Medical Tourism Diversity: a Comparative Study of Asian Countries

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Abstract

Objective: It aims to lay down a comparative yet comprehensive view of Medical tourism trends in various countries of Asia (India, Malaysia, Thailand, Singapore etc.)**.** From Research point of view, the study aims to provide a deeper insight into the facts and stats of Medical Tourism industry to enable the regulatory authorities to frame favorable policies for their growth.

Methods/ statistical analysis: The present study is a descriptive study based on secondary data.

Findings: Evidences suggest that Singapore and Dubai, alongside India, Malaysia and Thailand are the first wave of Asian Medical Tourism. in terms of price of medical services offered, number of medical tourists visited and migrated, factors affecting the demand of medical tourism in Asian Countries. Estimates of the figures of medical tourists are extracted from the statistics published by the Deloitte management consultancy and McKinsey and Company.

Application/ Improvement: The less restricted movement of goods and services under the aegis of the World Trade Organization has elevated the liberalization of trade of goods and services. Health care, as a service industry, has made health care services more tradable commodities across globe. The moving over of patients across borders in pursuit of medical treatments has emerged as a significant new element of this trade, a phenomenon evolved as Medical Tourism. A range of medical agencies and government policies have tried to stimulate economic development through medical tourism.

Keywords: Medical Tourism, Health Care, Asia, Tourists,

JEL: L83, N75

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Introduction

The less restricted movement of goods and services under the auspices of the World Trade Organization and its General Agreement on Trade in Services has paced up the liberty of the trade in health services. Health care as a service industry has made health services more tradable and global commodities. The moving over of patients across borders in pursuit of medical treatments has emerged as a significant new element of this trade, a phenomenon evolved as Medical Tourism.

While there are many diverse facets of Medical Tourism that have come up by now, few attempts have been made by some international reputed organizations to give a concrete definition to what Medical Tourism is:

When a person, whose primary and explicit purpose in traveling is to obtain medical treatment in foreign country, excluding: emergency tourists, wellness tourists, expatriates seeking care in their country of residence, patients travelling to neighboring regions to the closest available care – McKinsey, 2008

Broadly speaking it is the act of travelling to obtain medical care. There are three categories of medical tourism: outbound, inbound, and intrabound (domestic) – Deloitte, 2008

When people who live in one country travel to another country to receive medical, dental and surgical care while at the same time receiving equal to or greater care than they would have in their own country, and are travelling for medical care because of affordability, better access to care or a higher level of quality of care. "Domestic Medical Tourism" is where people who live in one country travel to another city, region or state to receive medical, dental and surgical care while at the same time receiving equal to or greater care than they would have in their own home city, and are travelling for medical care because of affordability, better access to care or a higher level of quality of care

– Medical Tourism Association

Availing health care services in a foreign land is not a new concept, and developments can be taken a glance within the history itself. Individuals have been travelling to other countries for health benefits since ancient times. During the 19th Century, richly affluent people from less developed corners of the world travelled to developed nations to access better facilities and highly trained medical facilities. The economic crisis in Asia during 1997 conjoined with the tumbling of Asian currencies was eye opening for governments in these nations to concentrate on their country being desired as leading destinations for international healthcare. Eventually, Thailand became the hub for plastic surgery, with fee charged at a fraction of what other countries were offering. In India, the popularity of Yoga and Ayurveda were slowly unfolding the history of medical tourism. As early as 5000 years ago, assemblies of medical travelers and seekers of medical treatments flocked to India to seek the benefits of these alternative-healing methods (source : Research Report: Global Spa Summit,2011)

The Joint Commission International (JCI) was incorporated in year 1997 to strengthen the international healthcare facilities to global standards due to mushrooming of health care providers around the world. During this time, the dentistry and cosmetic surgery industries attained new peaks in these countries. India and Thailand became topmost medical destinations in priority list of medical travellers due to JCI accreditation. Till date, other Southeast Asian and American countries are also emerging as attractive healthcare destinations.

