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Health Tourism today and into the future

Dr Tim Wilson: PwC Health Industries Leader



20 February 2018
Strictly private
and confidential

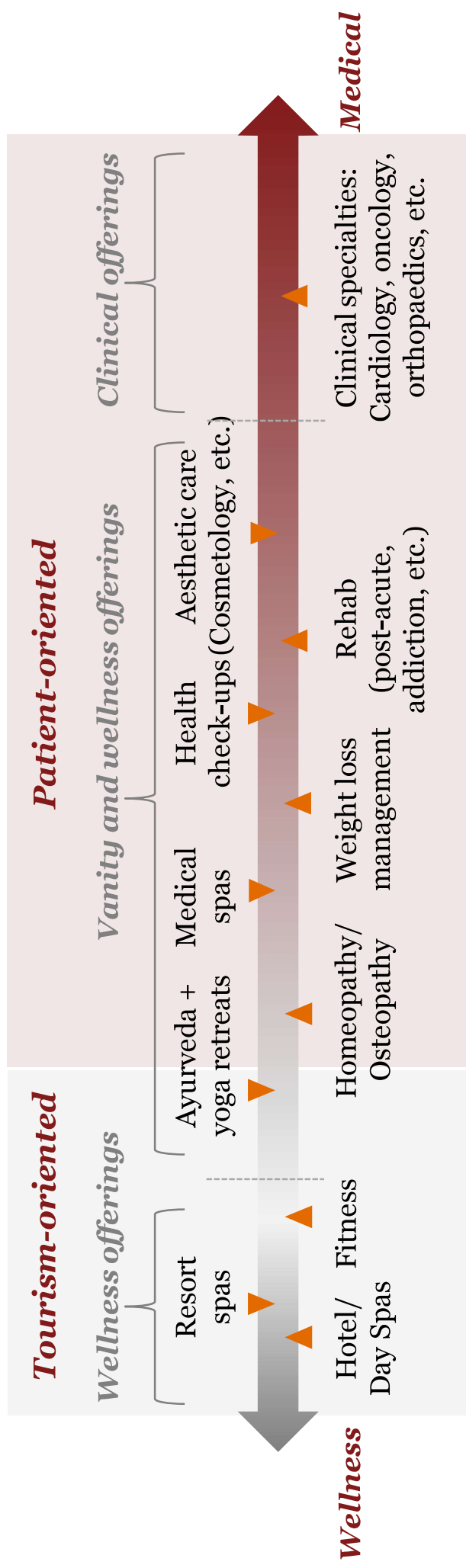
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Agenda

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What, where and why?

What do people travel for?



Source: Global Wellness Institute, PwC analysis

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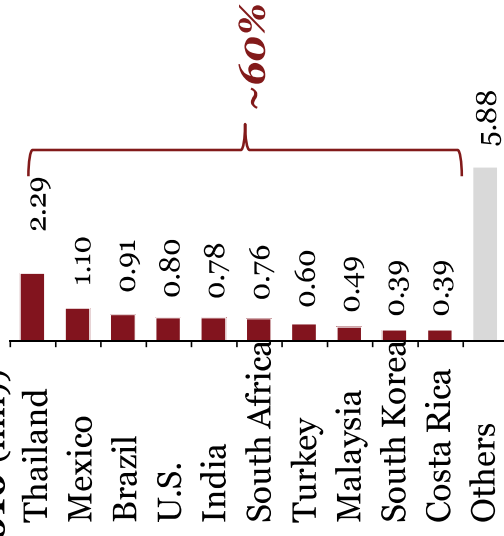
Where do people travel to?

Top 10 medical tourism destinations by Volume (2016)

Total medical tourists: ~ 14 mn



Number of medical tourists in 2016 (mn)



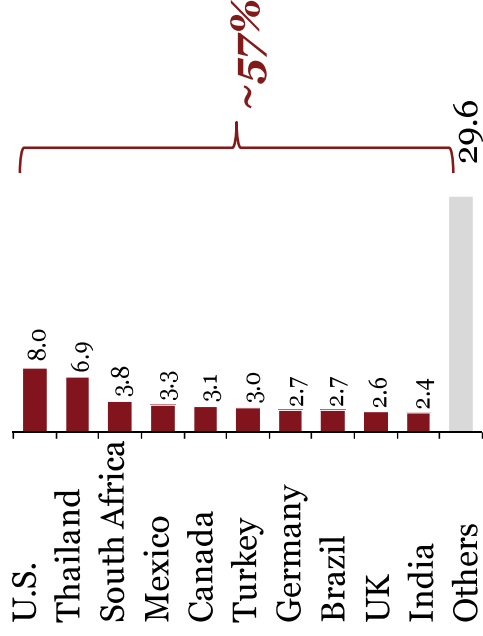
Top 10 medical tourism destinations by Value (2016)

Total market value: ~ USD 68 bn



Average spending per visit ranges from **USD 3,000-10,000 per tourist**

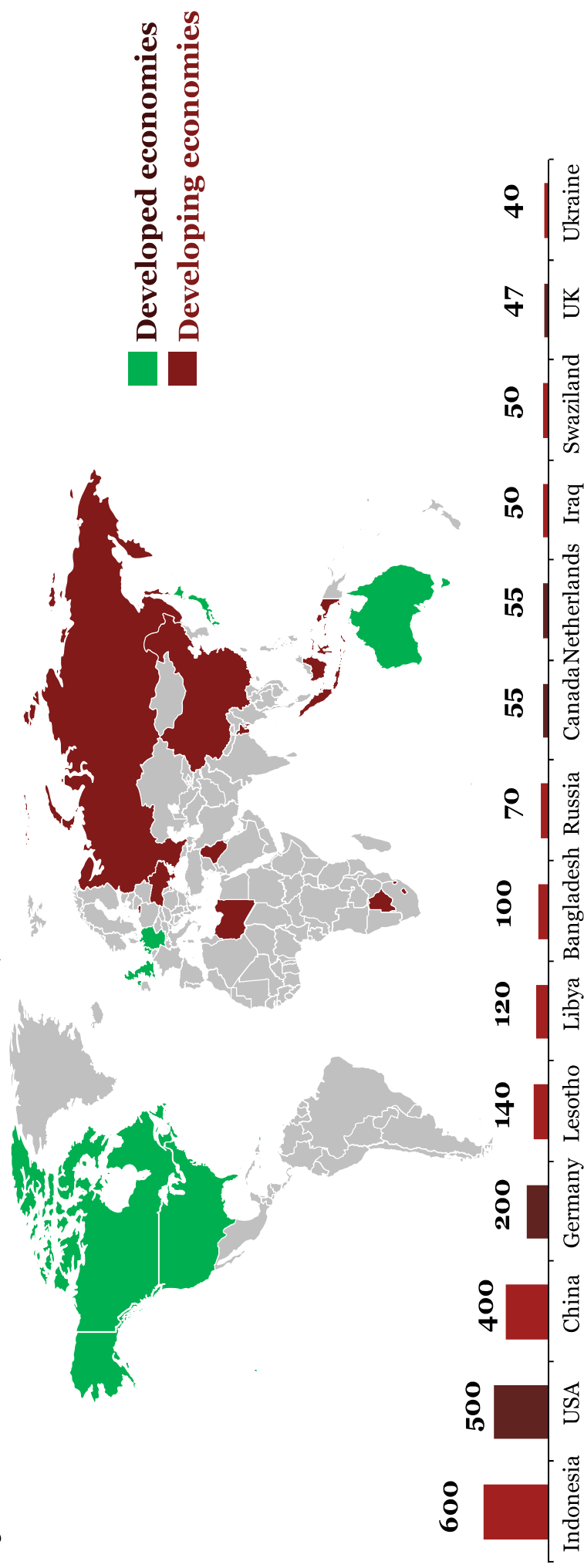
Medical tourism market value in 2016 (USD bn)



Source: Allied Analytics, Medical tourism facts & figures, Patients Beyond Borders, Anadolli, PwC analysis

Where do people travel from?

