



# Medical Tourism Unveiled: **Why Patients Travel and What Holds Them Back: A Deep Dive into the Medical Tourism Decision-Making Process**



MEDICAL TOURISM  
ASSOCIATION



INTERNATIONAL  
HEALTHCARE  
RESEARCH CENTER

# INTRODUCTION TO THE MEDICAL TOURISM PATIENT SURVEY



Growing at  
**15% to 25%**  
per year

## MEDICAL TOURISM VALUED OVER **\$100 BILLION**

Medical Tourism has become a pillar of global healthcare with an estimated value of over \$100 billion USD and growing at 15% to 25% per year. As patients traverse nations seeking the best care, they are not merely searching for skill or technology, but also seeking an inherent “trust” in the institutions and professional minds (and hands) that heal them. As patients increasingly seek optimal care beyond borders, understanding their motivations, concerns, and decision-making processes becomes paramount.

In the summer of 2023, the Medical Tourism Association, in partnership with the International Healthcare Research Center (IHRC), surveyed global healthcare consumers who journeyed abroad for medical treatments, as well as those who showed interest by inquiring about medical travel but chose not to proceed.

The survey encompassed respondents considering a wide range of health procedures abroad, from cardiac and cancer treatments to orthopedics and dental care.

Through their candid responses, we aim to unveil the driving forces behind their choices – be it the allure of superior medical expertise, cost-effectiveness, accreditation, or the promise of innovative treatments. Additionally, we also uncover the apprehensions and barriers that deter some from seeking care overseas.

The survey results show the paramount importance of trust-building measures including international accreditation and the critical role of effective communication and follow-up. It is evident that the patient's experience and journey begins way before they set foot in a clinic or hospital. The survey results show the importance of increased investment in staff training and cultural competence. The findings of the survey help healthcare providers and destinations with insights to grow their patient volume.

By addressing the concerns and aspirations expressed by these patients, providers can tailor their offerings, ensuring not only the highest standards of care but also the trust and confidence of potential medical tourists. One key finding from the survey is healthcare providers need to focus more on building trust and confidence in medical tourists, as "trust" is the bedrock of patient choices.

For healthcare providers, understanding and addressing these concerns is not just pivotal for patient satisfaction but is also directly correlated with the potential growth of their patient base.

Every year, the Medical Tourism Association (MTA) refers thousands of healthcare consumers from around the world to providers. **Its core mission is to elevate consumer understanding of medical tourism and champion the cause of transparent, high-quality healthcare.**



MTA now also champions commitment to aid healthcare providers in scaling and optimizing their medical tourism ventures through a strategic investment and development of DarwinAI, a cutting-edge, innovative marketing technology and consumer engagement platform. There is one goal: to achieve consumer awareness of medical tourism on a scale only previously imagined.

MTA drives awareness of medical tourism also known as medical travel to consumers and connects patients to providers and target markets in the Middle East, Europe, USA (United States of America), Asia, and Latin America, and other destinations. Between April 2023 when the project launched to October 2023, MTA produced over 14,000 articles through Medical Tourism Magazine in English, Arabic, Chinese, Russian, Spanish and German, doubling the readership in 4 months.

By the end of 2024, readership is projected to surpass one million visitors. Utilizing a proprietary algorithm and AI (Artificial Intelligence) Marketing Technology, DarwinAI has helped the industry achieve revolutionary visibility and an unparalleled digital presence.

The AI-Powered Insights deliver precision and personalization to deliver top-ranking, trustworthy healthcare content tailored for healthcare consumers no matter where they live or where they plan to travel to. This opens an entirely new market that supports the MTA's Medical Tourism Moonshot launched early 2023.

As we help healthcare providers and health tourism destinations attract patients, MTA also seeks to support efforts that focus on patient retention, patient experience, and increase referrals.

While DarwinAI is highly successful in generating brand awareness and patient leads for clinics and hospitals around the globe, the true challenge lies in assuring an enjoyable experience, word of mouth referrals, and patient retention. It is imperative that healthcare providers address the foundational concerns pinpointed in the recent survey.

Merely attracting patient leads will not suffice if the conversion does not transpire, or the experience is not up to patients' ever evolving expectations regarding experience.

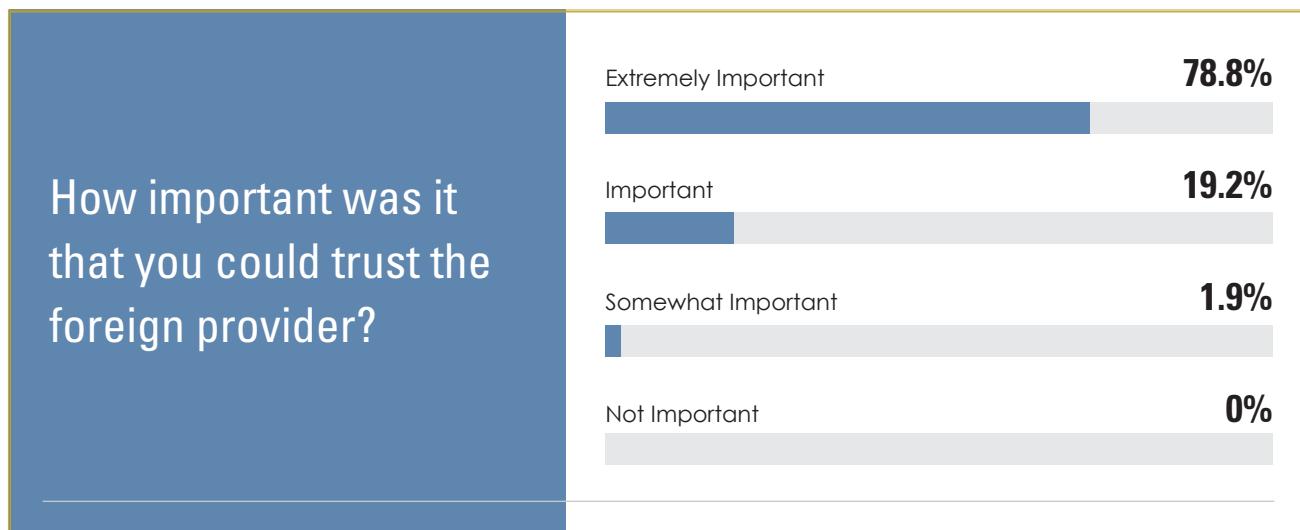
## INVESTMENT IN TRAINING INTERNATIONAL DEPARTMENTS

We strongly advise healthcare providers to amplify their investment in training international departments, standardizing their processes, improving patient experience, prioritizing accreditation, refining communication strategies for international clientele, and ensuring cost transparency in treatments which will undeniably bolster the conversion rates of these leads.



# DELVING INTO COMPLETED JOURNEYS

This section of our survey centers on those who took the leap and successfully embarked on their medical tourism journey. Their experiences, reflections, and feedback provide valuable insights into the completed medical travel lifecycle.



### Insights on the Importance of Trust in Healthcare Provider Selection:

**97.2%**

About 97.2% of medical tourists view 'trust' as a significant or paramount factor in their decisions. 78% stated it is extremely important and another 19.2% consider it important. This highlights the undeniable fact that trust is foundational in a patient's decision-making process when seeking medical care abroad and one of the most important characteristics of patient retention and future word of mouth referral.

**Takeaway for Providers:** Universally, patients are seeking reassurance and confidence in their healthcare choices. Providers must actively work on building and maintaining trust through every interaction, from initial inquiries to post-treatment care.

