

## Medical tourism: Key facts

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Please include a reference to [www.treatmentabroad.com](http://www.treatmentabroad.com), if you make use of any of this data in the media or on the web.

### How many UK medical tourists are there?

There's no exact data! There is our own research conducted in 2007/8 and the data from the International Passenger Survey which Treatment Abroad purchases and tracks over time. The latest IPS data is for 2010.

The International Passenger Survey also tracks inbound medical tourists. When considering the role of the UK in medical tourism, it is essential that you also consider the role of the UK and in particular, London in providing high value treatment to overseas residents. The value of inbound medical tourism is far greater than the value of outbound medical tourism; people coming to the UK for treatment come for major procedures (e.g. heart surgery, cancer treatment) whereas many outbound medical tourists travel for dentistry and cosmetic surgery abroad.

#### Our estimates

In 2010:

- Around 60,000 UK patients travelled abroad in total. The breakdown was something like this:
  - 25,000 cosmetic surgery patients (41%)
  - 19,000 dental patients (32%)
  - 5,300 for obesity surgery (9%)
  - 2,700 infertility treatment. (4.5%)

Source: IPS data on total number of medical travellers. Breakdown by type projected from the Medical Tourism Survey 2012 conducted by European Research Specialists on behalf of Treatment Abroad. Survey data was obtained from 560 UK medical tourists.

#### International Passenger Survey

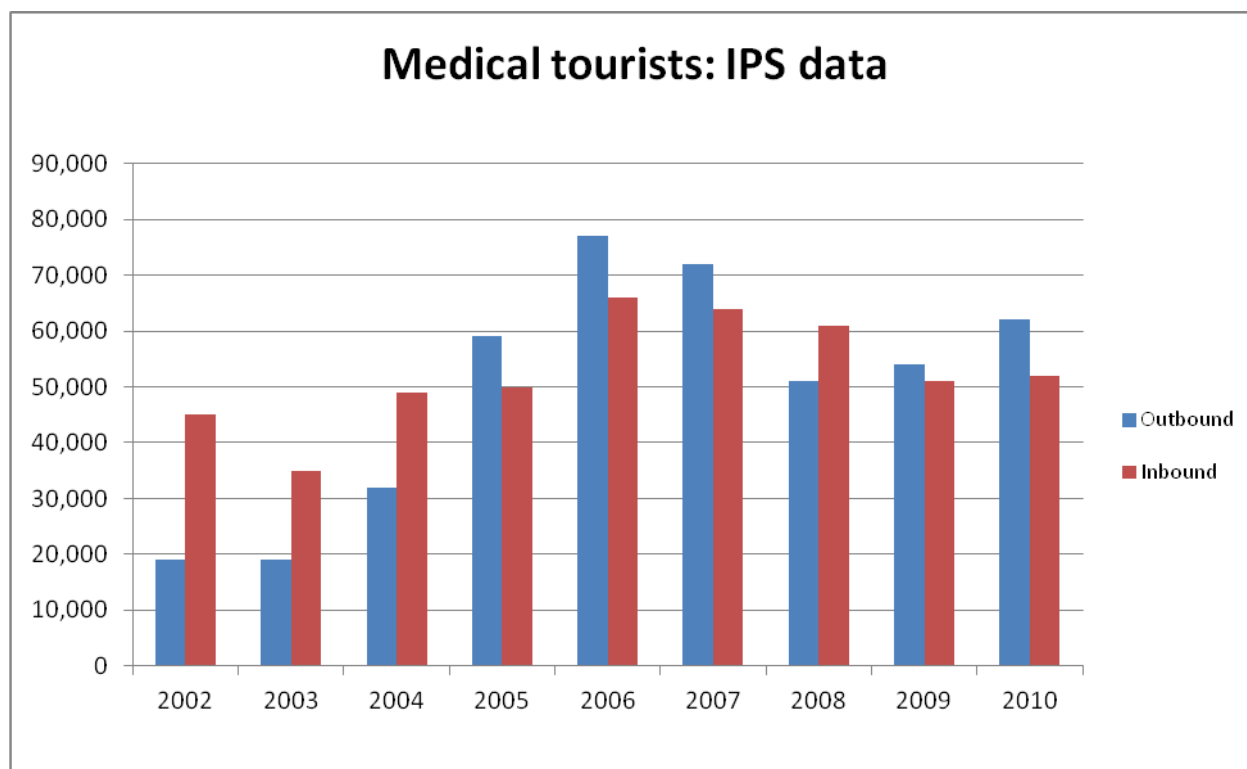
The International Passenger Survey is compiled from a sample of UK and overseas citizens leaving and arriving at UK ports and airports. Individuals are asked what the main reason for travel is. e.g. business, holiday, medical treatment.