Major source markets for medical tourists, 2015 (In Thousand)

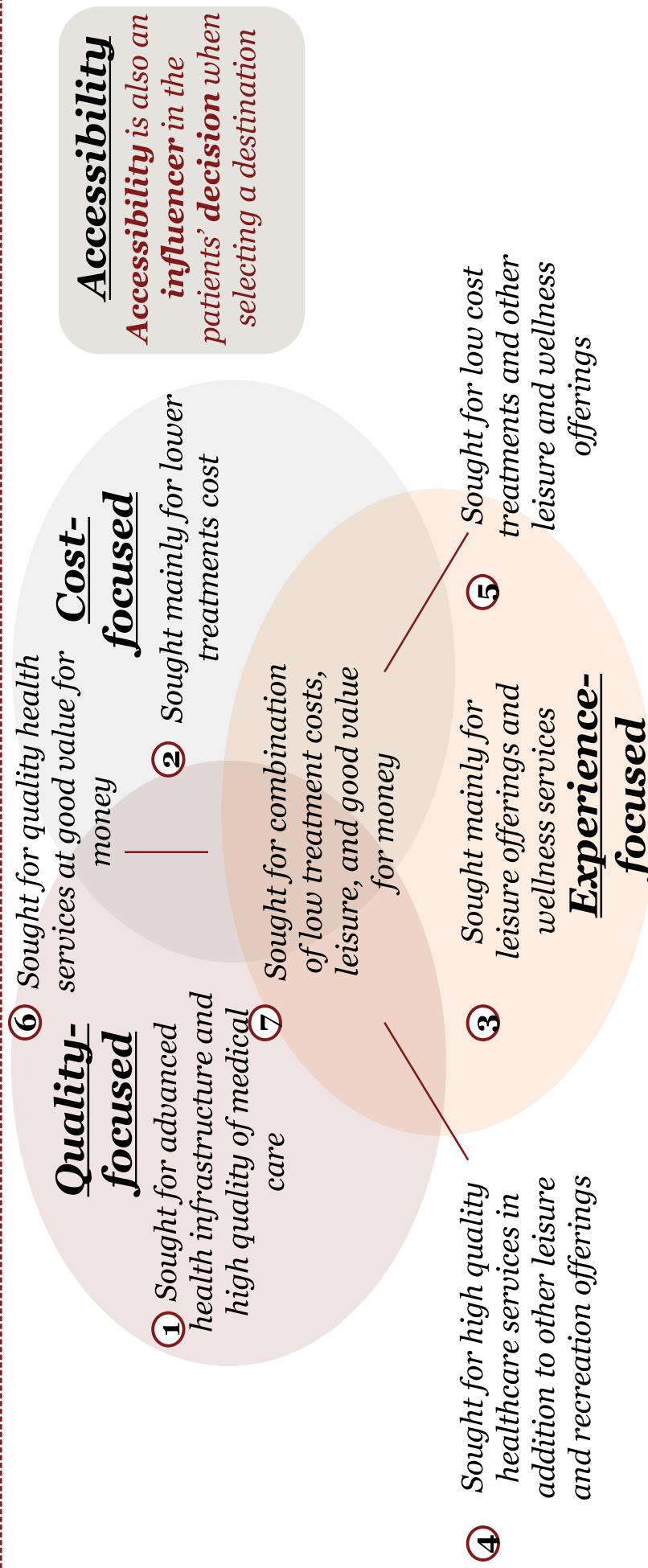


Source: Medical tourism facts & figures 2016, PwC analysis

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Why do people choose their destination?

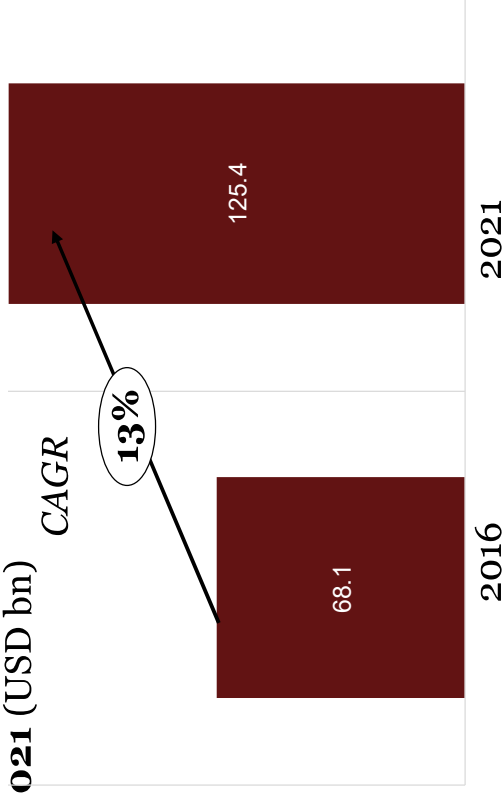


***What
might
health
tourism
look
like in a
few
years?***

How much will health and wellness tourism grow?

Global Medical tourism market by Value

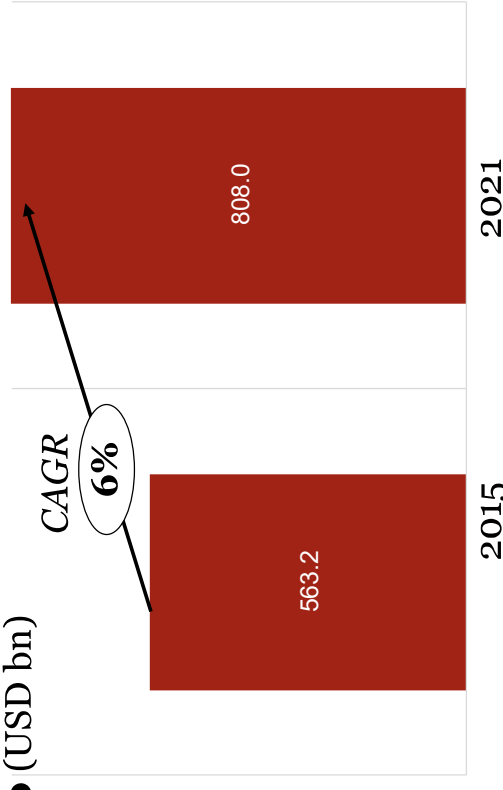
Global medical tourism market value, 2016-2021 (USD bn)



■ Global Medical Tourism Market Value

Global Wellness tourism* market by Value

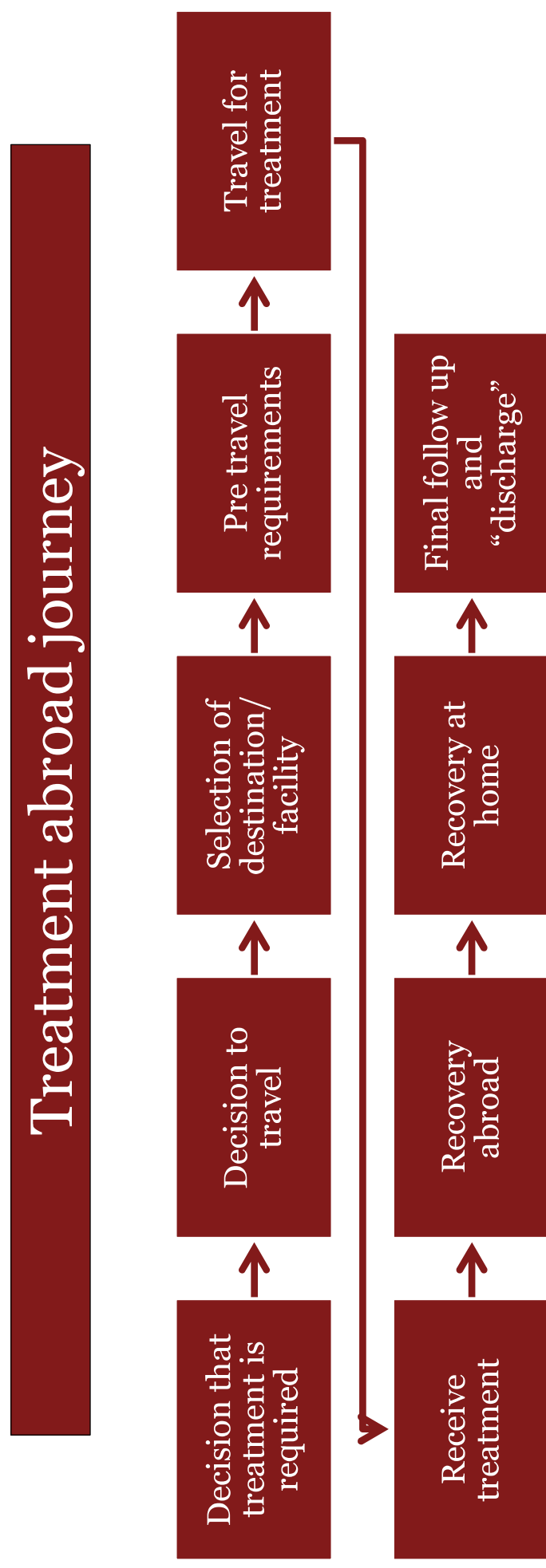
Global wellness tourism market value, 2015-2020 (USD bn)