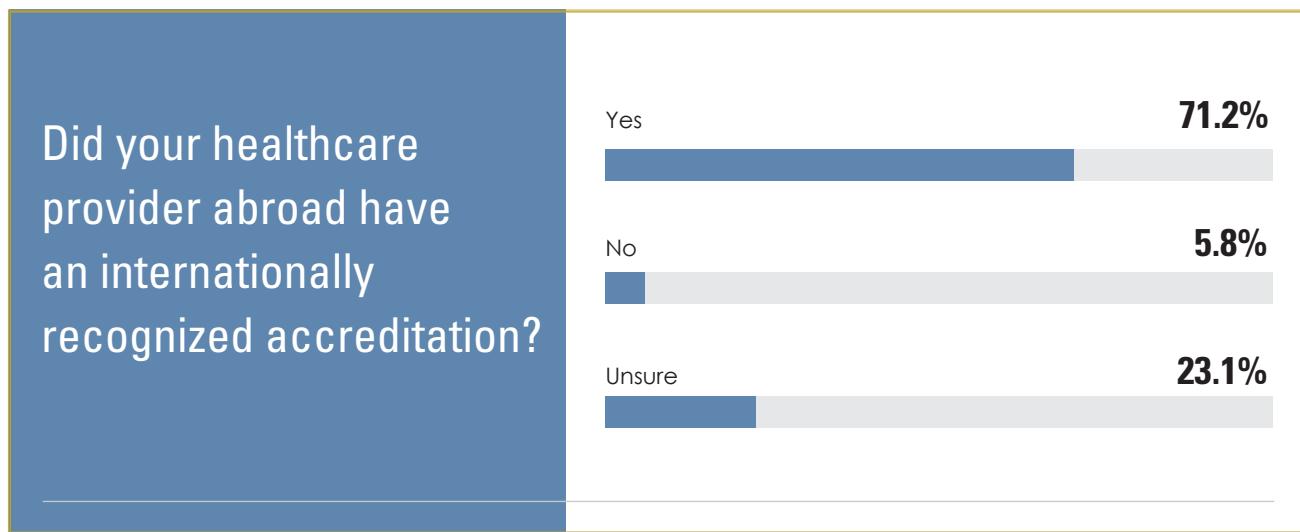
It is the foundation upon which patients base their decisions and, as such, should be at the forefront of every provider's strategy. From credentials to communication, every aspect should be tailored towards fostering trust. For healthcare providers looking to establish and enhance this trust, several strategies can be pivotal:

- **Industry Recognition:** Being published or featured in renowned industry publications, academic articles, and featured in events can bolster a provider's reputation, signaling expertise and credibility.
- **Association Affiliations:** Joining medical tourism or healthcare-related industry associations and displaying their badges prominently offers an assurance of adherence to recognized industry standards.

- **Doctor's Credentials & Achievements:** Transparently highlighting doctors' credentials, their advanced training, and any awards they have received can provide assurance about the quality of care and expertise available.
- **Hospital Awards & Recognitions:** Celebrating and promoting awards and recognitions the hospital or clinic has achieved can further amplify trust.
- **International Accreditation:** Pursuing and prominently displaying international accreditations signals a commitment to maintaining global standards of care.
- **Authentic Testimonials & Reviews:** Real patient stories, testimonials, and reviews offer prospective patients' genuine insights, further bolstering their confidence in the provider's services.

Incorporating these elements can significantly bridge the trust gap and, in turn, increase patient conversion for healthcare providers

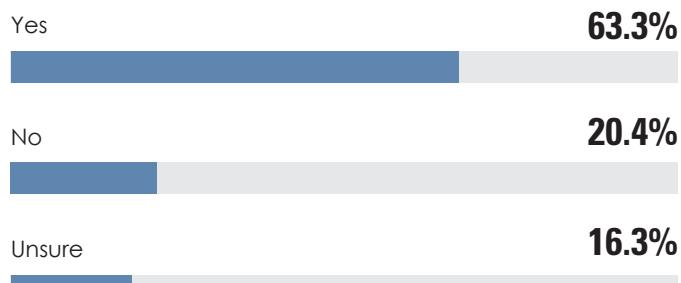
## The Importance of Accreditation and Trust



A compelling 71% of respondents confirmed that their healthcare provider held an internationally recognized accreditation, underlining the importance patients place on verified standards of care. This underscores the critical role of such accreditations in influencing patient trust and decision-making. An additional 23% who were unsure further suggests a potential opportunity: healthcare providers should not only seek these accreditations but also actively communicate and promote the value of them to consumers. Accreditations have become a market differentiator. By ensuring patients are aware of their adherence to international standards, providers can further enhance trust and influence more individuals to choose their services.

## Insights on the Influence of Accreditation in Decision-Making:

If yes, did the accreditation influence your decision to choose that healthcare provider?

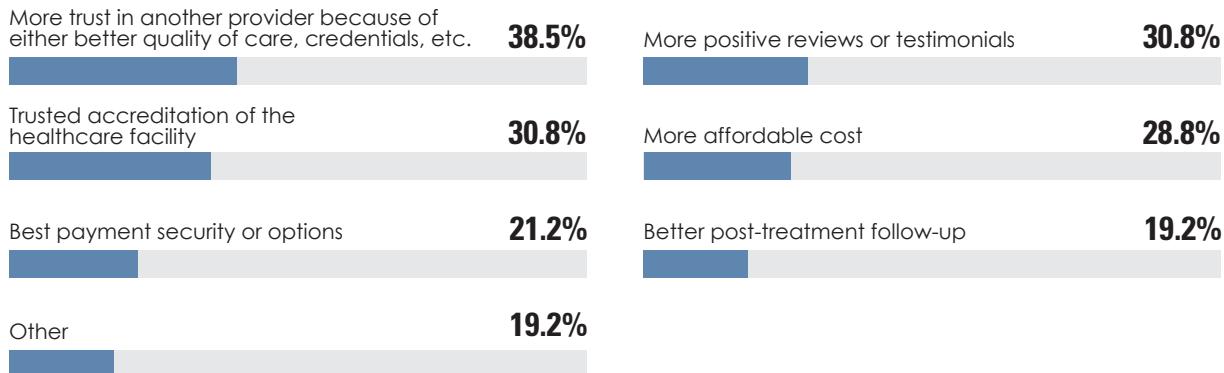


**6 out of 10**

medical tourists place a high importance on accreditation, indicating its critical role in their decision-making process.

A significant 63% of respondents affirmed that the internationally recognized accreditation of the healthcare provider directly influenced their decision to choose that specific provider. This underscores the profound impact accreditation has on reinforcing patient trust and confidence. Furthermore, the 16% who were “unsure” suggest that even if accreditation is not the sole deciding factor, it may still play a subtle, subconscious role in enhancing a provider's credibility. The takeaway for healthcare providers is clear: Securing and promoting an internationally recognized accreditation is not just a badge of honor—it is a pivotal element in patient decision-making, setting providers apart in a competitive medical tourism market.

If you opted for a healthcare provider or facilitator different from the one you initially inquired about, what prompted your decision to choose them?



**Quality and Trust at the Forefront:** A considerable proportion (38.5%) of respondents shifted their choice of who they worked with for medical tourism and where they went for medical treatments to, based on perceived better quality of care, credentials, and international accreditations. This signals the primacy of trust and quality in medical decision-making.

**Testimonials and Accreditation Drive Confidence:** Both positive reviews/testimonials and trusted accreditation of healthcare facilities hold equal sway, with 30.8% of respondents indicating these factors influenced their decision. Word of mouth and recognized certifications act as pivotal trust indicators.

**Affordability is Important, but not as important as we thought:** While quality and trust dominate, 28.8% of the respondents also highlighted the importance of cost. This highlights that while patients are keen on quality healthcare, some are sensitive to price points.

**Secure Payment and Post-Care:** Better payment security or options (21.2%) and superior post-treatment follow-up (19.2%) were other decisive factors. This stresses the significance of the complete medical tourism experience, from the beginning (payment) to the end (post-treatment care).

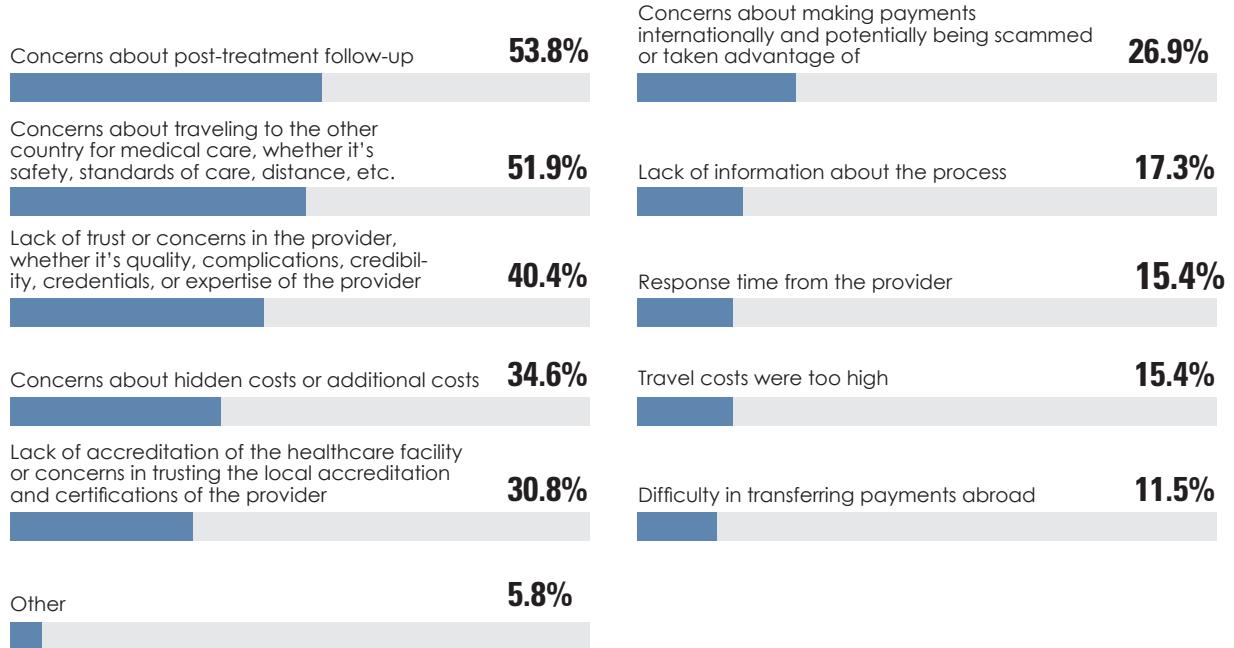
### Takeaways:

