Meanwhile, this retreat was attributed to Health Ministry's strict measures to inspect each medical case and determine whether treatment abroad was necessary.

👍 Like 19

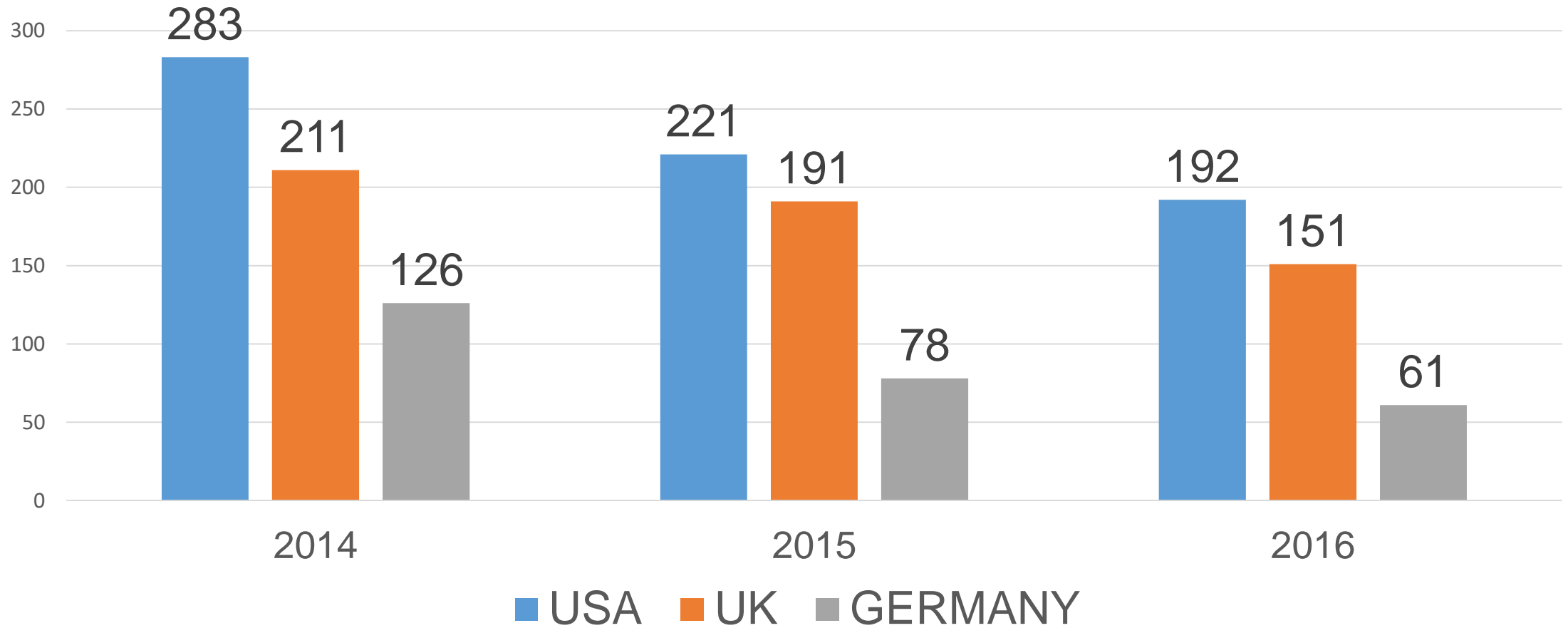
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QATAR

GOVERNMENT FUNDED PATIENTS



Source: Supreme Council of Health

IMPACT OF CHANGE: UK

“Admissions from the Middle East, an important part of HCA's London business, were down 33% in the second quarter.”

