

## Light medical tourism from Europe

Light medical tourism is a rapidly growing industry. European patients are increasingly travelling abroad for medical treatments as the price of European healthcare continues to rise and waiting lists are getting longer. If you can offer high quality combined with lower costs, limited waiting time and an appealing environment, your chances on the European market are good. Accreditation and attractive additional tourism activities are key.

### Contents of this page

1. [Description of the target group](#)
2. [Which European markets offer opportunities for light medical tourism?](#)
3. [What are the high-potential trends on the European market for light medical tourism?](#)
4. [Requirements for your light medical tourism product to comply with to be allowed on the European market](#)
5. [What competition do you face on the European market for light medical tourism?](#)
6. [Through what channels can you get light medical tourism products on the European market?](#)
7. [What are the end market prices for light medical tourism products?](#)

## 1. Description of the target group

Medical tourism (or health tourism) consists of patients travelling to another country with the primary purpose of receiving medical, dental or surgical care.

Table 1: Examples of medical treatments

Non-invasive	Light invasive	Invasive
Dental treatments (veneers, crowns, whitening)	Facelift	Orthopaedics (hips, knees, back, spine)
Eye laser	Scar/tattoo removal	Breast implants
Botox	Eyelid correction	Cardiovascular treatments (angioplasty, bypasses, valve replacements)
Hair removal	Cosmetic tattoos	Transplants (liver, kidney, lung)
Health scans	Varicose veins treatment	Fertility treatments
Alternative therapy (acupuncture, homeopathy)	Dental implants	Bariatric (lap-band, gastric bypass, gastric sleeve)

This study focuses on non-invasive and light invasive medical treatments. These treatments are easier to combine with holidays for patients and/or travel companions. Tourism experts see them as the most

promising/feasible options for you. Wellness tourism is not included in this study.

### Tip:

For information on wellness tourism, see our studies on [physical wellness tourism](#) and [inner wellness tourism](#).

## Health and safety measures

Health and safety are important to European tourists. They often inquire about the safety of their destination. Unclean rooms or equipment are unacceptable, especially for medical tourists, who may be vulnerable to infections.

### Tips:

Pay attention to general safety measures. Tour operators should make sure their facilities and equipment are clean, and hire experienced staff. Accommodation establishments should have safety measures in place, such as smoke detectors, fire extinguishers, emergency exits, first-aid kits and 24-hour medical assistance.

Show the outcomes of safety checks and licences to your clients.

## Political stability

Safety is important to European travellers, especially because some developing countries are politically unstable. Most commercial tour operators don't offer holidays to countries that their Ministry of Foreign Affairs has declared unsafe. This has led to a drop in tourism arrivals in countries such as Mali, Egypt and Kenya.

### Tips:

Keep (potential) customers updated on changes in the safety situation in your area, for example through your website and through your staff. Be open and honest in your communication: explain which areas are safe and where safety might be an issue. Your customer has plenty of information sources too.

Share safety experiences from customers on your website. Let them write about how safe they felt, because tourists value the experience of other travellers.

If your region is 'unsafe', commercial tour operators will most probably not go there. In this case, focus on volunteer organisations and individual travellers. Check your country's current safety status at the websites of the Ministries of Foreign Affairs in your target countries ([Ireland](#), the [United Kingdom](#) etc.).

## Lower costs

For Europeans who travel abroad for medical treatments, the significantly lower costs are usually the main

reason. Prices in developing countries can be half of what they are in Europe, or even less, depending on the specific countries and procedures.

### **Tips:**

Be clear and transparent in your pricing. For example, you should clearly define what treatments, supplies and care levels are covered in the price.

Provide an overview of potential cost savings by comparing the cost of a light medical treatment at your destination to the cost of the same treatment in your European target market. You can use the comparison tool of [Treatment Abroad](#), for example.

## **Quality service**

Good quality service is a vital part of attracting light medical tourists. While price is the main reason for Europeans to opt for medical treatment abroad, quality is the most important factor in selecting a destination. Diplomas, certifications and track records of hospitals, clinics, doctors and nurses play a key role in the selection of a destination and medical facility. The perceived lower quality of medical care in developing countries is one of the main barriers for light medical tourism.