- **Trust is Paramount:** For medical providers or facilitators looking to appeal to potential patients, establishing and promoting their credentials, quality of care, and international accreditations are paramount.
- **Leverage Patient Feedback:** Positive patient reviews can play a game-changing role. Providers should encourage satisfied patients to leave feedback and should prominently display such testimonials.
- **Transparency in Costs and Payments:** Clear, affordable pricing, along with secure and flexible payment options, can be a differentiator in a patient's choice of provider.
- **End-to-End Care Matters:** Medical tourism is not only about the medical procedure. Ensuring patients feel supported and cared for, even after the treatment, can significantly influence their choice and satisfaction.

## QUALITY, TRUST, COST, PATIENT EXPERIENCE, PAYMENTS.

Medical tourism decisions are multifaceted, driven by a blend of quality, trust, cost, and overall patient experience. While quality of care stands at the forefront of decision-making, the entire patient journey, from payment options to post-treatment care, plays a critical role. **Providers and facilitators must holistically address these aspects to be the preferred choice for medical tourists.**

## What were your initial concerns about traveling abroad for care before you choose to?



### Insights on Initial Concerns about Traveling Abroad for Care:

Choosing to seek medical care abroad is a weighty decision influenced by an array of concerns, with post-treatment care and quality and safety standards leading the pack. Addressing these concerns by ensuring trustworthiness, providing continuous support, and maintaining financial and procedural transparency is crucial for medical facilities aiming to attract international patients.

#### Insights:

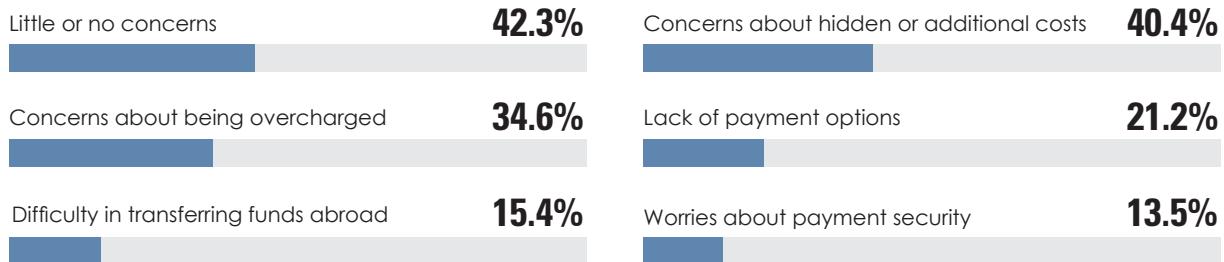
- **Post-Treatment Follow-up Tops Concerns:** A notable 53.8% of respondents expressed worries about post-treatment follow-up. This underscores the importance of continuous patient care, even after the primary medical intervention. The use of wearable devices and good communication protocols is extremely effective at making improvements in this area.
- **Safety, Quality and Standards in Foreign Medical Care:** Following post-treatment concerns, 51.9% of respondents were anxious about traveling to another country due to issues such as safety, quality, standard of care, and distance. This shows the weightage given to the overall environment and the medical standards of the destination country.
- **Is My Doctor Trustworthy:** 40.4% of respondents had reservations about the provider's quality, expertise, or the complications that might arise. The trustworthiness of the provider, including their credentials and expertise, significantly influences the patient's decision.

- **Financial Concerns and Transparency:** 34.6% of respondents worried about hidden or additional costs, while 26.9% feared international payment scams. This highlights the significance of financial transparency and security in the decision-making process.
- **Accreditation Matters:** For 30.8% of the participants, the lack of accreditation or doubts about local certifications played a role in their apprehensions.
- **Information, Communication, and Logistics:** Lack of information about the process (17.3%), delayed response time from providers (15.4%), and high travel costs (15.4%) were also deterrents. Payment logistics, such as transferring payments abroad, posed a challenge for 11.5% of the respondents.

### Takeaways:

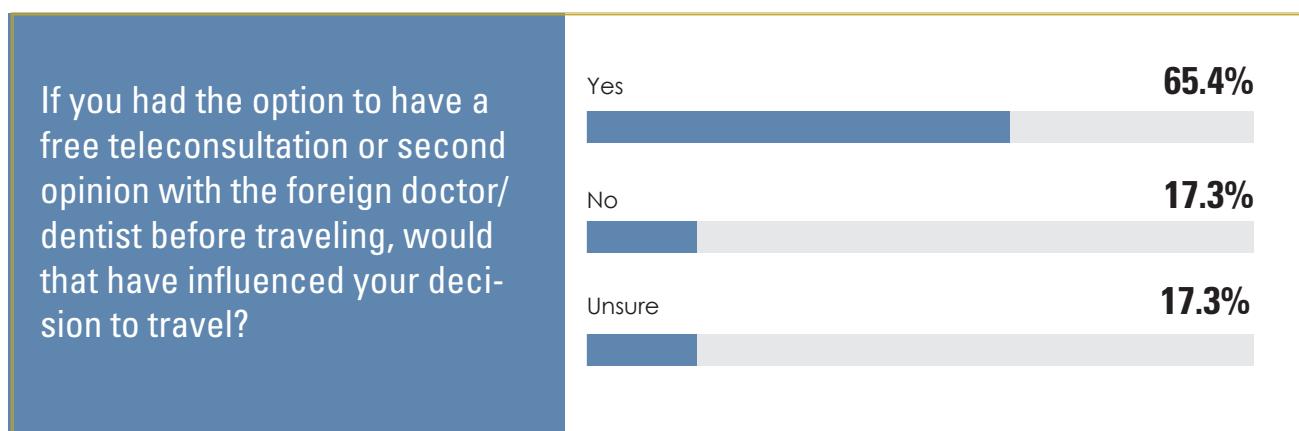
- **End-to-End Patient Support:** Medical facilities and facilitators should focus on providing comprehensive post-treatment support to alleviate a major concern among potential medical tourists.
- **Promote Safety, Quality and Standards:** To assuage fears related to traveling and treatment standards, providers should promote the safety measures, quality standards, and credentials they maintain.
- **Financial Transparency is Key:** Clearly laying out costs, without any hidden charges, and ensuring a secure international payment gateway can inspire trust among patients.
- **Effective Communication and Information Dissemination:** Providers must be proactive in sharing detailed information about the treatment process and be responsive to patient queries.
- **Highlight Accreditations:** Medical facilities should prominently display their accreditations and certifications to instill confidence in potential patients.
- **Ease of Payment and Travel Arrangements:** Simplifying the payment transfer process and offering solutions or partnerships to mitigate high travel costs can further enhance the appeal of a medical tourism facility

## Did you have concerns about making payment for treatment abroad?



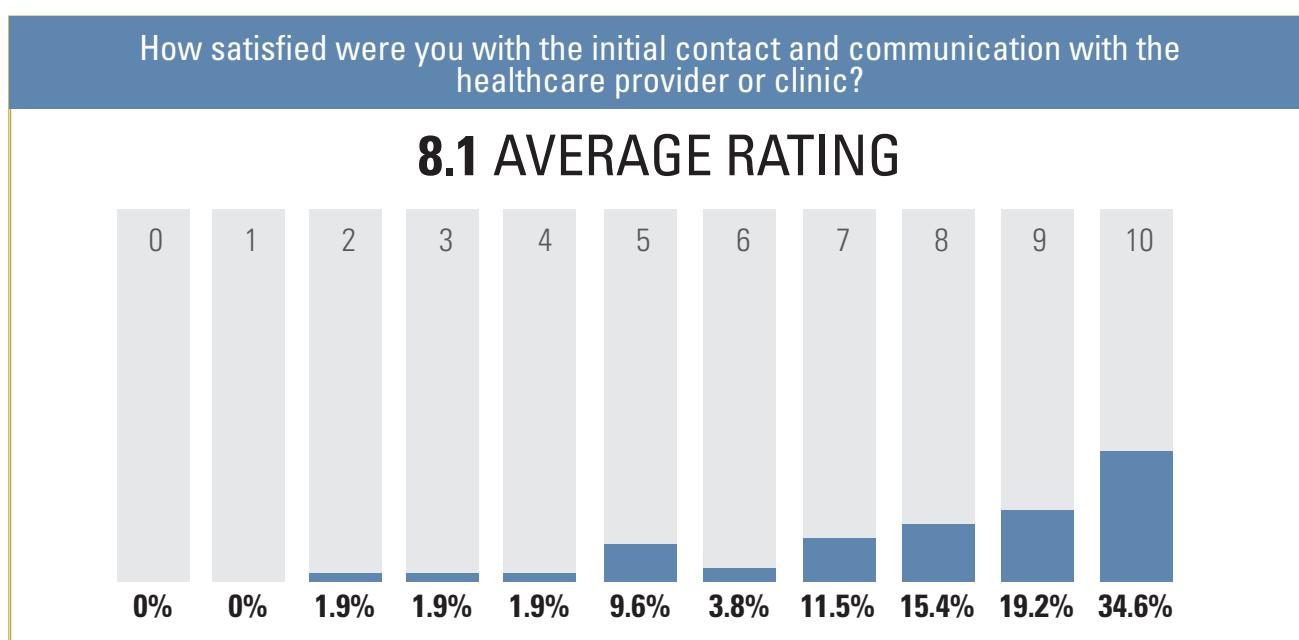
### Payment Concerns:

