

Medical Tourism Market Report by Treatment Type (Cosmetic Treatment, Dental Treatment, Cardiovascular Treatment, Orthopaedic Treatment, Bariatric Surgery, Fertility Treatment, Ophthalmic Treatment, and Others), and Region 2024-2032

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Abstracts

The global medical tourism market size reached US\$ 119.7 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 650.8 Billion by 2032, exhibiting a growth rate (CAGR) of 20.1% during 2024-2032. The increasing access to advanced treatment, cost savings offered by medical tourism, the rising demand for high-quality healthcare facilities, the availability of skilled medical professionals, and the growing requirement for specialized procedures are some of the factors propelling the market.

Medical tourism includes traveling to another country for medical treatment or procedures. It has gained popularity recently as individuals seek cost-effective and timely healthcare options. It offers various advantages, including access to specialized treatments, shorter waiting times, and cost savings compared to their home countries. Patients often choose medical tourism for cosmetic surgery, dental work, fertility treatments, and complex surgeries. Countries renowned for medical tourism attract international patients by offering high-quality medical facilities, experienced doctors, and affordable healthcare services. These destinations often combine medical treatments with recreational activities, providing a complete package for patients seeking medical care and leisure. As the demand for affordable and accessible healthcare continues to rise, medical tourism will likely remain viable for individuals seeking specialized treatments and cost savings outside their home countries.

The global market is driven by improved transportation and communication networks. In

line with this, the increasing geriatric population is driving the demand for medical procedures and specialized healthcare services, which, in turn, is significantly contributing to the market. Apart from this, the cost savings and other benefits to patients, such as breakthrough medicines, cutting-edge technologies, enhanced healthcare, individualized care, and superior hospitality, are acting as other growth-inducing factors. Moreover, the high cost of health services in domestic countries catalyzes the expansion of medical tourism. Besides, the growing demand for medical procedures uncovered by insurance is propelling the market. The support provided by the tourism sector and the governments of the host destination are creating a positive outlook for the market.

Medical Tourism Market Trends/Drivers:

Increasing consumer preference for cosmetic procedures

The increasing consumer preference for cosmetic procedures is significantly contributing to the market. With the societal emphasis on appearance and beauty, more individuals are seeking cosmetic enhancements to improve their physical aesthetics. However, the high cost of such procedures in developed countries often acts as a deterrent. Medical tourism offers a solution by providing access to affordable cosmetic treatments and surgeries in popular destinations known for their expertise in this field. Patients can undergo procedures like breast augmentation, rhinoplasty, liposuction, and facelifts at a fraction of the cost compared to their home countries. This cost advantage, coupled with the availability of skilled cosmetic surgeons and modern facilities, attracts a significant number of individuals to travel abroad for cosmetic procedures. As a result, the demand for medical tourism in the cosmetic sector continues to grow steadily.

Rising healthcare costs in developed countries

The rising healthcare cost in developed countries is positively influencing the market. Several individuals find it increasingly difficult to afford expensive medical treatments and procedures within their home countries. As a result, they seek alternative options that offer more affordable healthcare solutions. Medical tourism provides a viable solution by offering significantly lower medical treatment and procedure costs in popular destinations. Patients can save a substantial amount of money by traveling to countries with comparatively lower healthcare costs. This cost differential, combined with the availability of high-quality medical facilities and experienced healthcare professionals in medical tourism destinations, makes it an attractive option for individuals seeking cost-effective healthcare. As the cost of healthcare continues to rise in developed countries, the appeal of medical tourism as a cost-saving alternative is expected to drive the

growth of the market. Patients are increasingly willing to travel abroad to receive quality medical care at a fraction of the cost they would incur in their home countries.

Rapid technological advancements in the healthcare industry

The rapid technological advancements in the healthcare industry are catalyzing the market. With breakthroughs in medical technology, innovative procedures and treatments are becoming available, offering patients more options for their healthcare needs. Patients often seek medical tourism destinations to access advanced medical treatments and technologies that may not be readily available in their home countries. These advancements include cutting-edge diagnostic tools, minimally invasive surgeries, robotic-assisted procedures, and precision medicine techniques. Furthermore, the appeal of these advanced technologies, coupled with the expertise of healthcare professionals in medical tourism destinations, attracts patients seeking state-of-the-art healthcare solutions. They are willing to travel to benefit from the latest advancements and receive specialized treatments that can potentially enhance their health outcomes. As technological advancements continue to revolutionize the healthcare industry, the demand for medical tourism is expected to grow, with patients seeking access to the most advanced and innovative treatments available globally.

Medical Tourism Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global medical tourism market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on treatment type.

Breakup by Treatment Type:

- Cosmetic Treatment
- Dental Treatment
- Cardiovascular Treatment
- Orthopaedic Treatment
- Bariatric Surgery
- Fertility Treatment
- Ophthalmic Treatment
- Others

Cosmetic treatment dominates the market

The report has provided a detailed breakup and analysis of the market based on

Medical Tourism Market Report by Treatment Type (Cosmetic Treatment, Dental Treatment, Cardiovascular Treatmen...

treatment type. This includes cosmetic treatment, dental treatment, cardiovascular treatment, orthopedic treatment, bariatric surgery, fertility treatment, ophthalmic treatment, and others. According to the report, cosmetic treatment represented the largest segment.