The screenshot shows a news article from EON Enhanced Online News. The article is titled "HCA Reports Second Quarter 2017 Results" and is dated July 25, 2017, at 08:30 AM Eastern Time. The article text states: "NASHVILLE, Tenn.--(EON: Enhanced Online News)--HCA Healthcare, Inc. (NYSE: HCA) today announced financial and operating results for the second quarter ended June 30, 2017." It lists key second quarter metrics: Revenues increased 4.0 percent to \$10.733 billion; Net income attributable to HCA Healthcare, Inc. totaled \$657 million, or \$1.75 per diluted share; Adjusted EBITDA totaled \$2.090 billion; Cash flows from operations totaled \$1.404 billion; Same facility equivalent admissions increased 1.3 percent while same facility admissions increased 0.8 percent; and Same facility revenue per equivalent admission increased 2.0 percent. A detailed paragraph follows, comparing 2017 results to 2016: "Revenues in the second quarter increased to \$10.733 billion, compared to \$10.319 billion in the second quarter of 2016. Net income attributable to HCA Healthcare, Inc. totaled \$657 million, or \$1.75 per diluted share, compared to \$658 million, or \$1.65 per diluted share, in the second quarter of 2016. The Company recognized tax benefits of \$9 million, or \$0.02 per diluted share, and \$44 million, or \$0.11 per diluted share, for the second quarters of 2017 and 2016, respectively, related to the recording of excess tax benefits for employee equity award settlements as a component of the provision for income taxes. Adjusted EBITDA totaled \$2.090 billion compared to \$2.052 billion in the second quarter of 2016. Adjusted EBITDA is a non-GAAP financial measure. A table reconciling net income attributable to HCA Healthcare, Inc. to Adjusted EBITDA is included in this release." The article concludes with: "The second quarter 2016 results included gains on sales of facilities of \$6 million, or \$0.01 per diluted share, and legal claim costs of \$10 million, or \$0.02 per diluted share." The page includes social media sharing options (Like, Tweet, G+, LinkedIn, Save, Share, Email, Print) and a sidebar with a thumbnail of the article and links to the HCA website, news feed, and NYSE:HCA.

IMPACT OF CHANGE: GERMANY

“Klinikum Stuttgart,... the international unit that treated 5,500 patients a year, has been closed down.”

“For a Kuwaiti contract the unit was due 7.1 million euros and has only had 5.4 million.”

The screenshot shows the homepage of the International Medical Travel Journal (IMTJ). The navigation bar includes links for HOME, ABOUT US, ADVERTISING, SITE MAP, and a SUBSCRIBE button. The main header features the IMTJ logo and the tagline 'INTERNATIONAL MEDICAL TRAVEL JOURNAL - THE WORLD LEADING JOURNAL FOR THE MEDICAL TRAVEL SECTOR'. Below the header is a 'MEDICAL TRAVEL DIRECTORY' and a search bar. The article title 'GERMAN HOSPITAL CLOSES INTERNATIONAL UNIT' is prominently displayed, along with the date '31 January 2017'. The article text discusses the closure of the international unit at Klinikum Stuttgart, mentioning a 7.1 million euro contract and a 5.4 million euro actual amount. An image of a black funnel with Euro banknotes falling into it is used as a visual metaphor. The article also includes a section for 'CURRENT TAGS' and a 'RELATED NEWS' section. On the right side, there is an advertisement for 'AROGYA 2017' and a 'ADD A NEWS ITEM' button.

HOME ABOUT US ADVERTISING SITE MAP f t in y LOGIN SUBSCRIBE

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

BLOG SEARCH

MEDICAL TRAVEL DIRECTORY

TOPICS & SECTORS INSIGHT NEWS EVENTS REGIONS RESOURCES HEALTHCARE PROVIDERS AGENTS & FACILITATORS ORGANISATIONS SERVICES


Home > News > German Hospital closes international unit

GERMAN HOSPITAL CLOSES INTERNATIONAL UNIT

31 January 2017

CURRENT TAGS:
COUNTRY: Germany, Kuwait, Saudi Arabia
TOPICS: Agencies and facilitators, Finance, Statistics and Data

Losses on international patients lead to closure of international unit at top German hospital.



Klinikum Stuttgart is one of the largest hospitals in the state capital, with 2000 beds, 7,000 employees and an annual turnover of 650 million euros.

After audits and investigations, the international unit that treated 5,500 patients a year has been closed down. New top management has been appointed. The hospital will still take international

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COMPREHENSIVE EXHIBITION ON AYURVEDA, YOGA, NATUROPATHY, UNANI, SIDDHA, SOWA-RIGPA, HOMOEOPATHY & CONFERENCE ON AYUSH & WELLNESS

AROGYA 2017
1st International Exhibition & Conference on AYUSH & Wellness
4 - 7 December 2017, Vigyan Bhawan, New Delhi
www.internationalarogya.com

ADD A NEWS ITEM

Do you have some news or a press release that you'd like to share with the medical travel industry?

Publish for FREE on IMTJ.