■ Global Wellness tourism market value

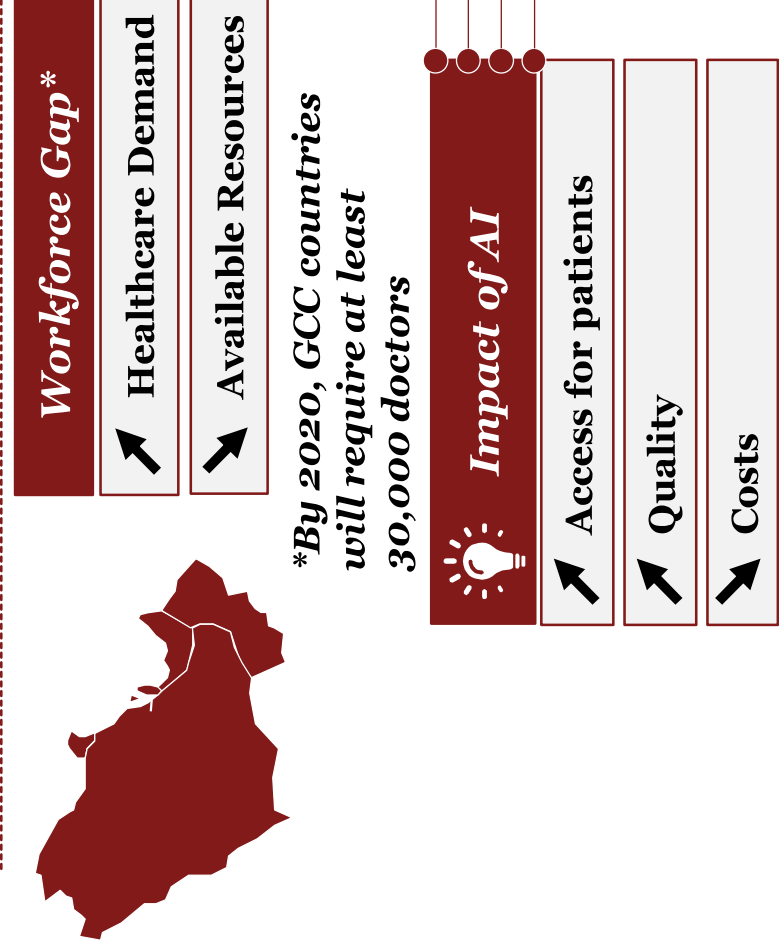
*includes individuals who chose to travel for wellness services or seek wellness services while travelling for leisure/business

How might health tourism change?



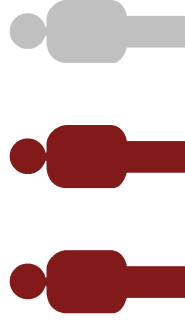
Where will AI have an impact?

Where will AI have an impact?



Source: https://www.pwc.com/m1/en/in_dustries/healthcare/what-doctor-video.html

What does the public in Middle East think of AI?



2/3 willing to engage with AI & Robotics for their healthcare needs

Most willing to receive AI services to



Monitor heart condition



Provide customised advice for fitness and health



Administer an ECG



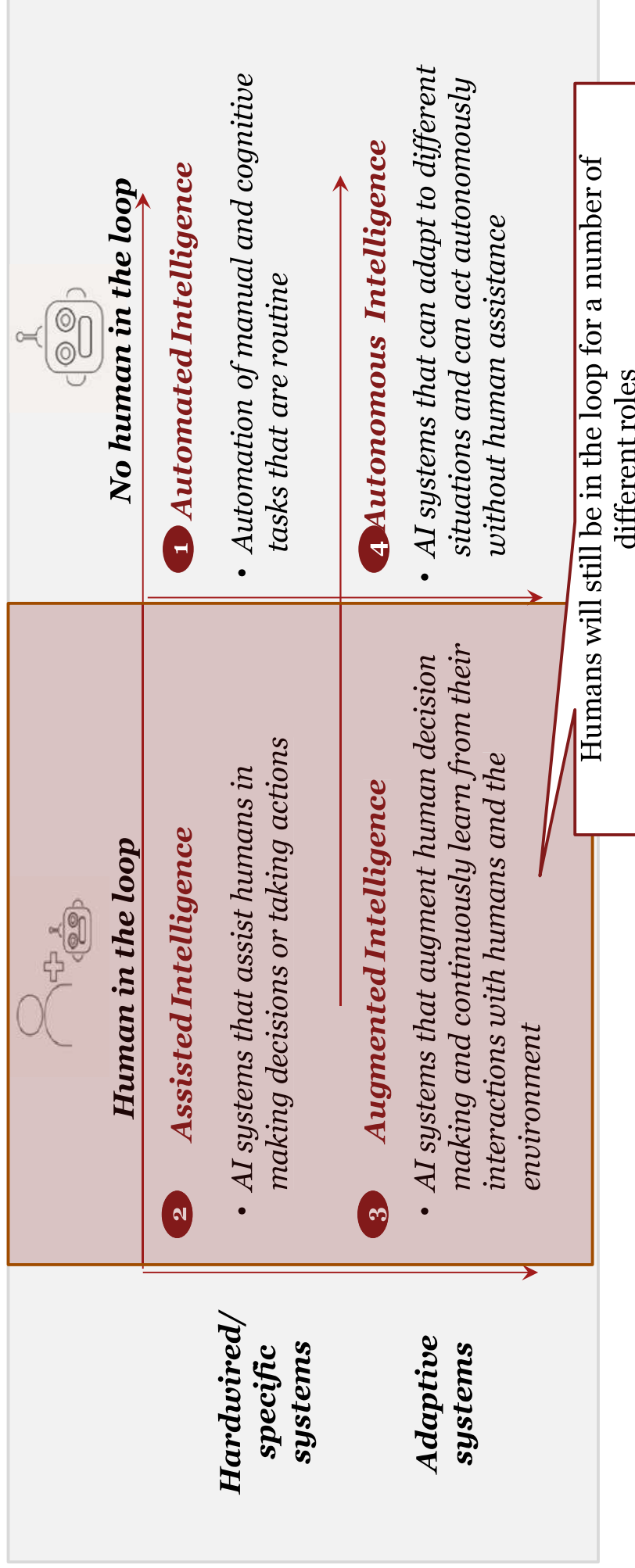
Take and test a blood sample and results



The main deterrents are the absence of empathy and lack of sufficient trust in a robot's decision-making

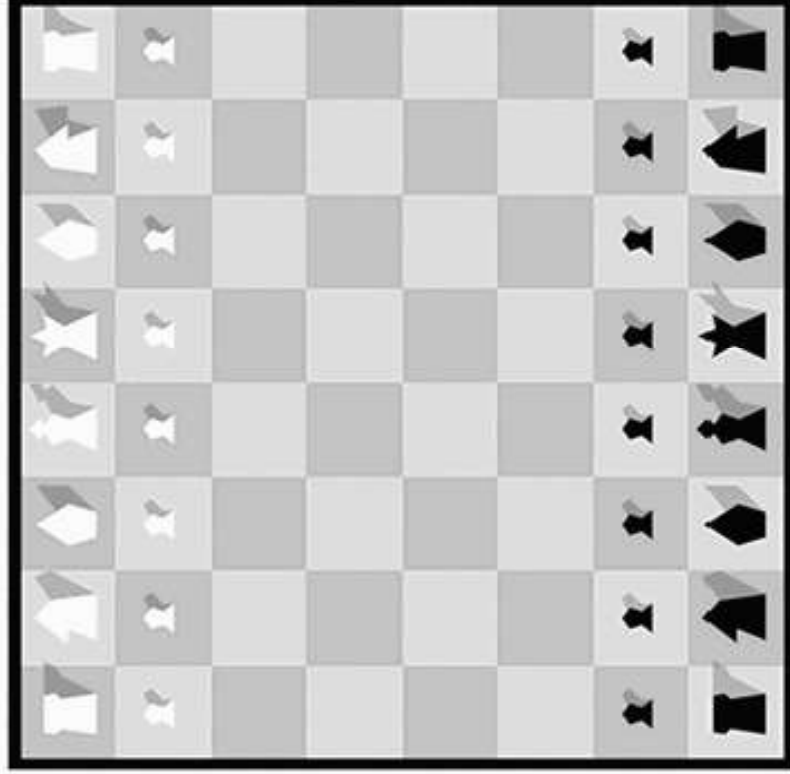
What is AI and what is it capable of in healthcare?

