



Evolving medical tourism
in Canada

Exploring a new frontier

Medical tourism presents opportunities for reduced wait times and costs

Medical tourism is an emerging global trend, one that has already taken root in Canada, but for which the future is still unclear. Over the past five years, Canadian governments have reduced the volume of insured medical services purchased out-of-country, but the costs of these services have more than doubled. At the same time, anecdotal reports suggest that Canadians are privately purchasing cosmetic and elective services at an increasing rate, though little data is available.

Many factors are influencing the growth and surrounding regulations of patients traveling for medical care:

- Evolving medical tourism guidelines and international accreditation
- Expanding and increasing sophistication of foreign medical tourism operations
- Increasing provincial and local provider interest in supporting medical tourism through legislation and policy
- Increasing demand for outpatient surgery and a drive to reduce wait times
- Emerging consumer interest in medical tourism options
- Economic constraints and changing financial incentives

Adding to the emerging state of medical tourism in Canada is growing policy and public attention to wait lists for key services, increasing consumer willingness to travel for health care services, and renewed direct-to-consumer marketing by medical tourism companies and foreign destinations. With this growth come opportunities for increased medical tourism in Canada – both for Canadians seeking care abroad, and for establishing Canada as a medical tourism destination – setting the stage for a renewed focus by Canadian governments, providers and consumers on medical tourism.

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Medical tourism defined: From global to local

Broadly speaking, medical tourism is the act of traveling to obtain specialized or economical medical care, well-being and recuperation. Many patients are traveling great distances to obtain medical care. Whether the destination is an exotic resort halfway around the world, a neighboring country, or a health care facility several hours away in another province, Canadians are increasingly embracing the benefits of medical tourism. Rapid expansion of facilities for patients abroad has helped to spur this industry growth.

Medical tourism can be categorized into three types (Figure 1).

Figure 1: Types of medical tourism

Types of medical tourism	Description
Outbound	Patients traveling to other countries to receive medical care
Inbound	Patients from other countries traveling to a host country to receive medical care
Intrabound	Patients travelling domestically for medical care

In Canada, domestic medical tourism occurs when patients travel to specialized tertiary/quaternary facilities, such as academic health sciences centres, outside of their local community to receive medical treatment. Travel between provinces is reported to be 2% of all inpatient hospitalizations across Canada, and is well-documented¹. This paper will instead focus on outbound and inbound medical tourism for patients and the health system.



The global organization of medical tourism is establishing new venues for care

The demand for medical tourism is expected to grow in Canada and globally. Latest estimates suggest that medical tourism is expected to grow around the world to an estimated \$40 U.S. billion annually by the end of 2010, as patients travel outside their local areas for health care². Medical tourism in foreign destinations is experiencing significant growth, accompanied by improved regulation.

- Accrediting bodies such as Accreditation Canada, the Joint Commission International (JCI) and Patients Beyond Borders³ in the US offer credible evaluations of the care standards of foreign providers.
- Organizations such as the American Medical Association have issued guidelines to patients and providers to support medical tourism programs^{4, 5}

And foreign providers are adopting these standards to demonstrate their alignment with quality standards expected by Canadian and US providers and consumers, and are continuing to grow their local markets.

- JCI accreditation of foreign medical sites increased from 76 in 2005 to over 220 in 2008⁶
- As one country experiencing significant growth, India's inbound medical tourism industry is forecast to grow to \$2.3 billion by 2012⁷

These global activities are creating new opportunities for Canadian consumers to obtain care abroad. They are also securing the footprint of different countries as medical tourism destinations, while Canada has yet to substantially enter this emerging market.

