

Medical Tourism Report: United States of America

July 2009

In Association with:



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About the study

The Medical Tourism Report was commissioned by YourSurgeryAbroad.com in association with the International Medical Travel Association, and was conducted in June of 2009. The survey, the first and largest of its kind, aimed to represent and understand the current and potential medical tourism markets.

The objective was to specifically investigate the level of experience with medical tourism, levels of willingness to participate, actual and potential motivations, preferred destinations and procedure types, and also the impact of the global economic downturn.

The survey was conducted in both the United States of America and the United Kingdom with general consumers aged 18-75, and resulted in a total of 8,003 respondents. Specific to the USA, there were a total of 1003 survey participants. Participant breakdown of the USA sample is as follows:

Gender	Number
Male	487
Female	516
TOTAL	1003

Age Group	Number
18-24 years	121
25-35 years	231
36-45 years	214
46-55 years	243
56-65 years	186
Over 65 years	6
No answer	2
TOTAL	1003

Executive summary

The Medical Tourism Report: USA was conducted in June 2009 and drew on 1,003 online participants. Results of this survey provide meaningful data for the exploration of the medical tourism sector, and, in particular there are a number of issues that hold significance for international healthcare providers and medical tourism enthusiasts. There are six issues specifically that YourSurgeryAbroad.com feel are of considerable importance.

- Only 11% of most recent surgery abroad was cosmetic, contradicting a commonly held viewpoint that healthcare abroad is primarily for cosmetic and plastic surgery.
- US medical tourists appear to favor going to destinations closer to home, such as Canada and Mexico. Of those who have already participated in medical tourism 40.9% traveled to a bordering nation. In addition, 40.6% of those surveyed reported that their preferred destination for medical treatment abroad would be Canada.
- The US market predominately considers cost of treatment to be the most important motivations when deciding to go abroad for treatment.
- The most important factors for selecting a medical tourism destination for the US population are the healthcare standards of a destination country (77.5%) and cost of treatment (75.9%).
- A total of 20.5% of the general population sampled do not currently have health insurance, highlighting the enormous potential for growth in the USA medical tourism market as more affordable options are sought over domestic healthcare.
- Medical tourism is a growing industry and appears to be flourishing in the Global Financial Crisis, with 54% of those surveyed being more likely to go abroad for an expensive medical treatment.

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Existing medical tourists

A total of 8.8% of the US general population sampled have participated in medical tourism on at least one occasion

Figure 1.1: Total number of existing medical tourists in the USA (%)

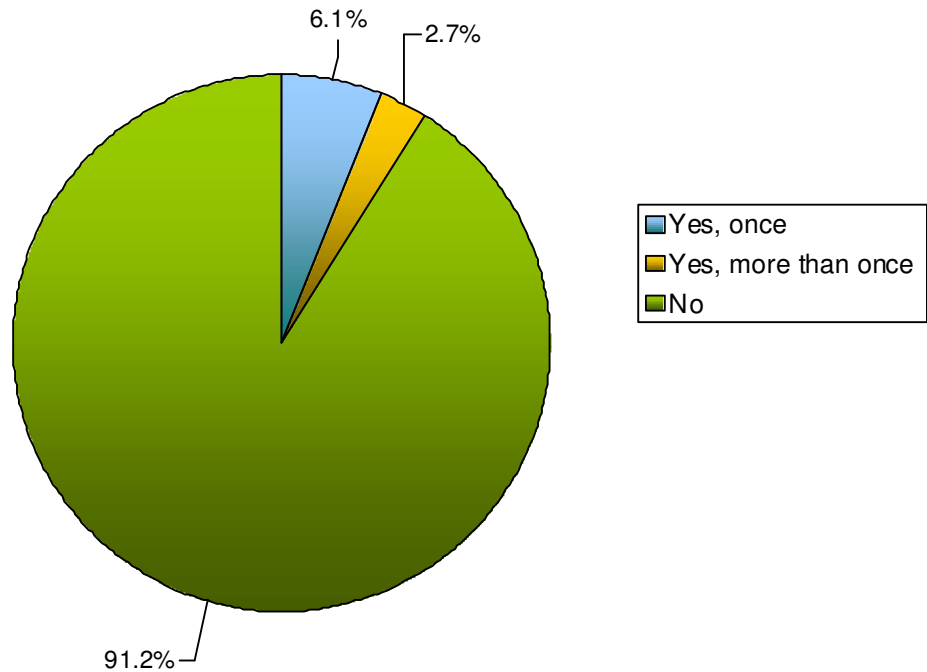


Figure 1.2: Total number of existing medical tourists in the USA by gender (%)

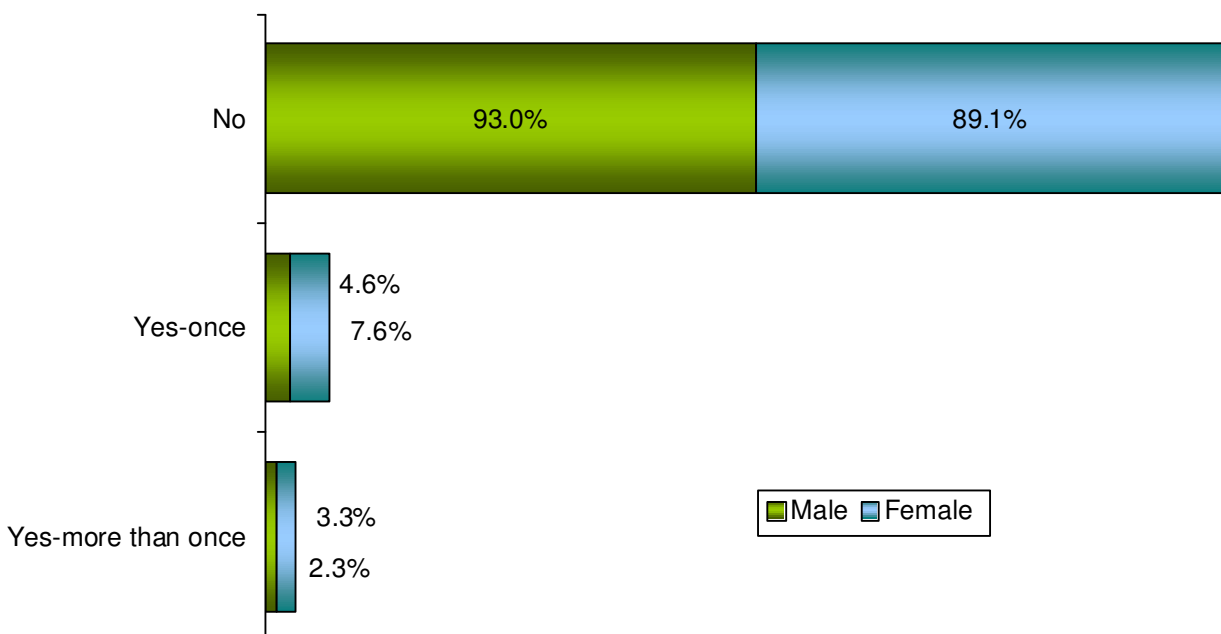


Figure 1.3: Total number of existing medical tourists in the USA by age (%)

	18-24 years	25-35 years	36-45 years	46-55 years	56-65 years	65+ years
Yes- once	9.1%	8.7%	7.1%	2.9%	3.1%	-
Yes- more than once	1.7%	3.5%	3.7%	1.2%	5.2%	-
No	89.3%	87.9%	78%	95.9%	91.6%	100%

Q. Have you ever travelled to another country to obtain healthcare?
 Base: 1003; general USA population

YourSurgeryAbroad.com, July 2009

Of the USA general population included in the survey sample, a total of 8.8% have participated in medical tourism on at least one occasion, with 2.7% of this group having participated more than once.

Males (10.9%) are slightly more likely to have participated in medical tourism than females (6.9%), as are younger members of the sample with 89.3% of those aged 18-24 years, 87.9% of those aged 25-35 years and 78% of those aged 36-45 years not having participated in medical tourism. This is in comparison to 95.9% of those aged 46-55 years, 91.6% of those aged 56-65 and 100% of those aged over 65 years, who have not participated in medical tourism.

Existing treatment categories

Dentistry is the most common treatment area sought by previous medical tourists

Figure 2.1: Treatment areas USA (%)

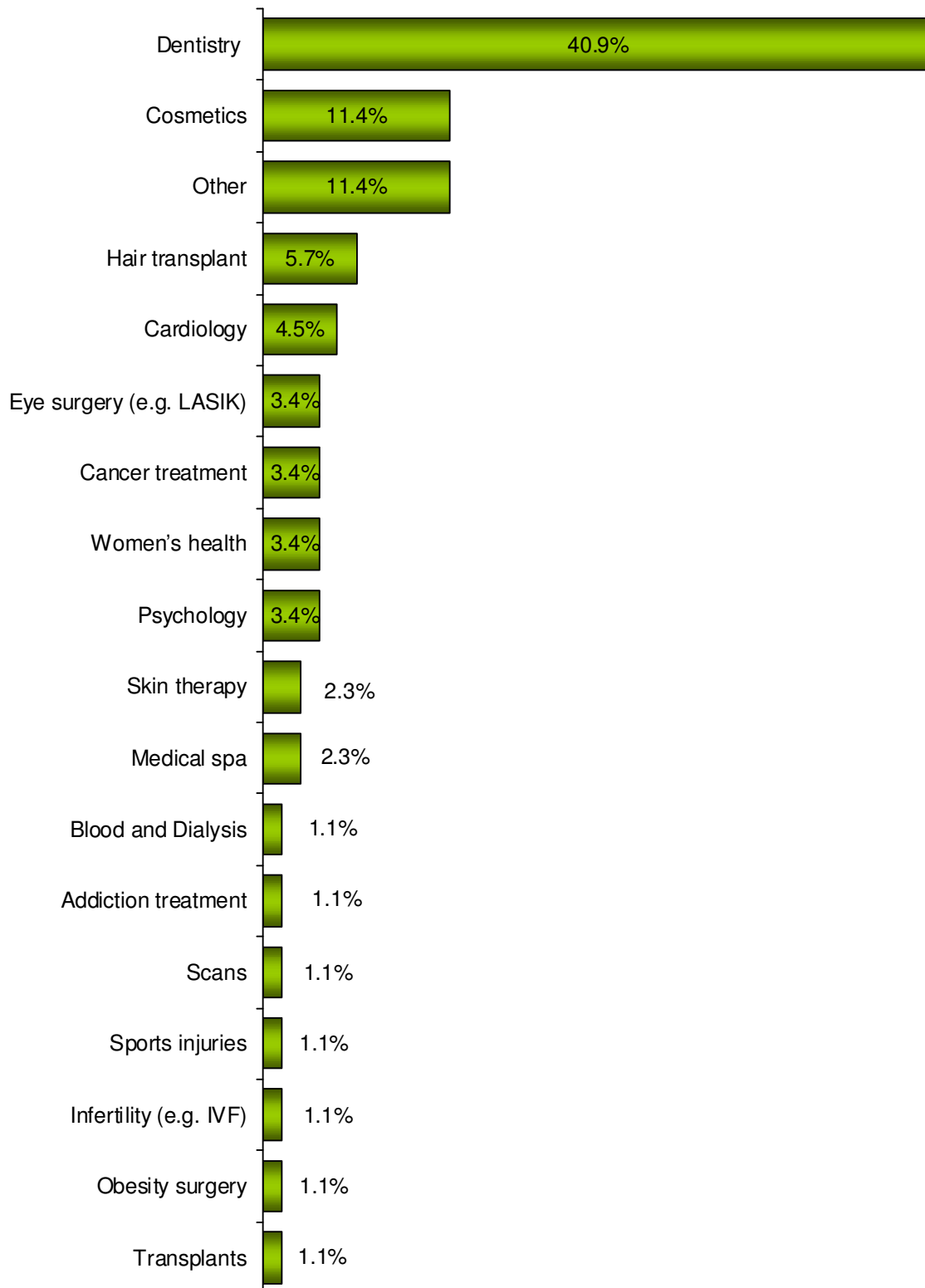


Figure 2.2: Treatment areas USA by gender (%)

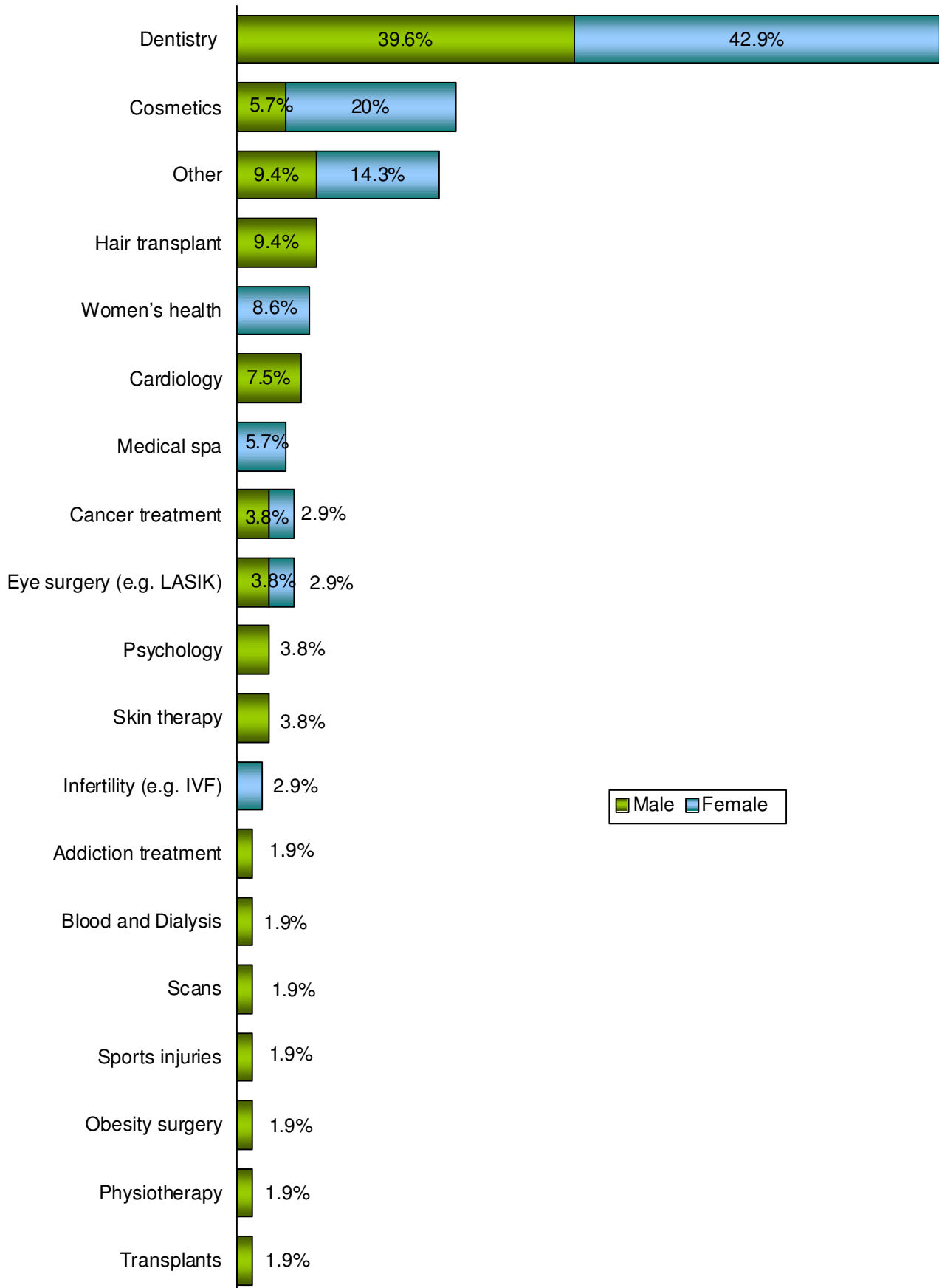


Figure 2.3: Treatment areas USA by age (%)

	18-24 years	25-35 years	36-45 years	46-55 years	56-65 years
Dentistry	69.2%	42.9%	3.8%	30%	54.5%
Cosmetics	7.7%	3.6%	19.2%	10%	18.2%
Eye surgery	-	3.6%	3.8%	10%	-
Blood & dialysis	-	3.6%	-	-	-
Addiction treatment	-	3.6%	-	-	-
Other	7.7%	10.7%	3.8%	30%	18.2%
Cancer treatment	-	3.6%	7.7%	-	-
Hair transplants	-	10.7%	3.8%	10%	-
Women's health	-	3.6%	7.7%	-	-
Cardiology	7.7%	-	11.5%	-	-
Medical spa	-	-	3.8%	10%	-
Scans	-	-	-	-	9.1%
Sports injuries	7.7%	-	-	-	-
Psychology	-	3.6%	7.7%	-	-
Infertility (e.g. IVF)	-	3.6%	-	-	-
Skin therapy	-	3.6%	3.8%	-	-
Obesity surgery	-	3.6%	-	-	-
Transplants	-	-	3.8%	-	-

Q.If yes, what treatment category was your most recent procedure in?
Base: 88; existing medical tourists USA

YourSurgeryAbroad.com, July 2009

Dentistry (40.9%), cosmetics (11.4%) and hair transplants (5.7%) are the most common treatment areas for previous medical tourists. Cosmetics are a more common treatment area with the female population (20%) than the male (5.7%), while hair transplants have been exclusively used by male medical tourists.