However, currently the scenario of Medical Tourism is showing different trends from the earlier forms of health-related travel both quantitatively and qualitatively. The difference is the reversal trends of this flow from developed to less developed nations for seeking better medical aids.

Global Medical Tourism Scenario (With Special Reference to Asian Countries)

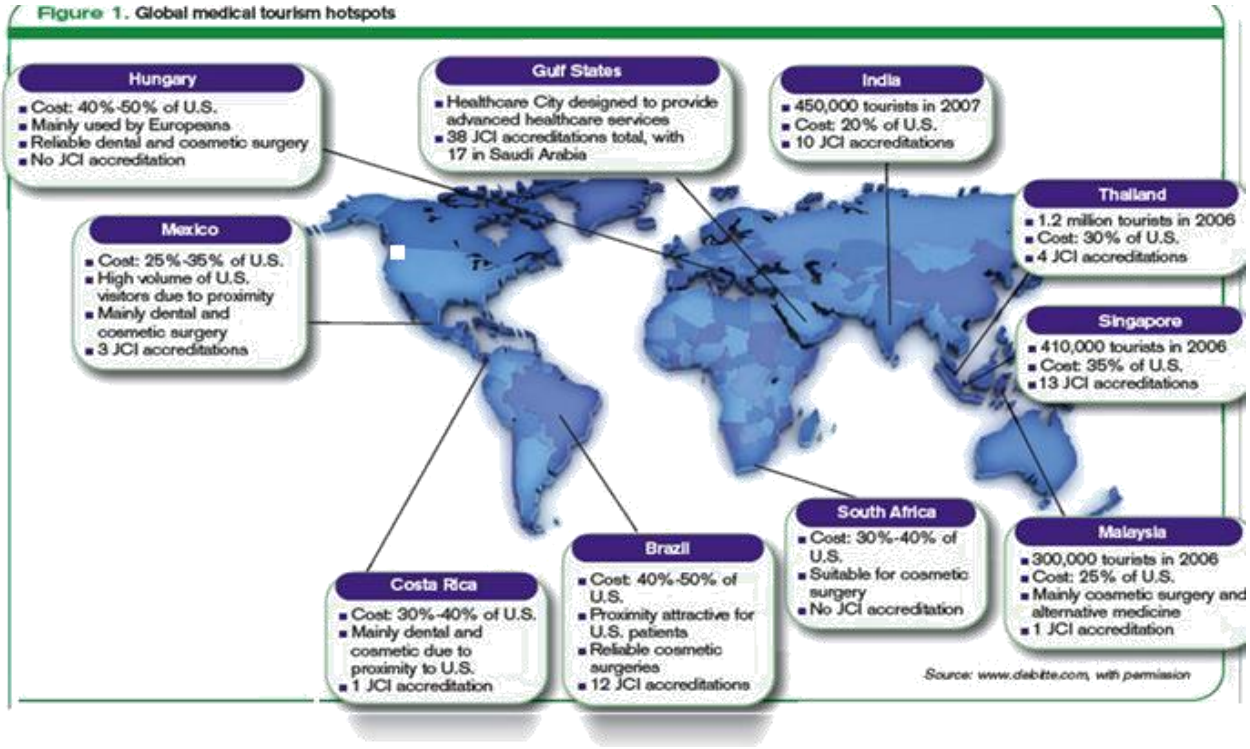
The global tourism facts in Medicine are much surveyed and reported by various agencies. Taking the excerpts from some notable research reports, the global medical tourism facts can be stated as follows:-

According to a report on global medical tourism market, published by Transparency Market Research (TMR), a market intelligence and research firm, the total value of the global medical tourism market by 2019-20 is going to be US $ 2.5 bn. It is worth mentioning that the market was valued at US $ 10.5 Mn in 2012 and is likely to grow at magnificent CAGR (compounded annual growth rate) of 17.90% during the period from 2013-2019.