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American Medical Association guidelines for patients traveling overseas for medical care:

- Medical care outside the U.S. should be voluntary
- Financial incentives to go outside the U.S. for care should not inappropriately limit diagnostic and therapeutic alternatives, or restrict treatment or referral options
- Financial incentives should be used only for care at institutions accredited by recognized international accrediting bodies
- Local follow-up care should be coordinated and financing arranged to ensure continuity of care
- Coverage for travel outside the U.S. for care must include the cost of follow-up care upon return
- Patients should be informed of rights and legal recourse before traveling outside the U.S. for care
- Patients should have access to physician licensing and outcomes data, as well as facility accreditation and outcome data
- Transfer of patient medical record should be consistent with HIPAA guidelines
- Patients should be provided with information about the potential risk of combining surgical procedures with long flights and vacation activities

Provincial investment in medical tourism has increased over the past five years, although the volume of services has remained stable

Provincial governments across Canada send patients abroad for care, diagnosis and treatment that cannot be provided in a timely manner closer to home. An example is bariatric surgery, where the average wait for bariatric surgery in Canada is estimated at over 5 years⁸.

The overall cost of out-of-country services has increased significantly over the past decade. However, volumes of publicly insured hospital and physician services outside of Canada remain stable (Figure 2). As illustrated below, the number and payments of insured hospital and physician services funded by the government for medical procedures outside of Canada from 2002 to 2009⁹. The government funded over 375,000 services in 2008-09 totaling over \$220 million¹⁰. This translates to approximately 41,000 patients being funded for treatment abroad¹¹.

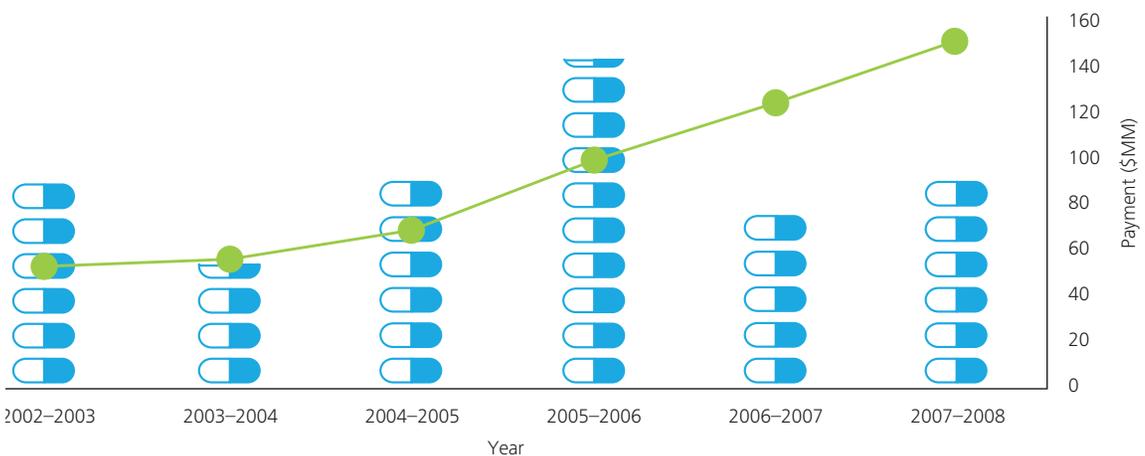
As provinces struggle with increasing out-of-country costs, alternatives in inbound and intrabound services are starting to be examined. Provinces are actively looking for options to improve access to care for their residents, reduce out-of-country costs, and explore new revenue opportunities to offset increasing health system budgets. Consider two examples in Western Canada:

- The British Columbia (BC) government has signaled interest in creating BC as a medical tourism destination¹² for other Canadians and foreign travelers, to tap into the potential of health system revenues
- The Saskatchewan government has explored surgical wait list reduction through sending patients to BC for service

The cost pressures facing government, and initial openness to medical tourism by some provinces set the stage for a renewed discussion, and a need to understand the consumer perspective, current medical tourism models and the implications of medical tourism in Canada for all stakeholders.

Figure 2: Rising cost of out-of-country payments for publicly insured health services

Number and payment of insured hospital and physician services provided outside of Canada



Navigating provincial out-of-country guidelines

Patients looking to have their out of country procedures' expenses covered should look to province-specific developed policies that have been developed to fund out of country medical expenses. The medical services are covered as long as certain requirements are met (see Figure 3).

