



MEDICAL TOURISM

AGENDA

1 What is **Medical Tourism**

2 **Objective** and **Challenges**

3 Project's **Frameworks**

4 Project's **Finding**

5 Solutions



WHAT IS MEDICAL TOURISM?



Medical Tourism

The process in which a patient travels to another destination for medical or health and wellness services.



WHY PEOPLE TRAVEL FOR MEDICAL CARE ?



World-Class Quality

Not just in facilities but also in the physicians themselves found in foreign hospitals.



Less Time Waiting

Access to immediate services is what attract the patients around the world.



Treatment Cost Saving

Around 30-90% cost saving with medical tourism (base on your destination)



OBJECTIVE AND CHALLENGES

OBJECTIVE and CHALLENGES



OBJECTIVE

To make Thailand the number one of medical hub in the world

CHALLENGES

How to compete with our main competitors

How to tackle with the rising competitors

How to continue providing aid to CLMV

How to make the medical tourism in Thailand sustainable





PROJECT FRAMEWORKS

PROJECT FRAMEWORKS



SWOT analysis

S.W.O.T. is an acronym that stands for Strengths, Weaknesses, Opportunities, and Threats.



Medical Tourism Index (MTI)

World class organization to measure quality of medical tourism



PROJECT'S FINDING



Medical Tourism *in Thailand*



“Development of medical tourism in Thailand”

The growth of medical tourism in Thailand faced a significant turning point after 1997.

After the economic crisis, the Bed Occupancy Rate (BOR) in many private hospitals significantly declined and many hospital beds became vacant.

Some private hospitals adjusted themselves by inducing medical tourists from high purchasing power countries



QUICK FACTS!



Medical Tourism In Thailand

Thailand has the most advanced medical tourism sector with end-to-end solutions; fully integrated with air travel, hotel accommodation for traveling families, and airport greeting.



Capture large amount of share



In 2016, over 3.5 m foreign patients came to Thailand spending over \$4.8 bn

Competitor



Main competitor is Singapore also with India who offers more price-effective care.

Where are the patients from?



Attracts patients from Japan, the Middle East, USA, and also from neighboring countries.

53 hospitals accredited by the JCI!!



One of the most reputed hospitals is Bumrungrad International Hospital.



SWOT ANALYSIS



S | STRENGTH

Medical Tourism Industry in **Thailand**



Many well-known tourism places



Affordable price compared to quality



Outstanding in Thai traditional medicine as a Wellness & Herb hub



Good reputation of hospital with international standard



Good services and facilities for consumers

Popular Sector In Thailand

Cardiology

Branch of medicine dealing with disorders of the heart.



Sexual reassignment

Transgender person changes their physical appearance and function of their existing sexual characteristics



Cosmetic surgery

Focusing on enhancing appearance through surgical and medical techniques



Orthopedics

Branch of medical that deals with disorders of the skeletal system





W | WEAKNESS

Medical Tourism Industry in **Thailand**



Have no specificable national committee to lead the policies



Lack of doctor and medical personnel



Rapid growth of medical fees in private hospital



Lack of research and development system to support medical tourism



Cooperation of PPP is still not effective.



OPPORTUNITIES

Medical Tourism Industry in **Thailand**



Medical tourism market is large and expanding.
Especially, Wellness Tourism.



The framework of ASEAN agreement and other agreements about free trade negotiation.



High demand in the market from foreign patients like CLMV.