What is AI?



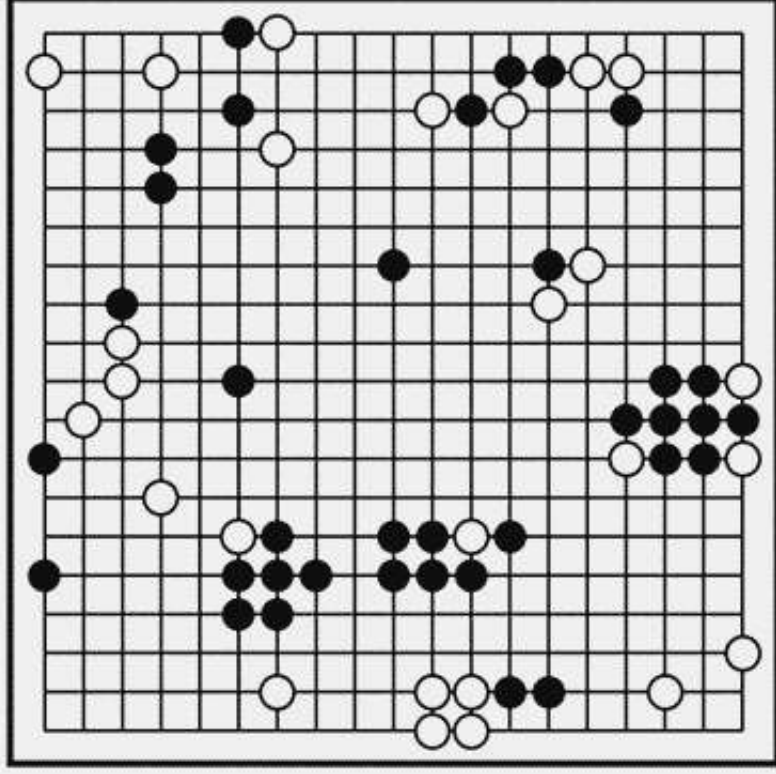
What might health tourism look like in a few years? | What is AI and what is it capable of in healthcare? | What is the role of AI in health tourism? | What, where and why?

What is AI capable of?



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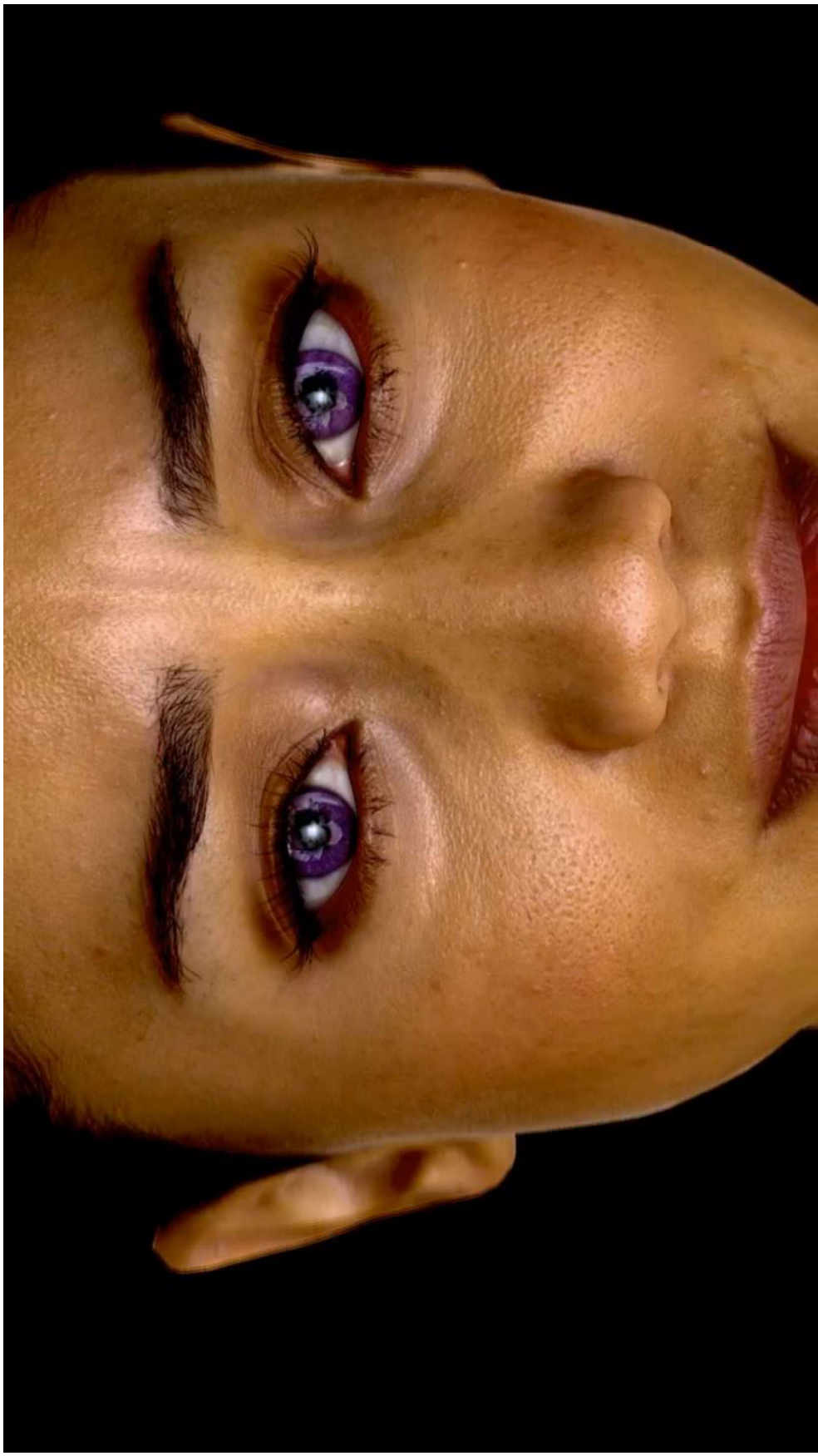
What is AI capable of?



Google DeepMind

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What is AI capable of?