Figure 3: Examples of approval processes for selected provinces

Province	Sample processes for out-of-country medical cost reimbursement
Ontario	<p>Prior approval from the Ministry of Health and Long-Term Care is required in order for patients to receive funding for OHIP insured hospital and medical services out of country (OOC). Written approval must be received from the ministry before OOC health services are rendered. The requested OOC services are prescribed as insured services, if the "Prior Approval Application for Full Payment of Insured Out of Country Health Services" establishes that the services and treatment being requested are:</p> <ul style="list-style-type: none"> • Performed at a hospital or licensed health facility • Not experimental or for research or for a survey • Generally accepted in Ontario as appropriate for a person in the same medical circumstances as the insured person • Either not performed in Ontario by an identical or equivalent procedure or • Performed in Ontario but the insured person must receive the services outside Canada to avoid a delay that would result in death or medically significant irreversible tissue damage
British Columbia	<p>In order for Medical Services Plan (MSP) to consider funding elective out of country medical care, an application for prior approval must be submitted to MSP. The decision to approve MSP payment for out of country medical services is based on the following criteria:</p> <ul style="list-style-type: none"> • The service would be a benefit if performed in B.C. • The service is being provided by a licensed physician or oral surgeon • The service is medically required • The service needs to be performed outside Canada because appropriate, acceptable treatment of the patient's medical condition is not available in Canada, or a delay in accessing treatment would have medically significant consequences for the patient • The service is generally accepted by the medical profession in B.C. to be a non-controversial and worthwhile treatment for the patient's medical condition • The service is provided in an accredited acute care general hospital
Alberta	<p>The Out-of-Country Health Services Committee (OOCHSC) reviews, evaluates and makes decisions pertaining to requests for funding for the costs associated with medical, hospital and/or oral surgical services to be received outside of Canada. The following conditions must be met for an applicant to be considered for Oochsc funding:</p> <p>Funding must be approved before the services are provided</p> <ul style="list-style-type: none"> • The services must be medically required • The services must be unavailable in Alberta or elsewhere in Canada • The services must be insured medical, oral surgical and/or hospital services • The services cannot be experimental or in the research stage (clinical trial) • The applicant must be an Alberta resident who is registered with the AHCIP, and who has not opted-out of the plan

Consumers are increasingly open to medical tourism

More patients are seeking and are able to afford medical care when not provided by the public health system. These patients, who are part of an overall aging population in Canada, are willing to travel to access faster care, specialized treatment, or better technology not available in their own country. The types of medical tourism procedures or services most common for consumers include the following:

- Orthopaedic procedures
- Neurosurgery/neurology
- Weight loss/liposuction
- Cosmetic/plastic surgery
- Dental procedures
- Cardiovascular procedures
- Oncology
- Fertility
- Sex reassignment

For individual Canadians, five key drivers will spur medical tourism growth – each pointing to increased access, convenience and quality for the consumers who choose to use medical tourism services^{13, 14}:

- Shorter waiting periods and quicker access to care
- Comparable or better quality care
- Ability to afford out-of-country costs
- Access to services not approved/available in Canada
- Cosmetic services

A Deloitte 2009 Survey of Canadian Health Care Consumers found that Canadians are open to publicly insured medical tourism services, but current private-pay service use is still limited (Figure 4):

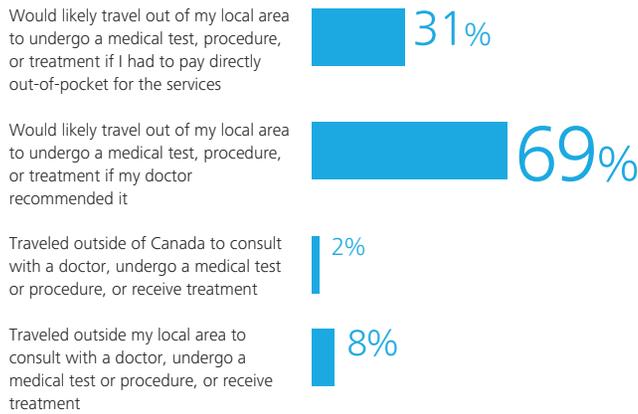
- **Only 2%** have travelled outside of Canada to consult with a doctor, undergo a medical test or procedure, or receive treatment
- **Approximately 8%** have travelled outside of their local area (i.e. within Canada)