CAMBODIA

GENERAL INFORMATION

Population : 16,245,729 people

Infant mortality rate: 47.4 per 1000 lives

Health system world ranked : **174th**

Number of public hospital : 33

Number of private hospital : 54

CURRENT SITUATION

- 1 doctor for every 5000 people in country
- Low staff motivation due to low payment
- Imbalance in the location of health facilities

LAOS

GENERAL INFORMATION

Population : 16,964,920 people

Infant mortality rate: 49.9 per 1000 lives

Health system world ranked : **165th**

Number of public hospital : 130

Number of private hospital : 17

CURRENT SITUATION

- Poverty rate declined from 40% to 23%
- Western medical care is available in few locations
- Salary are low and seldom paid on time

MYANMAR

GENERAL INFORMATION

Population :53 million people

Infant mortality rate: 40.1 per 1000 lives birth

Health system world ranked : **190th**

Number of public hospital : 988

Number of private hospital : 66

CURRENT SITUATION

- Lacks modern devices and equipment
- Limited no. of healthcare professionals
- Low government spending on healthcare
- Lack of international quality healthcare service in Myanmar

VIETNAM

GENERAL INFORMATION

Population : 93 million people

Infant mortality rate: 17.3 per 1000 lives birth

Health system world ranked : **135th**

Number of public hospital : 1100

Number of private hospital : 130




CURRENT SITUATION

- Public hospital suffers from overcrowding
- 1 billion dollar spent every year by over 40000 vietnamese patient travelling abroad for healthcare service



T | THREATS

Medical Tourism Industry in **Thailand**

-  The world economy is still fluctuating.
-  Terrorism situation in some countries which affects confidence of foreign patients
-  Other competitive countries announce the same Medical Hub policy such as Singapore and India.



POPULAR DESTINATIONS AROUND THE WORLD



Source : Department of Health Service Support



OUR MAIN COMPETITOR

“Medical tourism in Singapore”

One of Asia's leading
destination for advanced
medical care with high-end
surgical procedures in many
specialties.

Singapore was ranked the
most attractive in terms of
"patient experience", but also
one of the least attractive
where costs were concerned.



QUICK FACTS!



Medical Tourism In Singapore

The healthcare system has the sixth best healthcare system in the world (WHO). It has a well-developed infrastructure and offers high quality treatment.



Statistic

Medical tourism accounted for almost \$1.94 bn in 2016 with close to 0.9 m patients.



Where are the patients from?

Attracts patients from Europe, the Middle East, USA,



Competitors

Singapore faces pricing competition from Thailand, India and Malaysia due to its higher costs.

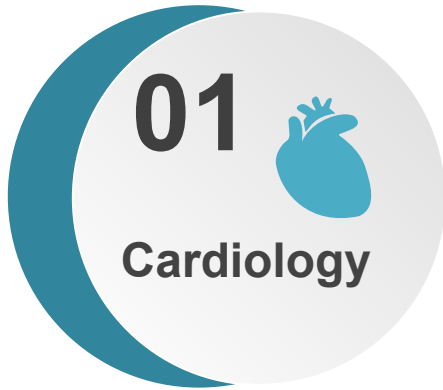


23 hospitals accredited by the JCI

One of the most reputed hospitals is Raffles hospital and Gleneagles hospital.

Source : [Malaysia Healthcare Travel Council](#)

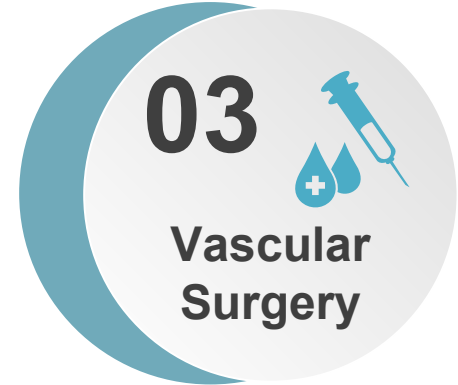
Popular Sector In Singapore



Branch of medicine dealing with disorders of the heart.