- **General Payment Concerns:** A notable 57.7% of respondents had concerns about the act of making international payments. This shows a broad unease about the entire process, indicating a gap in the market for a more user-friendly solution. With so many general concerns, healthcare providers need a payment solution that is intuitive and user-friendly. Simple interfaces, clear instructions, and seamless integrations can be a significant change.
- **Hidden Fees Fears:** Close behind, 40.4% of our respondents were wary of those unexpected costs sneaking into their bills. Transparency is paramount when it comes to financial dealings.
- **Fear of Being Overcharged:** It is not just about unexpected fees; 34.6% were worried they might be charged more than they should be. This stresses the importance of clarity and fairness in pricing. Addressing worries about hidden fees or being overcharged is crucial. Consider offering a transparent breakdown of all charges with no hidden fees, as well as future potential costs not included in the initial fees/quotations.
- **Payment Options:** One-fifth (21.2%) felt restricted by the payment choices available to them. This highlights a need for diverse, flexible payment methods. A variety of payment options, from credit cards to e-wallets, can cater to the diverse needs of your clientele.
- **The Hassles of International Transfers:** It is not always easy sending money across borders. 15.4% expressed their frustrations with this, signaling a market demand for a smoother, more streamlined transfer system. Minimize the number of steps required to complete a transfer. The quicker and simpler, the better.
- **Is My Money Safe:** Security is a priority, and 13.5% were apprehensive about the safety of their payments. This is a call to arms to a secure, trust-worthy payment platform. This also shows that some healthcare consumers are concerned about not having “trust” in the overseas healthcare provider enough to make payment to them. Healthcare Providers need to establish their credibility and trust with consumers better than they do today.



Offering a free teleconsultation or second opinion with a foreign healthcare provider seems to be a valuable proposition for potential medical tourists. A significant 65.4% of respondents indicated that such an option would have influenced their decision to travel. This suggests that direct interaction with the healthcare provider beforehand could alleviate concerns and instill confidence in patients, potentially tipping the scales in favor of their decision to travel for treatment. This underscores the power of direct, pre-travel interactions in building trust and clarity for medical tourists.

## Satisfaction with Medical Travel Care



Overall, the respondents who traveled abroad for treatment were satisfied with the quality of care they received. With an average rating of 8.1, 75% of the respondents rated their reception and the quality of care they received upon arrival at least 8 out of 10.

Initial contact and communication with a healthcare provider plays a pivotal role in shaping the patient's perception and trust. Findings reveal that most potential medical tourists felt positive about their initial interactions, with 69.2% rating their satisfaction at 8 or above. This underscores the significance of a strong first impression and effective communication in retaining potential medical tourists.

However, it is worth noting that around 15.1% rated their satisfaction at 6 or below, pointing towards potential gaps in communication, understanding patient needs, or setting the right expectations. It suggests that there's room for improvement, especially in terms of training staff and putting in better processes and procedures to deal with international patients whose needs and expectations might differ from domestic ones.

For healthcare providers keen on enhancing their global patient intake or increasing patient volume, it is not just about the medical expertise but also the patient experience right from the very first contact. Investing in training for the international patient department can be instrumental in optimizing these first impressions. Also, seeking accreditation in medical tourism can enhance the international patient department, boost the patient experience, and ensure patients feel understood, valued, and confident in their choice of a health provider.

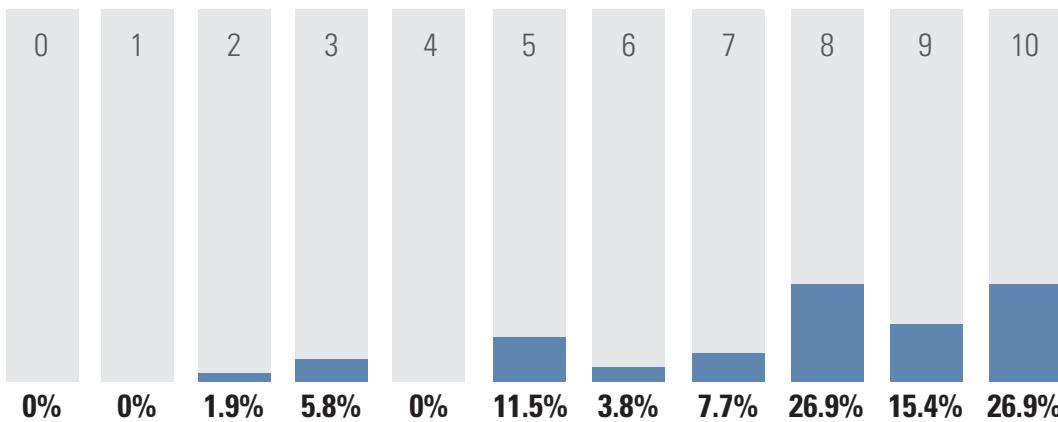
For every individual who had challenges with the initial communication (scoring 5 or below), twelve others had a positive experience, scoring 8 or above.

## THE IMPORTANCE OF ACCREDITATION IN MEDICAL TOURISM

While a strong majority found the initial contact satisfactory, the feedback from the minority that had concerns suggests there's room to enhance communication training, especially for international patient departments. **Accreditation in medical tourism and patient experience could further reinforce these standards.**

How satisfied were you with the clarity and comprehensiveness of the information provided about the treatment options?

## 7.8 AVERAGE RATING



Clarity and comprehensiveness in relaying information about treatment options are critical in fostering trust and ensuring the patient is well-informed. Our survey indicates that most of the respondents felt positive about the information provided, with 69.2% rating their satisfaction an 8 or above. This demonstrates the importance of providing thorough and transparent details to prospective patients to build trust and ease potential anxieties.

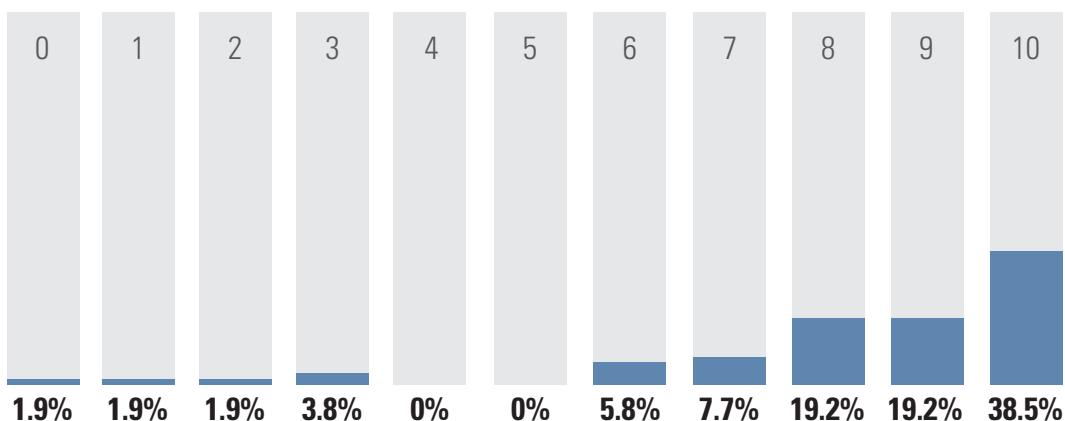
However, there is an underlying indication that some providers might not be hitting the mark entirely. With 22.0% of respondents rating their satisfaction a 6 or below, it points to inconsistencies or potential areas of ambiguity in the information provided. This emphasizes the need for healthcare providers to reassess the way they present treatment options and ensure they are as comprehensive and clear as possible.