However, 69% of Canadians are willing to travel out of their local area to undergo a medical test, procedure, or treatment if their doctors recommended it and the service remains covered under their health insurance. Only 31% would do so if services were self-paid. This suggests opportunity for increased medical tourism between provinces to reduce wait times, where services continue to be covered by public insurance.

When asked about out-of-country travel, similar trends are observed: approximately 60% would travel for health care if publicly insured; a lower proportion of approximately 20% would do so if self-paid. This willingness to travel, particularly with provincial insurance coverage, indicates an opportunity for the health system to seek services abroad to help alleviate provincial systems' capacity issues, where they exist.

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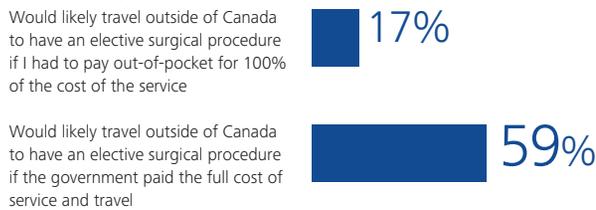
Figure 4: Deloitte 2008 survey of Canadian health care consumers: Consumer interest in outbound medical tourism



Quality



Consumer likelihood to travel for elective procedure



Consumer likelihood to travel for necessary procedures



	Gov't paid	Self paid
Male	60%	24%
Female	64%	23%
Age 18-24	58%	27%
Age 25-44	64%	26%
Age 45-64	63%	20%
Age 65-84	53%	20%
Age 85+	100%	0%
African Canadian/Black	63%	38%
Arab	53%	18%
Asian	54%	27%
Caucasian/White	63%	23%
First Nations/ Native Canadian	28%	17%
Latin American	79%	47%
Income <\$25K	49%	15%
Income \$25-\$50K	58%	16%
Income \$50-\$75K	59%	19%
Income \$75-\$100K	63%	25%
Income >\$100K	66%	29%
A major urban city	63%	24%
A small to medium-sized city or town	62%	22%
A rural/country area	59%	24%
A remote area of the country	24%	24%

Understanding medical tourism today

Medical tourism operators can support the patient at multiple points along their journey, through facilitation, care delivery or follow-up. In Canada, there is a growing trend of medical tourism operators, or ‘facilitators’, with companies operating at varying levels of maturity.

Many patients find using medical tourism facilitators to be more convenient and expedient than seeking medical services abroad on their own. Facilitators have experience in the medical tourism process and are able to address any concerns or questions that patients might have. They often provide assistance with logistics and travel arrangements. Patients may even be able to get lower rates from medical facilitators than directly from clinical programs abroad, with some operators identifying an 80% savings through bulk purchases of procedures abroad for their clients¹⁵.