However, the data needs to be interpreted with caution. The sample size is small when data on medical travel is analysed. So, there is significant margin for error.

The table and graph below show the historical International Passenger Survey data for:

- UK residents: Overseas visits for medical treatment i.e outbound medical tourists.
- Overseas residents: UK visits for medical treatment i.e. inbound medical tourists

### IPS historical data



### Data table: Historical

Patients ,000	Actual 2002	Actual 2003	Actual 2004	Actual 2005	Actual 2006	Actual 2007	Actual 2008	Actual 2009	Projected 2010
Outbound	19	32	25	59	77	72	51	54	63
Inbound	45	35	49	50	66	64	61	51	52

### Comments on trend data

- The worldwide recession has impacted on both inbound and outbound medical travel. Although there is economic pressure on UK patients to minimise their expenditure on discretionary healthcare (e.g. dentistry and cosmetic surgery), this has not driven a greater proportion to seek low cost treatment abroad. People have been delaying treatment whether it is in the UK or overseas. . Dental tourism providers in Europe who service UK patients report that patient numbers dropped by around 30% in 2009/10.

- Whereas the focus on medical tourism in the UK is often on Britons going for low cost treatment abroad, the IPS data suggests that the inbound patient market is still very important for the UK and remains strong. (Note: it is reported that 20% to 25% of the revenues of London's private hospitals comes from treating overseas patients.)
- Whereas the spend per patient who travels abroad is around £3,000 to 5,000, the spend per patient coming into the UK (mainly into London) is much higher due to the complexity of the treatments sought and diseases treated (e.g. cancer, heart disease).
- We estimate the value of the international patient spent on medical treatment alone in London is between £280m and £330m per annum.
- Growth in medical tourism is expected in the medium term. Factors that will encourage growth in medical tourism worldwide:
  - The pressure on healthcare resources in developed countries as a result of the global recession and bailing out of failing banks. For example, in the UK, public sector net debt, expressed as a percentage of Gross Domestic Product (GDP), was at a high of 60.1 per cent at the end of April 2011. Following significant investment on the NHS in recent years, public sector spending will have to fall and the NHS will bear the brunt of this.
  - The pressure on healthcare resources in developed countries as a result of demographic changes. People live longer....they will need more healthcare. And the state will not be able to fund this.
  - The improved quality of care in other countries. Other countries are catching up with the developed countries in terms of quality of care and access to medical technology.
  - Doctor mobility. Doctors are much more flexible in where they work.
  - Development of international accreditation standards for healthcare facilities. Examples of this include [Joint Commission International](#) and the [Trent Accreditation Scheme](#).
  - The adoption of the EU Directive on Cross-Border Healthcare may encourage more patients to travel. This Directive provides a framework for patients to travel from one EU state to another for treatment, paid for by their country of origin. E.g. A UK patient may travel to France for surgery and if certain criteria are met, the NHS will reimburse the cost. See: [A new dawn for cross-border healthcare in Europe?](#)
  - Internet use. The internet is now the first place that people go to seek information about treatment and healthcare issues.
  - Growth of private provision of health services. As governments struggle with the pressure on health services, private sector providers will take a bigger share of provision, and will have an international rather than national view.
  - Insurance products that provide low cost insurance based on treatment abroad will appear in the developed countries. A new scheme based on this approach is scheduled for launch in September 2011.

## Why are UK patients going abroad?

The reasons depend on the type of treatment. The main driver is of course low prices.

