

Leveraging the strengths while addressing the challenges of medical tourism that can potentially benefit Australia and India

Medical Tourism India

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What is medical tourism? Is it new?

- Travelling to another country to obtain medical treatment other than the own country of residence.

OR

- Offshore provision of medical services in combination with other conventional tourism products, by leveraging a comparative cost advantage.

- Not a new concept

- Historically: Developing  Developed

- Contemporary trend: Developing  Developed

A global phenomenon.....India is an emerging power while US leads the field of medical tourism and the rest of the western society is adapting to the trend of international travel for medical service.

Medical tourism destinations

Asia

Thailand

India

Singapore

Philippines

Malaysia

South Korea

Eastern Europe

Latin America

Overseas treatments

- Elective surgery
 - CABG, Valve replacement
 - Hip replacement
 - Knee replacement
 - Gastric bypass
 - Organ transplantation
- Dental treatments
- Reproductive treatments such as IVF, egg donation, surrogacy
- Medical check ups
- Cosmetic surgery, discretionary procedures like Rhinoplasty, hair transplant, cheek implants, brow lift, breast augmentation



Why is the contemporary trend in the opposite direction?

Developed Countries

- **Motivations** (patient perspective)
 - Cost (9%) – Uninsured or under insured
 - Discretionary (4%)
 - Waiting time (15%) – Quicker access
 - Better quality care (32%)
 - Advanced technology (40%)
 - Availability
- Spiraling healthcare cost? (healthcare system perspective)

Developing Countries

• Factors

- Increasing privatization of healthcare sectors
- Quality care
- Latest technology
- Lower cost
- Highly experienced and trained professionals
- Strategically alignment
- Immediate access
- Trade liberalization
- Government policies
- Ease of international travel

Why is India well suited destination of choice for medical tourism?

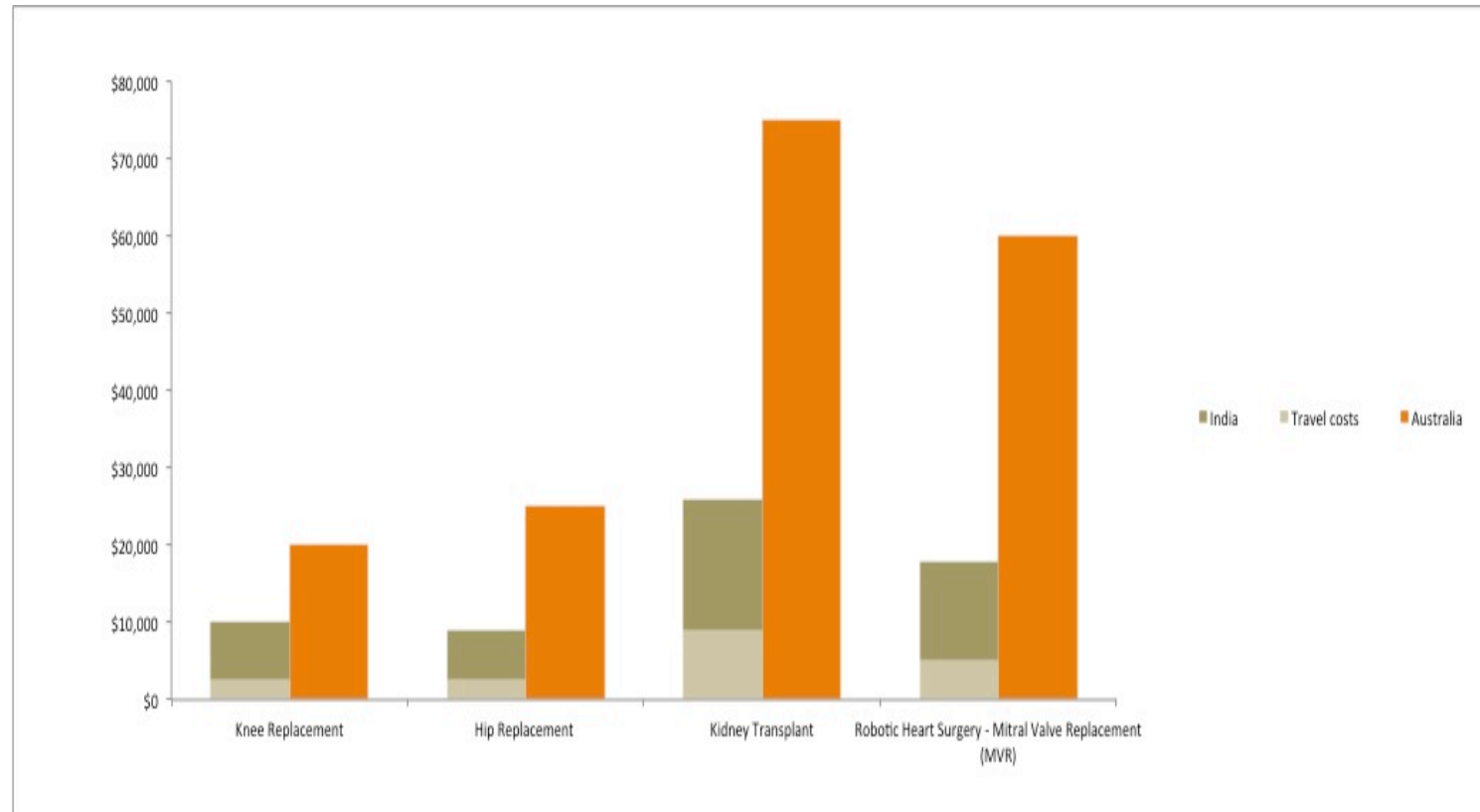
Advancement in medical services – High quality of care