## ACCREDITATION AND HIGHER SATISFACTION RATINGS

Providers with **recognized accreditations** or comprehensive patient communication training **tend to have higher satisfaction ratings**, underscoring the importance of continuous professional development.

How satisfied were you with the quality of medical or dental care you received?

## 8.2 AVERAGE RATING



- “67% of respondents expressed high satisfaction with the quality of care they received, giving a score of 8 or higher.”
- “13.5% of respondents provided a moderate score, rating their satisfaction level between 6 and 7.”

### Areas of Improvement:

- “7.6% of respondents signaled potential concerns with the care they received, scoring it at 3 or below.”
- “For every individual who rated the quality of care as subpar (scoring 3 or below), nearly nine others gave it high marks, scoring 8 or above.”

### Implications for Quality Assurance: Drawing a link to organizational needs:

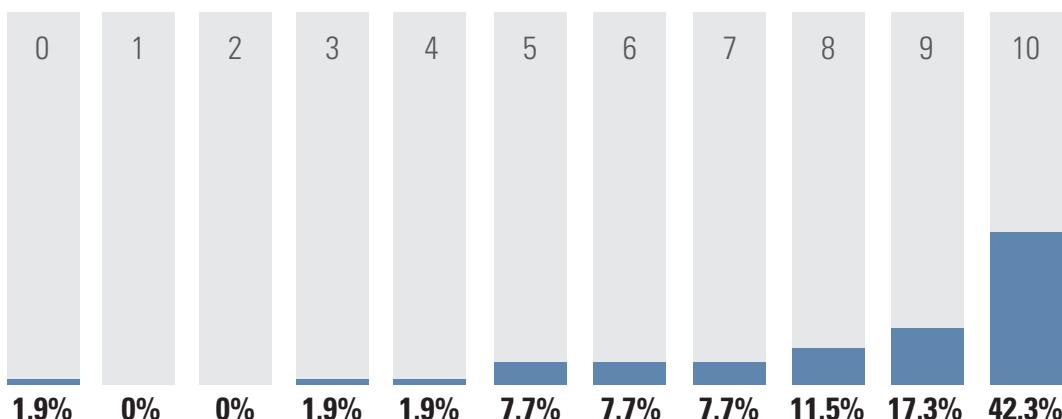
While a significant majority praised the quality of care, the feedback from the minority indicates that there's room to refine certain aspects of patient care. Rigorous quality assurance mechanisms, backed by recognized training, processes and accreditation, could help bridge this gap.

HIGH  
STANDARDS  
OF CARE

In conclusion, while the overall sentiment towards the quality of care is overwhelmingly positive, **it is essential to address the concerns raised by a minority to ensure universally high standards of care.**

Please rate your overall willingness to consider medical tourism in the future.

## 8.2 AVERAGE RATING



"A substantial 71.1% of respondents displayed a high willingness to consider medical tourism in the future, scoring 8 or above.

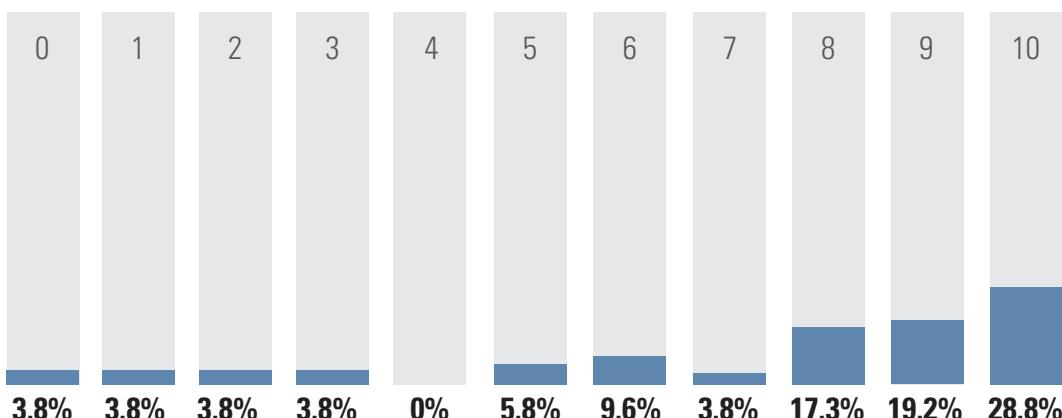
"15.4% of respondents show moderate willingness, with scores between 6 and 7."

"3.8% of respondents demonstrated reservations about considering medical tourism again, scoring 4 or below."

"For every individual who expressed hesitation or doubt (scoring 4 or below), twenty displayed strong enthusiasm and confidence in the prospect, giving it an 8 or higher.

How satisfied were you with the post-treatment care and follow-up provided by the healthcare provider or clinic?

## 7.4 AVERAGE RATING



- “65.3% of respondents expressed high satisfaction with post-treatment care and follow-up, rating it between 8 and 10.”
- “15.4% of respondents had moderate feelings about the post-treatment care they received, providing scores between 5 and 7.”
- “11.4% of respondents seemed considerably unsatisfied, rating their post-treatment care and follow-up 2 or below.”
- “7.6% of respondents gave a rating of zero or one, suggesting severe dissatisfaction or potential gaps in the post-treatment care they received.”

Many respondents felt positively about the post-treatment care, indicative of clinics and providers mostly meeting or exceeding expectations in this crucial phase. The moderate satisfaction group, however, points towards areas of potential improvement. The distinct minority expressing severe dissatisfaction should be thoroughly addressed to understand the root causes and to enhance the overall medical tourism experience.

Post-treatment care and follow-up stand out as integral elements of the medical tourism experience, and while most providers are handling this well, there's always room for refinement. Ensuring that all patients feel supported and cared for after their treatment is paramount, not only for their health and safety but also for the reputation and trustworthiness of the healthcare provider.

### **Suggestions for Optimization:**

**Standardization and Quality Control:** Standardizing healthcare services can significantly optimize post-treatment care experiences.

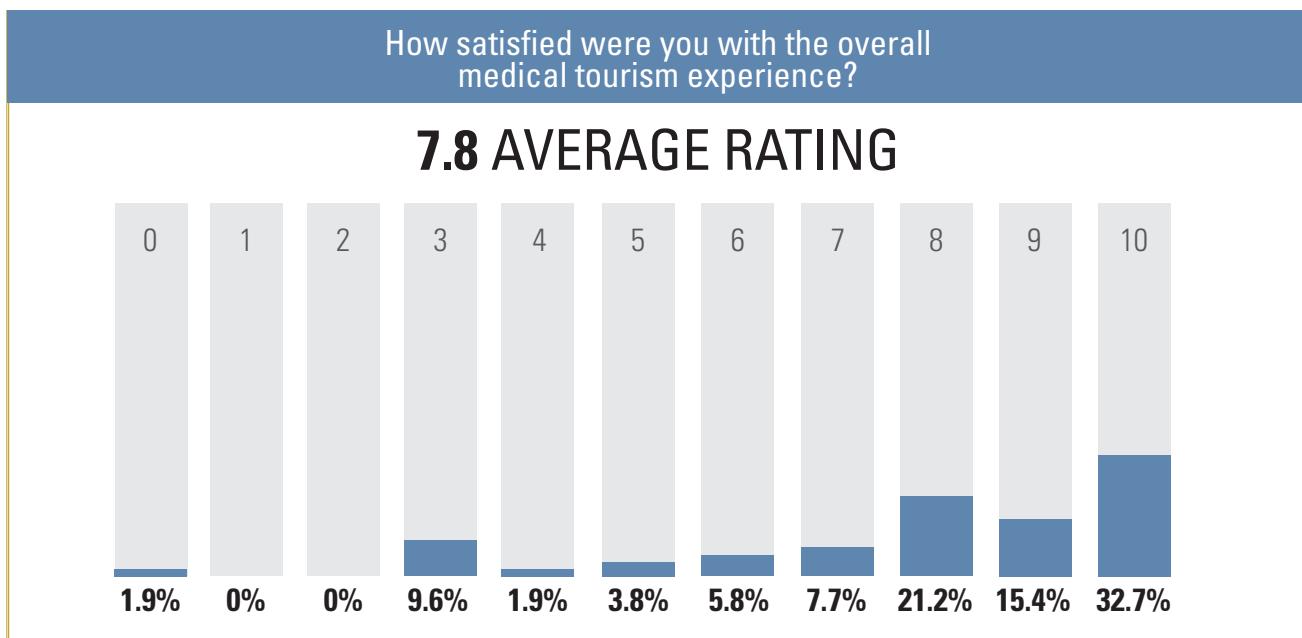
**Continuous Improvement:** Accreditation bodies often require periodic reassessment, pushing clinics and providers to constantly improve and address areas like post-treatment care.