The research report titled Medical Tourism Market - Global Industry Analysis, Size, Share, Growth, Trends and Forecast, 2013 - 2019 states that *the global medical tourism industry is growing by 20 - 30% annually. Every year, about 7 million people grab their passports and fly abroad looking for quality, affordable medical care — everything from dental work to weight-loss surgery to cancer treatment. That's fuelling an industry worth as much as $40 billion.*

World Travel and Tourism Council (WTTC), in 2013, has reported the contribution of medical tourism in global GDP (Gross domestic Product) as 9 percent (more than US$6 trillion) and generated for about 255 million jobs in 2013.

According to WTO data, medical tourism and healthcare will blossom into a global industry by year 2022. It is estimated that the global health care tourism market will grow with a CAGR of 9.5% from 2012 to 2018 due to competitive cost of treatments offered by countries. Factors like quality of care, upgraded infrastructure, better affordability, easy accessibility and availability of information through sources like internet and media have created a massive interest among the medical seekers of developed countries to explore less developed countries as a concrete option for medical tourism.



The above figure shows a bird eye view of various hotspots of medical tourism across globe. Following is the brief description of the tourism statistics of these countries that have led to a propulsive growth in the business of Medical Tourism.

Mexico

Dentistry and plastic surgery are two popular specializations available in Mexico. Mexican dentists often charge 25-35% of US prices. Americans, particularly those living near the Mexican border, now consider Mexico for medical care. Mexican hospitals are known for the dental surgeries the cost of which is not covered by some US insurers along with weight loss and plastic surgery. Mexican Hospitals have got 3 JCI accreditations so far.

Costa Rica

Costa Rica, despite being a small country, there are six major private hospitals and 22 public hospitals recognized for providing remarkable medical services in the world. Its contribution in the medical tourism industry has been remarkable over the years. Currently there are three JCI accredited hospitals all of which are currently located in San Jose, The growing number of visitors in Costa Rica is due to its proximity to US ad 30-40% saving in cost of treatment.

Brazil

Brazil has been historically known as a destination for cosmetic surgery. Brazil has got third highest number of JCI accreditations after Singapore and Saudi Arabia. Albert Einstein Jewish Hospital in São Paulo was the first JCI-accredited facility outside of the US. A saving of 40-50% in cost of Medical services is the major factor making Brazil a dominating chunk in contribution of global medical tourism services.

Thailand

In 2006, medical tourism was projected to earn the country 36.4 billion baht by 1.2 million medical travelers travelling to Thailand. The Medical services in Thailand comprise of cosmetic, organ transplants, cardiac, and orthopedic treatments to dental and cardiac surgeries. Spa, physical and mental therapies are also included in the list of treatments offered. Thai Health care system wears the crown of being at the third position (after UK and US) by The World Health Organization's 2000 ranking of Best Health Care services in World. Thailand provides 30% savings in cost of treatment and holds 4 JCI accreditations.

Singapore

This country is a home to high-quality and modern equipped hospitals and has thirteen hospitals accredited by the JCI. Prices of services offered are comparatively are higher than that of countries like Thailand or India but are much lower than in the United States. In 1997 (published 2000), the WHO ranked Singapore's health care system as 6th best in the world. Cost saving in Singapore is approximately 35%

Malaysia

Malaysia is on its way to develop itself as a medical tourism hub. The country has outstanding hospitals and staff has been strictly trained to meet international standard of the UK or the US. An active Association for Private Hospitals of Malaysia is formulated to work towards developing medical tourism in the country. While Malaysia has its own national accreditation healthcare scheme, Malaysian Society for Quality in Health (MSQH), yet many Malaysia's hospitals are currently on the way to achieve international healthcare accreditation. In account of JCI accreditation, Malaysia has just climbing the foothills by gaining 1 accreditation.

India

It is a well known fact that the medical tourism industry in India is growing**.** According to the study by CII-McKinsey, *country had earned Rs 5,000-10,000 crore in year 2012*.

Presently, in India, the healthcare sector has an estimated revenue of around $30 billion constituting 5% of GDP and offering employment to around 4 million people **[Source: Confederation of Indian Industry (CII)].**

The savings in cost of medical services in India is almost 30% lower to that in Western countries and the cheapest in South-East Asia. The services that attract medical tourists in India are cardiology and cardiothoracic surgery, dental care orthopedic surgery transplants, cosmetic treatments, joint replacements and many more.