Existing destinations

Mexico (25%) and Canada (15.9%) were the most popular destinations with previous medical tourists

Figure 3.1: Treatment destinations USA (%)

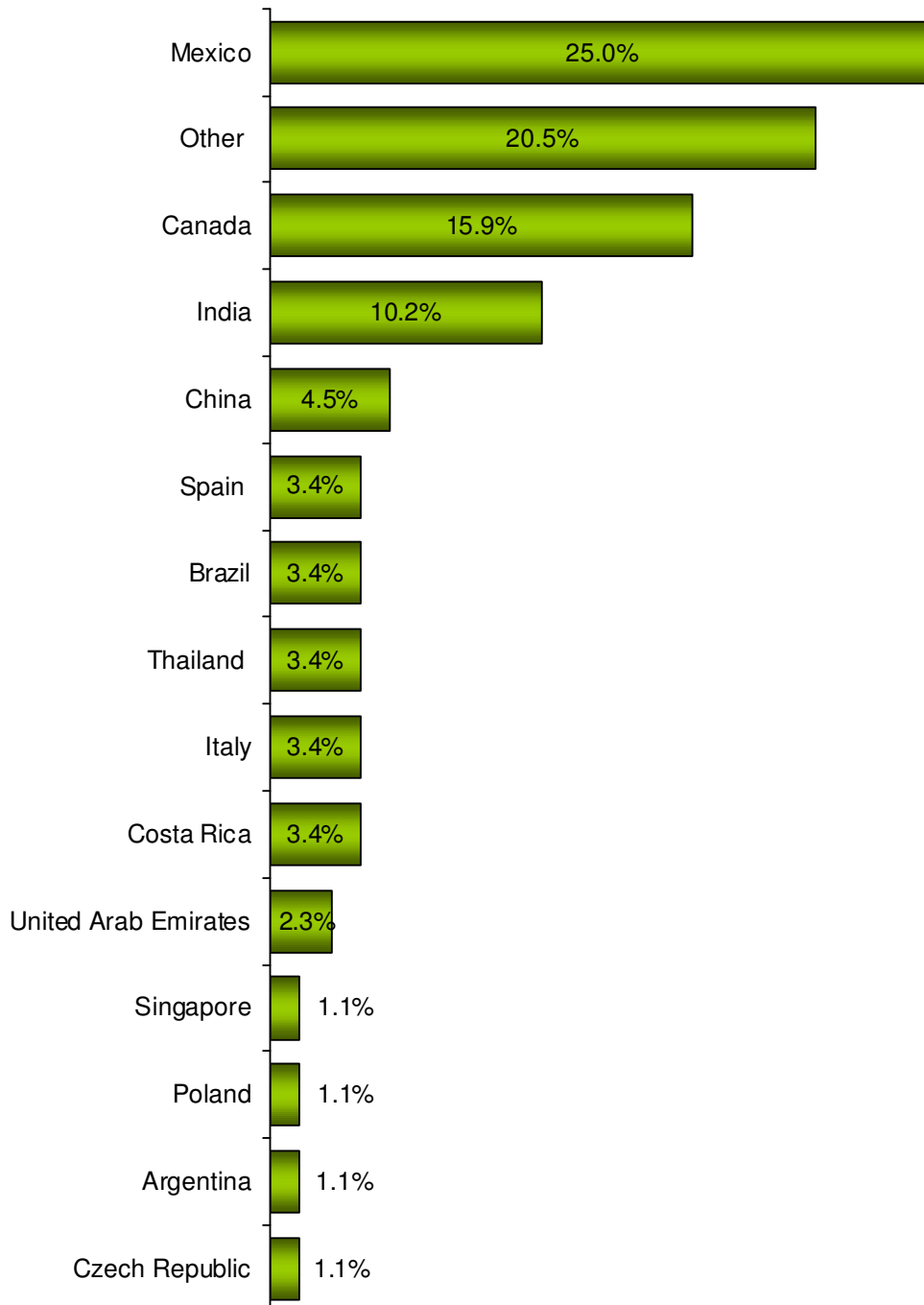


Figure 3.2: Treatment destinations USA by gender (%)

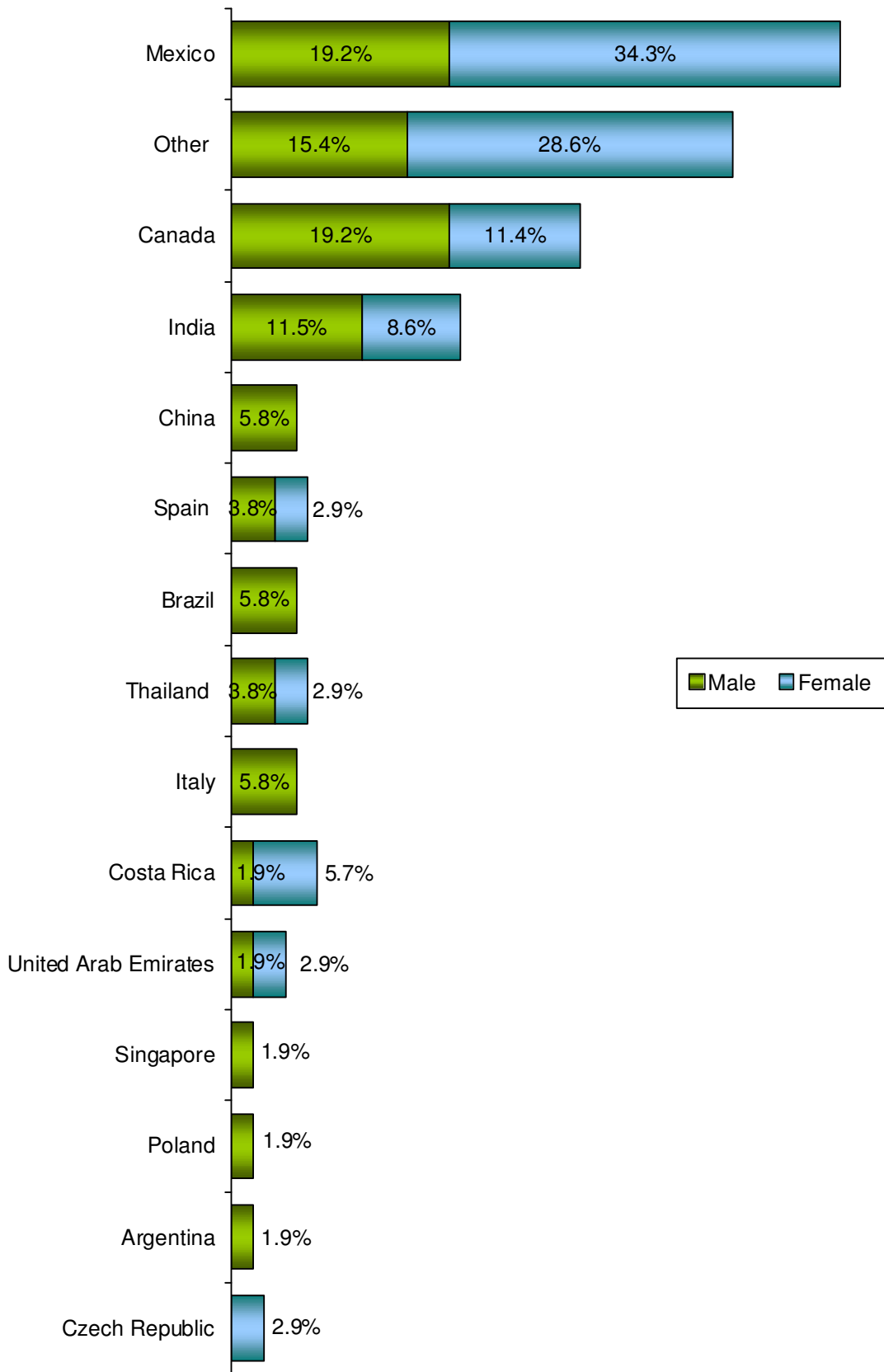


Figure 3.3: Treatment destinations USA by age (%)

	18-24 years	25-35 years	36-45 years	46-55 years	56-65 years
Other	23%	17.9%	19.2%	30%	18.2%
Spain	-	-	7.7%	10%	-
Brazil	15.4%	3.6%	-	-	-
Singapore	-	-	3.8%	-	-
Thailand	7.9%	-	3.8%	10%	-
Italy	-	10.7%	-	-	-
United Arab Emirates	7.9%	-	-	-	9.1%
Poland	-	-	3.8%	-	-
Canada	15.4%	10.7%	30.8%	10%	-
India	7.9%	25%	3.8%	-	-
Costa Rica	-	-	-	-	27.3%
Argentina	-	3.6%	-	-	-
Mexico	23%	17.9%	19.2%	40%	45.5%
Czech Republic	-	-	3.8%	-	-
China	-	10.7%	3.8%	-	-

Q.If yes, what country did you go to?
Base: 88; existing medical tourists USA

YourSurgeryAbroad.com, July 2009

Of those participants included in the sample who have previous experience with medical tourism, Mexico (25%) is the most common destination, followed by Canada (15.9%) and India (10.2%). It can be assumed from these results that the medical tourists from the USA have preferred to stay within the realm of North and Central America rather than traveling too far in distance.

It is of interest to note that females are more likely to have traveled to Mexico, while males are more likely to have traveled to Canada. Furthermore, that older members of the sample are more likely to have traveled to Mexico as a medical tourism destination than their younger counterparts with 40%

and 45.5% of those aged 46-55 years and those aged over 65 years having visited Mexico, in comparison to 23% of those aged 18-24 years, 17.9% of those aged 25-35 years and 19.25 of those aged 36-45 years.

Reasons for medical tourism

Price was the most attributed reason for participating in medical tourism

Figure 4.1: Reasons for medical tourism USA *multiple response* (%)

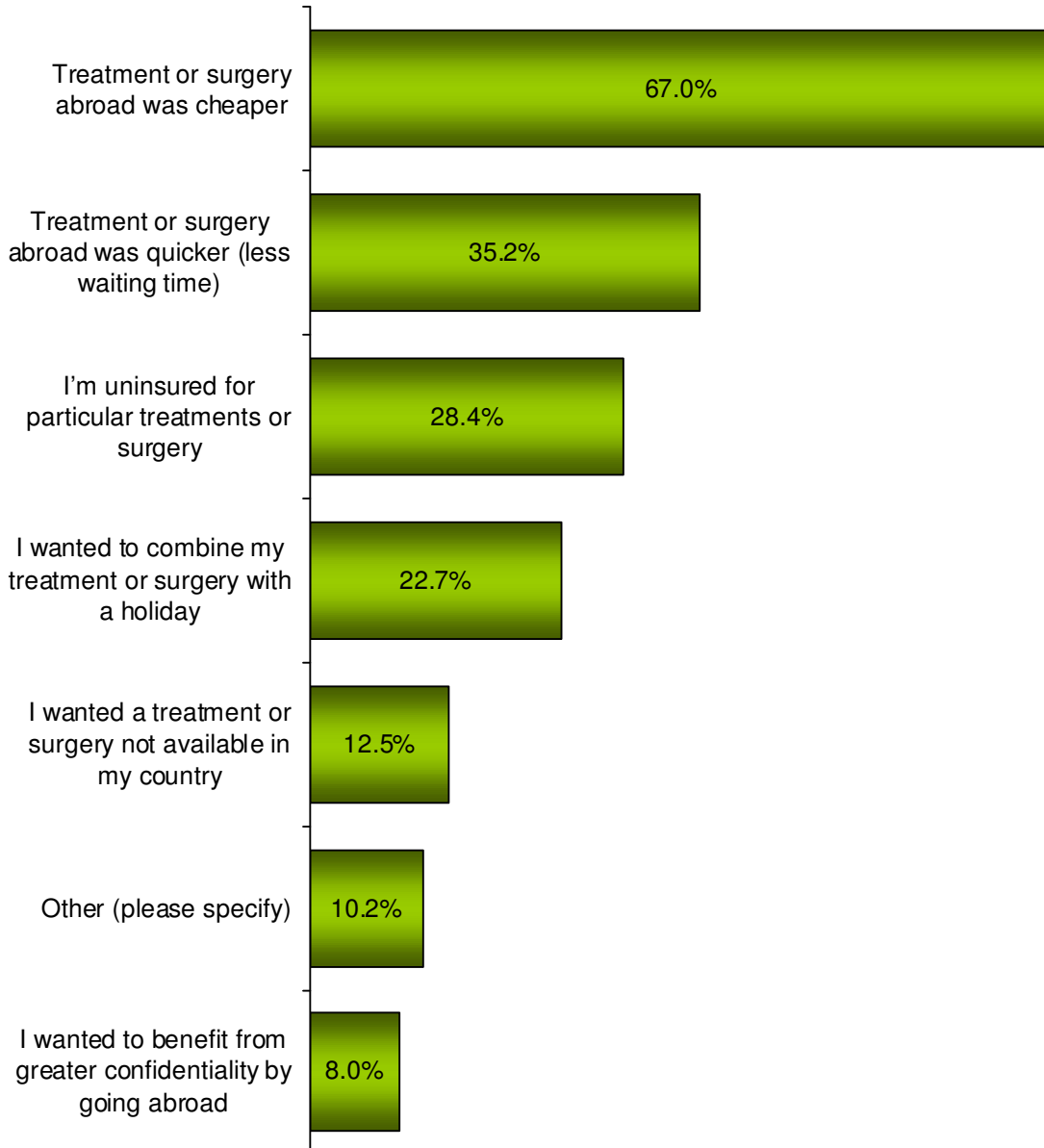


Figure 4.2: Reasons for medical tourism USA by gender multiple response (%)

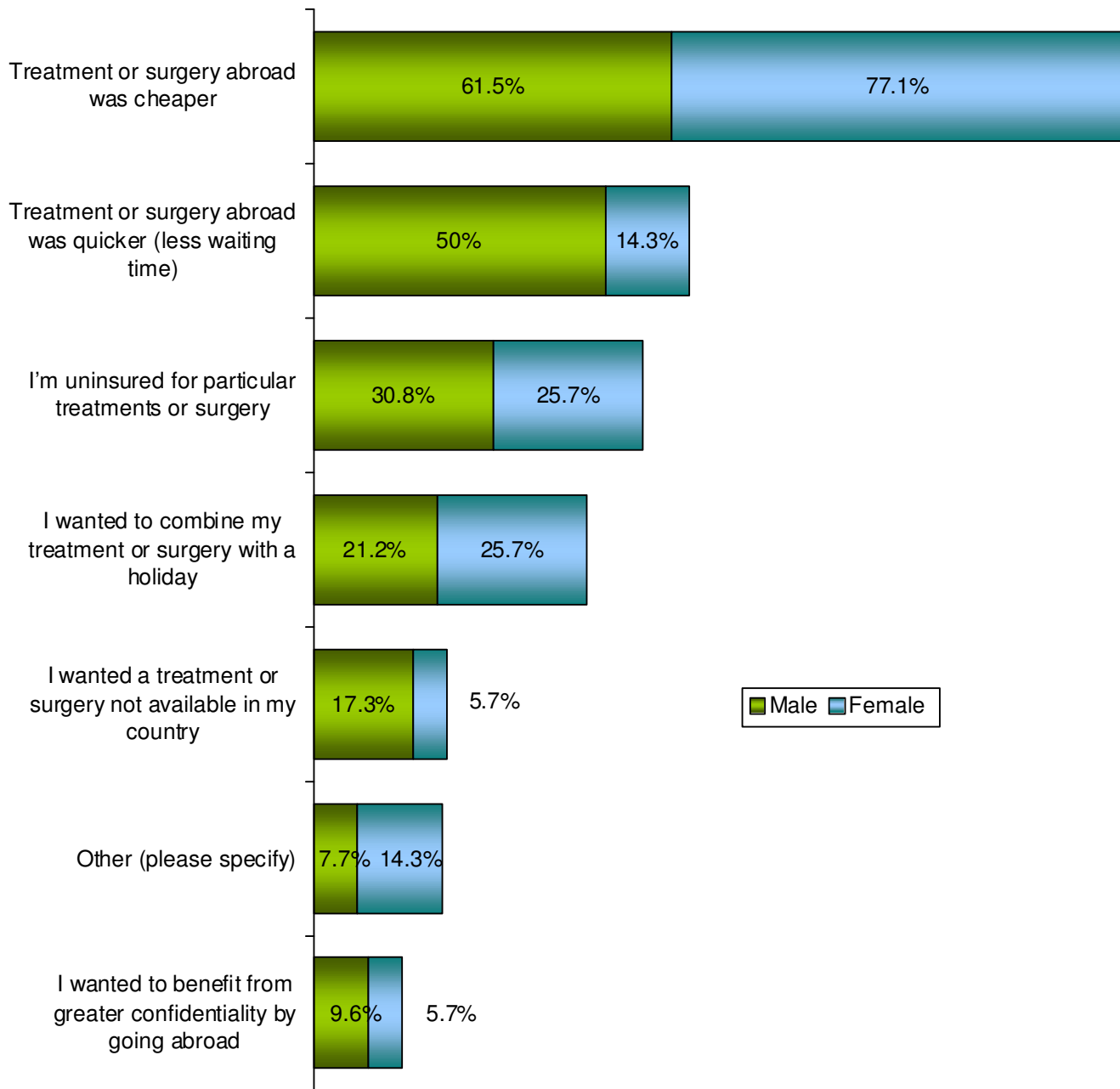


Figure 4.3: Reasons for medical tourism USA by age *multiple response* (%)

	18-24 years	25-35 years	36-45 years	46-55 years	56-65 years
Treatment or surgery abroad was cheaper	61.5%	60.7%	69.2%	70%	81.8%
Treatment or surgery abroad was quicker (less waiting time)	46.2%	42.9%	34.6%	-	36.4%
I'm uninsured for particular treatments or surgery	38.5%	28.6%	23.1%	30.0%	27.3%
I wanted to combine my treatment or surgery with a holiday	30.8%	25%	15.4%	30%	18.2%
I wanted a treatment or surgery not available in my country	-	17.9%	19.2%	-	-
Other	7.7%	7.1%	11.5%	10%	18.2%
I wanted to benefit from greater confidentiality by going abroad	-	7.1%	15.4%	10%	-

Q.If yes, why did you choose to travel abroad?
 Base: 88; existing medical tourists USA

YourSurgeryAbroad.com, July 2009

Two-thirds (67%) of the medical tourists surveyed report participating in medical tourism because treatment or surgery was cheaper abroad. This is followed by 35.2% who report their main motivation being that treatment or surgery abroad was quicker than domestic treatment in the USA, and 28.4% who were uninsured for particular treatments or surgery.

The cost of treatment was more important to female medical tourists with a 15.6% difference between male and female responses. Also noted is a substantial difference in the importance of

treatment or surgery abroad being quicker with a total of 50% of males reporting this is a reason for going abroad, in comparison to only 14.3% of females.