### **Tips:**

Hire professional medical staff and provide detailed professional information on them in your marketing materials.

Offer high-quality services. For example, provide personal attention to your customers' specific needs, offer 24/7 service and arrange pick-ups and transfers. Also pay attention to pre- and after-care, such as online consultation and/or follow-up in the country of origin.

Carefully manage customer expectations. Try to avoid service quality gaps (a difference between expected and actual service quality).

Consider applying for quality assessment via accreditation from an internationally recognised institution, such as [ISQua](#). Such accreditation is important for strengthening confidence in the quality of healthcare in your country.

Try to affiliate with reputable hospitals, clinics or healthcare systems in your target markets.

## **Access**

In addition to cost and quality, another major factor in light medical tourism is access. Access to more advanced technology, quicker access to medical treatment (no waiting lists) or prohibitions on treatments in the home country are also important drivers for European light medical tourists.

### **Tips:**

Invest in the newest technologies to increase your chances of attracting light medical tourists.

Try to reduce or eliminate waiting lists and clearly communicate this on your website. Give examples of how previous patients have received treatments at your facility long before they could have had

them at home.

## Clear information

Clear information about the facility, staff and treatments is also crucial to increase the confidence of light medical tourists. As most of them look for information online, having a good quality website with clear information is of the utmost importance.

### Tips:

Provide customers with good information regarding your facility, staff and treatments. For example, offer general information about the hospital or clinic (credentials, awards, accreditations, memberships, affiliations), detailed profiles of surgeons and doctors (expertise, qualifications, track records) and extensive information on the treatments (procedures, risks, prices, pre- and after-care).

Offer online consultation services to make sure potential customers receive the information they are looking for.

Provide copies of all medical records when patients go home to ensure adequate after-care.

## Language

Clear communication is extremely important in medical tourism, as minor misunderstandings can have serious consequences. Language skills therefore also play a major role in choosing a destination and facility.

### Tips:

Make sure your staff speak excellent English. Also offer round-the-clock professional interpreters for other languages and communicate the availability of such interpreters on your website.

Consider offering a private host service. The host is the patient's personal guide/contact and accompanies them to all appointments/consults. The host can also arrange partner programmes.

## Attractive tourism activities

Another reason for European light medical tourists to select a treatment destination is because the destination is also attractive for tourism purposes.

Travelling long distance shortly after a treatment may increase the risk of complications, especially in the case of air travel. To avoid such risks, many patients schedule time to rest and recover in the destination country. This period is often much longer than the actual in-patient stay and is used for necessary check-ups as well as tourism purposes. Popular activities include a guided city tour, a visit to natural/cultural highlights of the destination, a visit to a local community, a workshop with local craftsmen or light recreational activities in natural settings (walking, cycling, yoga).

### **Tips:**

Offer a complete travel package, including flights, treatment, accommodation, transfers, an interpreter and attractive pre- and/or post-treatment tourism activities.

Also add health-enhancing activities, for example small wellness modules that can be added to existing packages.

## **Traveller profile**

European light medical tourists can be any age. Their main purpose of visiting a destination is to receive light medical treatment, but they want to combine this with a holiday. Many light medical tourists often belong to higher income groups and travel with a companion. Once they have taken the step to go abroad for medical treatment, they are likely to do so again and/or recommend it to a friend or relative.

### **Tips:**

Design attractive packages that combine light medical treatments with leisure/relaxation. Bear in mind that activities have to be suitable for patients in a convalescence (recovery) period.

Be flexible in your offering. Provide different types of accommodation and activities that patients can choose from and be sure to offer an attractive partner programme as well.

## **2. Which European markets offer opportunities for light medical tourism?**

### **Light medical tourism is a growing market**

Although estimates vary, there are several millions of medical tourists worldwide. The market for light medical tourism is expected to continue to grow in the coming years. Growth is mostly driven by rising healthcare costs in Europe, the relatively low cost of treatments in developing countries, relatively inexpensive flights and increased marketing and online consumer information about medical services.