Branch of medical that deals with disorders of the skeletal system



A surgical subspecialty in vascular system, or arteries, veins and lymphatic circulation

Cost Comparison



THAILAND

AVERAGE SAVING

45-75%

(compared with fees in USA)

SINGAPORE

AVERAGE SAVING

30-45%

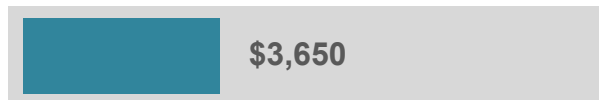
(compared with fees in USA)



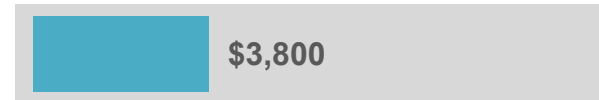
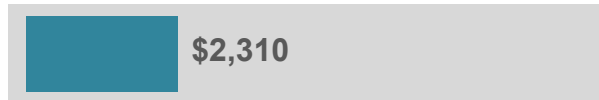
Heart Bypass



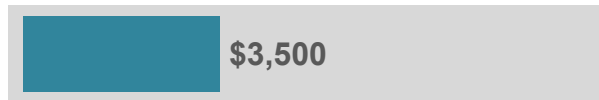
Hysterectomy



Lasik (2 eyes)



Breast Implant





A RISING COMPETITOR!

QUICK FACTS!



Medical Tourism In India



Numbers of patients

currently valued at \$3 billion which is further expected to touch \$8 billion by 2020.



Key Strength

Come up with price effectiveness with very low cost of services



Where are patients from?

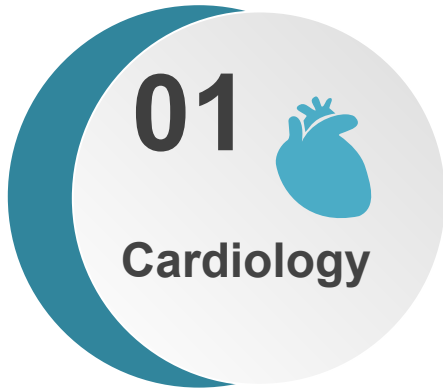
Receiving patients from Bangladesh, Afghanistan, Pakistan and Africa.



13 accredited hospitals

Not much compared to other destinations

Popular Sector In India



Branch of medicine dealing with disorders of the heart.



Branch of medical that deals with disorders of the skeletal system



involving the restoration, reconstruction, or alteration of the human body.

Cost Comparison



THAILAND

AVERAGE SAVING

45-75%

(compared with fees in USA)

INDIA

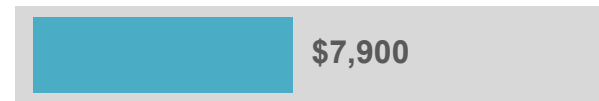
AVERAGE SAVING

55-85%

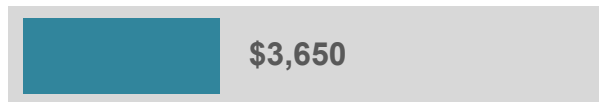
(compared with fees in USA)



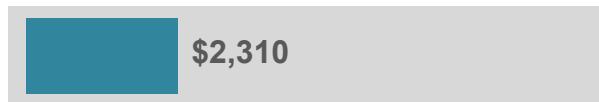
Heart Bypass



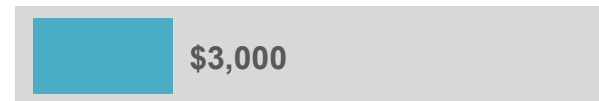
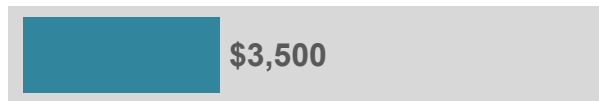
Hysterectomy



Lasik (2 eyes)



Breast Implant





Successful Country

What determines the Successful?

So, we classify the meaning of successful in 2 ways. First In term of *quality* and second is in term of *quantity*.



Medical Tourism Index

3 Dimensions 34 indicators 5,000 surveyed

Definition

The MTI measures the attractiveness of a country as a medical tourism destination in terms of overall **image and environment**, healthcare and tourism **industry and infrastructure**, and availability and **quality of medical facilities and services**.