Friend or relative

Of the non-medical tourists, 17.9% have a friend or family member who has in fact participated in medical tourism

Figure 5.1: Have a friend or relative who have participated in medical tourism USA (%)

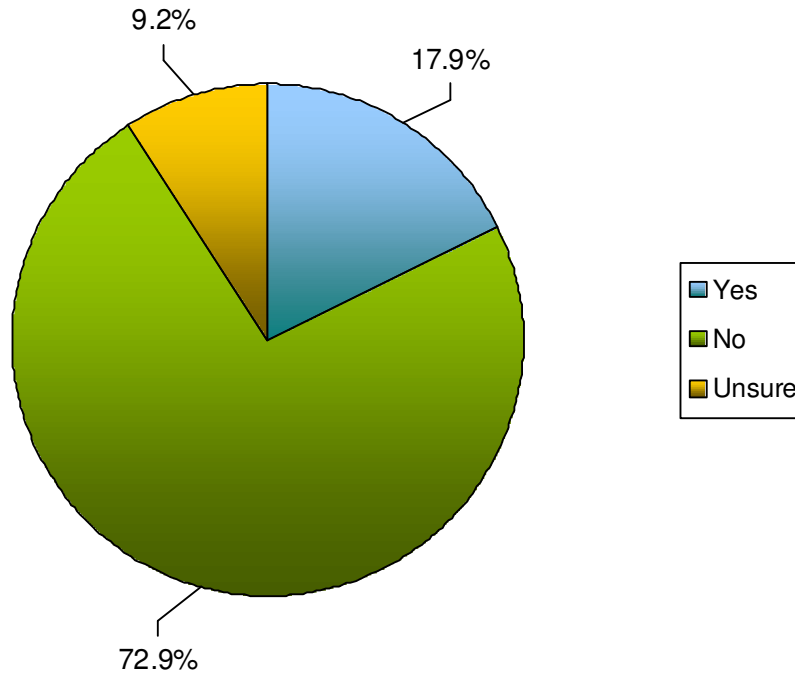


Figure 5.2: Have a friend or relative who have participated in medical tourism USA by gender (%)

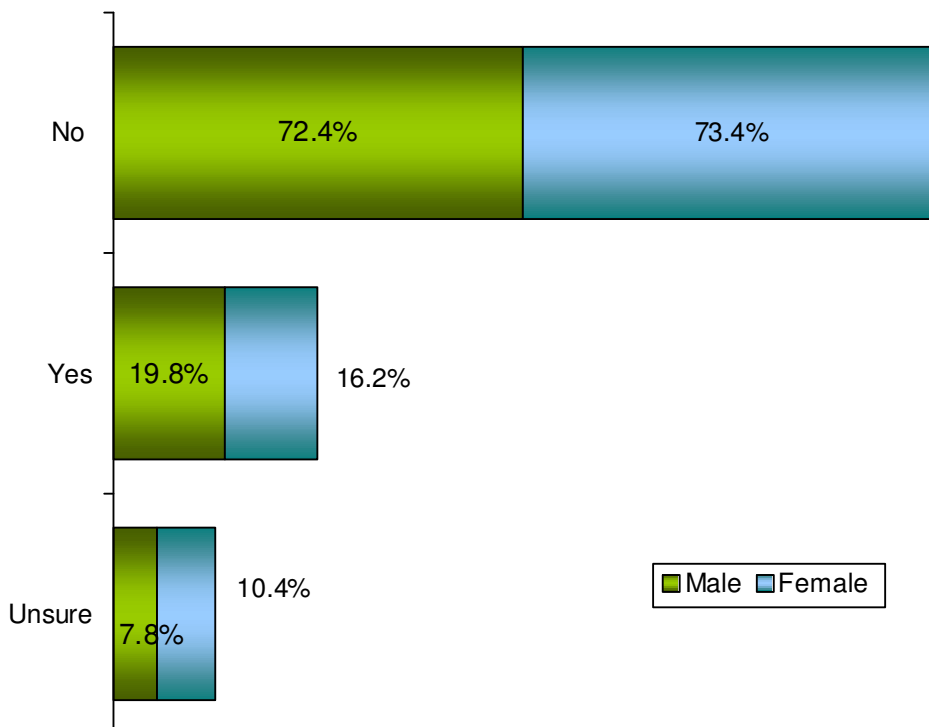


Figure 5.3: Have a friend or relative who have participated in medical tourism USA by age (%)

	18-24 years	25-35 years	36-45 years	46-55 years	56-65 years	65+ years
No	61.1%	67.9%	72.9%	78.5%	78.3%	100%
Yes	13.9%	19.2%	19.7%	13.3%	16.6%	-
Unsure	25%	12.8%	7.5%	8.2%	5.1%	-

Q.If no (to Q1), As you personally have not been abroad for any medical treatment, do you know a friend or relative who has?
 Base: 915; those who have not participated in medical tourism USA

YourSurgeryAbroad.com, July 2009

Of those participants included in the sample who have not previously participated in medical tourism, 17.9% actually had a family member or friend who has.

Consider seeking healthcare abroad

Just less than two-thirds (61.4%) of non-medical tourists have considered, or would consider, participating in medical tourism

Figure 6.1: Have or would consider seeking healthcare abroad USA (%)

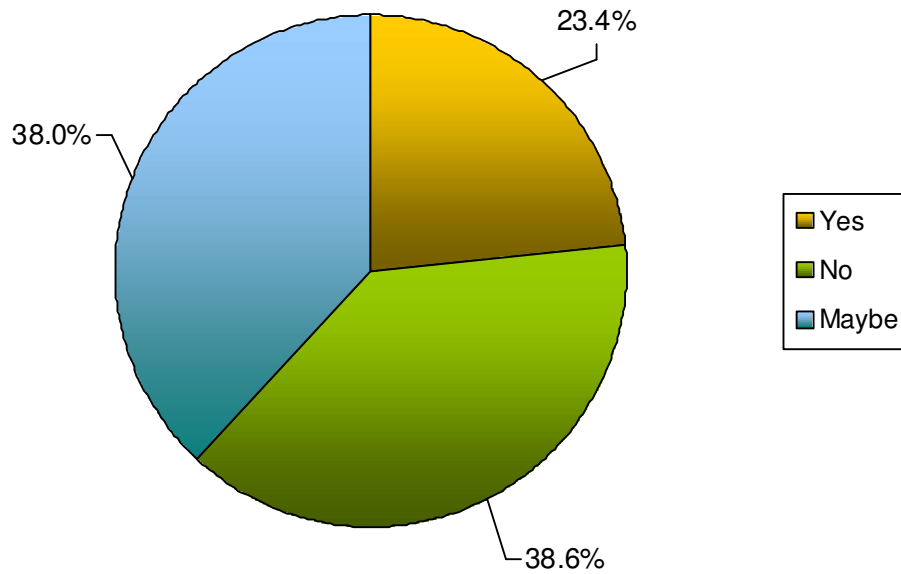


Figure 6.2: Have or would consider seeking healthcare abroad USA by gender (%)

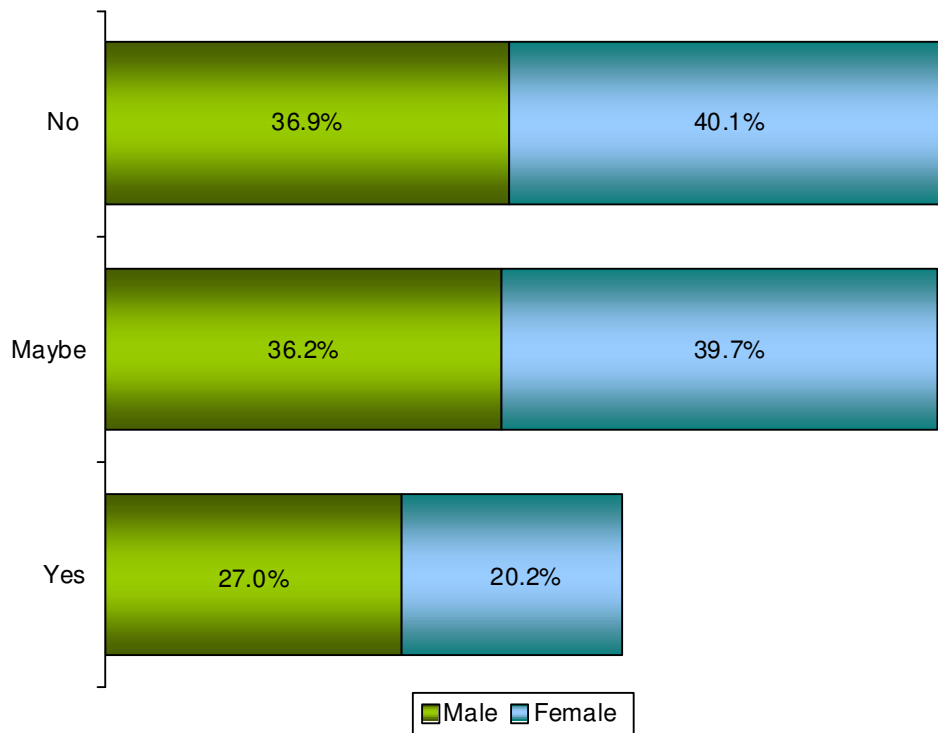


Figure 6.3: Have or would consider seeking healthcare abroad USA by age (%)

	18-24 years	25-35 years	36-45 years	46-55 years	56-65 years	65+ years
No	32.4%	31.5%	39.9%	40.8%	46.3%	50%
Maybe	34.3%	42.9%	36.7%	12.9%	36%	50%
Yes	33.3%	25.6%	23.4%	46.4%	17.7%	-

Q. Have you ever considered, or would you ever consider, seeking healthcare abroad?
 Base: 915; those who have not participated in medical tourism USA

YourSurgeryAbroad.com, July 2009

Of those participants who have not previously participated in medical tourism, 61.4% report that they have considered, or would consider seeking healthcare abroad. This includes 23.4% who report a definite 'yes' and 38% who report a 'maybe'. Younger members of the sample are more likely to be open to medical tourism with only 17.7% of those aged 56-65 years reporting a 'yes', and 0% of those aged over 65 years of age.

Circumstances needed to increase potential medical tourism

A total of 37.4% of those who had/would not consider, reported nothing would change their mind regarding medical tourism

Figure 7.1: Changes/situations required to increase potential medical tourism USA (%)

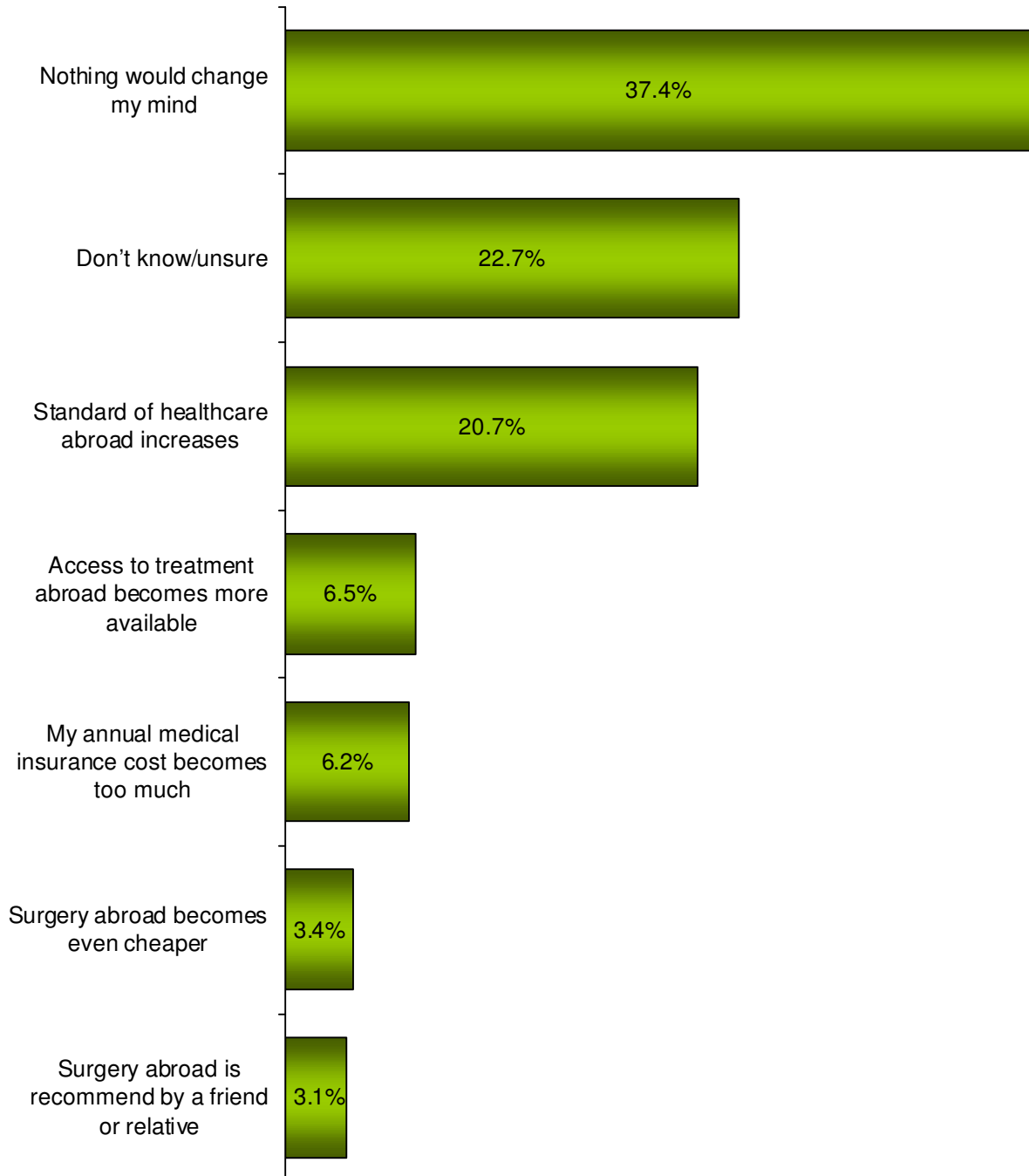


Figure 7.2: Changes/situations required to increase potential medical tourism USA by gender (%)

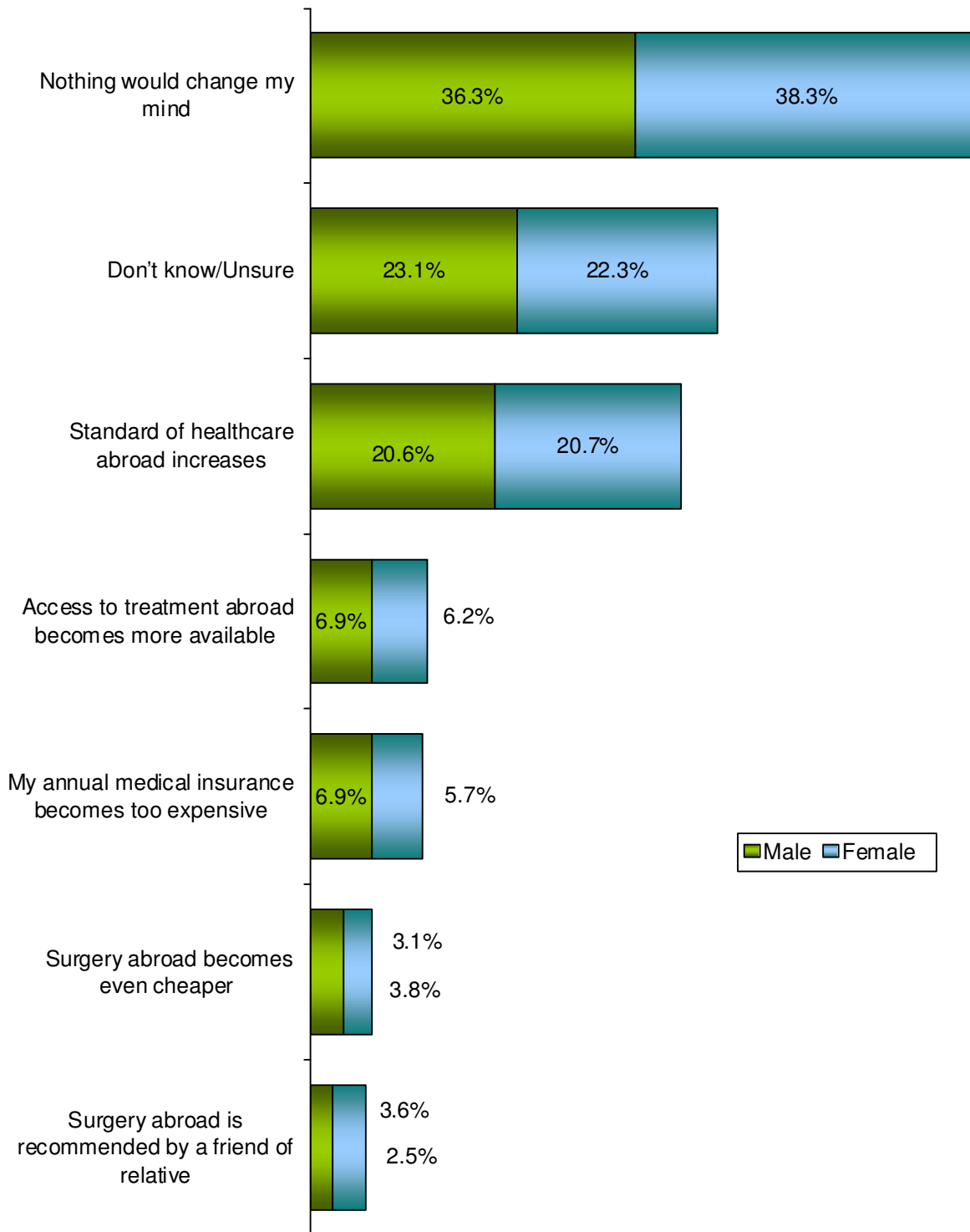


Figure 7.3: Changes/situations required to increase potential medical tourism USA by age (%)

	18-24 years	25-35 years	36-45 years	46-55 years	56-65 years	65+ years
Nothing would change my mind	34.3%	32.8%	38.7%	32.6%	45.7%	66.7%
Don't know/Unsure	22.9%	21.9%	20%	27.4%	19.8%	33.3%
Standard of healthcare abroad increases	20%	25%	16%	25.3%	17.3%	-
Access to treatment abroad becomes more available	-	6.3%	9.3%	6.3%	7.4%	-
My annual medical insurance cost becomes too much	8.6%	7.8%	12%	2.1%	3.7%	-
Surgery abroad becomes even cheaper	8.6%	4.7%	2.7%	3.2%	1.2%	-
Surgery abroad is recommended by a friend of relative	5.7%	1.6%	1.3%	3.2%	4.9%	-

Q.If no, what is the main thing that would need to happen for you to consider seeking healthcare abroad?
 Base: 353; those who would not consider participation in medical tourism USA

YourSurgeryAbroad.com, July 2009

Of those members of the general population sampled who had not previously considered, or would not consider medical tourism, a total of 37.4% are adamant that nothing would change their mind to make them reconsider. A further 22.7% are unsure what it would take to change their mind about medical tourism, while 20.7% reported that having the standards of healthcare abroad increase would create a more favorable situation for them to consider traveling abroad for healthcare.

Older participants are more likely to be adamant that they will not reconsider changing their opinion on medical tourism, with 66.7% of those aged over 65 years stating that 'nothing would change my mind', along with 45.7% of those aged 56-65 years. At the other end of the age spectrum, 34.3% of those aged 18-24 years, 32.8% of those aged 25-35 years, 38.7% of those aged 36-45 years and 32.6% of 46-55 year olds reported the same response.

