

# Inbound Medical Tourism



## Survey of US International Patient Departments



### *Executive Summary*

## **Inbound Medical Tourism: A Survey of US International Patient Departments Executive Summary**

International health travel, increasingly referred to as “medical tourism”, is attracting a growing amount of attention in the popular press. For our purposes, medical tourism is defined as “traveling from one region or country to another region or country expressly for the purpose of receiving medical, health, dental or wellness services, as well as those services associated with travel, such as transport, lodging and hospitality”. Medical tourism from the United States to other countries has drawn the greatest attention in the media; however, little information is available about international travel to the United States in order to obtain medical and health care (“inbound medical tourism”)

### **Background and Methodology**

The purpose of this survey was to gain information about inbound medical tourism to the United States in order to better inform organizations and individuals about trends in this important segment. Stackpole & Associates ([www.StackpoleAssociates.com](http://www.StackpoleAssociates.com)), an independent healthcare market research company, conducted this research without sponsorship of any kind. The results will not be sold or used in any way other than to provide the respondents with a valuable redacted report, and for professional publications and presentations.

This survey was conducted on-line in March 2010. Managers of international patient departments throughout the United States were invited to participate. Eighty-seven (87) representatives from forty-eight (48) unique medical centers were invited to participate in the study. In exchange for completing the survey participants were offered this summary report of the results, free of charge. The survey was launched electronically on March 9<sup>th</sup> and was concluded on March 23<sup>rd</sup>. Two reminder emails were sent.

Of those organizations contacted, 46% responded while 26% of individuals completed the survey.

### **Survey Topics**

The survey covered various topics relating to medical tourism and international patient departments including: Staffing and financial resources; international relationships including referral sources; international patient volume and medical services utilized; current and projected flow of international patients; international patients served by country or region; support services provided directly or by third parties; training for international patient department staff; obstacles to attracting international patients; and interest in a professional association.

## Observations from Survey Results

The data identified the following trends, observations, patterns, and projections from the international patient departments that participated in the survey:

- Respondents reported that their International Patient departments bring prestige to their institutions, and that their departments are less important from a financial / budgetary perspective.
- "International" was by far the most frequent descriptor used in the departments' names
- Most departments are staffed with full time personnel; the most frequent staff reported was 5 FTEs.
- When asked to describe the most important reasons their departments were founded, respondents reported revenue (paradoxically) frequently, as well as "demand" and "international relations" and market service factors.
- Only 17% of responding institutions reported operating or managing hospitals outside the United States, while 67% reported having referral relationships with hospitals outside the US, with 4 – 5 being the most frequently reported number of such relationships.
- Very few responding institutions (11%) report licensing or allowing hospitals outside the US to use their name or brand.
- Regarding total international patient volume, the highest percentages were Oncology (31.69), Cardiovascular (14.17) and Neurological (11.75). "Other" at 23.26% was the second highest category, and this was further reported as a wide array of surgical and medical specialties.
- Regarding unique patient volume, international patients do not represent a high percentage, with the weighted average reported as 1.5%, although 75% of respondents reported this volume increased over the past 12 months, and the same proportion anticipates growth in this volume over the next 12 month period.
- Regarding the proportion of the hospitals' budgets, respondents reported the weighted average was 1.13% and 43% stated that this was unchanged from the past 12 months, and by the same percentage anticipated no change in the next 12 months, perhaps suggesting pressure on prices.

- Regarding international patients' countries / locations of origin (sources), there was a wide range of answers, reflecting regional location and clinical specialization of the respondents. The largest percentages of patients were derived from Mexico (21.18%), followed by Middle East (14.07%), South America (12.33%), Central America (Excluding Mexico -11.25%) and Europe (11.23%).
- Most International Patient Departments responding to this survey (2/3 or more) reported providing additional services such as interpreter / translator, pre arrival medical assessment, assistance with hotel reservations or housing options, special dietary needs and coordination of aftercare services. Fewer (less than half) reported providing assistance with transportation and / or tourism related services.
- Support services most frequently outsourced were transportation (70%), home care / companion (50%), while fewer respondents outsource local tours and activities (30%). Given that 69% of respondents indicated that they provide local lodging assistance directly, and another 20% outsource assistance with hotel reservations it appears that international patient departments participating in this survey are covering traveling patients' lodging quite thoroughly.
- It appears that local tours, sightseeing and recreation are not part of what is being offered by respondents either directly or as an outsourced service. This indicates more "medical" and less "tourism" as a difference with foreign destination providers which often feature tourism.
- Over half (56%) of respondents reported that direct patient care staff do not receive specialized training in caring for international patients, although those which did offer such training related it highly (8.4, where 1 = poor , 10 = excellent).
- Sixty two percent (62%) reported that the staff of the international patient department had received specialized training (cultural issues) and this training was rated significantly less positively (7.22) than the training provided the direct care staff (8.40).
- The price of US healthcare was rated as the greatest obstacle to international patients (6.57, where 1 = very easy, 10 = very difficult) and obtaining a visa was the second most difficult (5.21).
- Regarding marketing, respondents rated word of mouth from patients and families as the most important source of patients (8.77, where 1 = not at all 10 = extremely) and physician referrals as second (8.08). The hospitals web site was third (6.83) and public relations fourth (5.62)

- Seventy three percent (73%) of respondents are interested in a professional association, and would be interested in networking with colleagues and educational programs.

### **Conclusions**

International patient departments in US health care providers deliver a variety of services to inbound patients from every corner of the globe, bringing prestige to those institutions. These departments expect modest growth over the next year. Staff coordinates with outside services to provide support for international patients but these staff members receive little training to meet the needs of global health travelers. Respondents indicated an interest in a professional association for networking and educational opportunities.