THAILAND

Global
Ranking

18TH

Overall
MTI
Score
66.60

 27th

Destination Environment

Score 56.4

 6th

Medical Tourism Industry

Score 73.25

 13th

Quality of Facilities &
Services

Score 70.14

SINGAPORE

Global
Ranking

4TH

Overall
MTI
Score
73.56



3rd

Destination Environment

Score 73.26



15th

Medical Tourism Industry

Score 70.79



6th

Quality of Facilities &
Services

Score 76.63

INDIA

Global
Ranking

5TH

Overall
MTI
Score
72.10



12th

Destination Environment

Score 63.26



1st

Medical Tourism Industry

Score 75.94



3rd

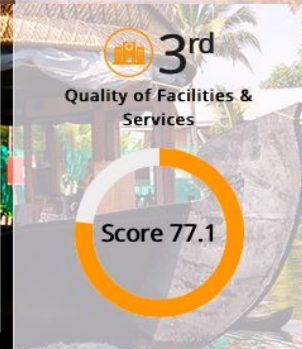
Quality of Facilities &
Services

Score 77.1

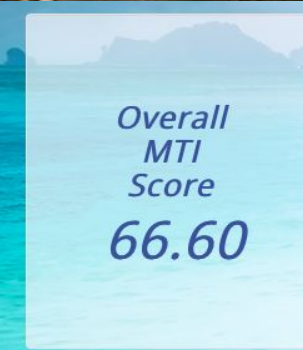
SINGAPORE



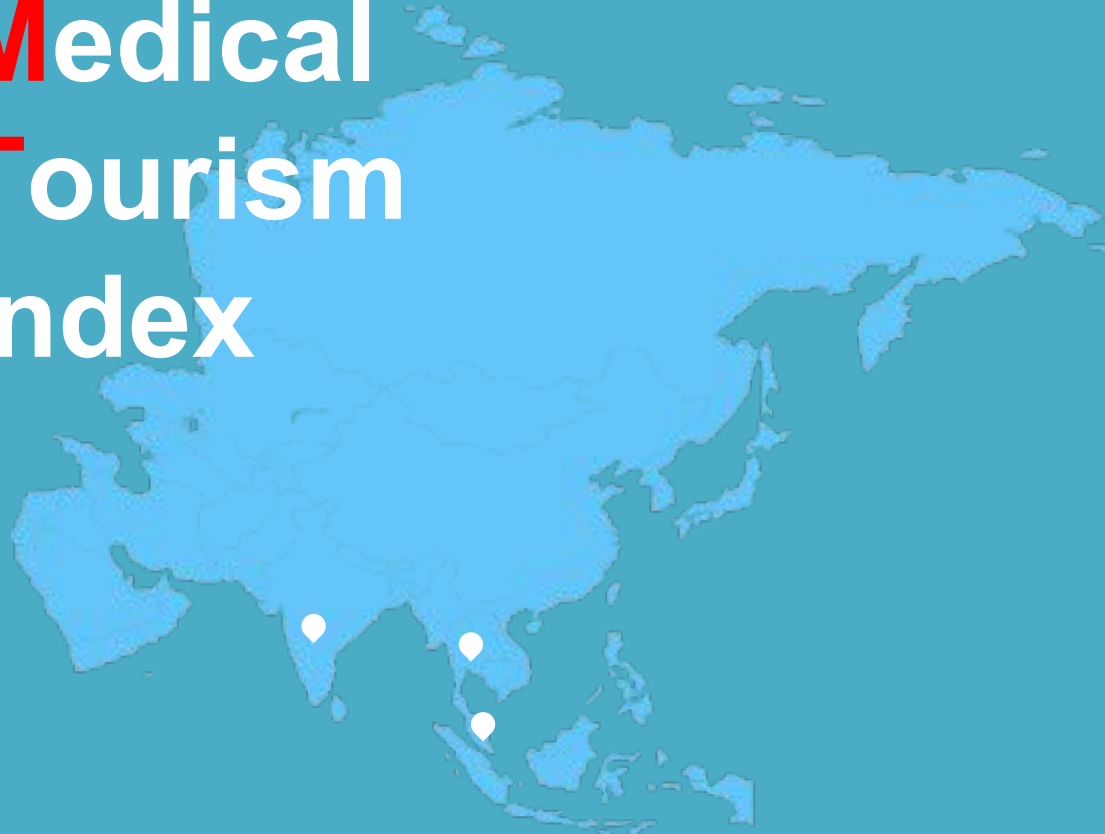
INDIA



THAILAND



Medical Tourism Index



Singapore (4th)

MTI 2016

73.56%



India (5th)

MTI 2016

72.1%



Thailand (18th)

MTI 2016

66.6%



STATISTIC COMPARISON in 2016



	INDIA	THAILAND	SINGAPORE
Numbers of medical tourists	2,800,000	3,500,000	890,000
Revenue (USD)	3,000,000,000	4,860,000,000	1,940,000,000
Average Revenue per patients (USD)	1,070	1,400	2,200

Source : Singapore Tourism Board
Malaysia Health Travel Council

Which country is more successful?

THAILAND OR SINGAPORE

In terms of
QUANTITY 

In terms of
QUALITY 





SOLUTIONS



Strategies and Policies

4 PRODUCTION HUB

The main productions are divided into 4 categories

Wellness Hub

a collaborative effort with community partners to provide visible, accessible, and reliable health promotion

Academic Hub

emphasis on features like access control, content approval, and research analysis.



