



CANADIAN HEALTHCARE  
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Binational Tourism Alliance – 4<sup>th</sup> Annual Binational Summit  
St. Catherine's, Ontario | May 1<sup>st</sup>, 2009

**MEDICAL TOURISM:**  
*Opportunities on both sides of the Border*

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**MEDICAL TOURISM:**  
*Opportunities on both sides of the Border*



## Current Issues in Healthcare

- Globalization of healthcare
- Explosion of Medical Tourism
- Increased consumerism from Patients
- Aging Populations
- Complex Disease Profiles
- Increasing demands
- Advancing technology costly
- Increase cost of Healthcare
- Global economic crisis
- Unemployment, uninsured, underinsured



.. Where do we go from here?



## American Healthcare

- High cost of healthcare
- Decrease in dollars for health spending (Consumer & Business)
- Interest in quality, cost effective options
- Increasing costs to patients
- Increased consumerism (Consumer & Business)





## Canadian Healthcare

- Lack of funding
- Funding forced closures of services, Beds, and Operating Rooms
- Increased interest in alternate revenue streams





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Canadian Healthcare Providers

+



Medical Tourism

American Healthcare Needs



- The rapid globalization of healthcare
- Social need for affordable access to quality healthcare
- An alternative for cost containment in an industry with rapidly rising rates
- Not just for the Uninsured; Insurers, Members & Employers are looking for alternative options

.... Has resulted in explosive growth in the  
Industry of Medical Tourism





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## Medical Tourism

Patients traveling across borders for healthcare driven  
by Quality, Affordability, and Accessibility



## Market Driver # 1: Quality

- Quality is of highest importance
- Canadian Healthcare is already recognized as quality
- Best Practice
- Internationally recognized accreditation (ISQua and its members)
- Regulated and controlled standards



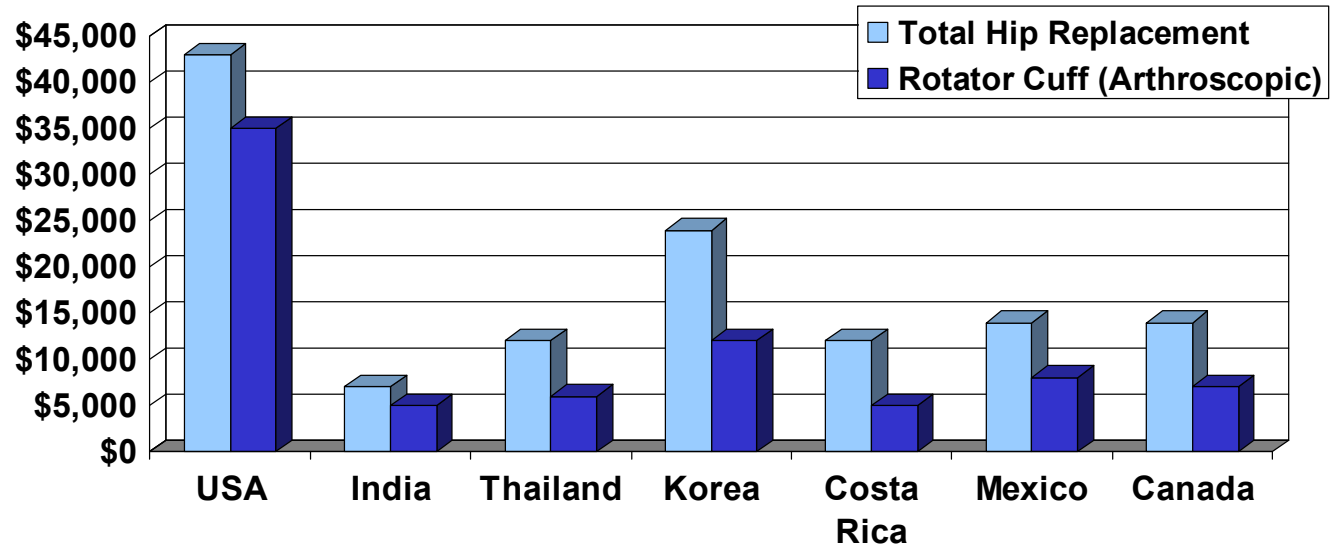


## Market Driver # 2: Price

### Global Price Comparisons

## **Total Hip Replacement & Arthroscopic Rotator Cuff Repair**

\*pricing based on standard patient with no significant co-morbidities





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### Market Driver # 3: Service

- Clear and transparent communication
- Customized, personal care plans
- Accountability to the patient
- Excellence in Customer Service





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## Other Factors Influencing the Growth of the Industry

- Increased priority placed on health
- International Trade
- Increased mobility of consumers
- Availability of Information



## Advantages for Canadians

- New Revenue Stream
- Physician Retention
- Capacity Utilization



## Advantages for Americans

- Quality, Affordable Healthcare
- Lower or no cost to patients directly
- Significant savings for Payors