Benefits of medical tourism

Saving money is perceived as the largest benefit of medical tourism by previous tourists

Figure 8.1: Largest benefit of medical tourism USA (%)

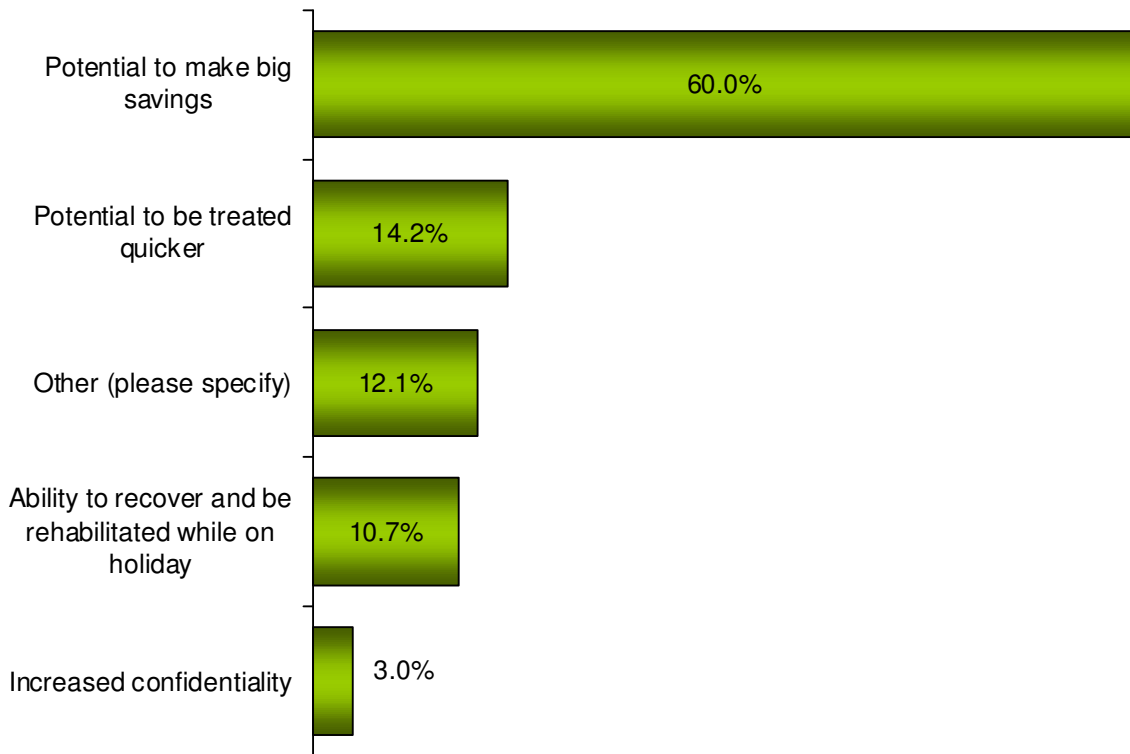


Figure 8.2: Largest benefit of medical tourism USA by gender (%)

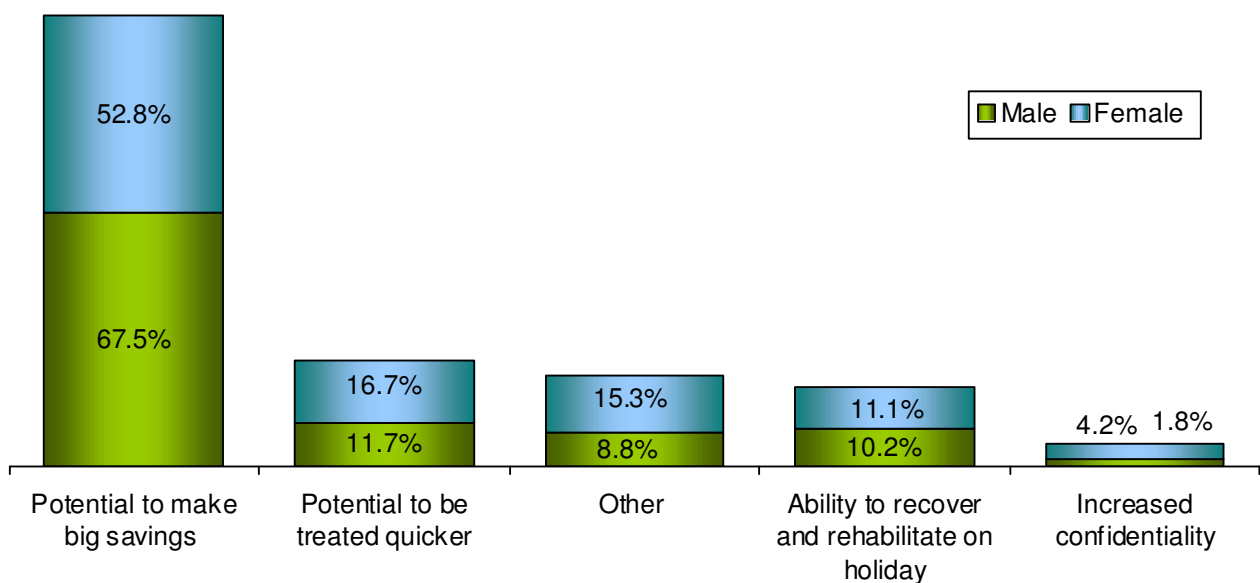


Figure 8.3: Largest benefit of medical tourism USA by age (%)

	18-24 years	25-35 years	36-45 years	46-55 years	56-65 years	65+ years
Potential to make big savings	61.6%	64%	53.1%	55.1%	67%	66.7%
Potential to be treated quicker	20.6%	15.8%	14.2%	15.9%	5.3%	-
Other	5.5%	13.7%	14.2%	15.2%	7.5%	33.3%
Ability to recover and be rehabilitated while on holiday	9.6%	3.6%	14.2%	10.1%	19.2%	-
Increased confidentiality	2.7%	2.9%	4.4%	3.6%	1.1%	-

Q. What do you think the biggest benefit to travelling abroad for healthcare?
 Base: 562; those who have/would consider medical tourism USA

YourSurgeryAbroad.com, July 2009

The US survey population is clearly financially driven when it comes to medical tourism, with a total of 60% of those who have/would consider seeking healthcare abroad citing the largest benefit as being the potential to make big savings on the cost of treatment. This is substantially higher than the potential to be treated quicker, which was the second highest benefit with 14.2%.

Potential female medical tourists are slightly less driven by price than males, with 52.8% and 67.5% respectively. Females do however have a slightly higher response to the potential to be treated quicker than males with 16.7% of females rating this as the largest benefit, compared to 11.7% of males.

Impact of the Global Financial Crisis (GFC)

More than half of the population are more likely to participate in medical tourism as a result of the GFC

Figure 9.1: Impact of GFC on likelihood of participating in medical tourism USA (%)

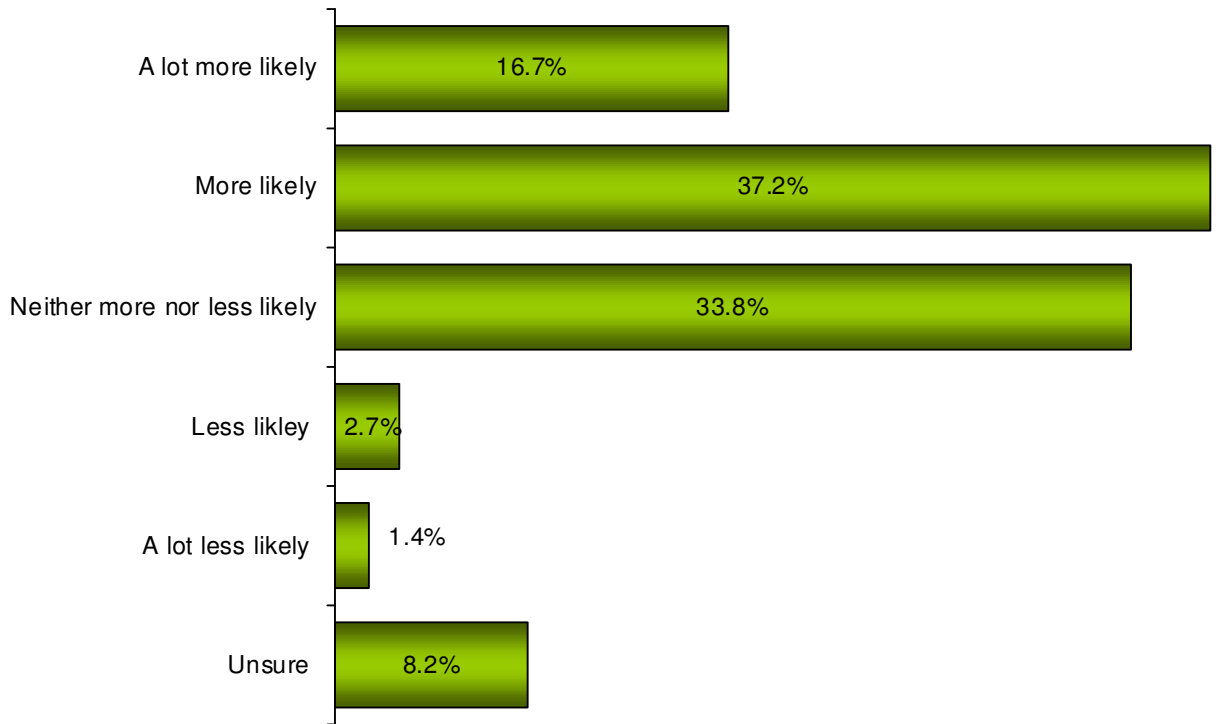


Figure 9.2: Impact of GFC on likelihood of participating in medical tourism USA by gender (%)

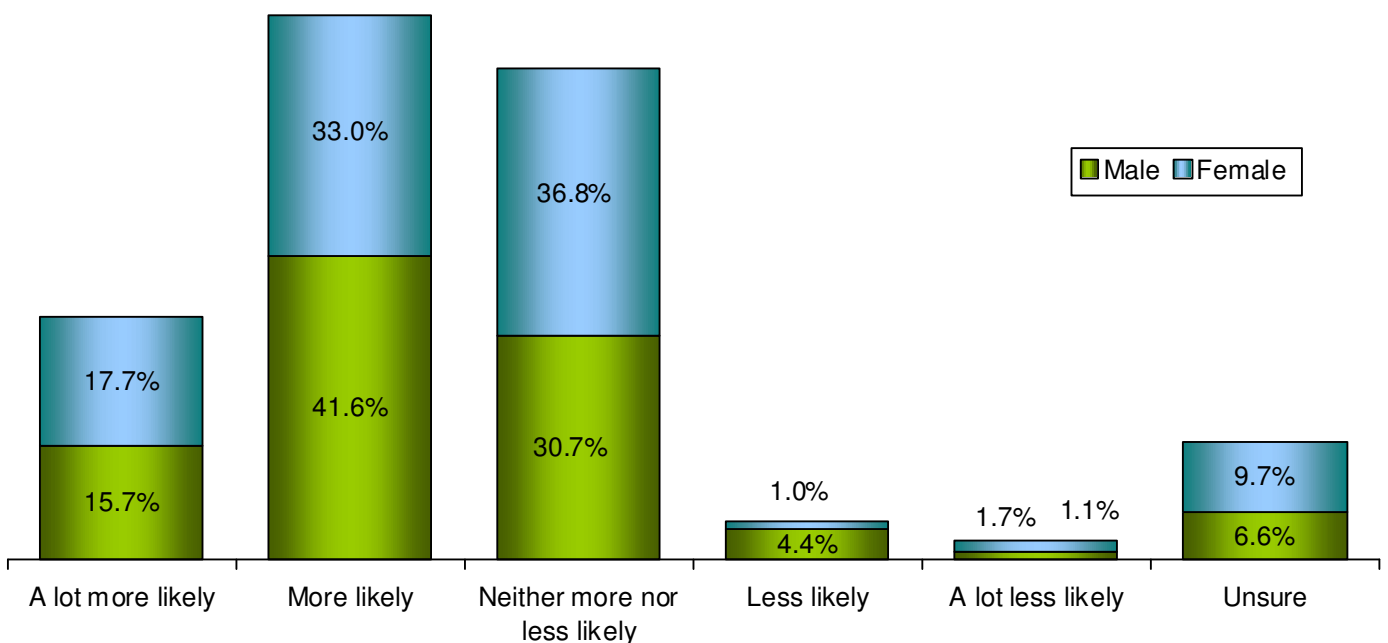


Figure 9.3: Impact of GFC on likelihood of participating in medical tourism USA by age (%)

	18-24 years	25-35 years	36-45 years	46-55 years	56-65 years	65+ years
A lot more likely	23.3%	13%	18.6%	17.4%	11.7%	66.7%
More likely	42.5%	43.2%	35.4%	31.9%	35.1%	33.3%
Neither more nor less likely	23.3%	30.9%	35.4%	37%	41.5%	-
Less likely	6.9%	1.4%	3.5%	1.5%	2.1%	-
A lot less likely	-	0.7%	0.9%	2.9%	2.1%	-
Unsure	4.1%	10.8%	6.2%	9.4%	7.5%	-

Q. In light of the current global financial crisis (GFC), if you wanted or were in need of an expensive private medical procedure, how much more likely are you to consider cheaper medical treatment abroad now compared to 1 year ago?
 Base: 562; those who have/would consider medical tourism USA

YourSurgeryAbroad.com, July 2009

A total of 53.9% of those who have/would consider medical tourism report they are more likely to consider traveling abroad as a result of the GFC. This includes 16.7% who report being a lot more likely to consider medical tourism.

Source of information

The Internet is the primary source of information regarding medical tourism

Figure 10.1: Primary sources of information on medical tourism USA *multiple response* (%)

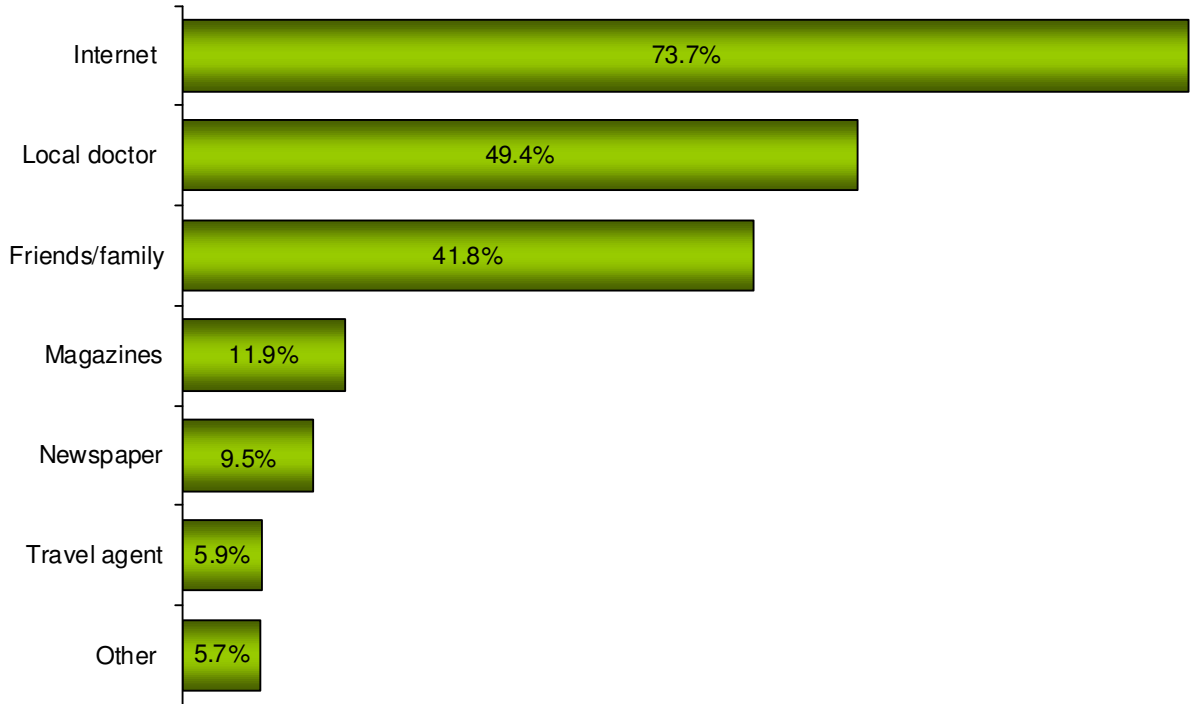


Figure 10.2: Primary sources of information on medical tourism USA by gender *multiple response* (%)

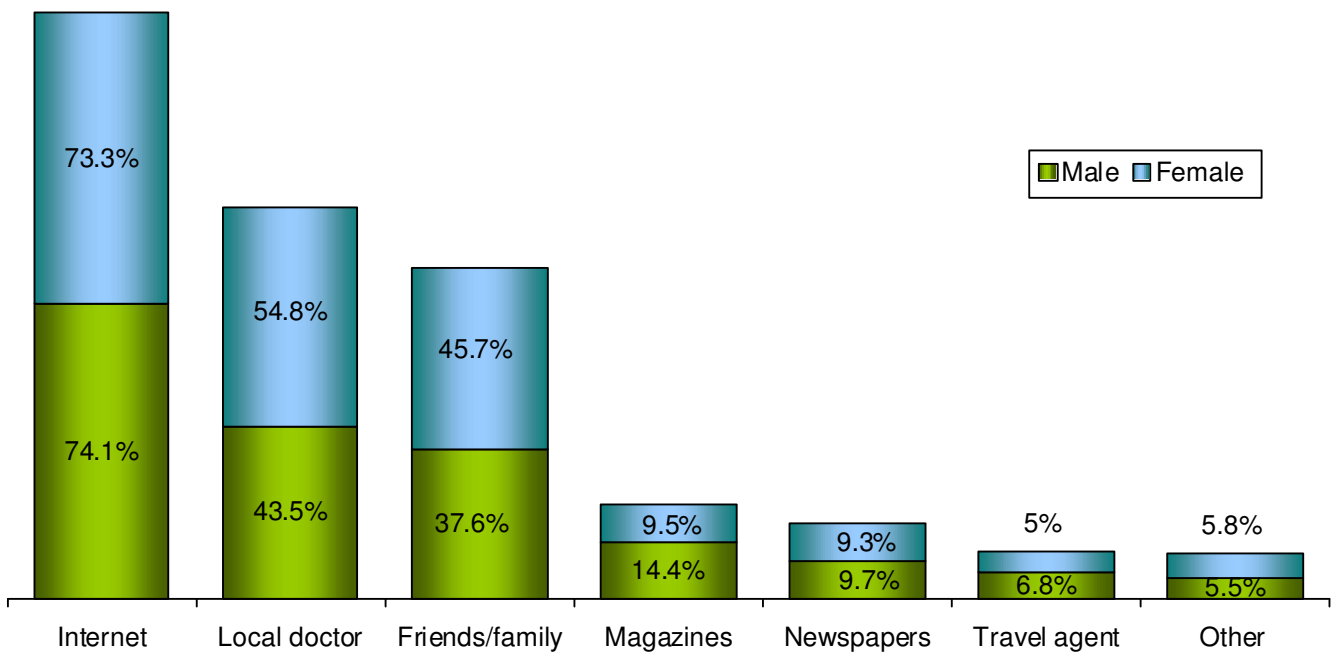


Figure 10.3: Primary sources of information on medical tourism USA by age multiple response (%)

	18-24 years	25-35 years	36-45 years	46-55 years	56-65 years	65+ years
Internet	71.8%	77.1%	74.8%	74.5%	64.5%	83.3%
Local doctor	48.1%	48.5%	49.5%	50.6%	47.8%	33.3%
Friends/family	52.7%	53.7%	40.7%	30.5%	33.9%	16.7%
Magazines	15.3%	14.7%	13.1%	7.0%	10.8%	-
Newspaper	7.6%	11.7%	10.7%	7.8%	8.6%	-
Travel agent	6.9%	6.9%	5.6%	3.7%	6.5%	16.7%
Other	4.6%	2.6%	4.7%	7.8%	8.6%	-

Q. Where would you/do you look for your information regarding medical treatment abroad?
 Base: 1003; general population USA

YourSurgeryAbroad.com, July 2009

The Internet is by far the primary source when it comes to seeking information regarding one's medical tourism options, with 73.7% reporting its use. Consulting a local doctor is also an important channel for information, with 49.4% reporting this is a primary source.