Need of Study in Asian countries

The Asia has become one of the premier regions in the industry of healthcare over the past few years owing to the high quality of healthcare infrastructure and low cost of treatment. With affordable services cost, quality of infrastructure and lesser costs, Asian Countries are blooming as most prominent players in the market for medical tourism over the past few years. Facts state that Asia attracted over 5.6 million foreign patients in year 2014, generation whopping revenue of US$6.4 bn form medical tourism. India , Singapore and Thailand are the top three landing places for the Asian medical tourism market, with a combined market share of more than 93% in year 2012 according to business consultancy RNCOS. In 2012 alone, the trio has contributed more than US$6.4 billion from the treatment of an estimated 2 billion foreign patients. Thailand bears the crown of being the most famous destination for cosmetic surgeries. Low cost and less waiting time in Asia as compared to western countries has favored Asia as preferred destination for medical tourists. Aligning with the Government‘s remarkable initiatives and improved infrastructure, Asia has witnessed a CAGR of 26.5% during 2013-2015 as reported by Asian Medical Tourism Market report. Asian Medical tourism market consisting of Malaysia, Thailand, India, Sri Lanka, Korea, Taiwan, and Singapore, is the most potential medical tourist destination in coming years as per a Forecast. Lately, the emergence of ancient treatments like homeopathy, ayurveda, naturopathy, aromatherapy, meditation and yoga are prominent factors of attraction of western people in Asia. Many tourists fly to Asian countries to seek the angelic serenity and healing power provided by these alternative medical therapies. The numbers of medical travelers from all over the World are highest in Asia as compared to any other continent the facts are supported by the following table:

Medical Tourists (data in percentage)

TO → FROM ↓	Asia	Europe	Latin America	Middle East	North America
Africa	95	4	1	-	-
Asia	93	1	-		6
Europe	39	10	5	13	33
Latin America	1	-	12		87
Middle East	32	8		2	58
North America	45	-	26	2	27
Oceania	99		1		

(SOURCE: McKinsey Report, 2016)
Note: Empty boxed denote data not available

The following facts laid in the favor of Asia being one of the leading regions in the world for medical tourism :-

- The growth rate of Asia's medical tourism industry is 20% per annum.
- Asia holds 12.7% of global market share in healthcare industry revenue generation. The forecast of growth rate of 17.6% and further growth up to 23% of revenue is expected by the end of year 2018.
- Thailand alone holds a dominant share of approximately 40 % share in Asia medical tourist arrivals till year 2016.
- India was one of the pioneers in Asia to recognize the potential of medical tourism. The rising trends in the Indian Medical visitors have extrapolated that India will be as huge as Rs.9500crore industry by the year 2020.
- Another contribution is by Malaysia which has seen an impressive growth in medical tourism industry. The international medical tourist arrivals to Malaysia saw a growth of 29.27 percent for the period of 2009 to 2016.
- Singapore is considered to be the best in Asia for the medical facilities even though its treatment costs are bit high as compared to its competitors.