**Cultural Sensitivity:** Training can equip medical staff with the skills to understand and manage cultural nuances, ensuring a smoother post-treatment care experience for international patients.

**Communication Barriers:** Specialized training can help in overcoming language barriers and ensuring that post-treatment instructions are clear, understood, and effectively communicated.

**Managing Expectations:** Patients coming from different healthcare systems might have varying expectations. Training can help providers in aligning these expectations and ensuring that

international patients know what to expect in terms of post-treatment care. Post-treatment care satisfaction could see significant improvement if clinics and providers undergo stringent accreditation processes and invest in specialized training for catering to international patients.



The data presents a positive view of medical tourism among the respondents. A sizable portion (69.3%) of the participants rated their overall medical tourism experience with a score of 8 or higher, highlighting a considerable level of satisfaction. However, it is worth noting that there is a small but significant percentage of respondents (11.5%) who gave a score of 4 or below, indicating a stark contrast in experiences. This discrepancy points to areas of improvement within the medical tourism industry.

**Strong Satisfaction Base:** Most respondents express great satisfaction, indicating that many medical tourism providers are meeting or even exceeding patient expectations.

**Diverse Experiences:** The spread of ratings suggests that experiences can vary widely, due to differences in healthcare providers, regions chosen for medical tourism, or the nature of medical procedures sought.

**Room for Improvement:** While a significant majority had positive experiences, the industry should address the concerns of the unsatisfied minority, as their experiences can provide valuable insights into potential pitfalls or areas of inconsistency within the industry.

While the medical tourism industry is delivering on its promises for a sizable majority, the varying degrees of satisfaction underscore the importance of consistent quality assurance, patient feedback mechanisms, and continuous improvement.

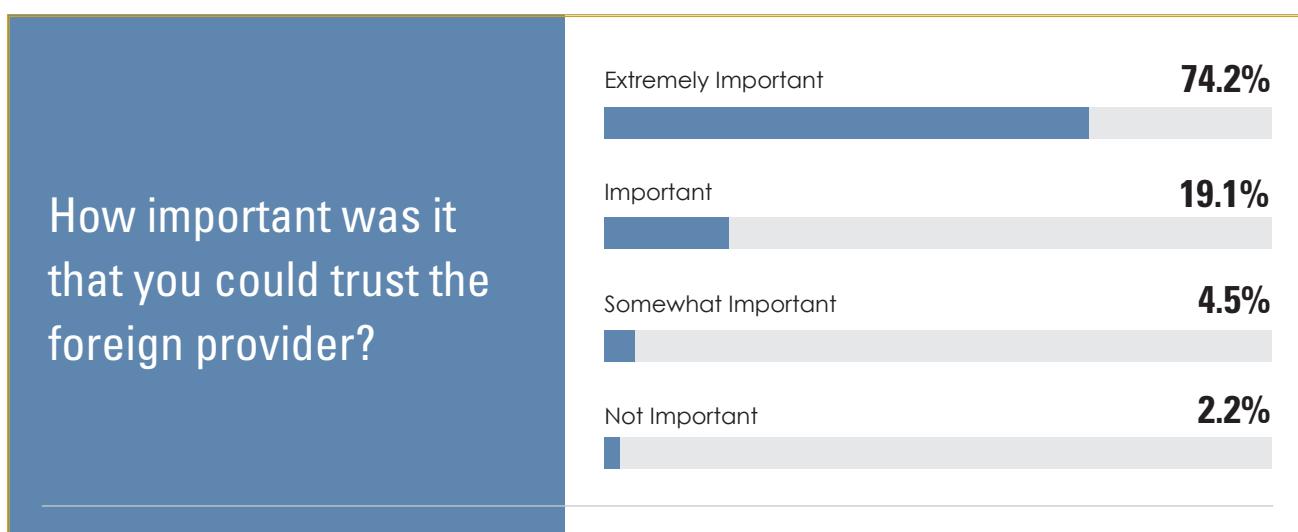


# **RESPONDENTS WHO DID NOT TRAVEL FOR MEDICAL TREATMENT**

## Exploring Untraveled Paths:

Shifting our focus, we now delve into the perspectives of those who initiated their inquiry into medical tourism but chose not to proceed further. Their reservations, concerns, and decision points offer a deep understanding of the barriers and potential improvements in the medical tourism industry.

In the ever-expanding world of medical tourism, understanding the motivations and reservations of potential medical tourists is crucial. While many embark on journeys abroad seeking quality healthcare, others, despite initial interest, opt not to travel. The data spotlights how the global healthcare community can better serve and reassure potential medical tourists in the future. By tuning into their concerns, preferences, and decision-making factors, we aim to shed light on the key elements that can make or break their journey.



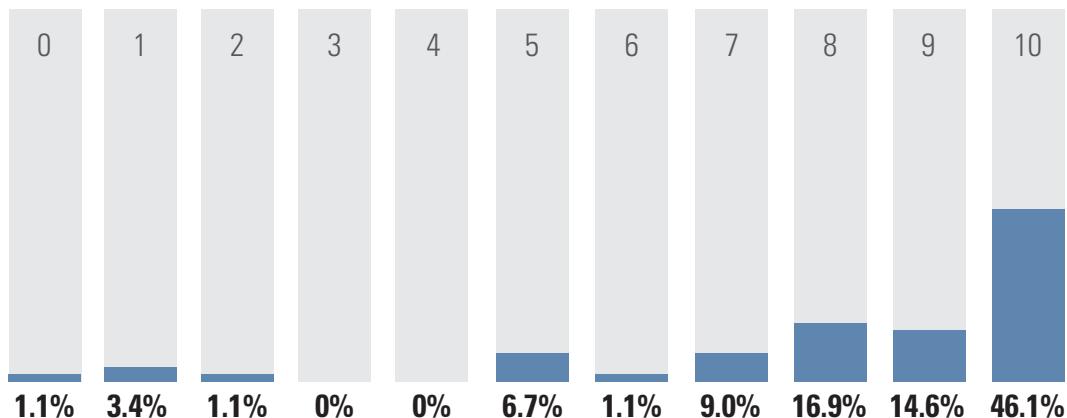
Trust remains an overriding factor for healthcare consumers considering medical tourism, but who haven't engaged in it yet. An overwhelming 74.2% of respondents deemed it "extremely important" to trust the foreign provider, while an additional 19.1% labeled it as "important". With a staggering 93.3% ranking trust as 'important' to 'extremely important', establishing and maintaining trust is crucial for providers aiming to attract international patients.

## LOSING MEDICAL TOURISM BUSINESS

**Many healthcare providers are losing medical tourism business and patients because they are failing at building trust with consumers.**

How important would it be for the healthcare provider to have an internationally recognized accreditation for you to consider medical tourism?

## 8.4 AVERAGE RATING



**The emphasis that potential medical tourists place on internationally recognized accreditation cannot be understated.**

A striking 77.6% of respondents ranked its significance at an 8 or above on a scale to 10. Even more compelling, over 60% assigned a near-perfect score of 9 or 10, indicating that for a significant majority, a healthcare provider's international accreditation is a make-or-break factor in their decision to pursue medical tourism.