AI is transforming every aspect of healthcare delivery in innovative ways

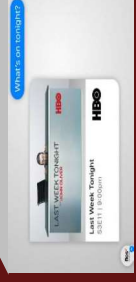


AI in *Provider* applications to identify anatomical features and abnormalities in medical images



Avicenna
Deep learning

AI in *Payer* applications to predict patients risk and premiums



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AI in *Pharma/Life Sciences* applications to develop drugs

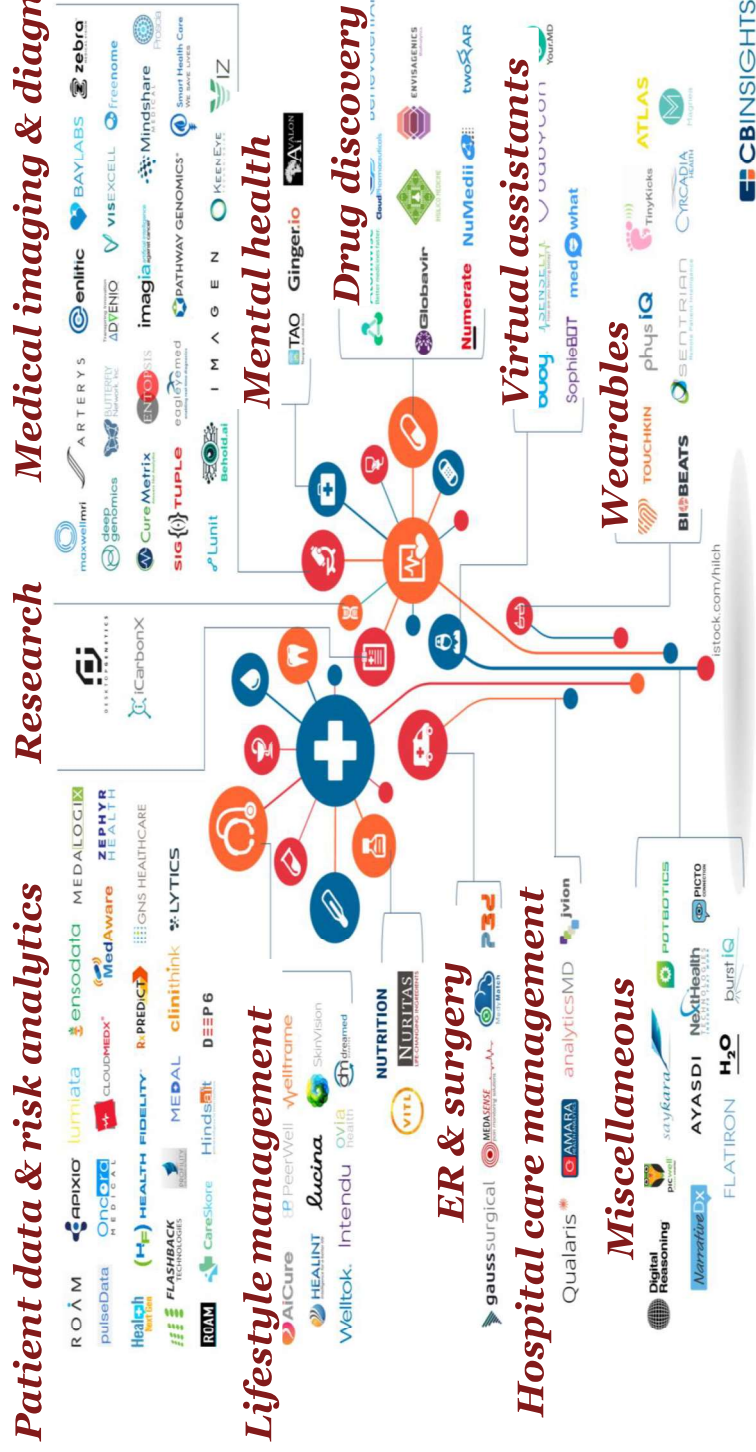


Benevolent AI
Machine Learning

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What is AI capable of?

A sample of AI start-ups from all over the world



‘By February 2017, investors had poured over \$1.79bn in acquisitions or funding for 106 AI start-ups in healthcare’

Source: <https://www.cbinsights.com/research/artificial-intelligence-startups-healthcare/>

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What is AI capable of?

PwC Middle East Report – The potential impact of AI in the Middle East

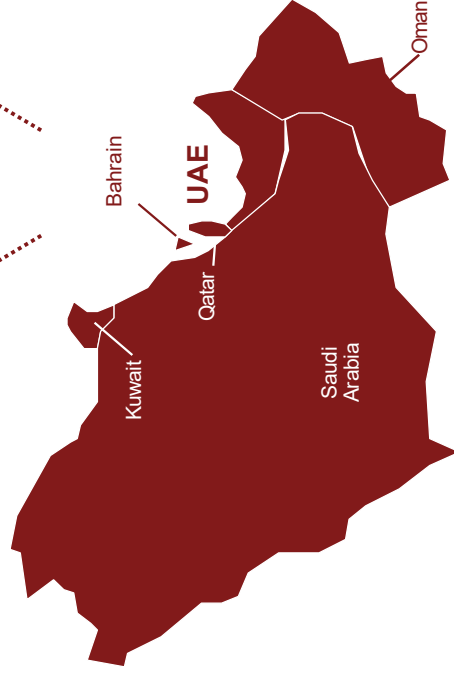
In 2030, AI in the Middle East will contribute to



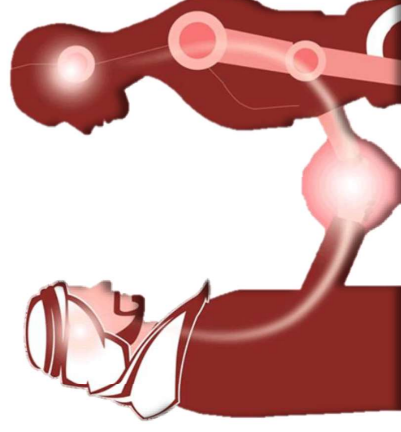
US\$320 billion to the economy



US\$59 billion to health and education



Enhanced patient experience



Improved clinical outcomes

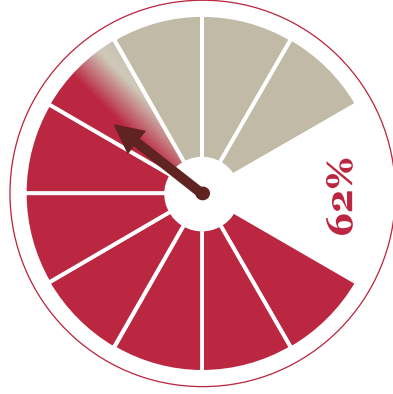
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Live polling

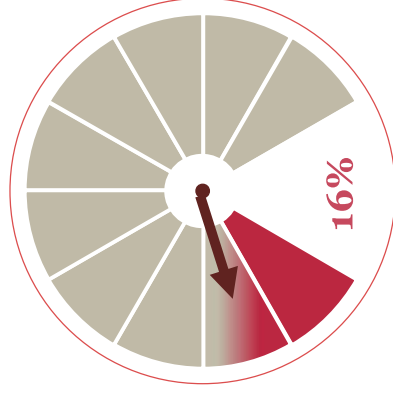


What are business leaders in the Middle East doing to prepare for AI?

PwC Business Readiness Survey 2018



think AI & Robotics will have a major impact in 10 years



have started implementing AI; 37% are exploring

Enablers to move forward with AI

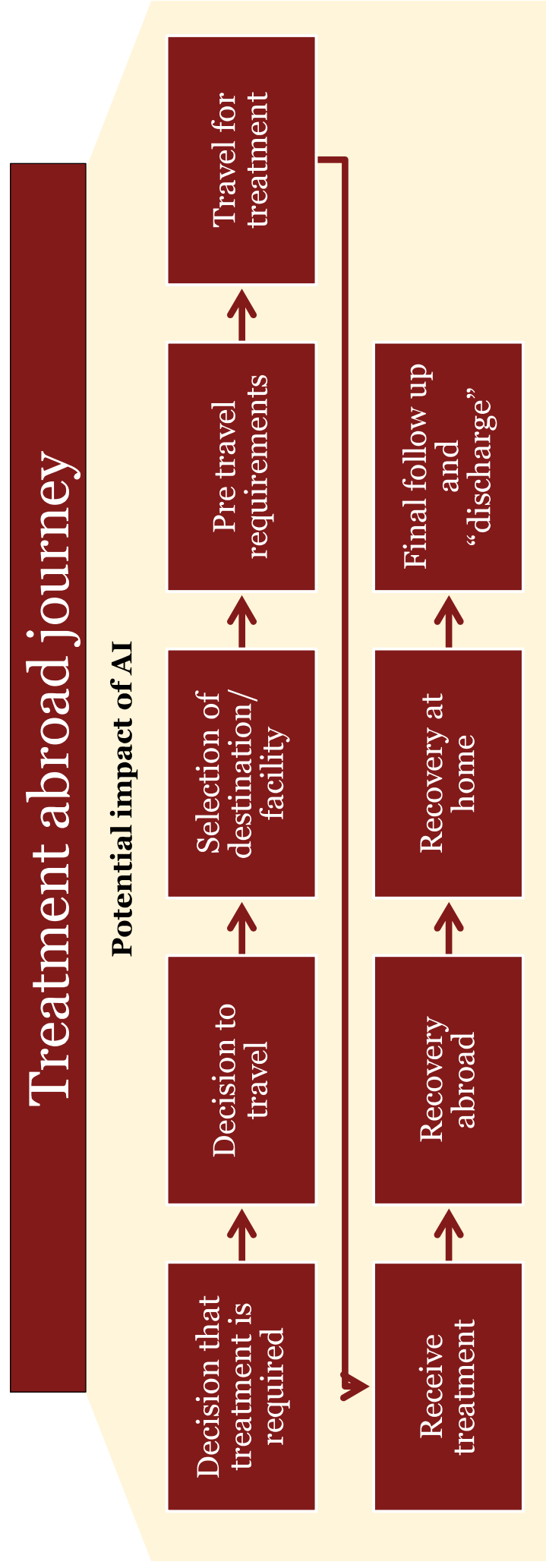
Funding & Investments

Leadership Support

Regulatory Environment

What is the role of AI in health tourism?