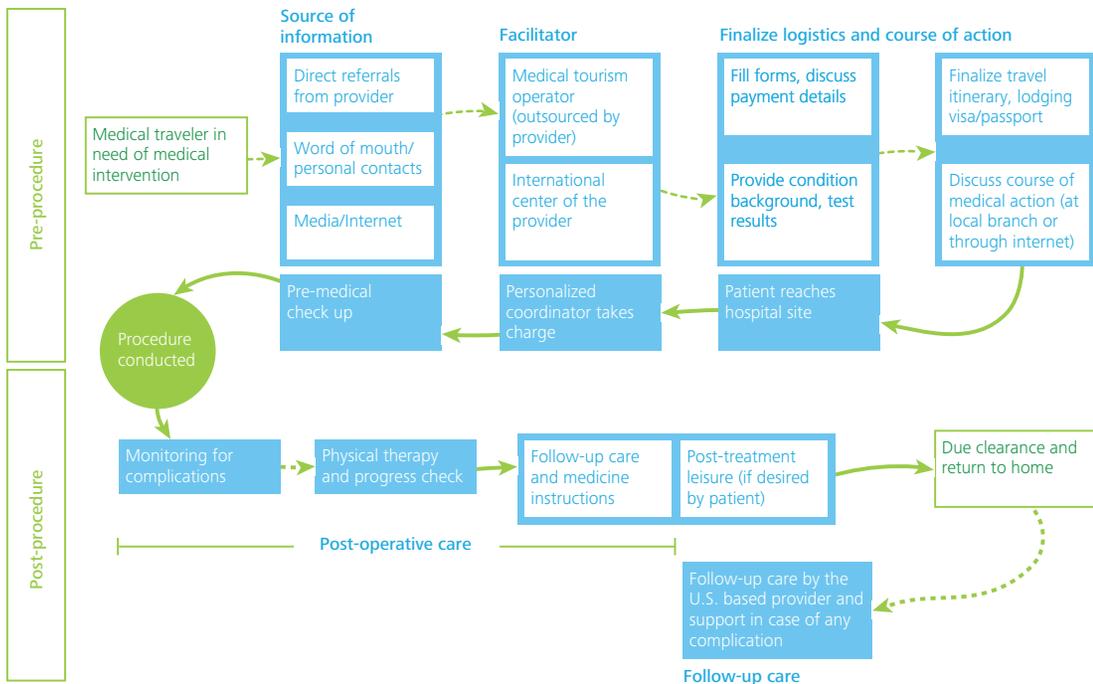
Medical tourism facilitators can be divided into four groups:

- **Hotel Groups**, such as the ITC-WelcomGroup in India, have expanded their service line to act as facilitator between the patient and the provider.

- **Travel Agencies**, such as Commonwealth Travel in Singapore, have tour plans for medical travelers and utilize their experience to organize logistics.
- **Medical Travel Planners**, such as MedRetreat, Planet Hospital, Global Choice Health care, and BridgeHealth International, act as patient representatives in finding treatment abroad.
- **Provider Groups**, such as Bumrungrad in Thailand and Apollo in India, have dedicated clinical programs solely for international patients.

Across the different types of medical tourism facilitators, there is a common outline of the consumer’s path in seeking, receiving and recovering from a medical procedure performed abroad (Figure 5).

Figure 5: A consumer’s path to medical tourism



Medical tourism operators in Canada

A number of medical tourism companies operate in Canada to promote travel to medical facilities in other countries. These facilities are located in Alberta, Manitoba, British Columbia, Ontario, and Quebec. Other players include more traditional travel agencies that advertise medical tourism packages. While some companies send their clients to a single medical facility in a particular country, others advertise a choice of destinations. Figure 6 illustrates a sample of known medical tourism programs in Canada.