Objectives of the Study

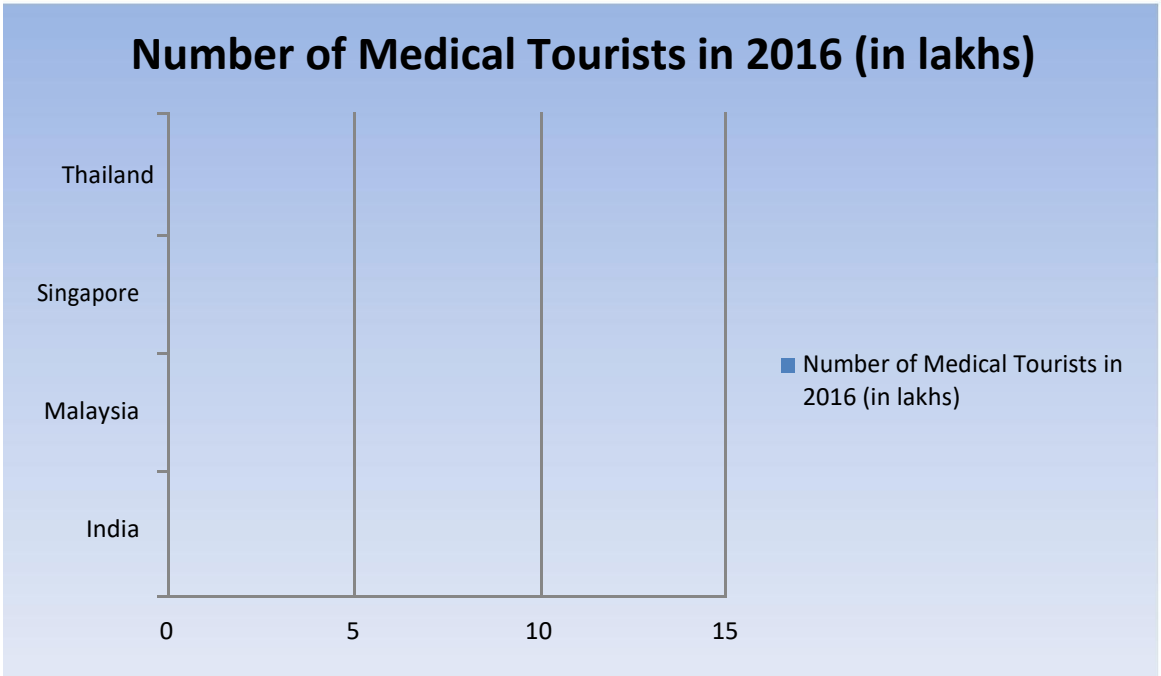
1. The main aim of the study is to present a comparative yet comprehensive view of Medical Tourism scenario in four Asian Countries i.e. India, Singapore, Thailand and Malaysia
2. The paper intends to explore the factors that drive medical tourists into the countries taken under study.

FACTS AND FINDINGS

1. **Specialized Medical Services Offered (Country-wise)**
   The below table presents the type of specialized Medical treatment offered in the countries taken under study:

COUNTRY	SPECIALIZED MEDICAL TREATMENTS OFFERED
Thailand	Dental, Cosmetic surgery, obesity surgery, Gender Realignment, Oncology, orthopedics, cardiology
Singapore	Organ Transplant, Stem Cells treatment, joint replacements
Malaysia	Dental, cardiac, transplant surgery, cosmetic surgery
India	Cardiology, Neurology

2. Number of Medical Tourists



(Source: www.imtj.com)

The above bargraph shows the number of Medical Tourist visitors in all four countries in year 2016 as reported by International Medical Travel Journal (IMTJ). Thailand leads the nations' list with highest number of visitors with around 14 lakhs visitors followed by Singapore which reports approximately 6.7 lakhs visitors. Where Malaysia ranks third in order with narrow difference with statistical figures of visitors of Singapore, India stands last with least number of visitors (5.5 lakhs) among all four countries.

3. Cost of Medical Services (in US $)

Medical Services	India	Malaysia	Singapore	Thailand
Heart bypass	10,000	9,000	20,000	13,000
Heart Valve replacement	9,500	9,000	13,000	11,000
Angioplasty	11,000	11,000	13,000	10,000
Knee replacement	8,500	8,000	13,000	10,000

Gastric Bypass	11,000	13,000	20,000	15,000
Spinal Fusion	5,500	N/A	5,000	7,000
Tummy Tuck	2,900	3,900	6,250	3,500
Dental Implants	1,100	2,600	1,500	1,300
Rhinoplasty	2,000	2,080	2,500	4,300
Organ Replacement	9,000	10,000	11,000	12,000
Organ Resurfacing	8,200	12,500	12,000	10,000
Face Lift	4,000	3400	N/A	3,600

Source: Skill India Medical Tourism Report, 2015

Note: 1. Figures are rounded off to nearest multiple of 100

2. N/A stands for Not Available

3. The Above cost is the pure cost of medical service (hospital+ doctor charges) for one patient that excludes the cost of flight and hotel bills till the duration of stay of any person accompanying