How might AI impact tourism? AI will disrupt health tourism



How can countries use AI to their advantage? 7 themes cut across the practical implementation of AI

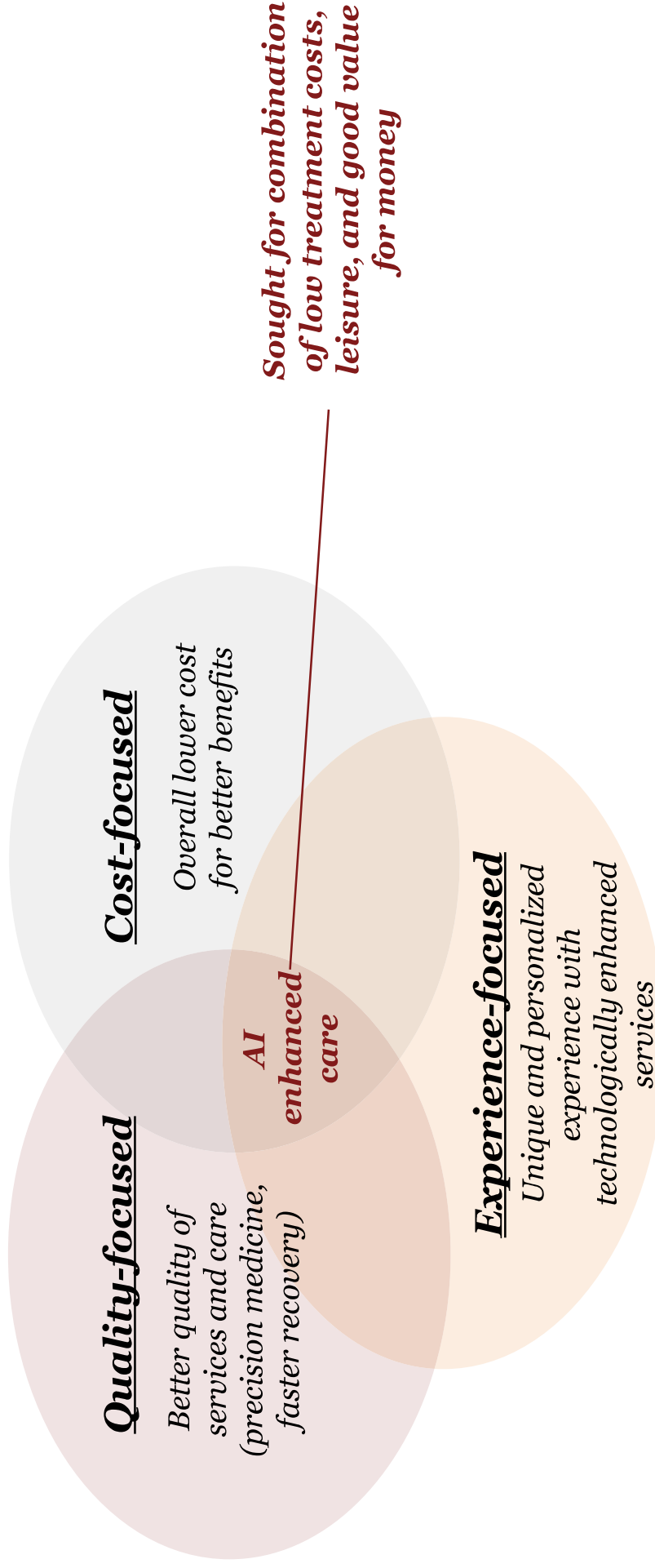


***AI is transforming every aspect of healthcare
delivery in innovative ways...***

Now is the time to start building trust

Adapt, adopt and transform

What will patients get by travelling for AI enhanced care?