Medical insurance

Majority (79.5%) of those surveyed do have medical insurance

Figure 11.1: Those with or without medical insurance USA (%)

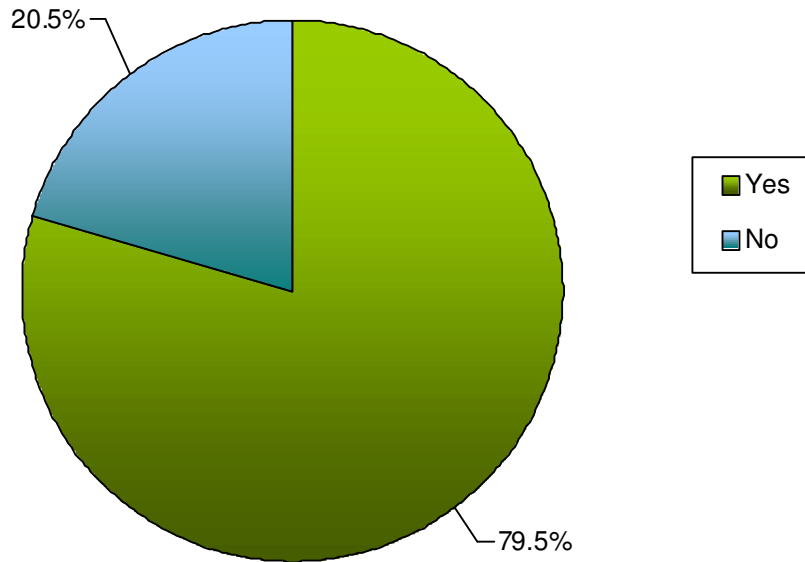


Figure 11.2: Those with or without medical insurance USA by gender (%)

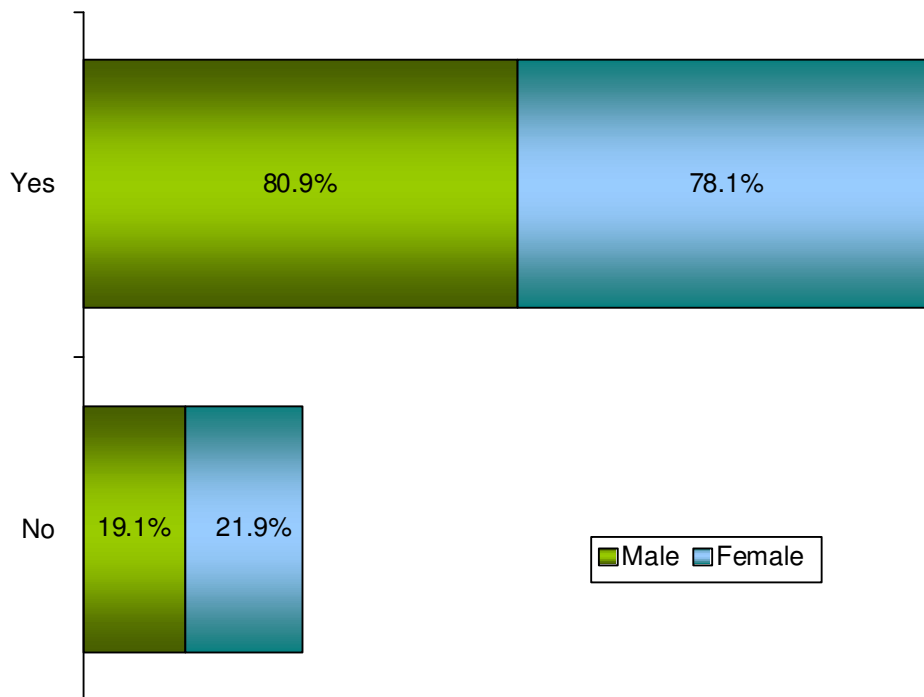


Figure 11.3: Those with or without medical insurance USA by age (%)

	18-24 years	25-35 years	36-45 years	46-55 years	56-65 years	65+ years
Yes	74.4%	80.5%	79%	79.4%	82.3%	83.3%
No	25.6%	19.5%	21%	20.6%	17.7%	16.7%

Q.Do you currently have health insurance?
 Base: 1003; general population USA

YourSurgeryAbroad.com, July 2009

While 79.5% of the general population sampled report having current medical insurance, a total of 20.5% do not currently have any health coverage.

Elective procedures cover

Most (65.3%) medical insurance policies do not cover, or have limited cover of elective procedures

Figure 12.1: Those with elective procedure coverage USA (%)

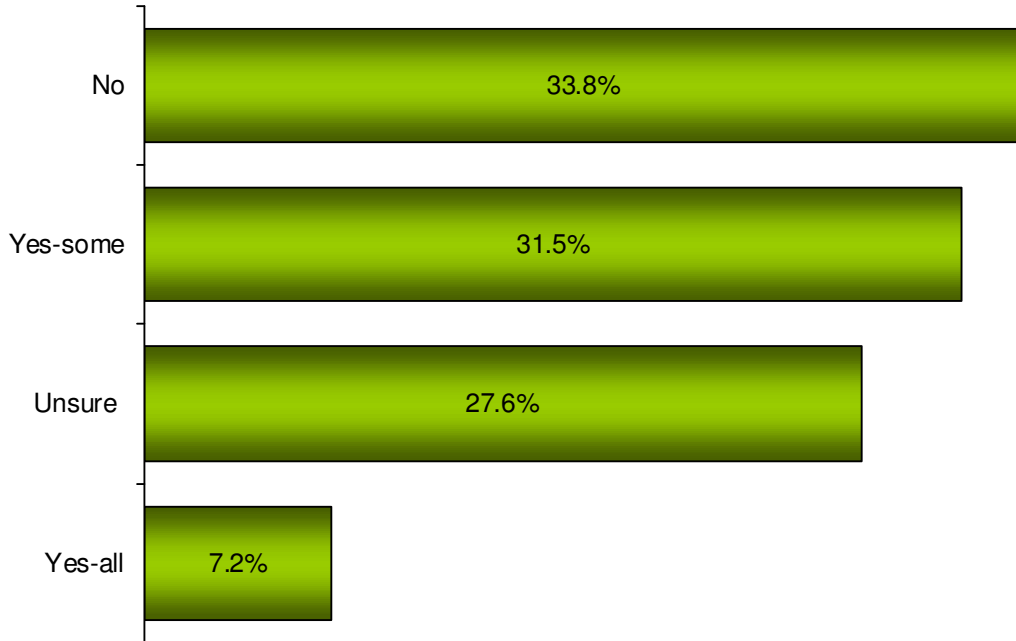


Figure 12.2: Those with elective procedure coverage USA by gender (%)

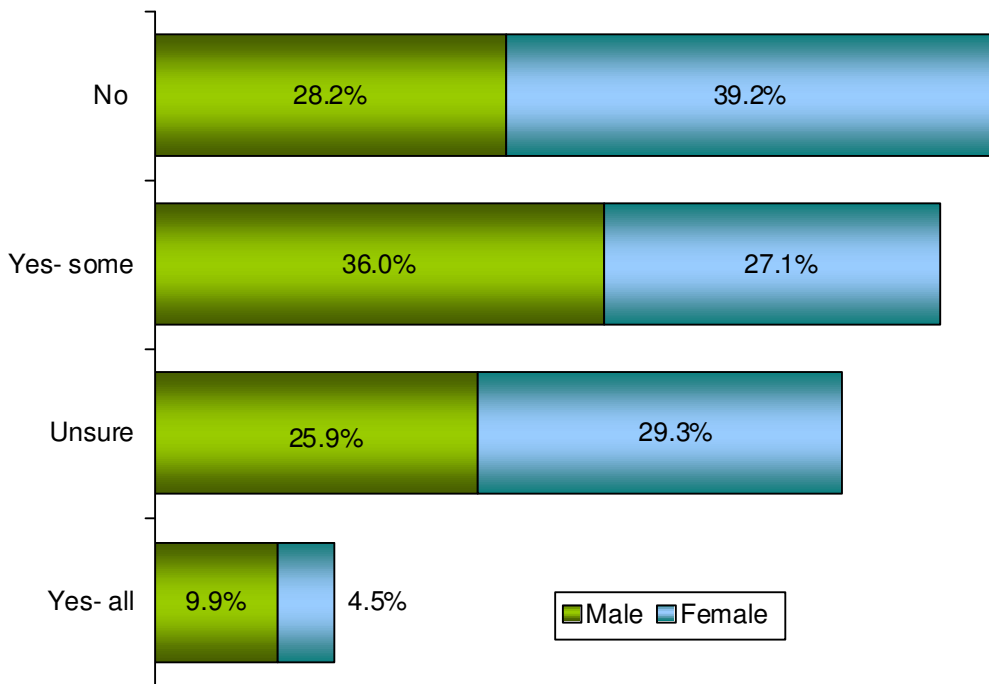


Figure 12.3: Those with elective procedure coverage USA by age (%)

	18-24 years	25-35 years	36-45 years	46-55 years	56-65 years	65+ years
No	24.4%	30.1%	30.8%	39.4%	39.9%	20%
Yes- some	36.7%	31.7%	33.1%	31.6%	26.8%	20%
Unsure	30%	31.7%	26%	25.4%	25.5%	40%
Yes- all	8.9%	6.5%	10.1%	3.6%	7.8%	20%

Q. Does this insurance policy cover any elective surgery (i.e. non-essential to treat non-life threatening issues)?
 Base: 797; those who have health insurance USA

YourSurgeryAbroad.com, July 2009

Only 7.2% of those who currently have health insurance are covered for all elective medical procedures, while an additional 31.5% are covered for some elective procedures. A total of 33.8% are not covered for any elective procedures, and 27.6% are unsure what their policy covers.

Interestingly, males are more likely to have full and even partial elective medical coverage, with 36% of males reporting that some elective treatments are covered, and 9.9% reporting all electives are covered. Females on the other hand report 27.1% having some coverage, and only 4.5% having all elective procedures covered.

Employer schemes

A total of 5.1% of employers currently offer medical tourism schemes

Figure 13.1: Employer scheme in place that allow medical tourism USA (%)

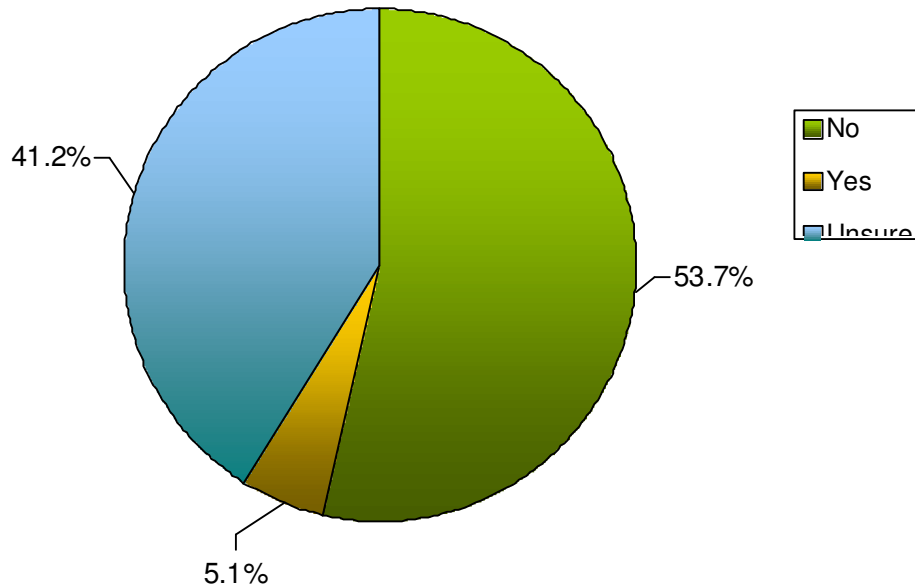


Figure 13.2: Employer scheme in place that allow medical tourism USA by gender (%)

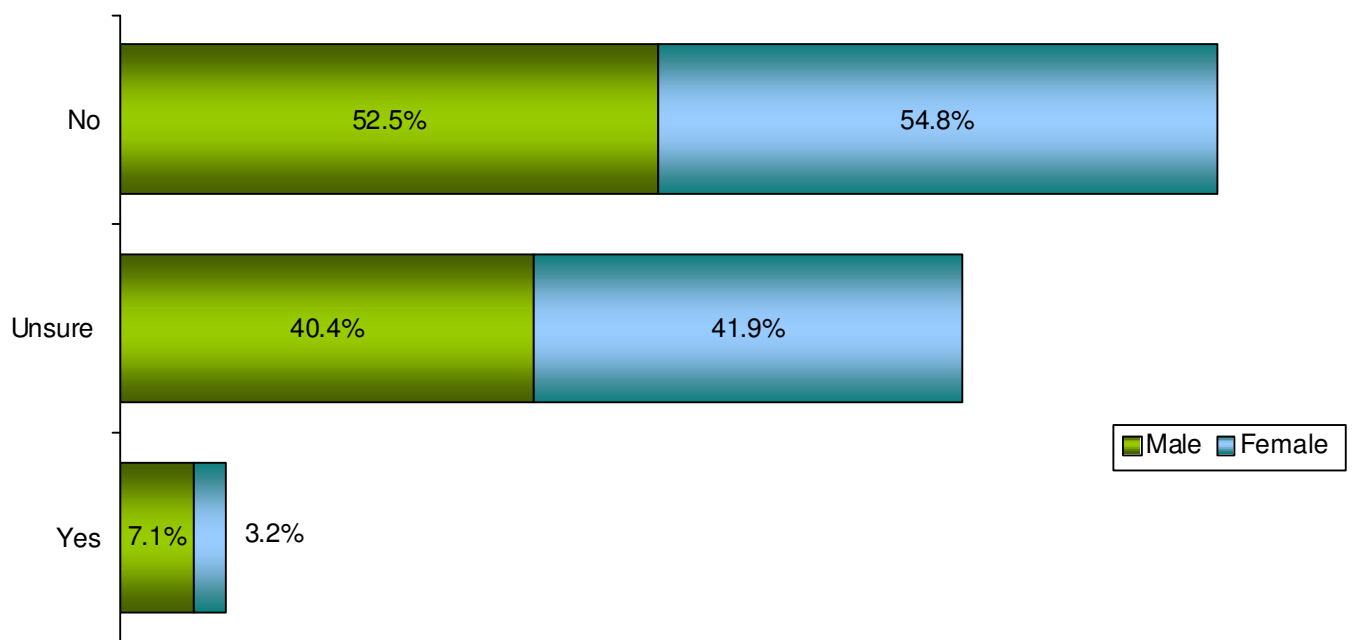


Figure 13.3: Employer scheme in place that allow medical tourism USA by age (%)

	18-24 years	25-35 years	36-45 years	46-55 years	56-65 years	65+ years
Yes-	6.7%	5.9%	6.5%	3.6%	3.9%	-
No	46.7%	51.1%	52.7%	56%	60.1%	20%
Unsure	46.7%	43.0%	40.8%	40.4%	35.9%	80%

Q. Does your employer have a scheme in place that allows for medical treatment abroad?
 Base: 1003; general population USA

YourSurgeryAbroad.com, July 2009

While more than half of participants do not currently have any employer schemes in place that includes medical treatment abroad, a further 41.2% are unsure if their employer has any such scheme in place. A total of 5.1% do currently have an employer scheme that allows for medical tourism .