The above table lays down the comparative view of prices of various medical services offered in all four countries taken under study. The prices are converted into a common unit of globally acceptable currency i.e US Dollars. Looking at the table, availing Medical services in Singapore is a costly affair overall as compared to the other three countries except for Dental implant and rhinoplasty. For a Heart bypass surgery in Singapore, one has to spend as high as $20,000 whereas it is much economical in Malaysia with a drastic difference of $11,000. Similarly in angioplasty too, Singapore takes the lead of being the most costly country with an expense of $13,000 whereas one can save $2000-3000 in other countries undertaken for study. Medical services in India are much economical as compared to other countries in all aspects. Thailand is the price maker in the competition among the four countries in organ replacement, spinal fusion and rhinoplasty and charges exorbitant prices for the same. India only leads in charging the prices of Face Lifting which are as high as $4,000 as compared to $3,400 and $3,600 in Malaysia and Thailand respectively.

4. Factors Driving Medical Tourism to: Thailand

1. Internationally Accredited Medical Facilities

Thailand has got maximum accreditations from international agencies in Medical service facilities. On a last count in 2014, Thailand has 38 accreditations from JCI. More than 350 hospitals in Thailand have accreditations from Ministry of Public Health and many more are on the way to get ISO accreditation. Thailand has all latest technological facilities available as a matter of prestige to add up to its Rank in Medical service providers around globe

2. Less entry barriers

There are less entry barriers in Thailand than other Asian countries. Thailand has allowed

citizens of 41 countries to stay within the country without a visa for 30 days. The less restriction of entry into the country makes it favorable for tourists to be picked up for travel and stay.

3. **Health Care Quality**
   Thailand Medical services are known for quality health care services. As per a report by World Bank titles 'Thailand: Sustaining Health Protection for All', 99.5% of people in Thailand have access to health facilities provided by Thai Government. Thai citizens are covered under various medical schemes like Universal Coverage scheme, Voluntary Health care card scheme etc.

4. **Tourism hub**
   Apart from Medical Tourism, Thailand is well known holiday tourist attraction destination with its scenic beauty and churning environment that allows one to relax and rejuvenate. Infact it is an aviation hub, where international almost all flights fly into Bangkok. Thailand is a beautiful country which attracts tourists from all over the world for its specialized spa and massage centers and some exclusive therapies which are found nowhere in the world.

5. **Highly Trained Doctors and Staff**
   To treat International patients in Thailand, the general practitioners and doctors are trained with English speaking in private hospitals and specialist clinics. Some prestigious hospitals appoint translators in largely spoken languages around the world for the ease of medical aid seekers. Many specialist doctors have earned international qualifications from western countries such as the US and UK. That being said, more than 500 doctors practicing in Thai hospitals and clinics nowadays are American Board Certified.

Malaysia

1. **Advancement in health care facilities**
   The advancement of healthcare in Malaysia makes the country one of the top 5 medical tourism destinations in the world. A wide network of hospitals have state of art facilities and quality infrastructure. Cardiac surgery, dentistry and plastic surgery are available at unbelievably low cost prices. There is a range of packages to be chosen by the patients that cover the basic to luxury demands of the medical aid seekers. Malaysian services give opportunity to choose for accommodation or after service rejuvenating activities and other holistic services like ayurveda, unani medicines etc.
2. **Visa benefits for medical tourists**
   Visa regulations in Malaysia are travel friendly too. Travelers coming to Malaysia will get a 3 months Visa on arrival and they need not apply for Visa beforehand. Visa extension upto 6 months is permissible after receiving an approval from the medical center where the treatment is being received.