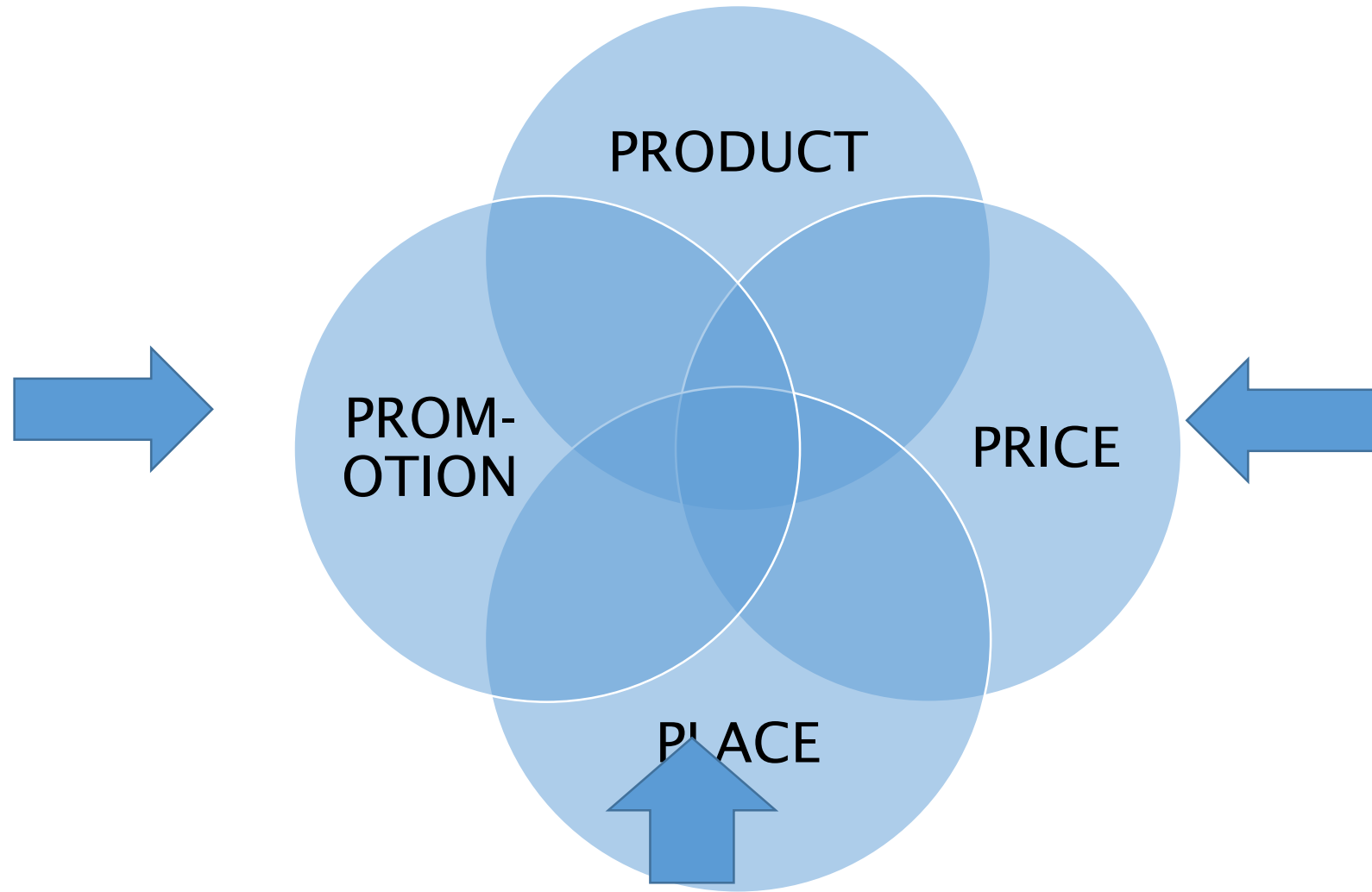
ADD NEWS ▶

RELATED NEWS

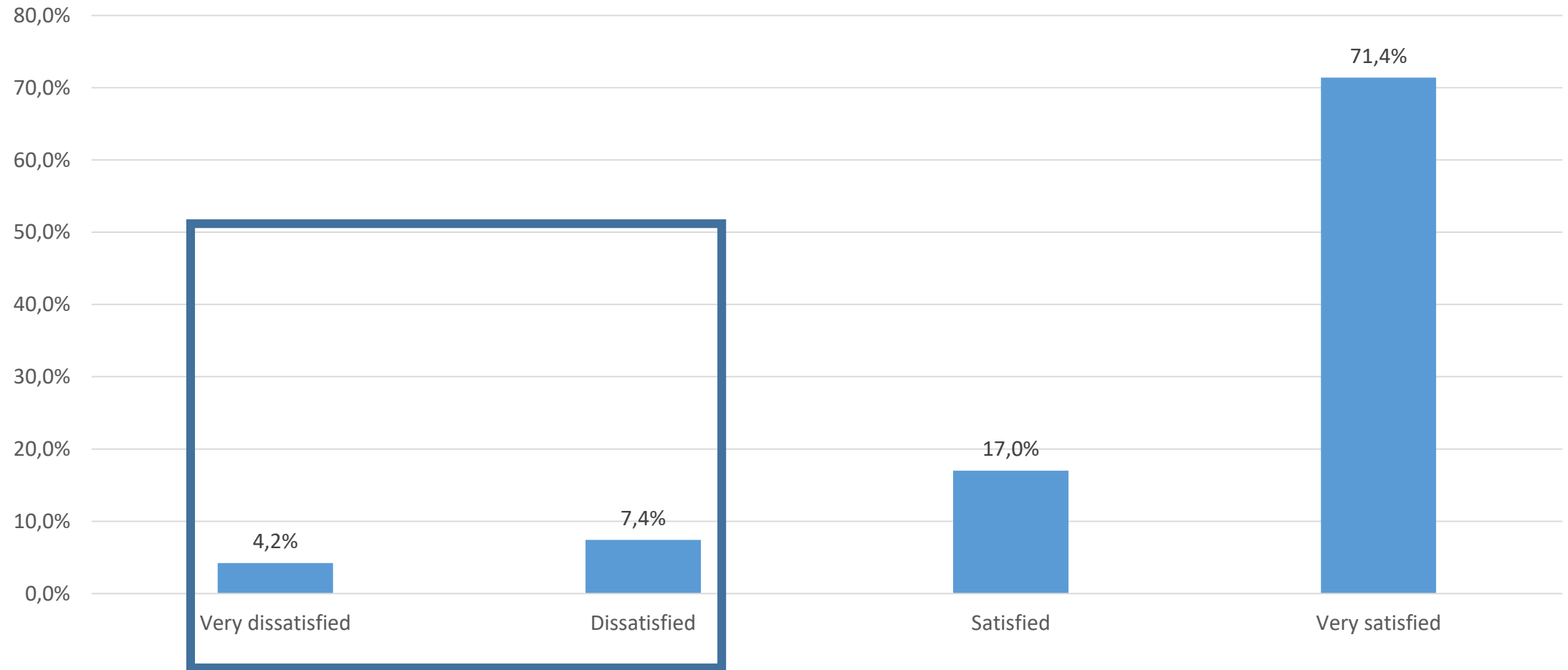
3. Putting promotion, price and place before product



THE FOUR “P”S OF MARKETING



PATIENT (DIS)SATISFACTION



Source: Treatment Abroad: Medical Tourist Survey 2017

AND THIS... IS WHAT HAPPENS

The Telegraph Search - enhanced by Google

Saturday 22 June 2013

Home News World Sport Finance Comment Blogs Culture Travel **Life** Women Fashion Tech Dating Offers Jobs

Women Motoring Health Property Gardening Food History Relationships Expat Puzzles Announcements Shop

Health News Health Advice Diet and Fitness Wellbeing Expat Health Pets Health

HOME > HEALTH > HEALTH NEWS

NHS spending millions fixing botched plastic surgery done abroad

NHS surgeons are having to fix botched plastic surgery after patients seek cheap deals abroad.

Up to 100,000 people a year are heading abroad for cheap cosmetic surgery Photo: PA

By **Rebecca Smith, Medical Editor**
11:35AM GMT 03 Dec 2008

[Comment](#)

Thousands of patients travel to eastern Europe, South Africa and elsewhere for cheap cosmetic surgery and then have to rely on NHS doctors if they suffer complications.