Since 2017, one of Europe's main trade fairs, [ITB Berlin](#), has a special [Medical Tourism Pavilion](#). This illustrates the increasing interest in medical tourism from among European consumers.

### **Popular treatment types**

The most common types of procedures that patients pursue during medical tourism trips are dental, cosmetic and alternative treatments. Popular dental procedures vary from caps/veneers and whitening treatments, to bridges and implants. Common light cosmetic treatments include hair removal, botox, facelifts and eyelid corrections. Examples of popular alternative treatments are acupuncture and herbal medicine.

### **Northern and Western Europe are important source markets**

Western countries are the main source markets for light medical tourism, as well as Asian countries. In Europe, key source markets include Germany, France, Italy and the United Kingdom. The Nordic countries and the Netherlands also have high potential for medical tourism. In these countries the costs of medical care are usually relatively high, making it attractive for people to seek treatment abroad.

### **Tips:**

Focus on Germany, France, Italy and the United Kingdom, as well as the Nordic countries and the Netherlands.

As regional medical tourism makes up for the majority of all medical tourism, also target medical tourists from your own region.

## **Destinations within Europe are the most popular**

Regional destinations are the most popular among European light medical tourists. Destinations in Central and Southern Europe are conveniently close and often offer medical treatments at considerably lower rates than Western and Northern European markets. Common destinations include Hungary, the Czech Republic, Poland, Turkey and Spain.

Medical tourism within the European Union is further stimulated by [European legislation on cross-border healthcare](#). According to [Directive 2011/24/EU](#), European Union nationals have the right to access healthcare in any European Union country. Their home country must reimburse them the same amount as they would receive for domestic treatment. This makes treatment abroad especially attractive for people from countries where medical care is relatively expensive.

For statistics on European source markets and destinations, see our study about [European demand for tourism in developing countries](#).

## **3. What are the high-potential trends on the European market for light medical tourism?**

### **Pressure to lower healthcare costs in Europe**

There is a lot of pressure in Europe to lower healthcare costs. As a result, many regular and alternative therapies (such as acupuncture or holistic treatments) are no longer or only partially covered by health insurance companies. In addition, budgeting in healthcare leads to longer waiting lists. For example, in the United Kingdom the maximum waiting time for non-urgent procedures is 18 weeks. This trend provides good opportunities for you, if you can offer quality treatments at a lower price and with a shorter waiting time.

### **Tip:**

Actively promote your light medical tourism products/services on the European market. Emphasise the cost and time savings that patients can achieve by having a light medical treatment at your destination, whilst being able to enjoy tourism activities as well.

## **Increasing demand for authentic experiences**

Like European tourists in general, light medical tourists increasingly value authenticity. This applies both to the (alternative) treatments they are interested in and to additional tourism experiences on location. Light medical tourism providers respond to this trend in different ways, for example by building locally inspired medical facilities, providing traditional healing practices and using local ingredients.

### **Tips:**

Include authentic elements into your light medical tourism product/service, while keeping the standards and requirements of your target group in mind. For example, decorate your medical facilities with traditional crafts, use local natural assets and ingredients and/or offer local/traditional treatments.

Offer suitable pre- and post-treatment local and authentic tourism activities, such as workshops or tours.

## **The European population is ageing**

Many European countries have ageing populations, as in 2017 the share of citizens aged 65+ reached nearly 1 in 5. With age often come medical issues, putting more pressure on European budgets and waiting lists for light medical care. This may lead to an increasing number of European senior residents seeking light medical services and treatments abroad. These tourists come with their own set of requirements and abilities for you to take into account.

### **Tip:**

Accommodate older light medical tourists, for example by making facilities easily accessible. For more information, see our study on [senior travel](#).