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## Opportunities in Medical Tourism





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## Opportunities for Canadian Physicians

- Increased Patient Base - yields increase revenue
- Increased Operating time – yields better outcomes



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## Opportunities for Canadian Hospitals and Clinics

- New Revenue Stream
- Capacity Utilization
- Physician Retention
- Increased recognition and reputation
- Improvements & upgrades to infrastructure and equipment benefit Canadian patients



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## Opportunities for Hospitality & Tourism Providers

- Increased Tourism
- Need for detailed travel arrangements
- Patients often travel with family member or companion
- Travelers with Diverse needs
- Travelers with Longer Stays
- Increased cross border spending



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## Opportunities for American Insurers, Employers, and Third Party Administrators

- Quality Healthcare at Affordable Prices
- Savings of 40 -70% from American Pricing
- Canadian Healthcare is easier to market over that of third world countries
- Employees happy with lower or no deductibles and out of pockets



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## Opportunities for American Patients

- Quality Healthcare they trust
- Affordable Healthcare
- Lower or No Deductibles / Out of Pocket expenses
- Excellent Service, Close to Home



## The Industry is Growing

- Approx. 750,000 Americans traveled abroad for medical care in 2007; with projections at 6 million for 2010
- World market currently estimated at \$60 Billion; expected at \$100 Billion by 2010
- Over 35 Countries serving more than 1 Million out of country patients each year

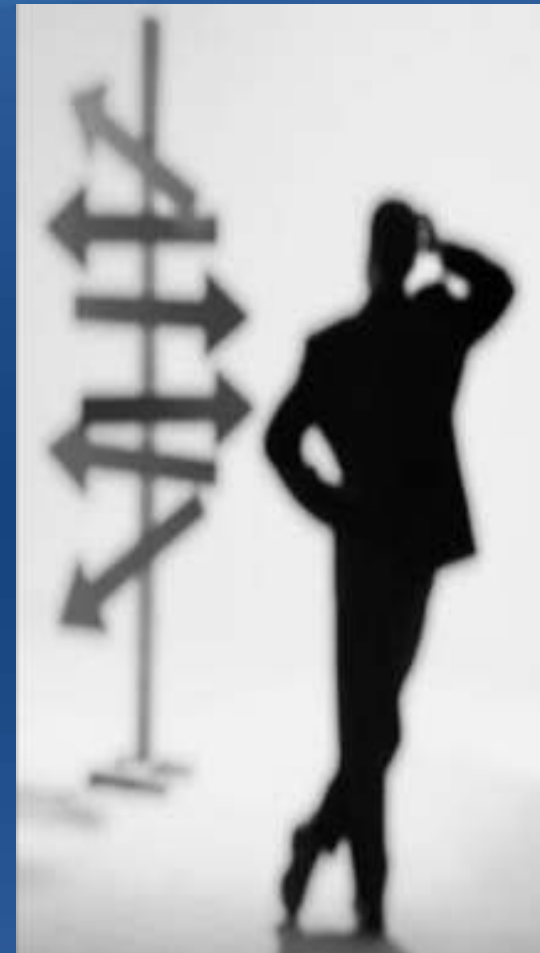
*Source: Medical Tourism, Consumers in Search of Value. Deloitte, 2008.*



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The pieces are all out there ...

But how do we take advantage  
of such opportunities?







Put the Pieces together ...

Partner

Package Services

Create a Network



## Advantages of a Network

- Joint Marketing
- Access to expertise and experience
- Improved cash flow and reduced overhead
- Wider range of Services
- Increased Credibility
- Greater Industry Exposure
- Growth and Opportunity
- Connecting Infrastructure
- Physician to Physician Referrals
- Support and Collaboration



## Challenges for the Medical Tourism Industry

- Medico-Legal
- Political Support / Resistance
- Accreditation
- Best Practices
- Language barriers / Foreign Cultures
- Long Flights and Travel



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- Medico-Legal
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## Solutions in Canada

- Strong Legal System with legal recourse for patients
- Support after educated on the opportunities generated
- International Accreditation (ISQua / AC)
- Recognized for best practices, standards and quality
- English Speaking providers, yet multi-cultural
- Right next door



## Moving the Industry forward

- Focus on the Industry Drivers: Quality, Affordability and Service
- Industry centered around Medical Care, partnering with Tourism
- Ensure Medical Professionals are directly involved to ensure clear, safe practices with good outcomes
- Take advantage of all opportunities by partnering, working together and building a Network



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## CANADIAN HEALTHCARE INTERNATIONAL

- Diverse Physician network
- Quality, Accredited Facilities
- Providers across Canada and Internationally
- Experience in the industry
- Quality, Affordability, Service

*CHI: Unlocking Canadian Healthcare  
to the World*

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Thank You!



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