Cosmetic procedures, such as plastic surgery, facial rejuvenation, and body contouring, have witnessed significant growth in demand worldwide. The increasing emphasis on physical appearance and beauty standards has led to a growing desire among individuals to enhance their aesthetic features.

Moreover, the rising popularity of social media platforms and the influence of celebrities have further fueled this trend. In addition, the cost differential plays a crucial role in driving the demand for cosmetic treatments through medical tourism. Several developed countries have considerably higher cosmetic procedure prices than popular medical tourism destinations. Patients can achieve substantial cost savings without compromising quality by traveling abroad for these treatments.

Furthermore, medical tourism destinations renowned for their expertise in cosmetic treatments attract a diverse clientele seeking highly skilled cosmetic surgeons, advanced technologies, and specialized procedures. These destinations often provide comprehensive packages that include medical care, accommodation, and post-operative care, making them an attractive choice for individuals seeking transformative cosmetic procedures.

Breakup by Region:

North America

United States

Canada

Asia Pacific

India

China

Indonesia

Thailand

Singapore

Malaysia

South Korea

Taiwan

Europe

Germany

Italy
United Kingdom
Spain
France
Russia
Czech Republic
Latin America
Mexico
Brazil
Costa Rica
Colombia
Middle East and Africa

Asia Pacific exhibits a clear dominance, accounting for the largest medical tourism market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (India, China, Indonesia, Thailand, Singapore, Malaysia, South Korea, and Taiwan); Europe (the United Kingdom, Germany, Italy, Spain, France, Russia, and the Czech Republic); Latin America (Mexico, Brazil, Costa Rica, and Colombia); and the Middle East and Africa. According to the report, Asia Pacific was the largest market.

Asia Pacific has witnessed significant advancements in medical care, including cutting-edge technologies, state-of-the-art facilities, and highly skilled medical professionals. These advancements have established the region as a hub for specialized treatments and procedures, attracting patients seeking high-quality healthcare. Additionally, the Asia Pacific region is known for its competitive pricing compared to developed countries. Affordable healthcare services and cost savings associated with medical tourism attract patients worldwide.

Furthermore, the rising construction of hospitals and healthcare facilities in the region has enhanced its capacity to accommodate medical tourists. The increasing number of internationally accredited hospitals and clinics ensures patients can access top-notch medical services. Moreover, the region offers various medical treatments, including cosmetic surgery, dental procedures, fertility treatments, cardiac surgeries, and more. This variety of options enables patients to choose the most suitable destination for their healthcare needs.

Competitive Landscape:

Top companies are acting as facilitators, connecting patients with reputable healthcare providers and coordinating travel and treatment arrangements. They have established partnerships with a wide range of internationally accredited hospitals, clinics, and medical professionals in popular medical tourism destinations. This network allows them to offer a diverse range of treatments and procedures to cater to the specific needs of patients. Furthermore, these top companies streamline the patient process, providing end-to-end services such as medical consultations, appointment scheduling, visa assistance, travel arrangements, accommodation, and post-treatment follow-ups. By offering comprehensive solutions, they enhance the patient experience and simplify the logistics of traveling for medical purposes. Moreover, they ensure that the healthcare providers in their network meet stringent quality standards. They conduct rigorous evaluations, assess accreditations, and consider patient reviews to maintain high-quality assurance. This instills confidence in patients seeking medical treatments abroad. Several leading companies provide transparent pricing information, enabling patients to make informed decisions. They negotiate competitive rates with healthcare providers, ensuring patient cost savings without compromising the quality of care. In addition, they also offer personalized guidance to patients, assisting them in selecting the most suitable destination, healthcare provider, and treatment options based on their specific medical needs. This personalized support helps patients make well-informed choices and enhances their overall satisfaction.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Aditya Birla Memorial Hospital
Apollo Hospitals Enterprise Limited
Asian Heart Institute
Barbados Fertility Center
BB Healthcare Solutions
Fortis Healthcare
Healthbase
KPJ Healthcare Berhad
Prince Court Medical Centre
Samitivej PCL
Seoul National University Hospital
UZ Leuven

Recent Developments:

In 2020, Aditya Birla Memorial Hospital collaborated with Medvarsity Online Ltd., a leading medical education company. This collaboration aimed to establish an e-learning platform for medical professionals.

In 2021, Apollo Hospitals Enterprise Limited, a prominent healthcare provider in India, partnered with Emirates Healthcare Group, a leading healthcare provider in the United Arab Emirates. This collaboration aimed to facilitate medical tourism between India and the UAE by offering seamless access to healthcare services for patients from both regions.

In 2019, Fortis Healthcare continued to strengthen its position in the medical tourism sector. The company established collaborations with various international organizations to provide high-quality healthcare services to patients worldwide. They focused on attracting medical tourists by offering specialized treatments and procedures at their state-of-the-art hospitals.

Key Questions Answered in This Report

1. What was the size of the global medical tourism market in 2023?
2. What is the expected growth rate of the global medical tourism market during 2024-2032?
3. What are the key factors driving the global medical tourism market?
4. What has been the impact of COVID-19 on the global medical tourism market?
5. What is the breakup of the global medical tourism market based on the treatment type?
6. What are the key regions in the global medical tourism market?
7. Who are the key players/companies in the global medical tourism market?

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