Figure 6: Examples of medical tourism operators in Canada

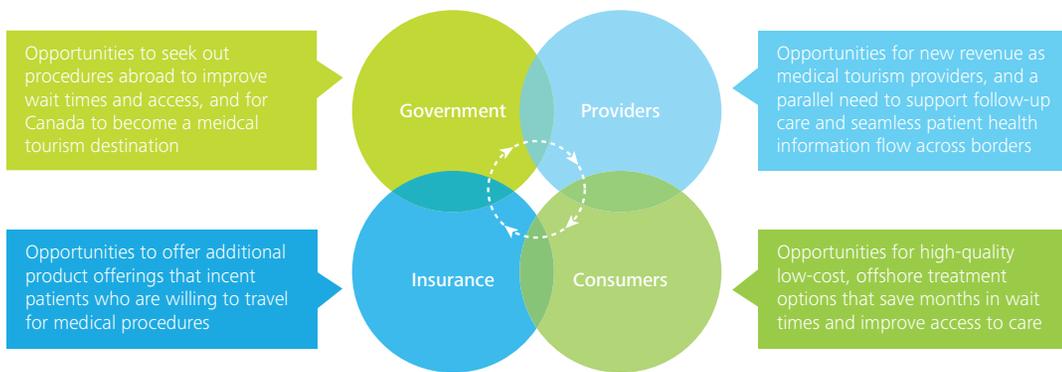
Province	Sample processes for out-of-country medical cost reimbursement
Cambie Surgery Centre http://www.csc-surgery.com	<ul style="list-style-type: none"> • Located in Vancouver, British Columbia • Multi-specialty surgical facility that allows patients access to world class Canadian health care expertise • Most of the physicians are nationally and internationally renowned
Canadian Health Care International Corp http://www.canadaheals.com	<ul style="list-style-type: none"> • Founded by two Ontario MDs in 2008 • Provide international patients world class medical care in Canada at rates drastically lower than those in the United States
Choice Medical Services http://www.choicemedicalservices.com	<ul style="list-style-type: none"> • Provide U.S. patients access to high quality medical care in Canada at up to 30 to 60 percent savings off US costs • Assists North American patients in getting health care services in Cuba and Costa Rica at savings of up to 80 percent off U.S. costs • Services include joint replacement, appendectomy, cosmetic surgery or other common surgery • Affiliated state-of-the-art medical clinics located near the Canadian-U.S. border in the Vancouver and Montreal areas
Cleveland Clinic in Canada http://www.clevelandcliniccanada.com	<ul style="list-style-type: none"> • Located in Toronto, Ontario • This is part of the famous Cleveland Clinic in Ohio • Offers referrals to their U.S. medical centers in Ohio or Florida
Debson Medical Tourism Inc. http://www.debsonmedicaltourism.com	<ul style="list-style-type: none"> • Facilitator based in Canada who works with internationally accredited hospitals and facilities that are accredited • Services offered include cancer treatment, cosmetic, dental, eye surgery, fertility, heart, orthopedics, and general surgery
International Health care Providers http://www.ihcproviders.com	<ul style="list-style-type: none"> • Office is located in Windsor, Ontario • Provides immediate access to diagnostic, medical and surgical services • Partnered with top tier US medical specialists and hospitals • All arrangements can be made by phone or in person • Known for their personal and complete service
MedExtra http://www.medextra.com	<ul style="list-style-type: none"> • This is a Canadian company that offers facilitation services with respect to health care • Not an insurance company, MedExtra is membership driven • Services consist of finding access to health care through their public, private and international affiliations

Figure 6: Examples of Medical Tourism Operators in Canada (Con't)

Province	Sample processes for out-of-country medical cost reimbursement
Medipassion Healing Inc. www.medipassionhealing.com	<ul style="list-style-type: none"> • Incorporated in Canada, office located in Quebec • Provide custom design medical tourism packages for individuals, families, corporations, broker, TPA (Third Party Administrator), Insurers, or self-insured employers
Meditours http://www.meditours.org	<ul style="list-style-type: none"> • Based in British Columbia, Meditours puts together packages for patients looking for medical and surgical care in India • Started specifically for hip and knee replacements, but now offer dental implants, Plastic, Lasik eye (400 MHz laser) as well as other specialized procedures
Parkway Group Health care http://www.parkwayhealth.com	<ul style="list-style-type: none"> • This organization operates three leading hospitals in Singapore • Offers a wide array of medical services • Website offers information and instruction for international patients including a local contact in Canada
Passport Medical passportmedical.com	<ul style="list-style-type: none"> • Full-service medical tourism facilitator serving both the United States and Canada • Procedures include dental, IVF, cosmetic surgery, bariatrics, ophthalmology, age management
Star Hospitals.net http://www.starhospitals.net	<ul style="list-style-type: none"> • North American health care service • Offers affordable and timely treatment abroad through a network of JCI/NABH/ISO accredited hospitals throughout India, Singapore and Thailand • Care facilities offer a wide range of high quality procedures
Surgical Tourism Canada http://surgicaltourism.ca	<ul style="list-style-type: none"> • Offices located in Vancouver and Toronto • Strategic Alliances with World Class JCI accredited hospitals in India, USA, Canada and Mexico such as such as Wockhardt Hospital, Apollo Hospital, and Marshfield Clinic • Provides medical tourism insurance that includes medical complications and travel insurance
Timely Medical Alternatives http://www.timelymedical.ca	<ul style="list-style-type: none"> • Office is located in Vancouver, British Columbia • Provides quick access to medical imaging, medical and surgical care • Partnered with numerous well known medical centers across America and private clinics in Canada • Services focused exclusively in North America