Product Hub

a center of medicine and health product especially Thai traditional medical product

Medical Service Hub

outstanding medical foundation that includes premium medical services, qualified healthcare specialists and various internationally accredited medical facilities

WELLNESS HUB



THAILAND'S IDENTITY

Thinking of wellness, Thailand is the first choice



ADVERTISING

Promote via government official website.

LEARNING CENTER

- Open for foreigner to learn about fundamental knowledge
- Create jobs for Thais



QUALITY

Increase quality of Thai massage and other services by having license and standards.

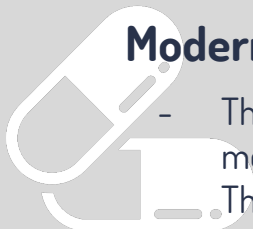


PRODUCT HUB



Organic Products

- Traditional herbs



Modern Medicine

- Thailand has our own medicine. This is Thailand's advantage compared to our competitor in term of cost



Up-to-date equipment

- Thailand has improving technology and innovation



Supplement

- Whey protein



Alternative Medical Service

- Chinese medical care
- Acupuncture



Cosmetics

- Most Thai concern of beauty lead to increase in Thai cosmetic products which is accepted by world standard

ACADEMIC HUB



01

In the hope to be the center of medical world class conference

02

To further improve medical school in Thailand and also increase the supply of future doctors

03

Increase government spending in medical sector especially academic term

MEDICAL SERVICE HUB



Foreign Insurance

Provide insurance for foreigner



Patient's duration

Especially CLMV and Chinese people, we can help to extend visa duration for patient to be 90 days or depending on symptom.