### **Cosmetic surgery**

- Cosmetic surgery is becoming “acceptable”. The number of UK operations grew last year by 30%. TV/media have popularised the “makeover”.
- Overseas prices make cosmetic surgery affordable for lower income groups.
- Some people want to have cosmetic surgery and keep it secret. They go abroad, have surgery, then take a holiday before they come back.

### **Dentistry**

- Reduction in “free” NHS dentistry.
- High prices for private dentistry.
- Increasing popularity of cosmetic dentistry.

### **Infertility treatment**

- Costs savings at overseas clinics.
- Shortage of sperm donors in the UK
- Shortage of eggs in the UK.
- Changes to the law relating to the child’s rights to identify the “donor” parent
- Availability of surrogacy.
- Ability to select sex of child in some countries.

### **Obesity and elective surgery (e.g. knee replacement)**

- Despite major investment, NHS waiting lists still exist and with future reductions in NHS expenditure they may increase again. Obesity surgery may not be covered under the NHS.
- Growth of the UK “self pay” market. People are becoming more prepared to pay for private treatment if they need it, rather than use health insurance.

## What treatment do they go abroad for?

- The most common dental procedures for patients travelling abroad from the UK are crowns, dental implants, bridges and veneers.
- The most common cosmetic surgery procedures for patients travelling abroad from the UK are breast augmentation, breast reduction, tummy tuck, liposuction and facelift.
- The most common elective surgery procedures for patients travelling abroad from the UK are hip replacement, knee replacement, laser eye surgery and cataract removal.

Source: Treatment Abroad Medical Tourism Survey 2012

### How did they rate their experience?

In the Treatment Abroad Medical Tourism Survey:

- Nine out of ten respondents would definitely or probably go abroad for treatment again and the same number would recommend going abroad for treatment to a friend or relative.
- 84% would go back to the same doctor, dentist or clinic.
- 51% of respondents travelled to a country they had never been to before for their treatment.

### Medical Tourism Ratings and Reviews

Treatment Abroad also encourages travelling patients to submit ratings and reviews of their experiences of medical tourism through the Medical Tourism Ratings and Reviews site at:

<http://reviews.treatmentabroad.com>

### How much do they save?

In the Treatment Abroad Medical Tourism Survey:

- 71% said they had saved more than £2,000 by travelling overseas. 12.7% said they had saved more than £10,000 by going abroad for treatment. The greatest savings were seen to have been for dental and orthopaedic treatment.
- The average in-patient stay among respondents was just three days with the average trip length being 16 days. The longest stay was for orthopaedic patients, the shortest for obesity patients.

### Code of practice for medical tourism

Treatment Abroad has implemented a Code of Practice for Medical Tourism to encourage the development of best practices amongst medical tourism agencies and healthcare providers.

Information on the Code can be found at:

See: <http://www.treatmentabroad.com/medical-tourism/code-of-practice>

### Useful areas of the Treatment Abroad site

- Free "Guide to medical tourism". People can download this for free at: <http://www.treatmentabroad.net/guide/medical-tourism-download>
- Patient stories: <http://www.treatmentabroad.net/stories>
- Latest news on medical tourism: <http://www.treatmentabroad.net/medical-tourism/news>

### The Health Tourism blog

Keith Pollard of Treatment Abroad writes a blog on health tourism:



<http://www.imtj.com/blog/>

## Background to Treatment Abroad

Treatment Abroad is the UK's busiest medical tourism site and is located at [www.treatmentabroad.com](http://www.treatmentabroad.com). It is owned by Intuition Communication Ltd.

We receive over 1,500 enquiries each month from people seeking treatment abroad.

The site was set up around 6 years ago, in response to enquiries from people in the UK and from clinics/hospitals overseas wanting to promote themselves to UK patients. It is a sister site to our main site, Private Healthcare UK – [www.privatehealthcare.co.uk](http://www.privatehealthcare.co.uk) – which is the UK's main portal for private treatment and has been around since 1997.

We also publish a business to business online journal in medical travel:

- [International Medical Travel Journal](#)

Intuition is not a medical tourism agency. Intuition is a specialist web publishing company in the health care sector. We also own [HarleyStreet.com](#), [Harley Street Guide](#), [Surgery Door](#), and other healthcare information sites such as [Cancer Advice](#), and [Self Help UK](#).

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