Funding for medical tourism

The most common method of funding for medical tourism would be personal savings

Figure 14.1: Methods of funding for medical tourism USA (%)

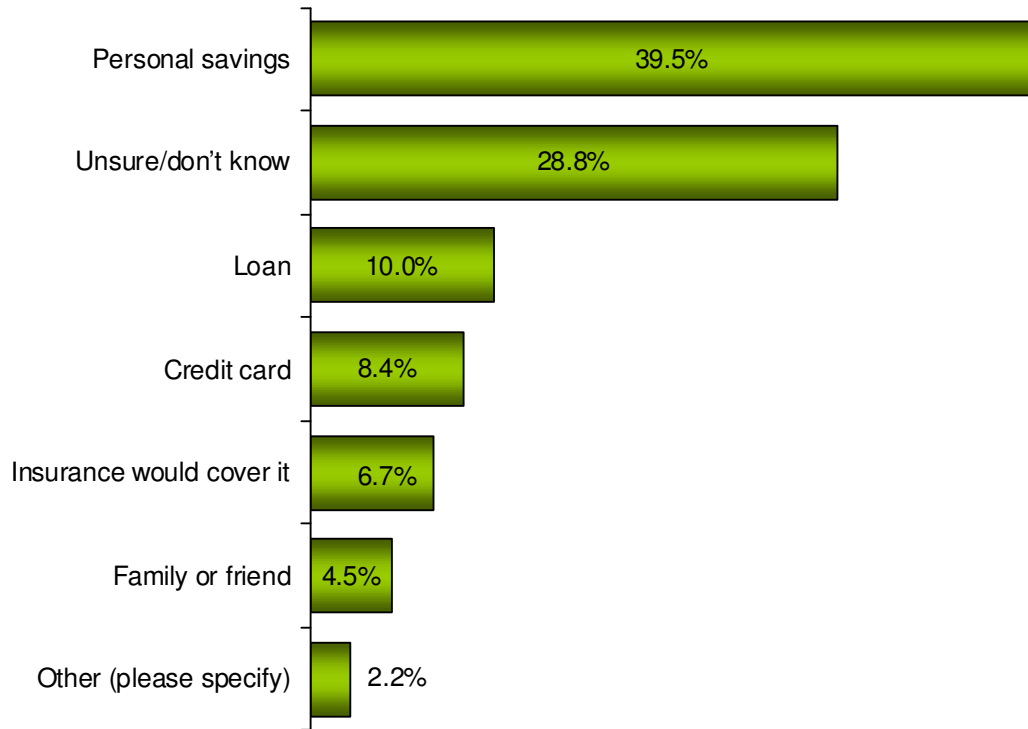


Figure 14.2: Methods of funding for medical tourism USA by gender (%)

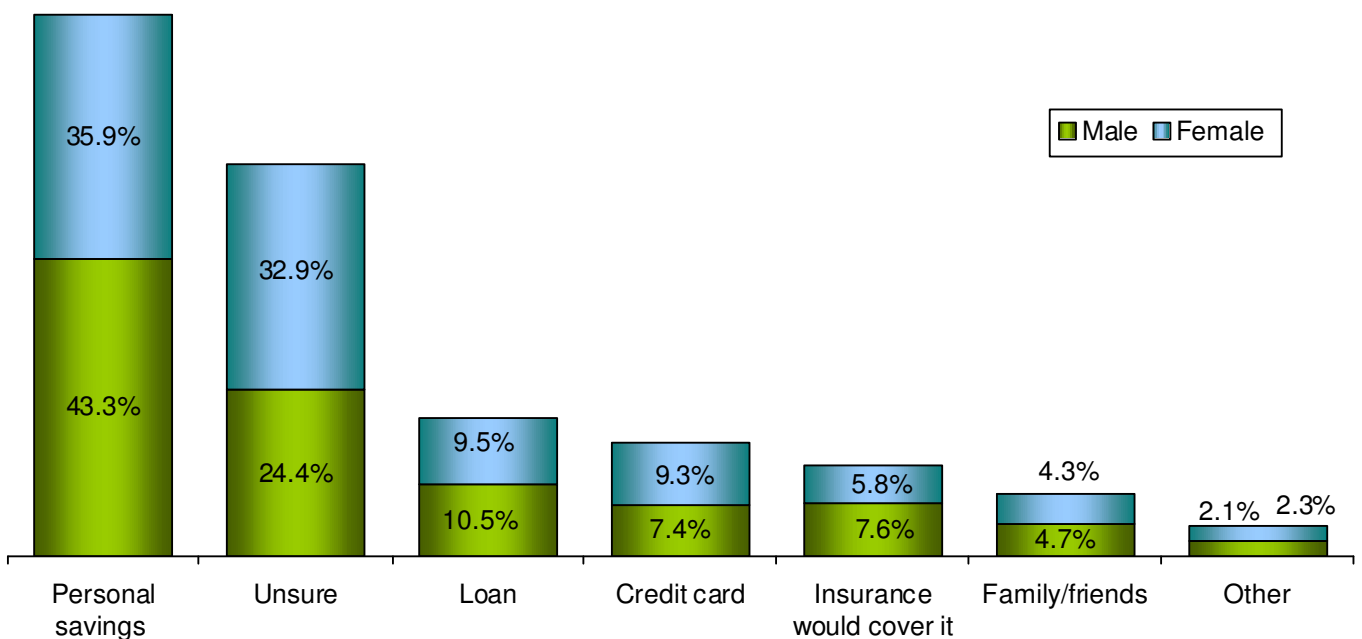


Figure 14.3: Methods of funding for medical tourism USA by age (%)

	18-24 years	25-35 years	36-45 years	46-55 years	56-65 years	65+ years
Personal savings	49.6%	40.3%	43.9%	31.7%	37.1%	33.3%
Unsure	18.2%	23.4%	25.7%	37.4%	34.9%	33.3%
Loan	7.4%	11.3%	10.3%	9.9%	9.7%	-
Credit card	4.1%	12.1%	8.4%	8.2%	7%	-
Family or friend	10.7%	6.5%	3.3%	2.9%	1.6%	-
Insurance would cover it	9.1%	5.2%	6.1%	7.8%	5.9%	16.7%
Other	0.8%	1.3%	2.3%	2.1%	3.8%	16.7%

Q: If you decided to go abroad for treatment (and it wasn't covered by insurance), how would you fund this?
 Base: 1003; general population USA

YourSurgeryAbroad.com, July 2009

The majority of those included in the sample would use personal savings (39.5%) or are unsure how they would cover costs (28.8%) if they were to participate in medical tourism. An additional 18.4% would go into debt by obtaining a loan or using a credit card.

Funding options for essential surgery (non-tourism)

Almost half of those surveyed would postpone (perhaps indefinitely) essential treatment

Figure 15.1: Source of funding for essential treatments that are insured, and medical tourism is not an option USA (%)

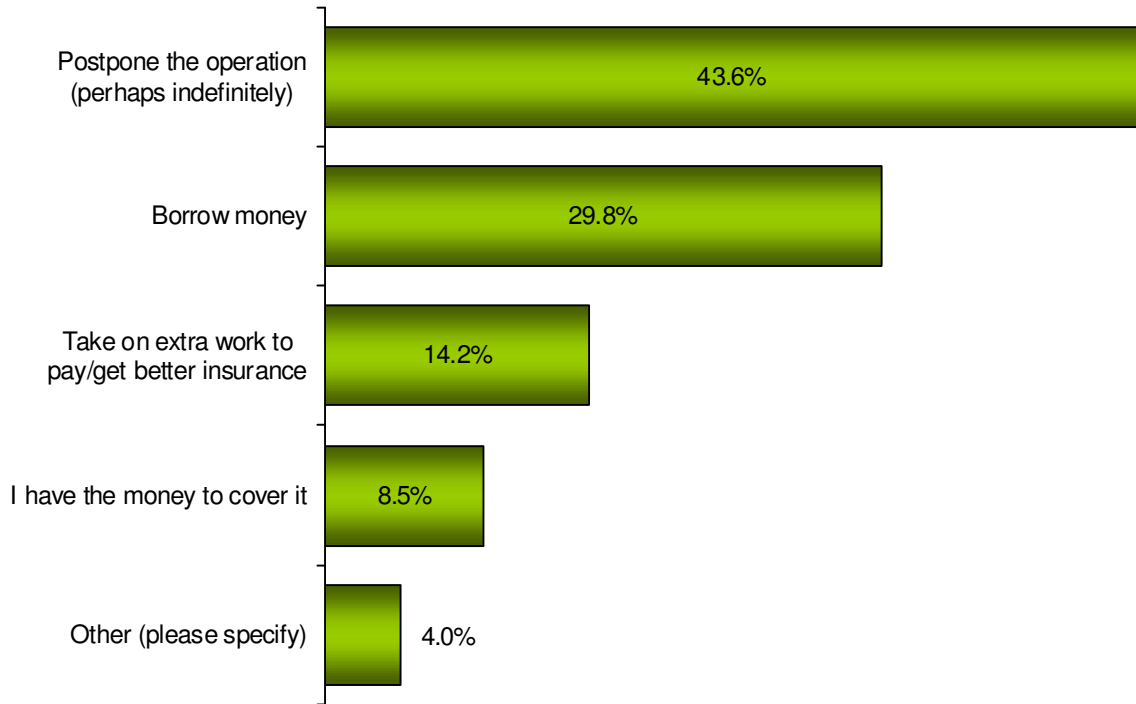


Figure 15.2: Source of funding for essential treatments that are insured, and medical tourism is not an option USA by gender (%)

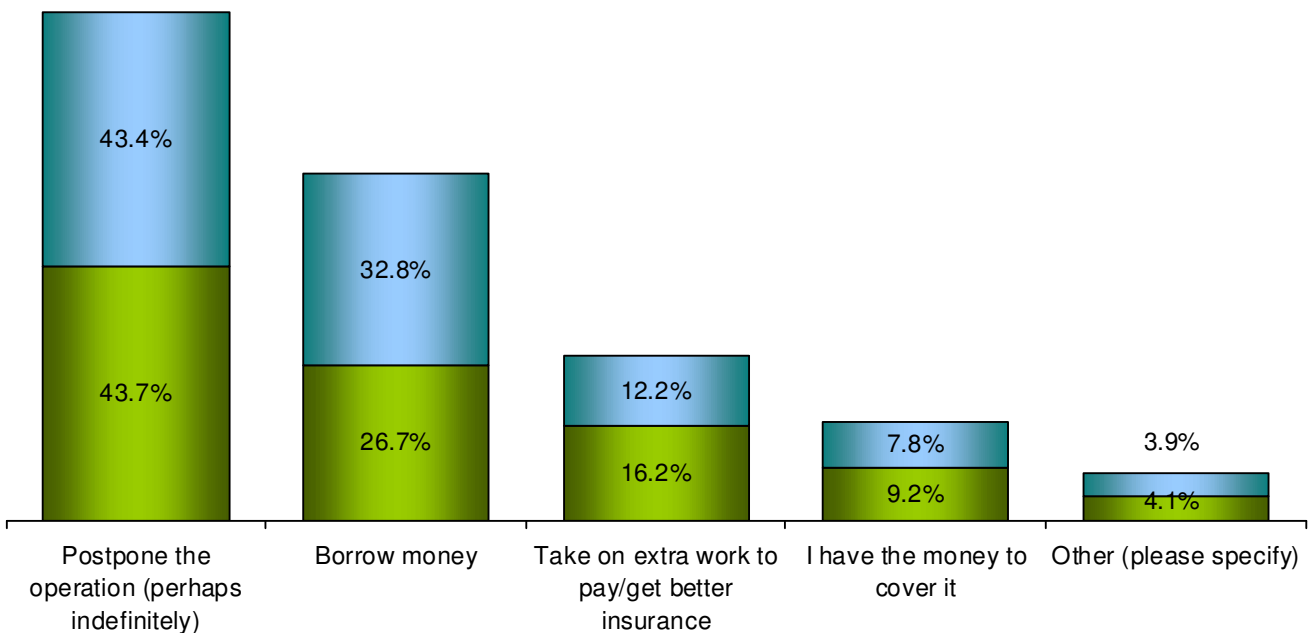


Figure 15.3: Source of funding for essential treatments that are insured, and medical tourism is not an option USA by age (%)

	18-24 years	25-35 years	36-45 years	46-55 years	56-65 years	65+ years
Postpone the operation (perhaps indefinitely)	30.6%	36.4%	43.5%	48.1%	54.8%	66.7%
Borrow money	32.2%	41.1%	29%	25.9%	20.4%	16.7%
Take on extra work to pay	25.6%	14.7%	15 %	11.9%	8.6%	-
I have the money to cover it	9.9%	7.4%	8.4%	9.1%	8.1%	-
Other	1.7%	0.4%	4.2%	4.9%	8.1%	16.7%

Q. If travelling abroad was not an option and you found yourself in need of a procedure (that was not covered by insurance), which of the following would you most likely do?
 Base: 1003; general population USA

YourSurgeryAbroad.com, July 2009

If faced with an expensive procedure not covered by insurance, and traveling abroad was not an option, a worrying 43.6% of the general population sampled would postpone their treatment, perhaps indefinitely. A total of 29.8% would go into debt to cover the cost of such a procedure, and 14.2% would take on extra work to cover the costs.

Older members of the sample are more likely to postpone treatment, with 54.8% of those aged 56-65 years and 66.7% of those aged over 65 years reporting this option, unlike 30.6% of 18-24 year olds and 36.4% of 25-35 year olds.

Determining factors for destination

Standard of healthcare is only slightly more important than the price/exchange rate when selecting a medical tourism destination

Figure 16.1: Factors of importance for selecting a medical tourism destination USA *multiple response* (%)

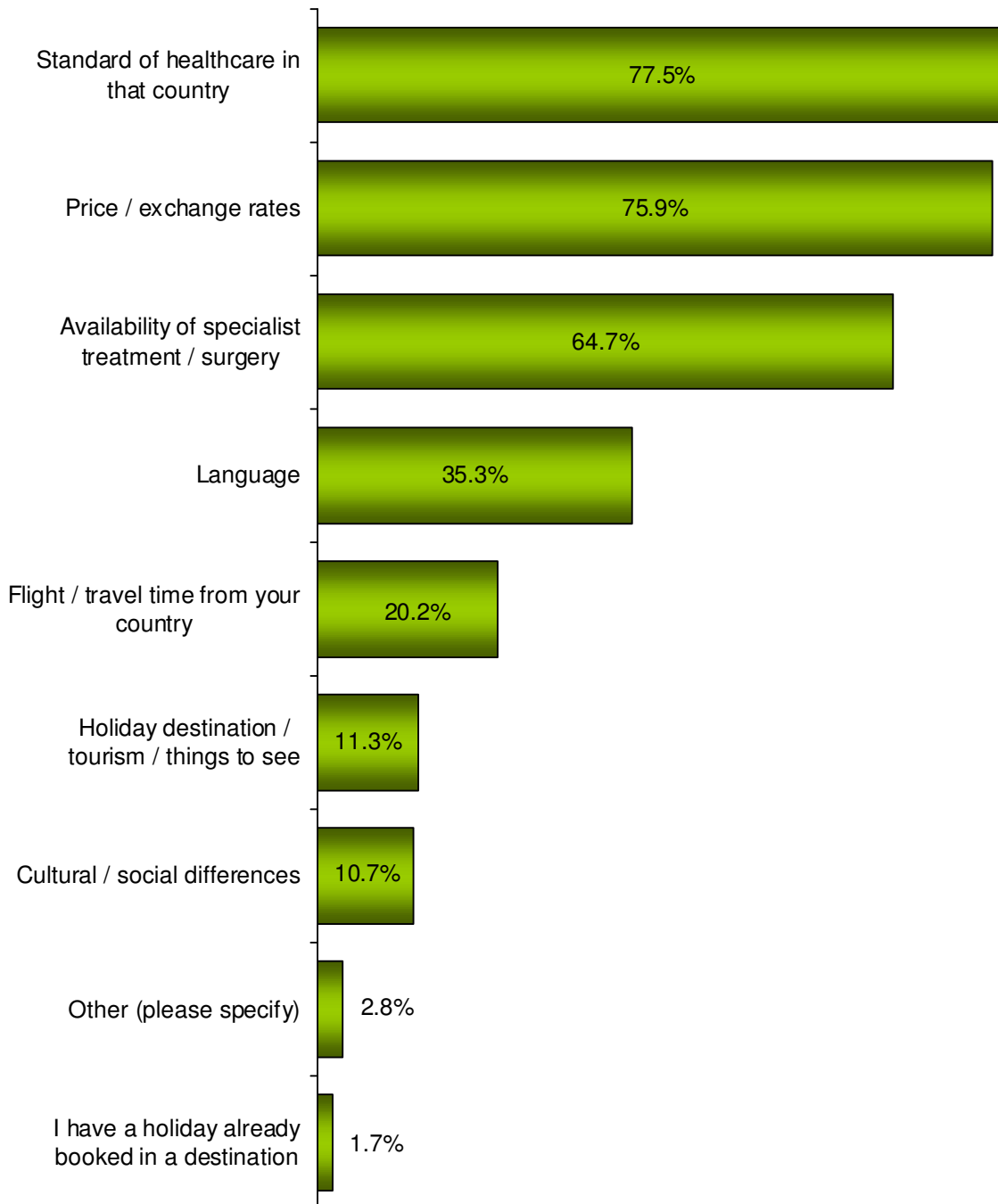


Figure 16.2: Factors of importance for selecting a medical tourism destination USA by gender multiple response (%)

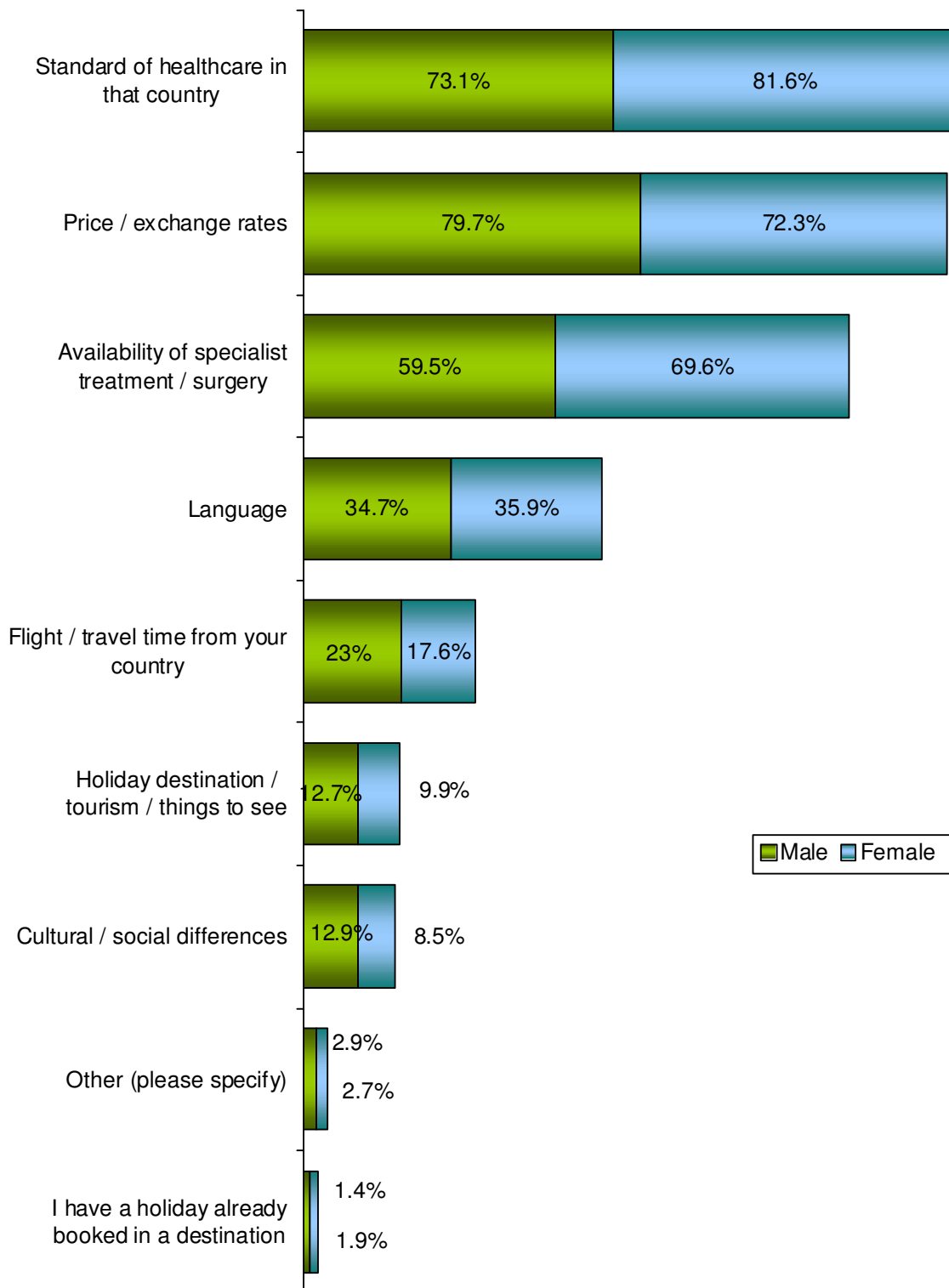


Figure 16.3: Factors of importance for selecting a medical tourism destination USA by age multiple response (%)