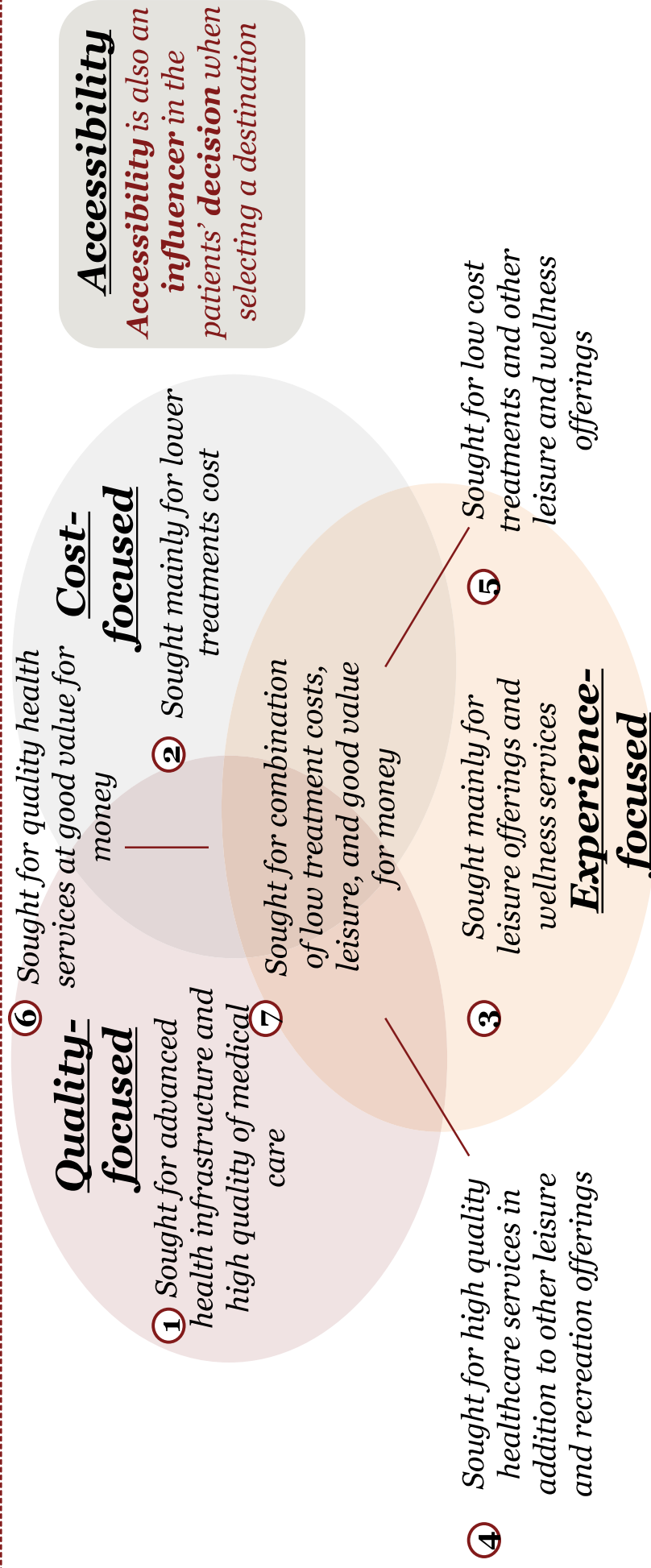
Thank you



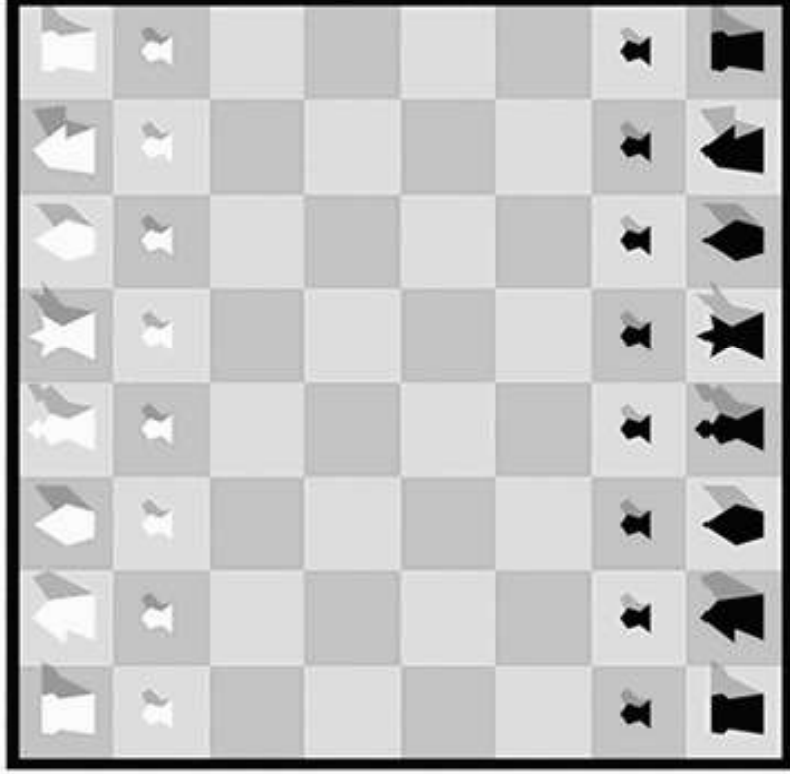
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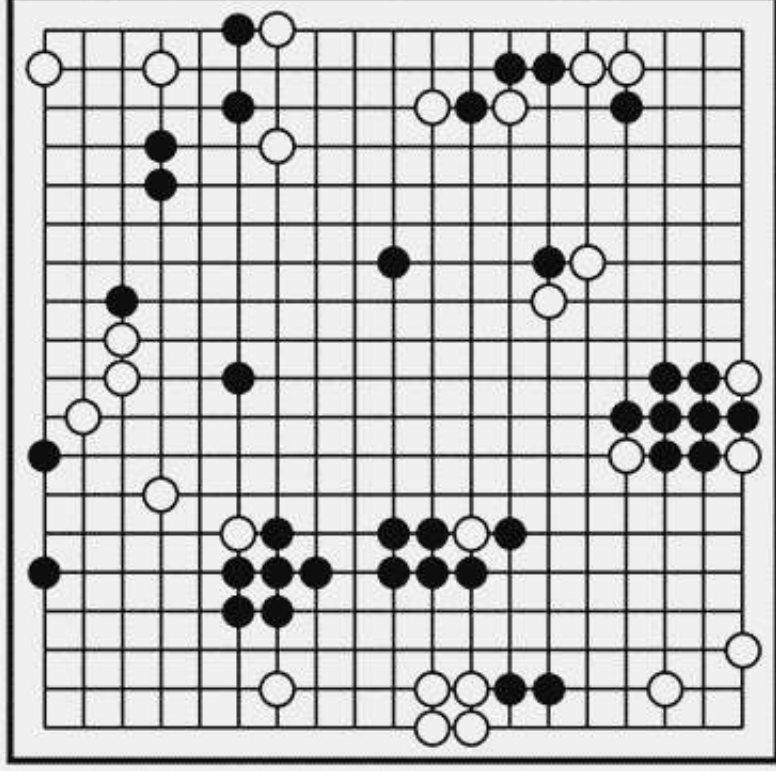
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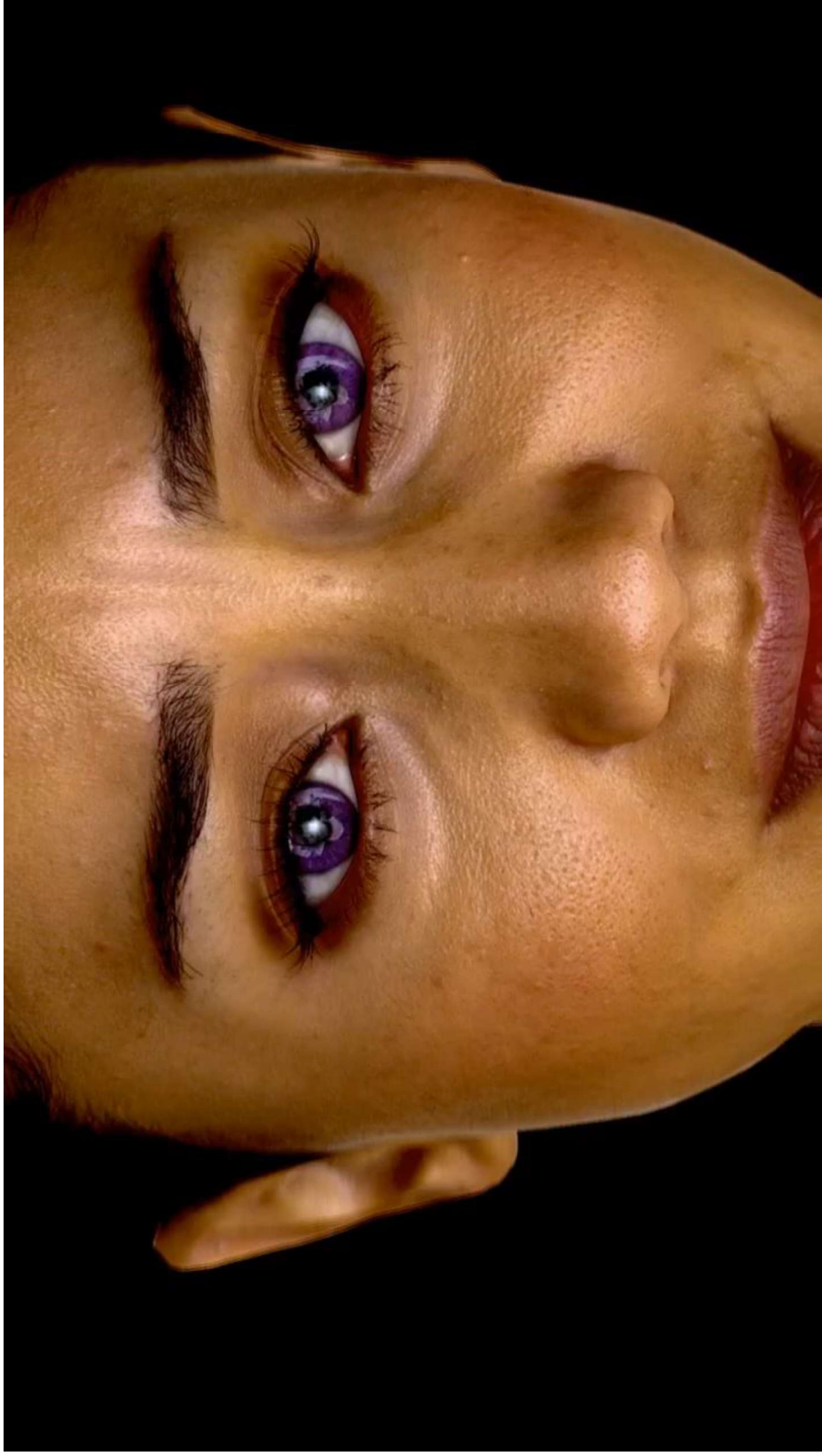


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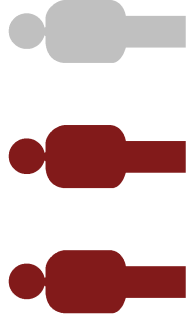