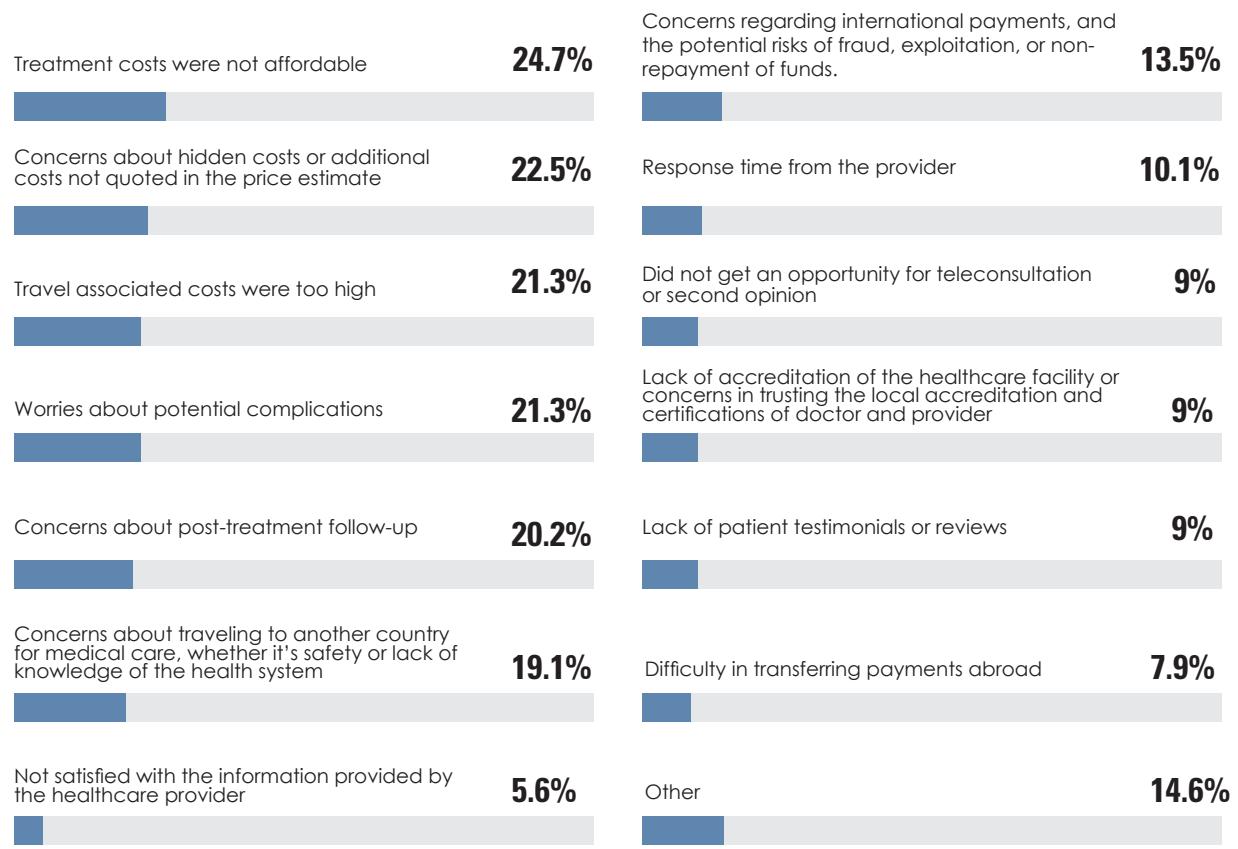
This data stands in stark contrast to the mere 4.5% who considered it of minimal importance, marking the influence of global healthcare standards as undeniable.

Healthcare providers without such credentials might find themselves at a considerable disadvantage in the eyes of discerning global patients.

## IMPORTANCE OF AN INTERNATIONALLY RECOGNIZED ACCREDITATION

**Most potential medical tourists view internationally recognized accreditation as a pivotal factor in their decision-making.**

## What were the primary reasons for not traveling for medical treatment?

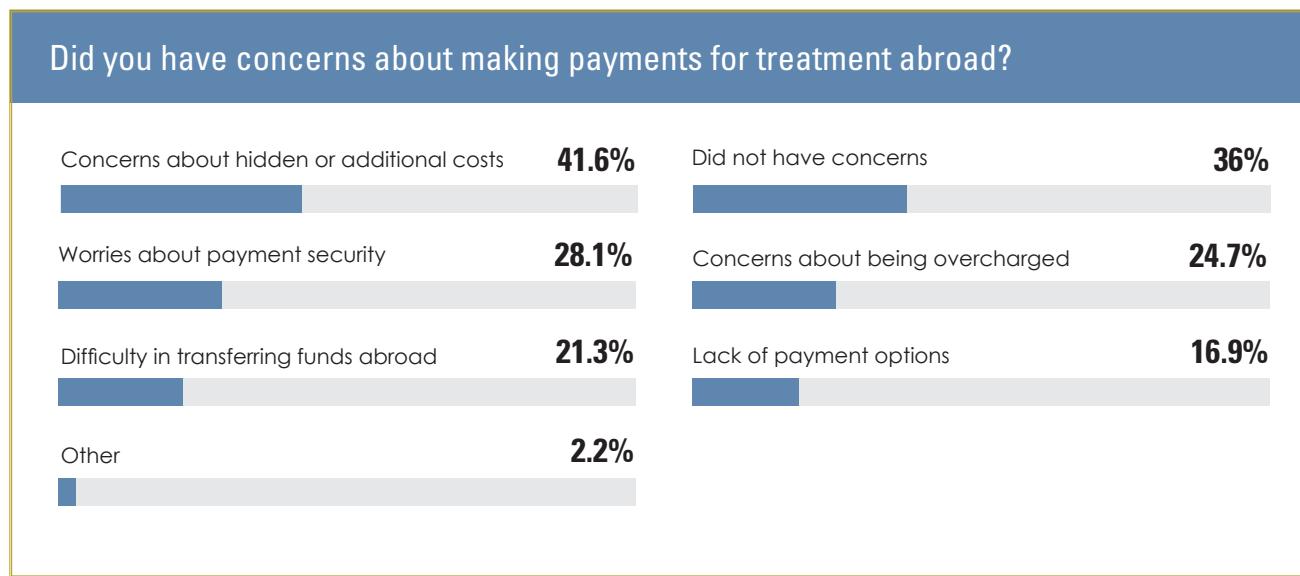


Financial apprehensions are a dominant theme among potential medical tourists who refrain from pursuing their treatment abroad. Treatment costs being unaffordable was the top reason at 24.7%, closely followed by worries about hidden or additional costs at 22.5%.

Coupled with the concern about high travel-associated costs (21.3%), it is evident that transparent, comprehensive, and competitive pricing is crucial to converting inquiries into active medical journeys and that the cost of the entire medical trip is a major consideration. 13.5% of respondents reported a lack of trust in paying the provider played a significant role in their decision not to travel for medical tourism. However, beyond the fiscal, the integrity of the medical procedure and its aftermath are pivotal. Concerns about potential complications (21.3%) and post-treatment follow-ups (20.2%) underscore the necessity for providers to offer reassurances about quality and care continuity.

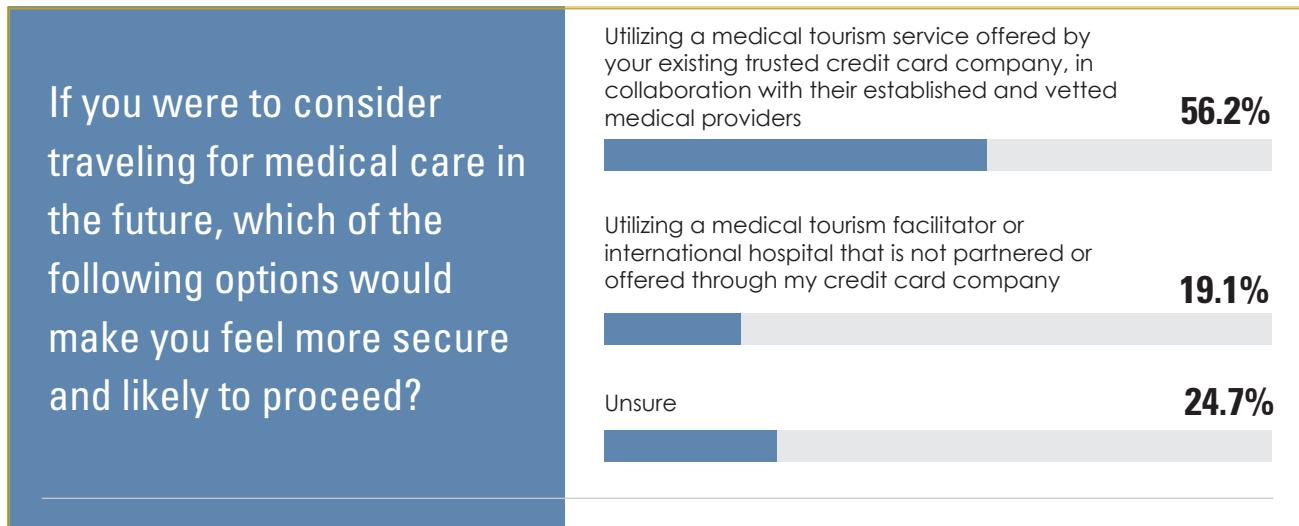
Concerns about the quality of the medical care, safety and not receiving enough information about the foreign healthcare system by the healthcare provider was also a major issue for 19.1%.

While financial concerns remain a substantial barrier for potential medical tourists, the myriad concerns about quality, safety, post-care, and international standards resonate deeply. For providers aiming to grow their patient base, addressing these qualms through transparency, fostering trust, and upholding international standards seems paramount. The desire for tele-consultations and patient testimonials further emphasizes the need for a more connected and transparent patient journey in the world of medical tourism.



With 41.6% of consumers having a fear of encountering unexpected additional or hidden costs, financial uncertainties play a significant role in why some medical tourists decide not to take the trip. Payment concerns - from hidden costs to transfer difficulties, to having their money stolen, are clearly among the barriers holding back many from pursuing medical tourism.