## **Cosmetic procedures are on the rise**

Cosmetic treatments are becoming increasingly popular. Where the subject was previously taboo, nowadays celebrities and influencers are more open about their cosmetic enhancements. Technical developments and innovations also make cosmetic procedures less invasive than before, which makes them more accessible. These developments add to the popularity of medical tourism for light cosmetic treatments such as facelifts, eyelid corrections and Botox treatments.

### **Tips:**

Include light cosmetic treatments in your offering.

Clearly promote the non-invasiveness of the procedures, making them particularly suitable for combinations with leisure tourism activities.

For more general information, see our study about [European tourism market trends](#).

## **4. Requirements for your light medical tourism product to comply with to be allowed on the European market**

For general tourism requirements, see our study on [what requirements your services should comply with to attract European tourists](#).

In addition, there are some more specific requirements for light medical tourism.

## Reliability

European light medical tourists are looking for reliable, professional providers. They seek accreditations, affiliations and memberships of national and international associations and networks as proof. Accreditation from the [Joint Commission International](#) (JCI) is becoming increasingly important. This type of accreditation makes safety and quality of healthcare in offshore destinations less of an issue. The global [Medical Tourism Association](#) also offers certification programmes.

### Tips:

Study the possibilities and feasibility of receiving JCI accreditation, as this will strengthen your image.

Join national and international sector associations and networks, such as the global [Medical Tourism Association](#).

## Liability

Liability plays an important role in tourism in general, but particularly in medical tourism. Failings during medical treatments can result in adverse outcomes, also in the case of light medical care. As medical tourists may be uninsured or underinsured, good liability insurance to cover possible medical failures is key. Having such insurance in place can give you a major competitive advantage over competitors without it.

### Tips:

Look for possibilities to contract liability insurance and clearly communicate that you have such insurance.

If you can't get liability insurance, push with your authorities and trade associations to make it possible. Also discuss this with potential partners, as they might have some influence as well.

## 5. What competition do you face on the European market for light medical tourism?

### Popular long-haul light medical tourism destinations

Popular long-haul destinations for European (light) medical tourists are mainly located in Asia (such as India, Malaysia and Thailand) and to a lesser extent in Latin America (for example Brazil, Costa Rica and Mexico). Malaysia won the Destination of the Year Award at the [IMTJ Medical Travel Awards 2017](#).

Preferred destinations may vary per treatment, as each destination has its areas of expertise. For example, Brazil is renowned for its cosmetic procedures, Thailand is known for its quality dental care facilities and Turkey has established itself as a centre for eye treatment by offering inexpensive laser surgery.

Many developing countries are keen to establish themselves as medical tourism hubs, often as part of a wider economic development strategy. Their main motivation is the revenue they can earn from both the medical



services and the tourism services needed while a patient stays in the country. Governments also see medical tourism as a way to attract investment in healthcare services and to encourage medical staff to stay in the country, with potential long-term benefits for locals too.

### **Tips:**

Join forces with different stakeholders in your country/region such as the Ministry of Health, the Ministry of Tourism, healthcare associations, tourism associations, hospitals, medical centres and local tourism businesses. Together, invest in creating and/or improving medical facilities and develop a strategy to your area as a destination for light medical tourism.

Differentiate your products/services from those of competitors. For example, develop light medical tourism packages that include unique experiences that tourists can't find elsewhere. Highlight these experiences in your marketing with good quality photos and videos.

Showcase your country's traditional or nature-based light medical and healing traditions. Location-specific offers can become the 'signature treatment' of your destination, to help distinguish it from competitors.

## **Medical Tourism Index**

The marketplace for light medical tourism consists of an increasing number of countries competing for patients by offering a variety of light medical, surgical and dental services. Many of these destinations pride themselves on modern facilities with state-of-the-art technology and alluring accommodations.

The [Medical Tourism Index](#) (MTI) provides insight into the competitiveness of your country as a medical tourism market. It is based on:

- Country Environment
- Medical Tourism Industry
- Facility and Services

The MTI scores destinations on these three factors and ranks them accordingly. Its detailed [destination profiles](#) show what areas your country excels in and what it needs to improve.