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In Health News

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Telegraph Politics

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REMOVE **RISK** AND
UNCERTAINTY

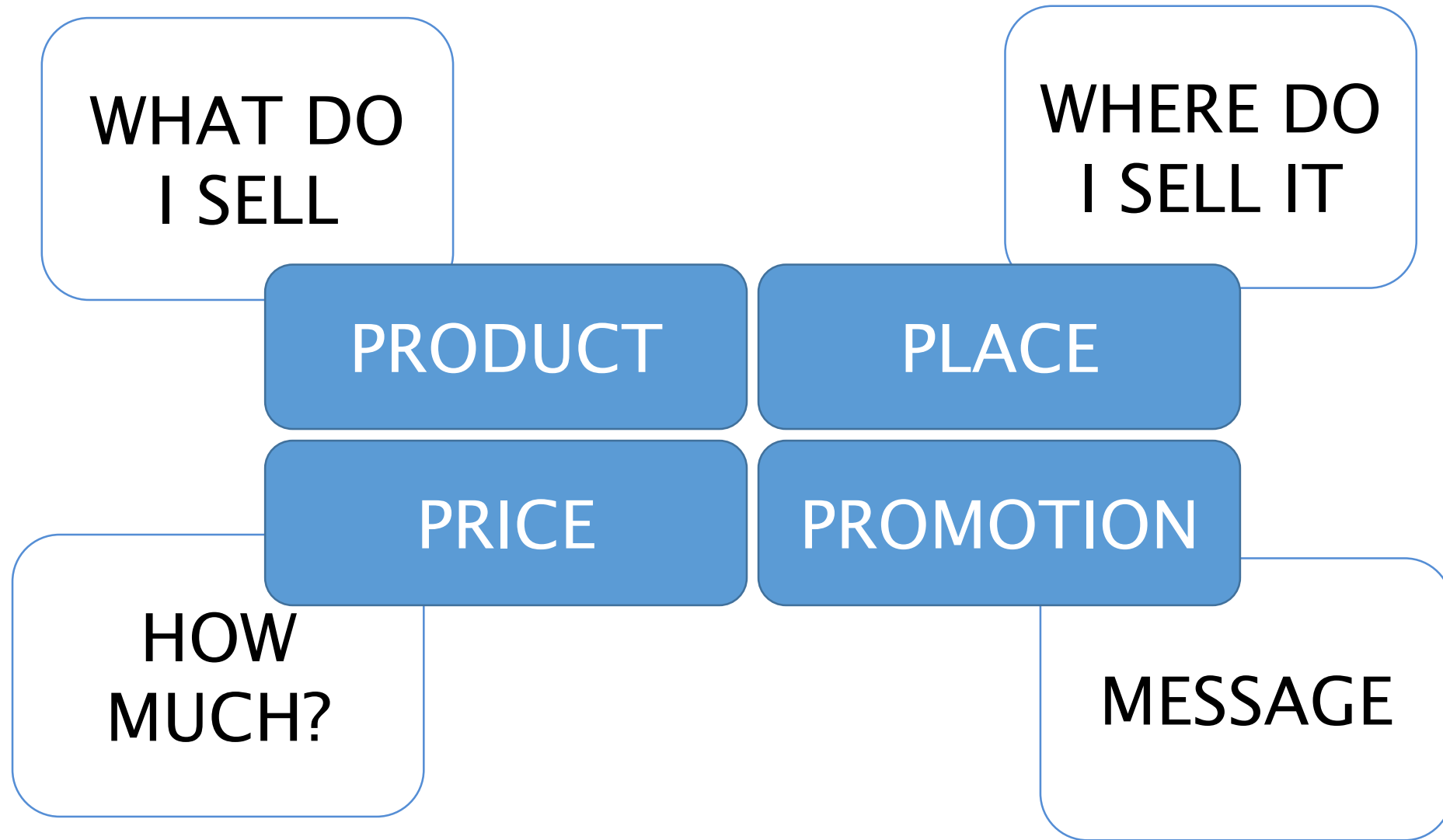
“MEDICAL TRAVEL IS
A DECISION OF **LAST**
RESORT”



GETTING IT
RIGHT...



THE FOUR P'S



WHAT DO WE **SELL**?

**WELLNESS AND
SPA?**

**DENTAL?
IVF?**

COSMETIC?

ELECTIVE?

WHERE DO WE SELL?



WHO ARE OUR CUSTOMERS?

COMPANIES

GOVERNMENTS

INDIVIDUALS

INSURERS

WHAT IS THE RIGHT MESSAGE?