	18-24 years	25-35 years	36-45 years	46-55 years	56-65 years	65+ years
Standard of healthcare in that country	75.2%	76.2%	74.8%	81.5%	79%	66.7%
Price / exchange rates	82.6%	86.6%	69.2%	72.8%	69.4%	83.3%
Availability of specialist treatment / surgery	62.8%	61%	65.9%	68.7%	65.6%	16.7%
Language	29.8%	34.6%	39.3%	31.7%	39.2%	66.7%
Flight / travel time from your country	20.7%	19%	25.2%	18.9%	17.7%	16.7%
Holiday destination / tourism / things to see	15.7%	11.3%	10.7%	9.1%	10.2%	50%
Cultural / social differences	10.7%	7.8%	12.1%	12.3%	10.8%	-
I have a holiday already booked in a destination	1.7%	3.0%	1.4%	0.4%	1.6%	-
Other	0.8%	0.4%	1.4%	4.5%	6.5%	-

Q: If you were to travel abroad, what factors would determine your decision in terms of destination?
 Base: 1003; general population USA

YourSurgeryAbroad.com, July 2009

The standard of care is the most important determining factor for selecting a medical tourism destination with 75.9% of participants reporting this as an important criteria. However, this is very closely followed by the price of the destinations with 75.9%. The availability of treatment specialists is also ranked as an important factor with 64.7%.

Preferred destinations

Canada is by far the most preferred medical tourism destination for the sample population

Figure 17.1: Preferred destination for medical tourism USA (%)

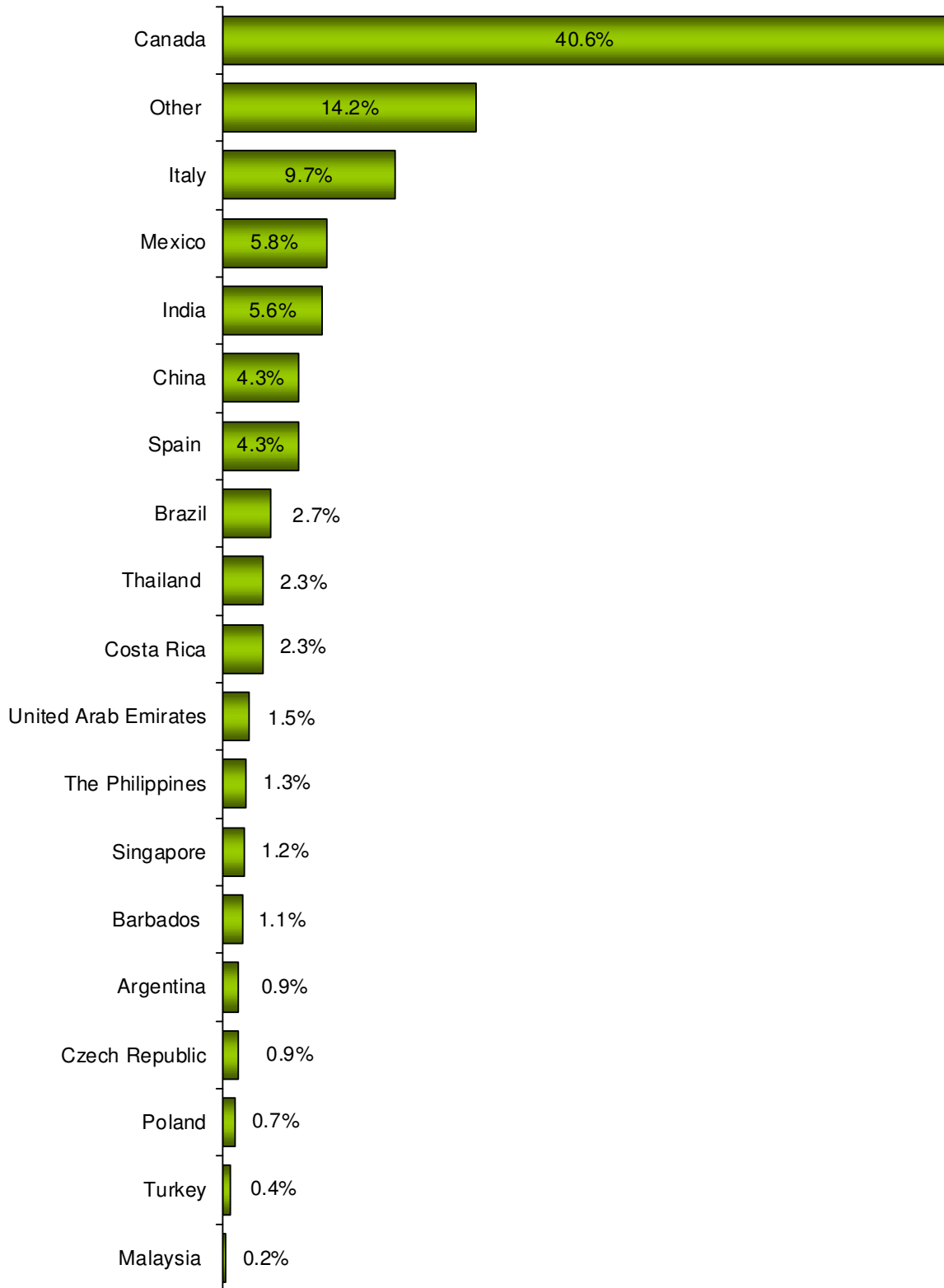


Figure 17.2: Preferred destination for medical tourism USA by gender (%)

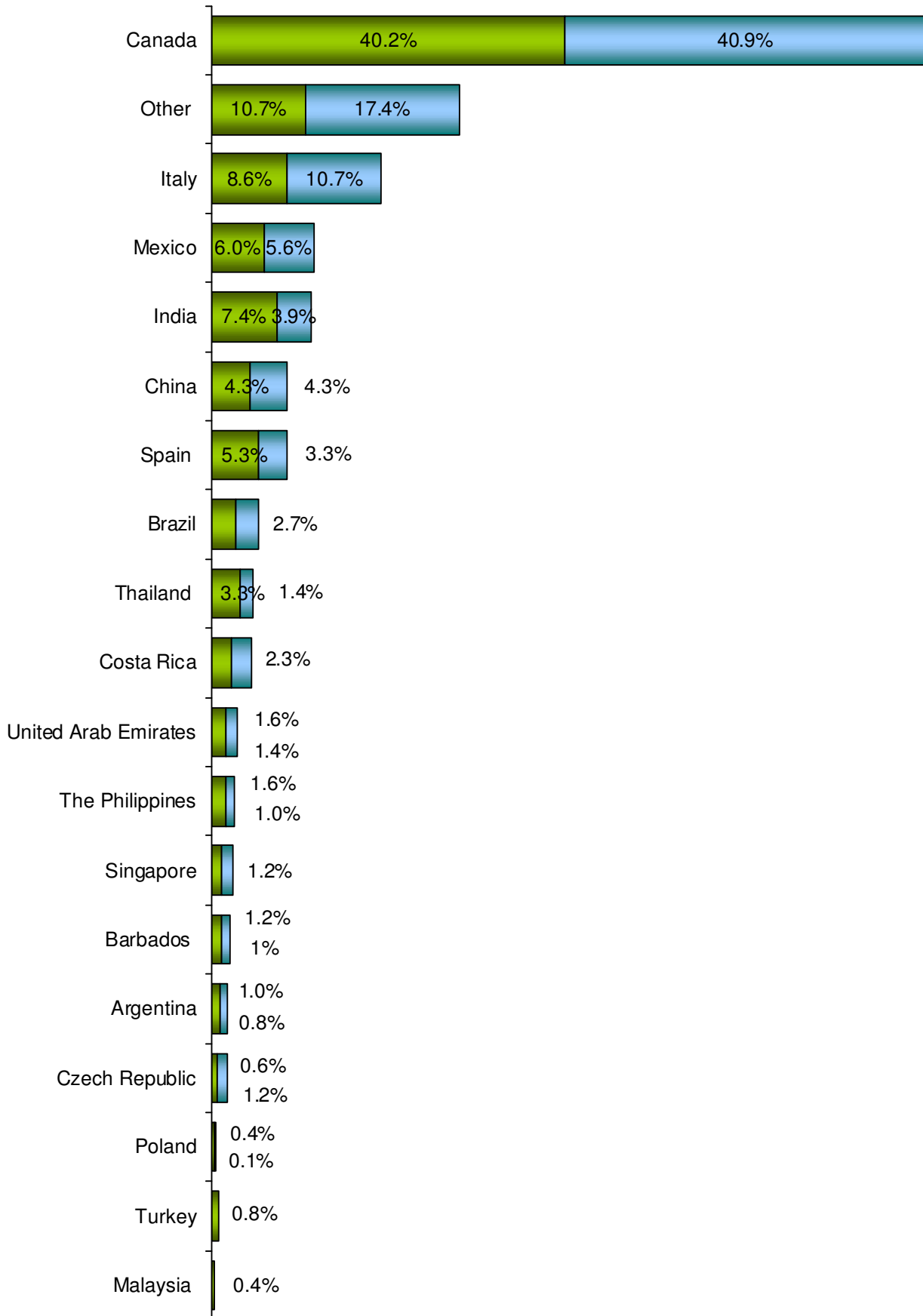


Figure 17.3: Preferred destination for medical tourism USA by age (%)

	18-24 years	25-35 years	36-45 years	46-55 years	56-65 years	65+ years
Canada	32.2%	44.6%	41.6%	46.9%	32.3%	16.7%
Other	14.0%	7.4%	13.1%	15.2%	22.0%	33.3%
Italy	8.3%	11.7%	10.3%	8.6%	8.6%	16.7%
Mexico	2.5%	5.2%	6.1%	6.2%	7.0%	16.7%
India	8.3%	6.1%	6.1%	4.1%	4.8%	-
China	9.1%	5.2%	5.6%	1.6%	2.2%	-
Spain	8.3%	4.8%	3.3%	4.1%	2.7%	-
Brazil	5%	3.9%	1.4%	1.2%	3.2%	-
Thailand	5%	0.4%	2.3%	1.6%	3.2%	16.7%
Costa Rica	0.8%	0.4%	1.4%	3.3%	5.4%	-
United Arab Emirates	1.7%	1.7%	1.9%	1.2%	1.1%	-
Philippines	-	0.9%	-	2.1%	3.2%	-
Singapore	3.3%	0.4%	1.4%	0.8%	1.1%	-
Barbados	-	2.2%	1.9%	0.4%	0.5%	-
Argentina	0.8%	0.4%	1.4%	1.2%	0.5%	-
Czech Republic	-	0.9%	1.4%	0.8%	1.1%	-
Poland	0.8%	1.7%	0.5%	-	0.5%	-
Turkey	-	1.3%	0.5%	-	-	-
Malaysia	-	0.4%	-	-	0.5%	-

Q: Of the list, which destinations would you most prefer to travel to for medical tourism?
 Base: 1003; general population USA

YourSurgeryAbroad.com, July 2009

Canada is by far the most sought after destination for the US general population included in the sample, with 40.6% reporting it as a preferred medical tourism destination. It could be assumed that this is mainly due its close proximity to the US and thus the assumption of high standards of healthcare, as well as shared language and cultural aspects. Italy (9.7%), Mexico (5.8%) and India (5.6%) are also favoured destinations.

Determining factors for provider selection

International reputation is the most important factor when selecting a medical tourism provider

Figure 18.1: Important factors for selecting a provider USA *multiple response* (%)

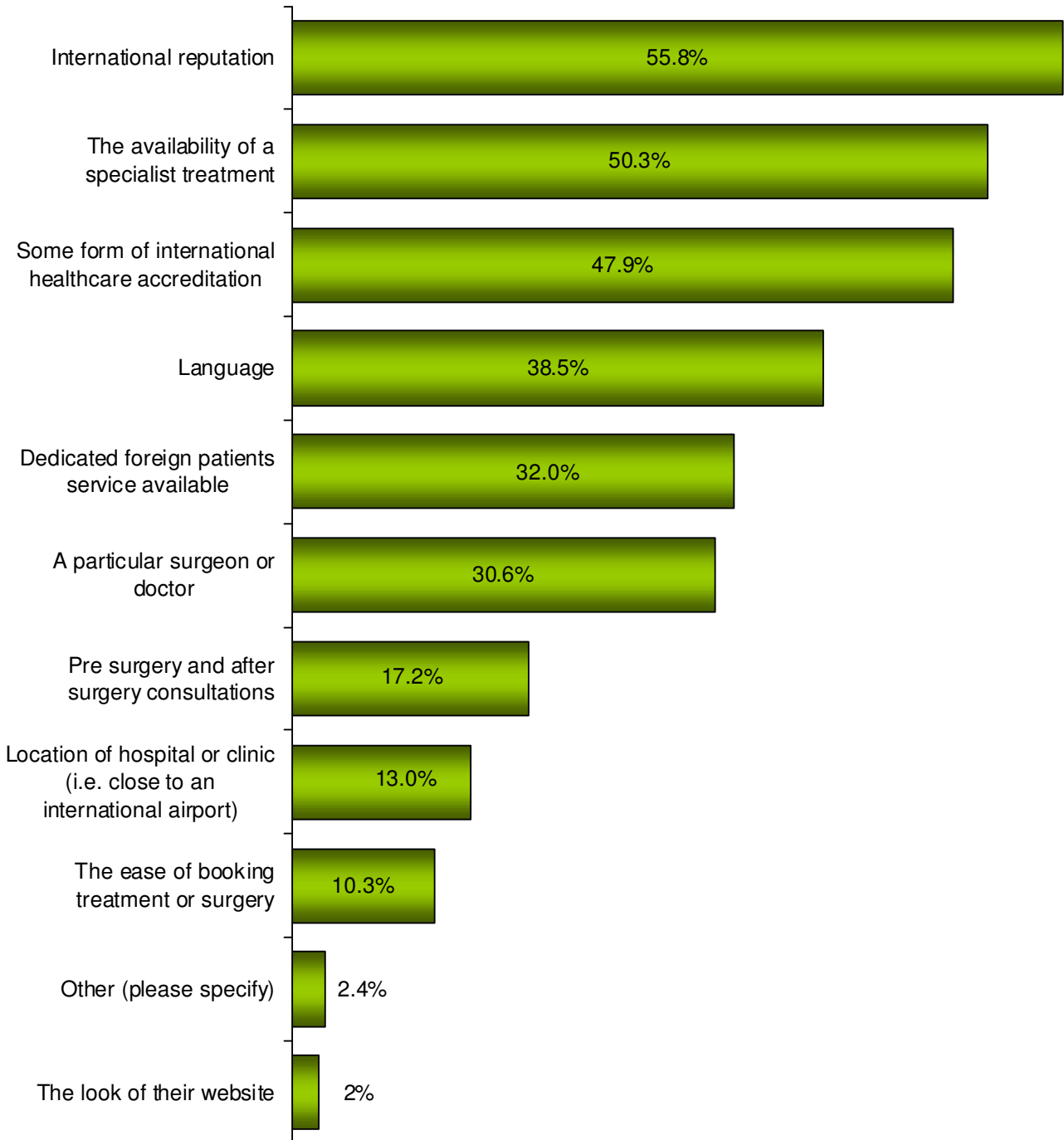


Figure 18.2: Important factors for selecting a provider USA by gender *multiple response* (%)