3. **Quality Healthcare System**
   There are many hospitals in Malaysia that are accredited at an international level by the JCI (Joint Commission International). The Malaysian Society for Quality in Health (MSQH) also issues accreditation on a national level to the hospitals to ensure the maintenance of quality in health care. The Ministry of health in Malaysia works with various healthcare services to ensure that medical and health care quality is not compromised. According to the rules of quality assurance in health care, all healthcare providers are supposed to be licensed under the Health Care Facilities Act of 1998. The association of private hospitals in Malaysia also strives to bring about the quality required in health care. Many of the hospitals in the country have both national and international accreditation

4. **Quick service**
At the hospitals in Malaysia, you can get treatment without having to face a long waiting list. The patients may get hospitalized on their arrival and the remaining tests and examinations are also done in a prompt manner. The efficient and organized patient registration systems help in reducing long patient queues. The treatments and medicines are dispensed to patients as quickly as possible so that they can decide whether to return home or to recuperate at a location of their choice

Singapore

1. Singapore is an efficiently managed and urbanized country. The life expectancy in Singapore is the highest in the world and access to basic necessities is available in Singapore to every citizen.

2. Singapore is a base for consultancies organized in the form of conferences, training, seminars and symposium talks. Many biomedical companies have set up regional headquarters in Singapore.

3. Singapore is known for its investment in specialized biomedical sector. Facilities of storing stem cells are probably one of the best facilities available in the country. Singapore was a pioneer in the movement to discover drugs to fight against cancer.

4. The climate of Singapore is very favorable which makes it a suitable destination for recovery of illness. The weather is warm and congenial throughout the year. Singapore has a tropical rainforest climate and as such there are no seasons. The temperate is always uniform with abundant rainfall

5. Visa requirements for Singapore are very friendly too. British And Irish receive a 30 day visa on arrival. Travelers from more than 40 countries may apply for visa extension via e-Extend program upto 89 days from the date of entry.

India

1. **Low cost treatment**
The cost of getting treatment in India is very low even when comparing with other medical tourism countries. It is at the most 10% to 20% of what will be charged in the US or UK. Above all you will find the same standards upheld that you would have found in your country.

2. **India has many tourist attractions that offer healing environs and other rewarding experiences**
India has a rich cultural and historical past, and is well connected to all places by train, bus and flight. Travel is also very economical and easy. When you are done with your medical procedure, you can visit the many tourist destinations in India. Many of the people who come to India for health tourism end up visiting the country.

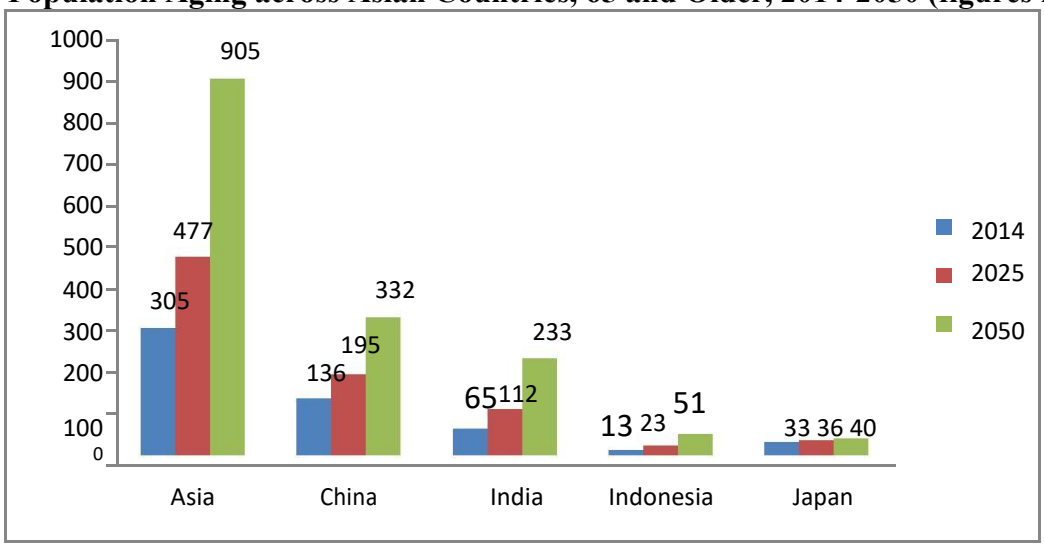
3. Visa Convenience

Indian Visa regulations are known for their ease and friendliness across globe. For seeking medical treatment in India can obtain visa online and up to two companions are permitted to accompany the patient. India has its niche in Neuro surgery, plastic surgery, renal problems, cardiac surgery and organ transplants.