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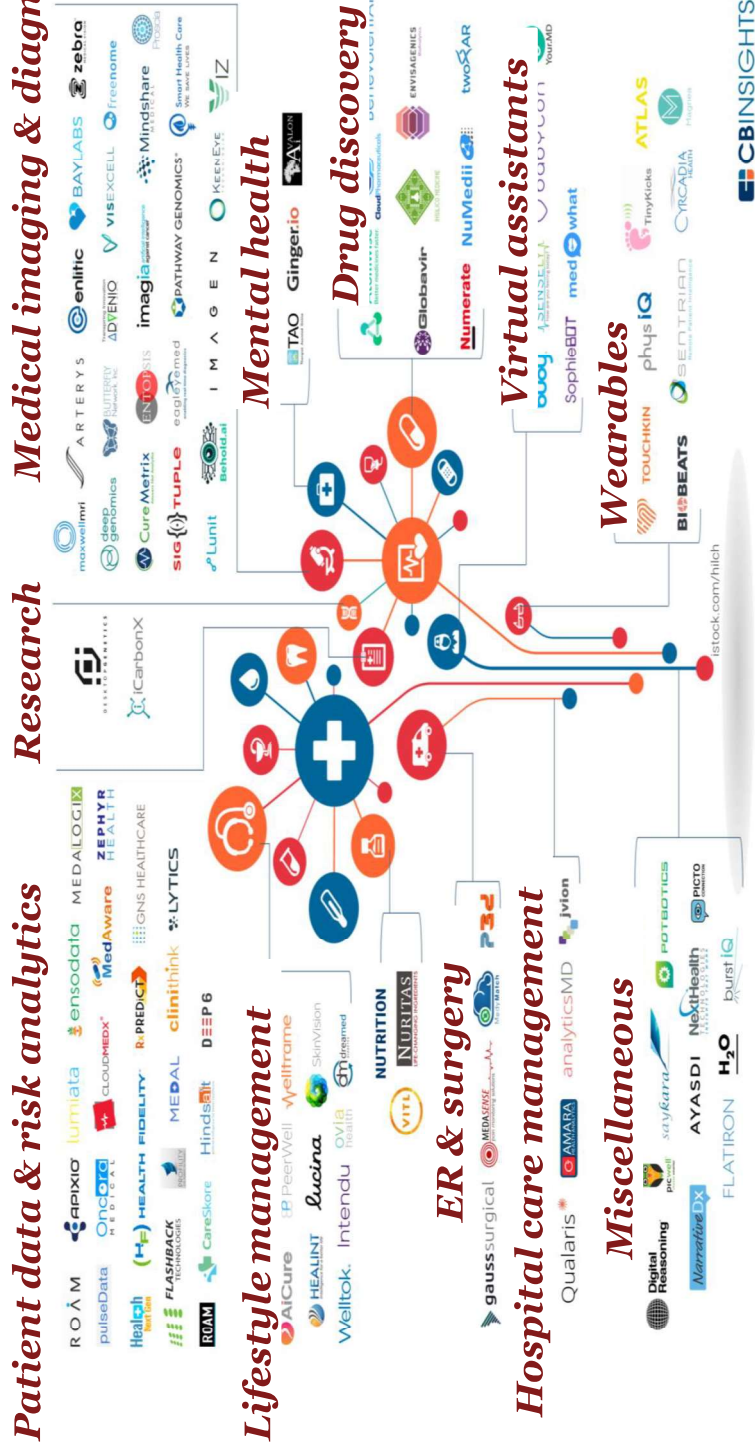
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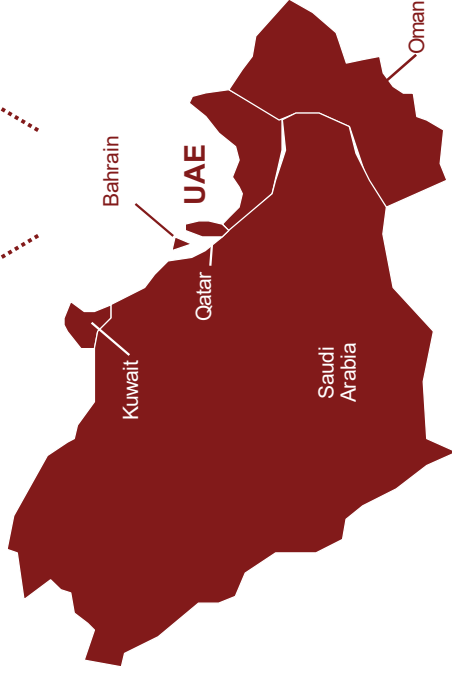
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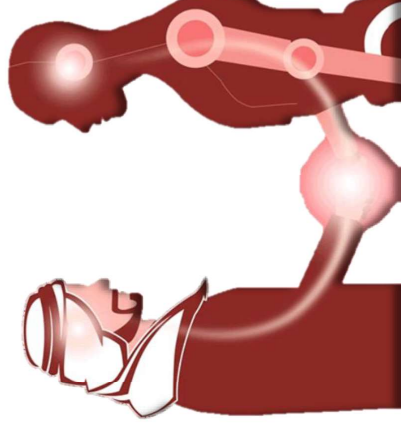
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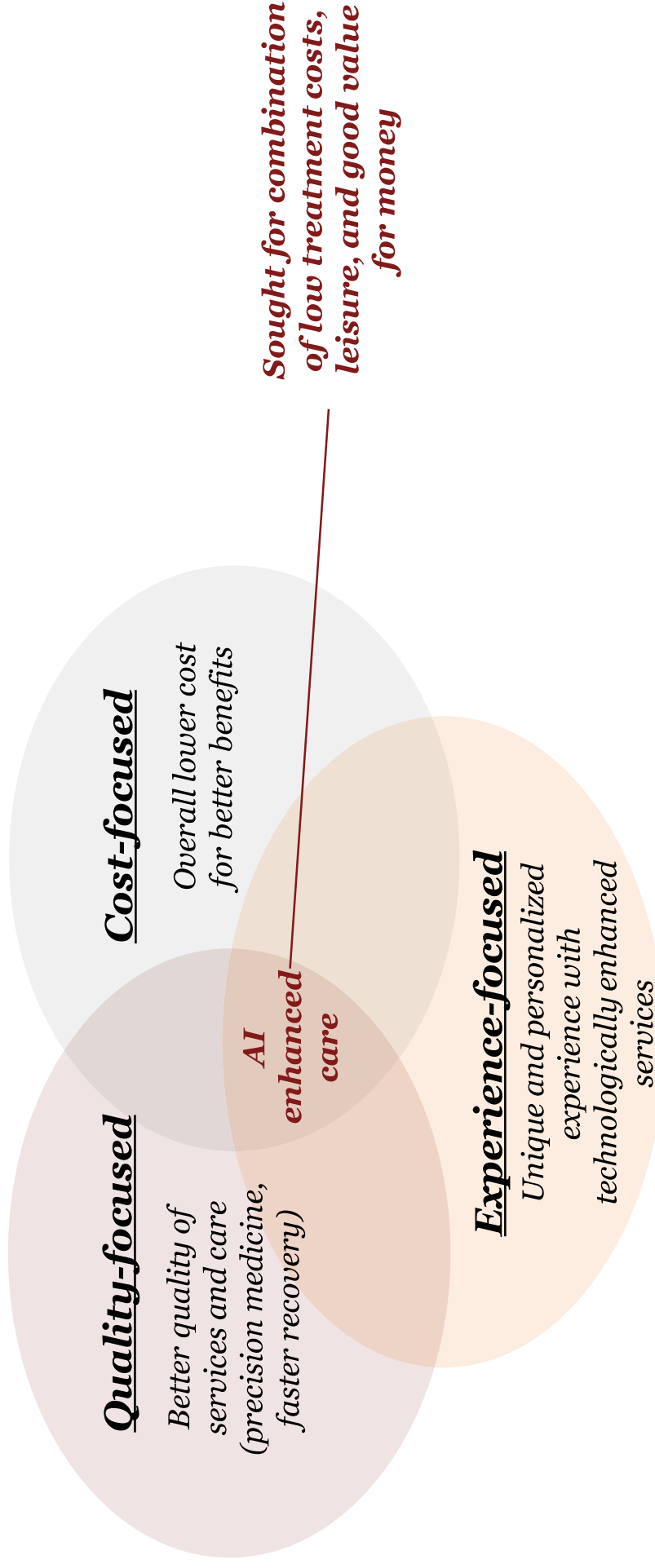


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Improved clinical outcomes

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Sought for combination of low treatment costs, leisure, and good value for money