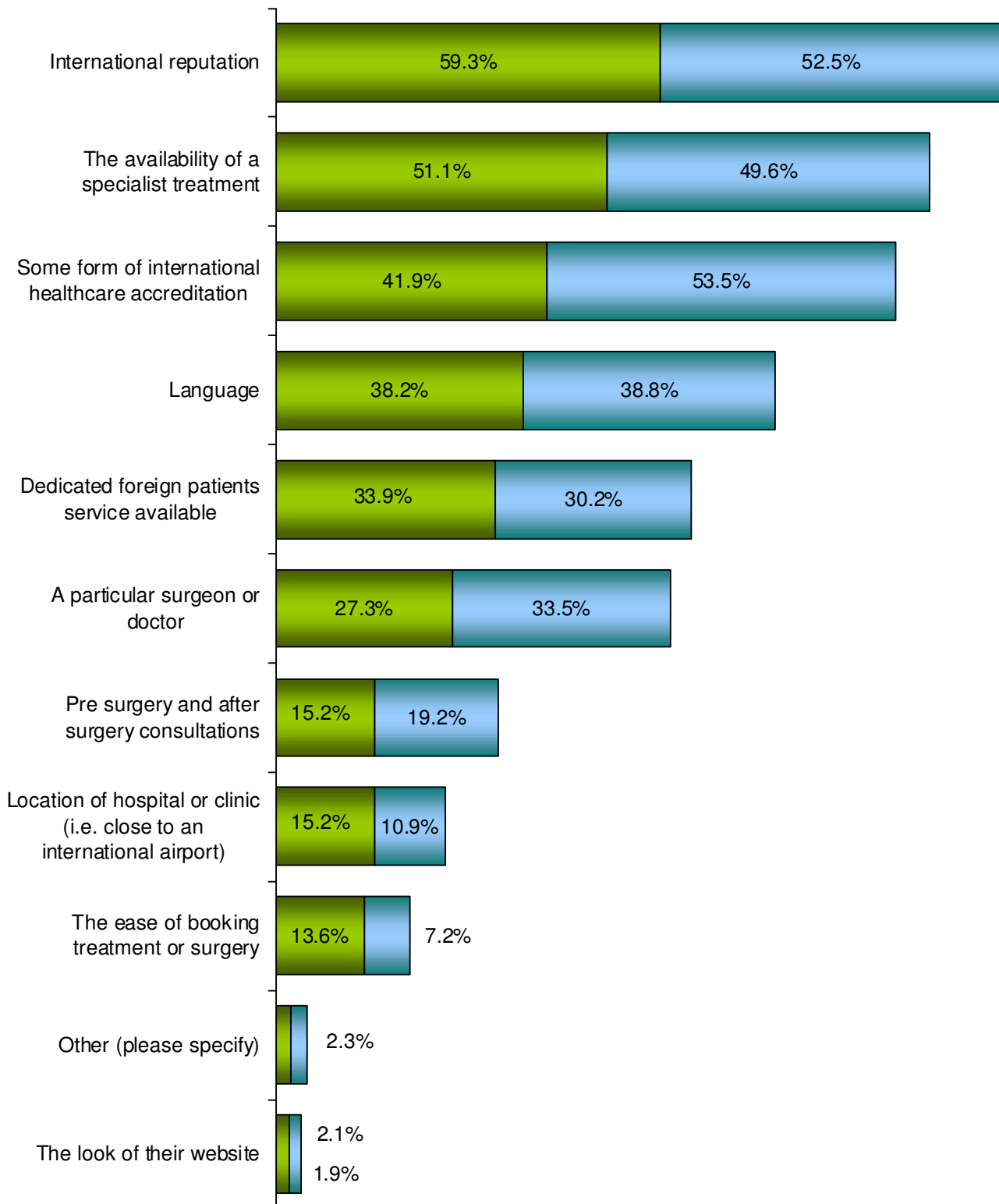


Figure 18.3: Important factors for selecting a provider USA by age *multiple response* (%)

	18-24 years	25-35 years	36-45 years	46-55 years	56-65 years	65+ years
International reputation	58.7%	53.2%	58.9%	47.7%	59.1%	33.3%
The availability of a specialist treatment	48.8%	44.3%	52.8%	52.7%	53.2%	33.3%
Some form of international healthcare accreditation	46.3%	50.2%	43.5%	51.0%	46.2%	83.3%
Language	38.4%	39.0%	39.3%	35.8%	41.9%	33.3%
Dedicated foreign patients service available	34.7%	34.6%	27.6%	33.3%	29.6%	66.7%
A particular surgeon or doctor	33.1%	32.0%	31.3%	32.1%	25.3%	16.7%
Pre surgery and after surgery consultations	14%	11.3%	16.8%	21.4%	21.5%	16.7%
Location of hospital or clinic (i.e. close to an international airport)	9.9%	15.2%	15.0%	12.8%	9.1%	-
The ease of booking treatment or surgery	9.1%	12.6%	10.3%	9.9%	8.6%	16.7%
The look of their website	4.1%	1.7%	3.3%	0.4%	1.1%	-

Q: If going abroad what would determine your choice in terms of hospital or clinic?

Base: 1003; general population USA

YourSurgeryAbroad.com, July 2009

International reputation (55.8%), the availability of a specialist treatment (50.3%), some form of international healthcare accreditation (47.9%) and language (38.5%) are all important considerations for potential medical tourists when selecting an international healthcare provider.

Potential treatment categories

Dentistry and cosmetics are the two most popular treatment areas for potential medical tourists

Figure 19.1: Treatment areas considered USA *multiple response* (%)

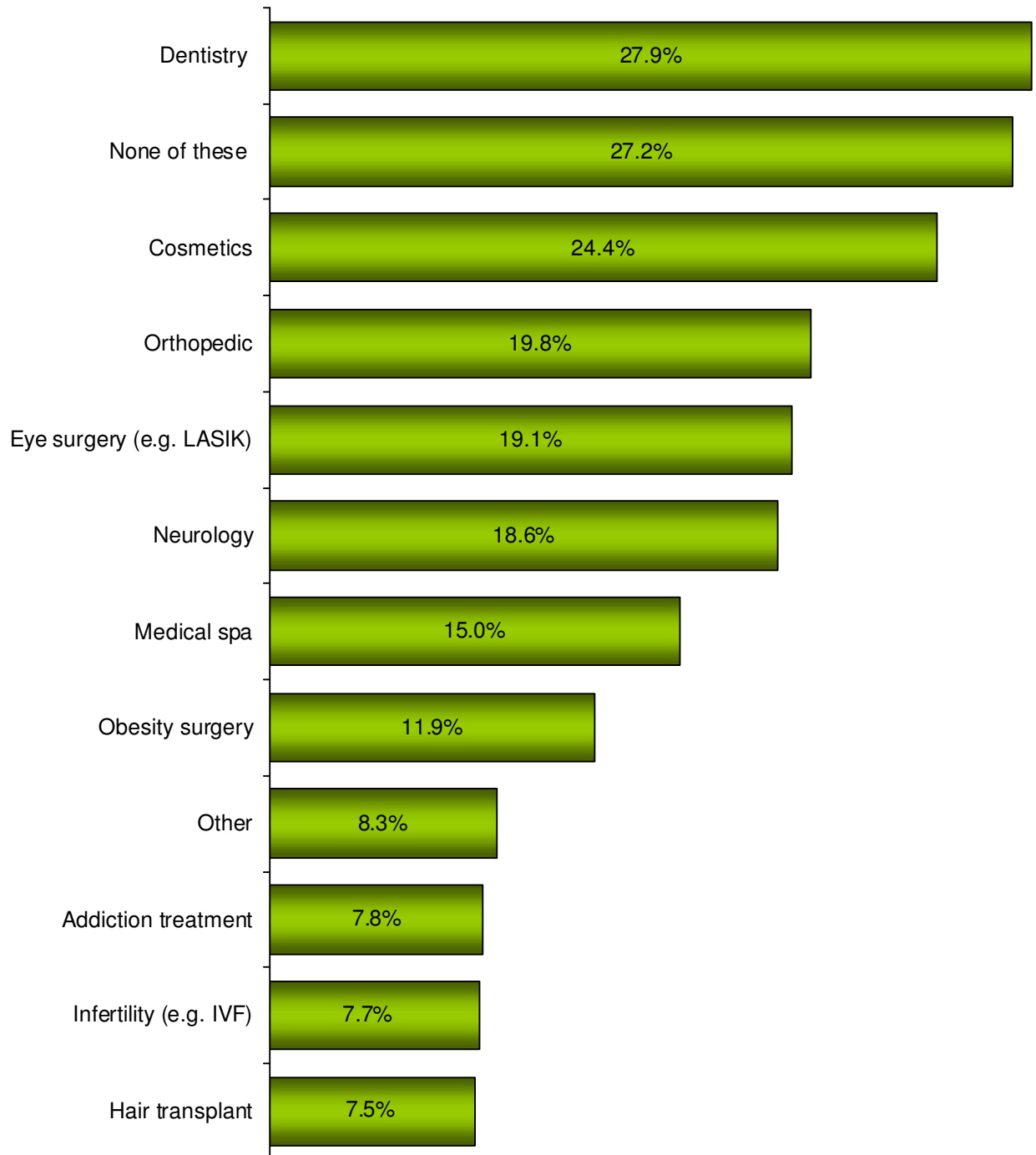


Figure 19.2: Treatment areas considered USA by gender *multiple response* (%)

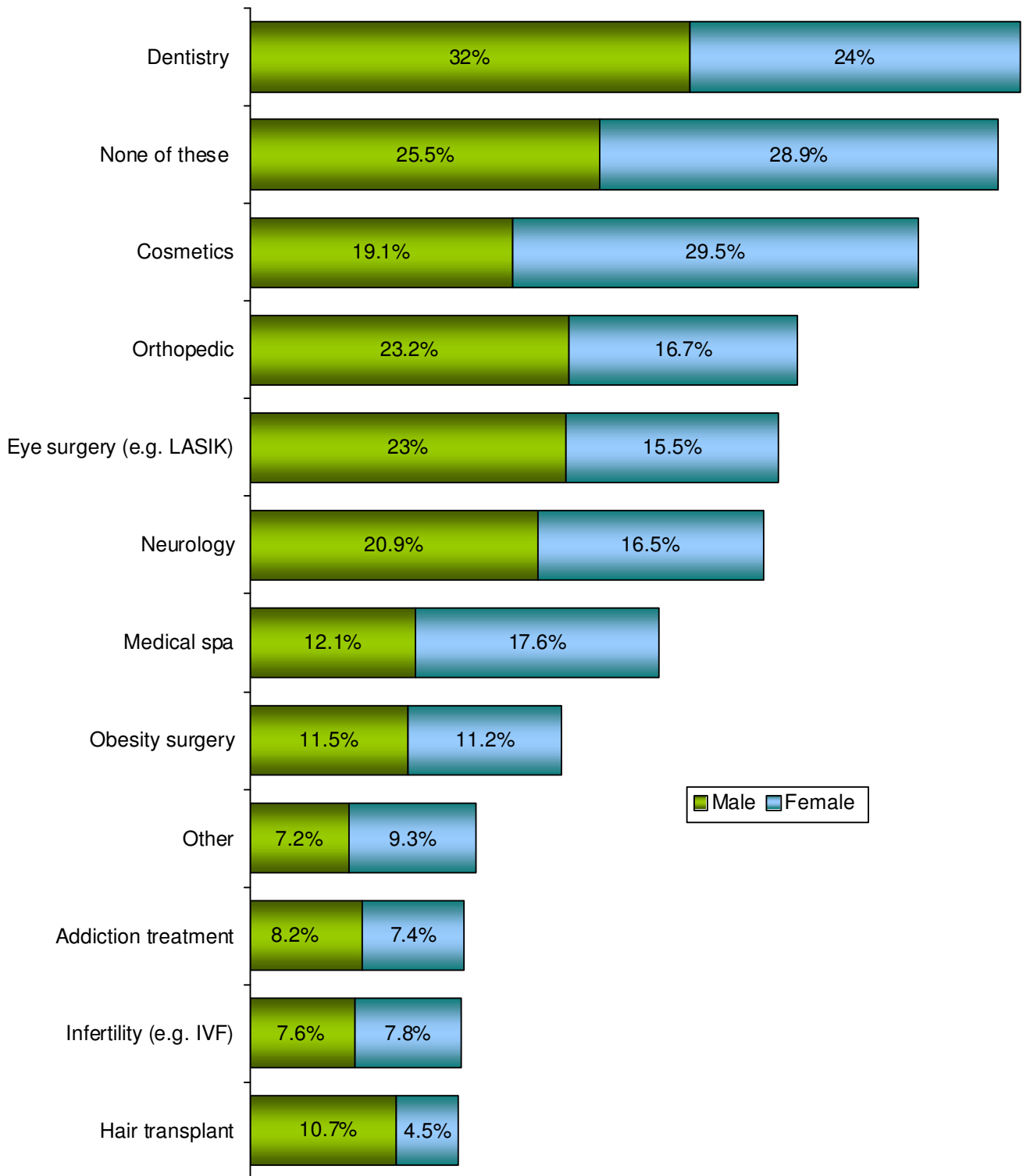


Figure 19.3: Treatment areas considered USA by age multiple response (%)

	18-24 years	25-35 years	36-45 years	46-55 years	56-65 years	65+ years
Dentistry	31.4%	30.7%	28.0%	24.3%	26.9%	16.7%
Cosmetics	20.7%	35.5%	25.7%	20.2%	17.7%	16.7%
Orthopedic	19.0%	22.5%	18.7%	17.3%	21.5%	16.7%
Eye surgery (e.g. LASIK)	23.1%	26.8%	18.7%	13.6%	14.5%	16.7%
Infertility (e.g. IVF)	13.2%	13.9%	9.8%	2.9%	0.5%	-
Medical spa	19%	19%	14%	13.6%	9.7%	33.3%
Neurology	20.7%	21.2%	22.9%	16%	12.4%	33.3%
Obesity surgery	17.4%	14.3%	11.2%	10.3%	8.6%	-
Hair transplant	13.2%	8.2%	9.8%	3.3%	5.4%	16.7%
Addiction treatment	16.5%	10%	8.4%	4.9%	2.7%	-
Other	2.5%	5.6%	12.1%	10.3%	8.1%	-
None of these	20.7%	21.6%	23.8%	32.1%	36.6%	-

Q: Which of these treatments or surgeries would you consider going abroad for?
 Base: 1003; general population USA

YourSurgeryAbroad.com, July 2009

The most common treatment areas for potential medical tourists are dentistry (27.9%), cosmetics (24.4%), orthopedics (19.8%) and eye surgery (19.1%). Males are more likely to be interested in dentistry (32%) and orthopedics (23.2%), while the female population is more interested in cosmetics (29.5%).

The older population is again shown to be more sceptical of medical tourism with the highest levels of participants reporting they would not seek any medical treatment categories being in those aged 46-65 years of age.

Combing planned holiday and treatment

One-third (32.6%) of those surveyed would combine a planned holiday with medical treatment

Figure 20.1: Willingness to combine planned holiday with treatment USA (%)

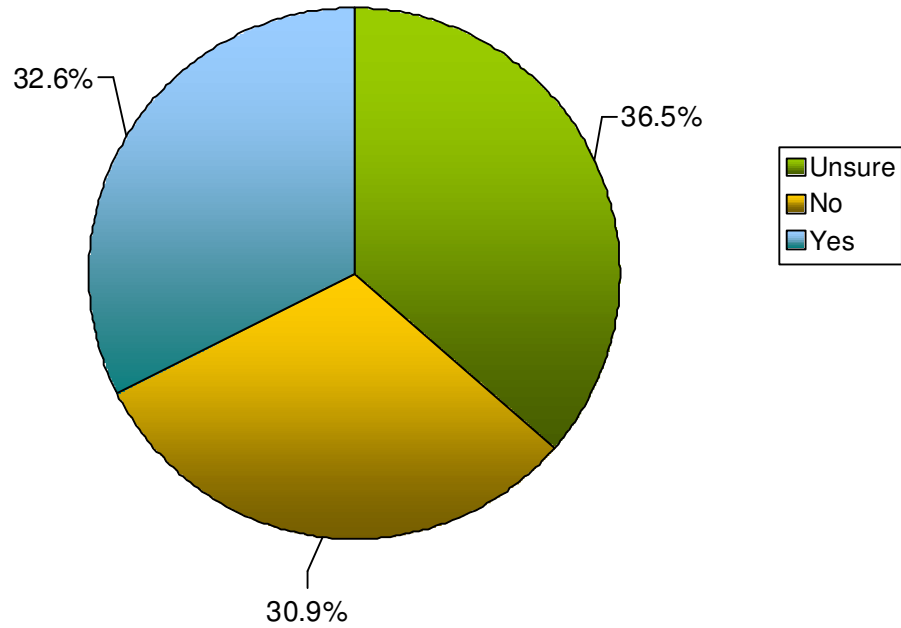


Figure 20.2: Willingness to combine planned holiday with treatment USA by gender (%)

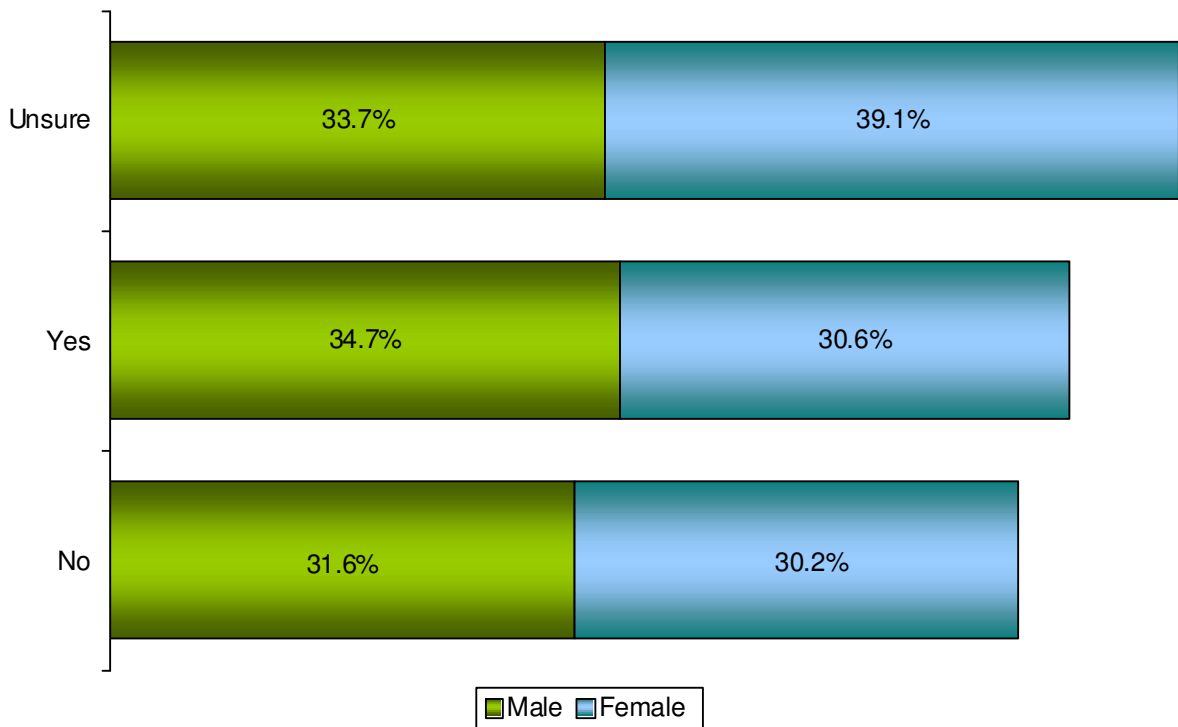


Figure 20.3: Willingness to combine planned holiday with treatment USA by age (%)

	18-24 years	25-35 years	36-45 years	46-55 years	56-65 years	65+ years
No	32.2%	29.9%	24.8%	32.5%	36.6%	16.7%
Unsure	25.6%	37.2%	41.1%	39.1%	34.9%	-
Yes	42.1%	32.9%	34.1%	28.4%	28.5%	83.3%

Q: Would you combine treatment or surgery with a planned booked holiday?
 Base: 1003; general population USA

YourSurgeryAbroad.com, July 2009

A total of 32.6% of the general population sampled would be willing to combine an already planned holiday with medical treatment, while a further 36.5% are unsure.