Facilities and specialists

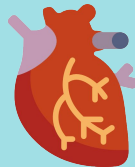
- Provide facilities at the airport and border checkpoint
- Provide more specialist doctors at border hospitals in Thailand

PRIME DISEASES OF CLMV



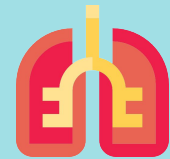
Malaria
Lack of adequate
sanitation

Dietary risks, high
blood pressure,
smoking and
pollution
Heart Disease



Diarrheal Disease
Contaminated food
and water which
causes extreme
dehydration

Do not have access to
vaccines
Respiratory Infections



MEDICAL TOURISM

POLICY NEGATIVE EXTERNALITY

A policy impact for medical
tourism in Thailand



Worker brain drain

Thailand's public to
private health worker
brain drain has strained
public health provision,
especially in rural areas

Inequality

Issues of growing
inequality due to
development in only
private hospitals



MEDICAL TOURISM

POLICY NEGATIVE EXTERNALITY

A policy impact for medical
tourism in Thailand



Equity of access

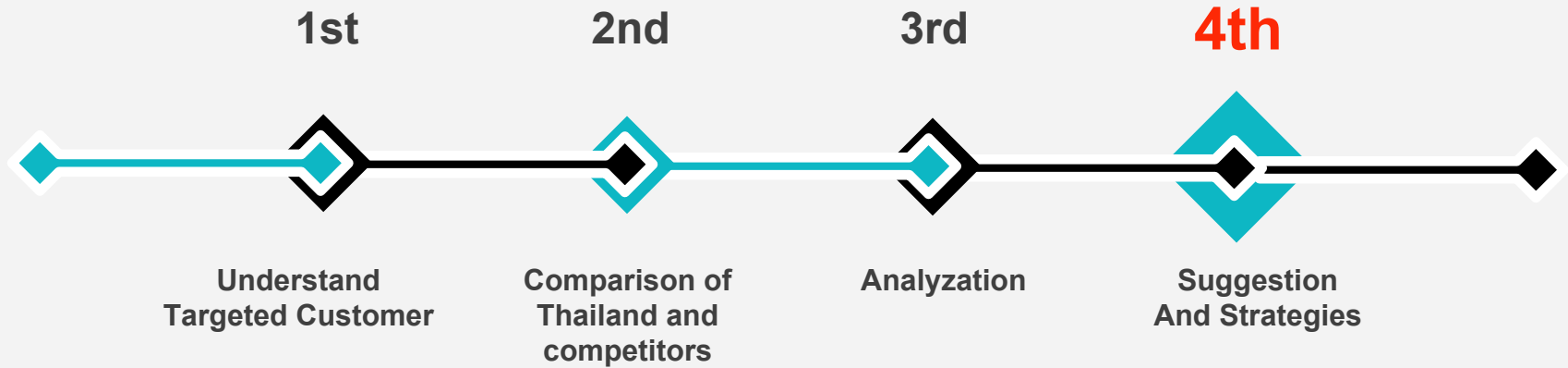
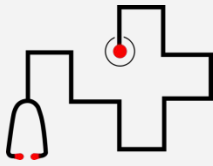
There are growing concerns about the impact of medical tourism on health systems, particularly equity of access for both foreign and local consumers

Increasing in medical fees

Higher technology and higher quality in medical services lead to changes in medical costs and fees



Refer back to our Objective and goals





Q & A
Thank you



APPENDIX



ASEAN'S GROWING MEDICAL AND HEALTHCARE INDUSTRY



620

million people
in ASEAN

The world's 3rd largest workforce



\$2.4

trillion USD in GDP
The 7th largest
in the world



125

million households
Middle-income status
by 2025

↑
INCREASING

- Public intervention
- Health Policies
- Healthcare investment

THAILAND

THE LEADER IN ASEAN MEDICAL TOURISM



Thailand

\$4.3 billion

Estimated earnings

2.5 million

No. of foreign patients



Singapore

\$3.5 billion

Estimated earnings

850,000

No. of foreign patients



Malaysia

\$158 million

Estimated earnings

583,000

No. of foreign patients



Ipsos Business Consulting

Build • Compete • Grow

healthcare.bc@ipsos.com

MEDICAL HUB STRATEGIC POLICIES

Develop Thai traditional medicine service and alternative medicine service

To improve establishments of both Thai traditional medical service and alternative medical service to international standard



Develop service sector to promote health

To improve both establishments and personnels to compete with international standard.