### **Tips:**

Identify and focus on your country's key competitive advantages over other countries. Define travellers' unique experiences in your country.

Use the MTI to compare your country's performance to others. In which areas does it score well? Emphasise this in your marketing message.

Join forces with local tourism companies, governments and other stakeholders to improve competitiveness and strengthen your position.

For more general information, see our study on [what competition you face on the European outbound tourism market](#).

## 6. Through what channels can you get light medical tourism products on the European market?

The trade structure for light medical tourism from Europe is slightly different from the trade structure for European tourism to developing countries in general. The most important trade channels for you are specialised intermediaries and direct sales.

### Specialised intermediaries

Because of the complexity of booking a light medical tourism product/service, many patients turn to a specialised intermediary. These so-called medical tourism facilitators specialise in facilitating the light medical process. They take care of arrangements such as access to clinics and specialists, transport, visas and accommodation, as well as sightseeing and leisure activities.

The main reasons for patients to turn to medical tourism facilitators are their specialist knowledge and expertise, experience, reduced rates, better access, complete light medical tourism packages and package price. Most medical tourism facilitators work on a commission basis with the clinics, hotels and tour providers they engage.

You can identify medical tourism facilitators via trade associations, events and databases, such as:

- [International Medical Travel Journal](#) - trade publication with a [medical travel directory](#).
- [ITB](#) - annual tourism trade event with a [Medical Tourism Pavilion](#), March, Berlin.
- [Medical Tourism Association](#) - global trade organisation for the medical tourism industry. You can [search for members](#).
- [Treatment Abroad](#) - medical tourism portal with an [agencies and facilitators directory](#).
- [World Medical Tourism Congress](#) - annual conference and trade show, United States.

Examples of medical tourism facilitators are [Medigo](#) and [Qunomedical](#). Both are active in various key European markets, such as Germany and the United Kingdom.

### Direct sales

The Internet has enabled patients to research options beyond national borders and has expanded international marketing opportunities. It has also broken down cultural barriers and helped to remove doubts about the quality of foreign light medical services. To increase your chances of direct sales, promote your product on medical tourism websites/portals.

For instance:

- [MedicalTourism.com](#)
- [Patients Beyond Borders](#)
- [Treatment Abroad](#)

Many popular medical tourism destinations, such as [India](#) and [Malaysia](#), have a medical tourism portal.

### Tips:

Maintain a strong, professional Internet presence and online marketing strategy, including social media.

Use good quality professional photos and videos to bring your story alive.

Use current customers as ambassadors for your company and area. Encourage them to share their experiences and visuals on social media, write blogs and review your company.

For more information, see our [10 tips for online success with your tourism company](#).

Check if your country has a medical tourism portal. If not, team up with local stakeholders to develop your own national or regional medical tourism portal.

For an overview of the trade structure for tourism, see our study on [the channels and segments of the European tourism market](#).

## 7. What are the end market prices for light medical tourism products?

Prices for light medical tourism products vary considerably, mainly because of the wide range of treatments available. In general, tourists have many destinations and types of holiday to choose from. This makes tourism a relatively price-sensitive and competitive industry. The price of a long haul trip is determined by three factors:

1. The exchange rate between the currency of the country of origin and that of the destination country.
2. The costs of transport to and from the destination country.
3. The price of goods and services the traveller consumes in the destination country.

European tour operators are not open about the purchasing prices of their tourism products. According to industry experts, their margins vary between 10% and 25%. Prices of holiday packages vary widely as they depend on a lot of factors, such as:

- availability
- destination
- modes of transport
- travel period
- number of travellers
- length of stay
- type of accommodation
- activities included

### Tips:


Check which countries have cheap direct flights to your destination, for instance at [Skyscanner](#). This gives you a competitive advantage in those countries.


You can compare prices for medical tourism products online, for example at [WhatClinic](#).

Tourism Council WA has some useful [on-line tools for pricing tours and accommodation](#). These help you determine the break-even point and ideal retail price of your tourism product.

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