Addressing these apprehensions and streamlining the payment process could be instrumental in turning inquiries into actual journeys for treatment abroad. Healthcare providers need to proactively address payment concerns and fears. 28.1% of prospective medical tourists were concerned about payment security and 21.3% had major difficulty with transferring funds abroad. Healthcare providers will need to improve their credibility and trust when it comes to presenting packages and quotations to medical tourists, and they also need to provide easier methods for payment if they wish to increase their patient volume and convert more of the prospective medical tourists.



**Trust in Familiarity:** A significant majority (56.2%) of respondents indicated a preference for utilizing medical tourism services offered by their existing trusted credit card company. This suggests a strong inclination towards familiar brands or entities. When it comes to medical decisions, trust in the service provider is paramount, and people lean towards entities they already have a relationship with or have built trust with over time.

**Independent Facilitators and Hospitals:** Despite the dominance of the credit card-affiliated option, a noteworthy 19.1% still preferred independent medical tourism facilitators or international hospitals. This shows there is a market segment that either values autonomy in choice or views the direct healthcare pathway as more transparent or genuine.

**Uncertainty Still Exists:** Almost a quarter (24.7%) of the respondents remain unsure about which option they would consider more secure. This highlights a certain level of apprehension or lack of knowledge about medical tourism, emphasizing the need for better education and awareness about the process.

- **Leverage Existing Trust:** For those in the medical tourism industry, partnerships with trusted brands, like credit card companies or other trusted entities, can be a strong selling point. The association with a known brand alleviates concerns and offers a level of security and assurance.
- **Educate and Inform:** Given the high percentage of “unsure” responses, there is an evident gap in knowledge or clarity about the medical tourism process. Efforts should be made to educate potential patients about the benefits, processes, and safety measures in place when opting for medical tourism.

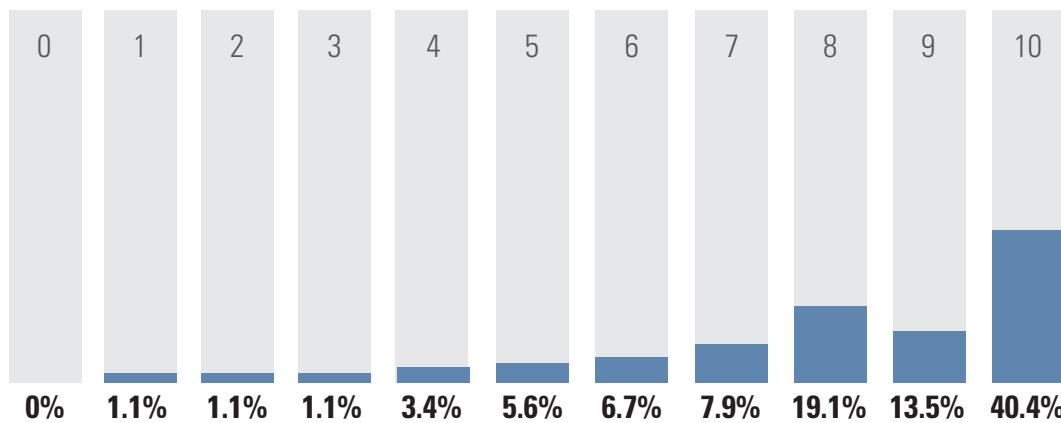
- **Value of Independence:** While affiliations and partnerships matter, it is equally vital to understand and cater to the segment that prefers independent providers. Ensuring high-quality services, transparent processes, and building trust are crucial for this segment.

## SECURITY IS PARAMOUNT IN MEDICAL TOURISM

**When venturing into medical tourism, the sense of security is paramount for potential patients. Aligning with trusted brands or entities can provide an advantage, but there is an evident need for education and trust-building within the industry.**

Please rate your overall willingness to consider medical tourism in the future.

### 8.2 AVERAGE RATING



### Why didn't medical tourists travel?

When looking at the survey segment of consumers who decided not to travel for medical tourism, and the reasons they hesitated or decided against traveling, it is evident that their concerns are both valid and varied. Potential medical tourists yearn for clarity, assurance, and trust. Accreditation stands out as a beacon of this trust—a testament to quality, professionalism, and care standards. For healthcare providers eyeing the burgeoning global market, it is no longer just about highlighting capabilities. As the industry moves forward, embracing these benchmarks will be the linchpin to turning potential travelers into confident patients, assuring them they are making the right choice in their medical journey abroad. Despite the varied responses on specific aspects of medical tourism for those who decided not to travel for medical tourism, a sizable portion of respondents showed a high willingness to consider medical tourism in the future. This points to the potential growth and revenue opportunities that could be gained that are currently being lost.

# CONCLUSION

## Conclusion

While highlighting robust positive feedback in areas like treatment quality, the medical tourism industry displays room for improvement in post-treatment care, payment security, and provider communication.

Emphasizing internationally recognized accreditations and enhancing patient-provider communication can play pivotal roles in elevating patient trust and satisfaction.

The industry's future looks promising, but to truly thrive, providers should focus on holistic patient experiences, ensuring excellence not just in medical procedures, but in every touchpoint of the medical tourism journey.

The survey provides untapped opportunity for continuous improvement of communication methods and in the quality of information. By addressing these concerns, healthcare providers can enhance trust, ensuring that potential patients choose their facility over others.

## PARAMOUNT IMPORTANCE OF THE PATIENT'S EXPERIENCE

The survey highlights the paramount importance of the patient's experience in the medical tourism journey.

Investing in rigorous training for the international patient department is not just a qualitative enhancement; it has quantifiable benefits in terms of increased trust, patient influx, and increased and optimized revenue.

Neglecting this aspect can have severe repercussions in a competitive market where patients have a plethora of options to choose from.

# TOP PRIORITIES TO INCREASE BUSINESS REVENUE AND PATIENT CONVERSIONS



## TRUST AND ACCREDITATION

The significance of accreditation emerged as a pivotal criterion for decisions made. A major portion of respondents found internationally recognized accreditations essential. This indicates that trust and assurance in the medical provider's credibility are paramount.

The industry should consider emphasizing and promoting such accreditations.



## COMMUNICATION AND CLARITY

Responses regarding initial contact, clarity in treatment options, and post-treatment care suggest that while many providers excel in these areas, there is a notable portion that falls short.

Enhanced training for staff, especially those in the international patient departments, could bridge this gap.



## PAYMENT CONCERN

Concerns related to hidden costs, payment security, and ease of payment transactions were recurrent themes.

This indicates a market gap that needs addressing, either through streamlined payment systems or better financial communication between providers and patients.



## POST-TREATMENT CARE

While many were satisfied with their actual treatment, post-treatment care and follow-up emerged as areas of concern for a considerable number of respondents.

This suggests a need for sustained patient engagement even after the primary medical service has been rendered.

## Important Takeaways from the Survey:

1. Trust Factor: A significant percentage emphasized the importance of trusting healthcare providers before they travel for care. Accreditation plays a key role in building this trust.
2. Communication & Clarity: Satisfaction levels with initial contact, communication, clarity, and comprehensiveness about treatment options signal the need for improved communication skills.
3. Post-treatment Care & Follow-up: A substantial number of voiced concerns about post-treatment care and follow-up, highlighting the necessity of a dedicated international patient department to handle post-care.
4. Overall Medical Tourism Experience: The collective satisfaction score, while positive, shows room for improvement. Patient experience is an amalgamation of all touchpoints, from initial contact to post-treatment care.

## Positive Benefits of Enhanced Training of Healthcare Providers:

1. Increased Trust & Credibility: Proper accreditation and consistent positive patient experiences can significantly boost an institution's reputation.
2. Higher Conversion Rates: Addressing concerns about communication, clarity, and post-treatment care can translate to higher lead conversions.
3. Patient Retention: Satisfied patients are likely to return for future treatments and can become brand advocates, providing authentic testimonials and word-of-mouth referrals.
4. Competitive Edge: In the competitive landscape of medical tourism, institutions that offer an unparalleled patient experience will stand out.

## Negative Outcomes of Neglecting Training/Lack of Investment in the International Patient Department:

1. **Loss of Potential Patients:** As the survey shows, unsatisfactory communication or lack of trust can deter potential patients, even if the medical services are top-notch.
2. **Decreased Brand Reputation:** Negative experiences, especially when shared online, can tarnish a healthcare provider's reputation, making it difficult to attract international patients in the future.
3. **Reduced ROI on Marketing & Outreach:** Without addressing the fundamental concerns of potential patients, even the best marketing strategies can fall flat, leading to decreased ROI.
4. **Missed Revenue Opportunities:** Unsatisfied patients not only reduce immediate revenue but also potential future earnings from repeat visits or referrals.



## MEDICAL TOURISM ASSOCIATION

[www.MedicalTourismAssociation.com](http://www.MedicalTourismAssociation.com)