MEDICAL HUB STRATEGIC POLICIES

POLICY PLAN DURING 2016-2025

Increase capability from competition in healthcare service sector

To improve healthcare service sector by compete with other countries (competitive market)



Improve nursing and treatment

To promote and support nursing to be better.



Develop medicines and healthcare products

To improve medicines and thai traditional medicines

Improve academic and research in medical (Academic Hub)

Improve medical schools and produce more healthcare providers

WELLNESS HUB



GROWTH RATE
9.1% in 2017



ECONOMIC VALUE
\$438.6 billion



FEATURE
Spa, fitness



QUALITY
Higher quality and willingness to pay around 130%

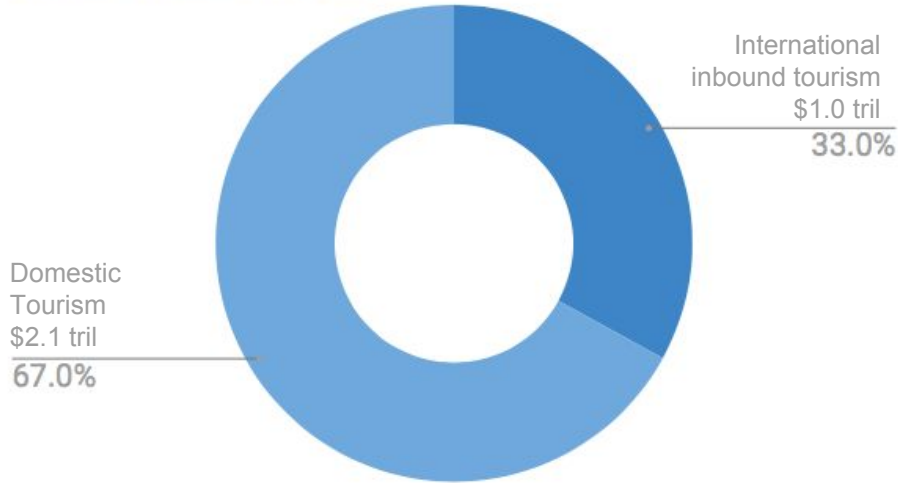


COMPARISON economic value

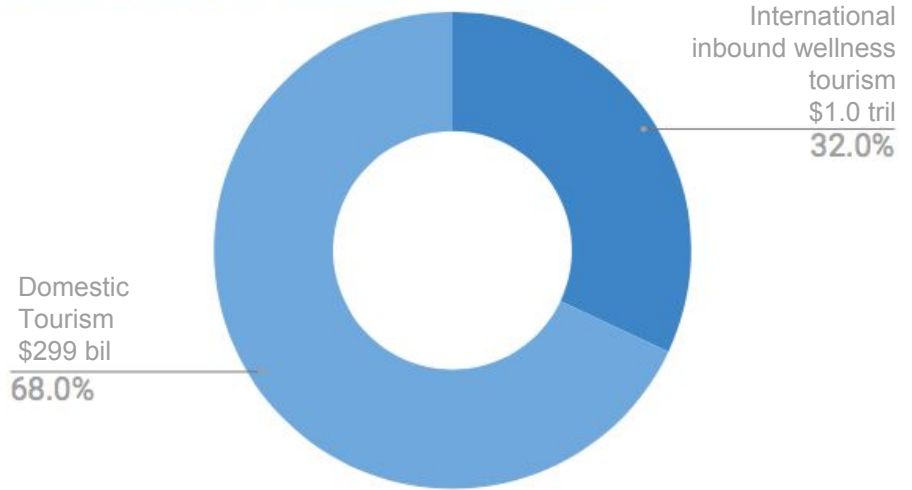
between global tourism and wellness tourism



Global tourism \$3.2 trillion



Global wellness tourism \$438.6 billion



Source: The Global Wellness Tourism Economy 2013