Looking ahead

The evolution of medical tourism in Canada presents many opportunities and challenges, and points to the need for a different type of dialogue across government, providers, insurance companies, consumers and medical tourism operators. By exploring these opportunities and potential risks, leaders will be engaged to understand the future of what growing medical tourism means for Canada and consumers.



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Looking ahead

Implications and opportunities for consumers

In seeking out medical services abroad, the public needs the reassurance that the services provided are of the caliber and experience as Canadian hospitals and will offer standardized operations and coordinated level of care to ensure a seamless transition back to Canada

Although medical tourism offers significant time and cost savings, it comes with increased risk to consumers. Complications as a result of a procedure in a foreign country may require the consumer to work through the host country's legal system. This can be difficult and burdensome if the consumer lives far away from the place where treatment was received, or if the host country has political instability. As consumers seek out medical interventions in foreign destinations, the following key questions can help to guide decision making:

- Is the foreign medical site internationally accredited? Are medical practices, equipment and clinical information technologies up-to-date?
- Does it have an affiliation with any Canadian or U.S. academic health sciences centres, or employ any Canadian or U.S. clinicians, to demonstrate the caliber of services provided?
- Is there information available on the medical site's safety, quality, and effectiveness?
- What type of pre- and post-procedure coordination is provided, and how does the foreign medical site connect with local providers for follow-up care?
- Are personal health records or other electronic tools available to facilitate coordination?

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Looking ahead

Implications and opportunities for government

Given potential willingness by Canadians to consider medical tourism, provincial governments have the opportunity to not only seek out procedures abroad to alleviate the health system's wait times and improve access to care, but to also explore creating Canada as a medical tourism destination

As the federal and provincial governments continue to drive strategic investments to reduce wait times and improve access to care, enhancing the use of medical tourism providers may be an option for reducing associated costs. However this will need to be approached with caution: a recent public poll showed that 60% of Canadians support publicly-paid out-of-country treatment when that treatment is not available within Canada, and 29% oppose any form of publicly-paid medical tourism¹⁷.

Considering inbound medical tourism, the Canadian health system has unused capacity today, which is not funded for public service. Using this capacity to establish Canada as a medical tourism destination creates new opportunity for revenue generation, which in turn can increase the availability of services in the public system.

Exploration of both inbound and outbound medical tourism will need to be carefully planned and discussed with stakeholders, as models that appear to create burden on the individual travelling, or to allow foreign paid access to Canadian facilities ahead of Canadians will receive opposition. As governments seek out medical tourism opportunities, the following key questions can help to guide decision making:

Outbound medical tourism

- Will the cost of medical tourism services be less than the delivery of services locally?
- How much and what type of additional access is needed through medical tourism services?
- Are there potential medical tourism destination countries that should be avoided due to political instability?
- What relationships, structures and patient information are needed to ensure safe and effective medical tourism services for Canadians?
- What additional care coordination and public health insurance mechanisms are needed to enable follow-up care locally?

Inbound medical tourism

- How much additional capacity exists in the health system that can be made available for medical tourism services without impacting Canadians' access to care?
- What type of dialogue and ongoing monitoring is needed with providers, health professionals, unions and the public before and after initiating medical tourism services?
- What infrastructure enhancements are needed to make Canada an attractive medical tourism destination?
- What pricing structure should be established to generate sufficient revenue and still remain globally competitive?
- How do Canadian medical tourism services need to be branded and marketed, and to which initial target markets?