- State-of-the-art private hospitals and diagnostic facilities
- Sophisticated, modern technology
- Centres of excellence
 - Cardiology
 - Orthopaedic surgery
 - Gastroenterology
 - Ophthalmology,
 - transplants and urology
- Highly experienced and internationally trained doctors
- Internationally accredited hospitals (JCI)
- English speaking and trained nurses

Why is India well suited destination of choice for medical tourism (cont)

Lowest treatment cost (Source: MyMedicalChoices)

- Significantly lower cost
- Price transparency



Why is India well suited destination of choice for medical tourism (cont)

Waiting time

- Immediate access

High level of hospitality offered to the clients

- English speaking workforce
- International service desk
- Translator
- Prayer rooms
- International cuisine

Indian heritage and natural beauty

- Tajmahal, Backwaters of Kerela

Alternate medicine

- Ayurveda

Government support

Facts & Figures

India - Healthcare Total Value: > \$34 billion (2007); Projected to nearly \$40 billion (2012)

McKinsey & Co and CII (Confederation of Indian Industries)

- Indian medical tourism was estimated at \$350 million (2006), potential to grow to \$2 billion (2012)
- Annual growth rate of 25-30%
- Potential to attract 1M medical tourist each year, \$5 billion to the economy.
- Gross medical tourism revenue to rise to \$100 billion world wide by 2012

Volume – The current volumes are modest

- Globally, 922 M international tourist, 5.4M travelled to India (2008)
- Thailand – 1M medical travellers (2005), 1.25M (2008)
- India - 500K (2005)
- Singapore – 250K (2005)

The accurate volume is difficult to obtain or unknown as there is no systematic collection of data.

An Australian story for heart surgery facilitated by MyMedicalChoices (MMC).

Patient's experience -

“All in all the services of Dr. Hemani and MMC was excellent also an important service for my successful surgery and trip to India. Their service was superb, above and beyond. I only found out later but while I was in intensive care Dr. Hemani was a very helpful link in reassuring family members in Australia and keeping in touch with the hospital so could keep all fully reassured. After returning to Australia Dr. Hemani has kept in touch to make shore all is OK. My Surgery was having a new Mitral heart valve using a da Vinci Robot. Now 5 weeks post op. I am well on my way to recovery. Without having my chest opened up with less pain and faster recovery rate.”

CHANGE!!!!

- Systematic and Integrated manner
 - Collaboratively
- To benefit the consumers, society and healthcare system

Mutually benefit and raise the quality bar internationally!