Future Scope of Medical Tourism:

Medical Tourism is gradually gaining momentum by becoming new and emerging international business. The rapid increase in demand of medical services coupled with rise in movement of medical tourists across countries has broken the shackles of stringent regulations and policies across borders. As a future scope of study, needless to say, Medical Tourism industry, in times to come, has ample opportunities for countries in terms of employment, revenue generation and foreign exchange. The following histogram gives one of the robust reasons to look forward to dive deep in the arena of Medical tourism in Asia itself.

Population Aging across Asian Countries, 65 and Older, 2014-2050 (figures in lakhs)



Source:UN,WorldPopulationAgeing:1950–2050,PopulationReferenceBureau,2014WorldPopulationDatasheet

The above histogram shows the estimates of aging population across Asian countries (65 years and older) till year 2050. Clearly the graph of aged people (65 years and older) is showing a propulsive increase in decades to come. Till year 2014, Asia had 305 lakhs of aged people, in which China is the biggest contributors in numbers with 136 lakhs followed by India (65 lakhs aged people). In coming decade, the estimates show that the number is going to increase to approximately 477lakhs in Asia with China having a big chunk of 195 lakhs whereas India is going to witness an almost two-fold growth in aging population from 65 lakhs to 112lakhs. The estimates established by UN World

Population Bureau in 2014 foresees a huge leap in figures of aging population by year 2050. Estimates predict that Asia will be home to approximately 905 lakh aged people by the end of the year 2050 with almost one-third contribution from China alone.

Thus, along with the growing infrastructure, inventions of latest scientific methods and growing in numbers of consumers of medical services (aged population) in Asia, there is a great potential in the area of Medical Tourism industry in coming times.

Conclusion

Medical Tourism services, since ancient times, areabounding with historical records of people who have travelled to other territories to seek improved health services. The gradual removal of restrictions and facilities of free trade have evolved the movement of people for seeking improved medical services especially related to dental surgery, cosmetic surgery and other complicated procedures since 1980s till date. Though, Mexico is the crown bearer of the most premiere Medical tourism destination in the world, the following slots of the race are occupied by the Asian countries with Thailand among the top ones in Asia. The paper has attempted to bring out a comparative view of top 4 medical tourism destinations in Asia i.e. Thailand, Malaysia, Singapore and India in terms of specialized services offered, costs of medical services and factors responsible for medical tourists attraction in respective countries. The paper comes out with a conclusion that from all the four countries, Thailand is the most favored destination to medical tourists due to its easy accessibility, wide aviation networking, convenient visa procedures, recuperating tourist places and above all, the affordable prices charged for various services when compared to other three countries. Singapore is extravagant when it comes to the costs of medical services which are nearly 1.5-2 times the costs charged in other countries even then the country bags the second highest number of medical tourists after Thailand. The unbeatable quality of medical services in Singapore along with availability of highly qualified staff is a factor of compromise of cost for medical travellers. Malaysia, specialized for dental, cardiac and cosmetic surgery ranks third in number of medical tourist visitors with a narrow difference from Singapore. India needs to push itself in competition and needs to be proactive in procuring a stiff stand to its competitors. Though opportunities and initiatives taken by Indian Government like M-Visa, MX-Visa, MDA(Marketing and Development Assistance) schemesare pro to the upcoming medical scenarios across globe, the research evaluation has not kept the pace with development of medical tourism in India. With rising aged population in Asia, which will further increase the demand of medical services across globe, there is a potential opportunity in the medical tourism industry in times to come. If not solely driven by the commercial interests, and being more organized with the policy makings and delivery, Medical Tourism industry can largely cure the wounds of bleeding economies of the world with an estimated growth of US $143.8 bn by the year 2022.

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