Looking ahead

Implications and opportunities for providers

Medical tourism presents a need for follow-up care for Canadians travelling to foreign destinations, and opportunity for Canadian providers to become medical tourism destinations

Providers today already face the challenges of providing follow-up care for Canadian who have travelled abroad for medical tourism services and have complications upon return. As medical tourism grows, establishing programs to support follow-up care presents a new opportunity if additional revenue can be captured. If provincial governments open the door to inbound medical tourism, providers will have a renewed opportunity to use existing capacity or build new capacity to generate revenue through foreign services.

As providers examine medical tourism opportunities, the following key questions can help to guide decision making:

Outbound medical tourism

- Are there new revenue opportunities through government or by offering marketed follow-up services for patients travelling abroad?
- What are the risks and liabilities of providing follow-up care?
- How do we facilitate appropriate patient care and information coordination with foreign providers?

Inbound medical tourism

- What changes will be needed to the business model to enter into medical tourism services?
- What additional capacity exists that can be used for medical tourism services?
- What are our costs of service delivery and what do we need to do to be price-competitive?
- How should we approach the market – as a standalone organization, local network, through the use of satellite clinics, considering international affiliations?
- What brand positioning should we consider – basic or luxury provider, academically-affiliated, other?
- What investments are needed to become an attractive medical tourism provider (e.g. infrastructure, patient service enhancements, clinical information technologies, additional language or cultural supports)



Looking ahead

Implications and opportunities for insurance companies

Although medical tourism insurance exists today, increased consumer or government demand will drive new opportunities and additional product offerings

Patients who are willing to travel for medical care create a mostly untapped market opportunity for private insurers. The willingness of consumers to travel outside of their local areas to receive faster medical care enables insurers to develop innovative plans that cater specifically to that need. For example, Acure Health Corp., a company based in Calgary, currently offers a medical access insurance product which provides clients access to treatment if they have to wait longer than 45 days for care in the public health-care system¹⁸. It covers the cost of pre- and post-surgery specialist consultation, diagnostics such as MRI and CT scans, and surgery, including approved travel expenses, for roughly 135 treatments and conditions. However, the popularity of this product and has been limited by opposition from stakeholders who want to ensure the public health system is protected¹⁹. Other insurance companies such as the British Columbia Automobile Association have faced similar challenges and stakeholder opposition, where the decision was made to end its trial offering of a similar wait time insurance product to its members even though a majority of their members supported the product offering²⁰. To move beyond stakeholder opposition, insurance companies will need government support to enable medical tourism offerings.

As insurance companies examine medical tourism opportunities, the following key questions can help to guide decision making:

- What is the health profile of members today and the ability to augment consumer plans with new products?
- What is the total potential market for medical tourism insurance offerings?
- What product offerings should be considered – cost allocation/ reimbursement only, facilitation services, access to a rostered network of international service providers, reimbursement for follow-up care in Canada?
- Will employers purchase medical tourism products, or is a direct sell to consumers required?
- Should the foreign destinations for insured services be limited – based on value-for-money, risk, or other factors?
- What are the risks and liabilities of providing medical tourism insurance?
- What government or policy mechanisms are needed to support medical tourism offerings?
- How should medical tourism offerings be branded to avoid stakeholder opposition?

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The future of medical tourism in Canada

Medical tourism is an emerging global trend that is starting to take root in Canada, one that presents opportunities and challenges. Canadians are showing an emerging interest and willingness to travel for health care for out of country procedures, however overall volumes of medical tourism today are relatively low.

The growth of medical tourism will be driven by cost, consumerism, quality, and foreign economic development. Outbound medical tourism is expected to increase as health consumers seek new medical treatments available abroad, and aging Boomers choose to afford self-paid services for improved access and convenience. The availability of low-cost, offshore treatment options could save Canadian patients months in wait times and improve access to care. For inbound medical tourism to gain government and public support, a clear demonstration that the revenues generated from inbound medical tourism are used to increase capacity for publicly-funded care.

Opportunities exist for all stakeholders. Careful planning and dialogue can mitigate the identified challenges, enabling governments, providers, insurance companies and patients to capitalize on the potential of future medical tourism.



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