



**JAMPRO**  
TRADE & INVESTMENT JAMAICA

# Health and Wellness Tourism

Opportunities for development of the  
health and wellness tourism  
sector in Jamaica

APRIL 2015

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## 2. Introduction and Background



The Global Spa and Wellness Summit estimates the size of the health and wellness market to be a US\$438.6 billion global market within the wider US\$3.2 trillion tourism market. It further estimated that the wellness tourism market will grow by 9.1% per year through 2017, which is at a higher rate than traditional tourism is projected to grow.

Jamaica currently has an incubatory health and wellness sector which has the following profile:

- Independent boutique and spas;
- Hotel spas and wellness centers;
- Traditional spas, some of which are in need of rehabilitation

The Government of Jamaica (GoJ) is committed to supporting a number of factors that will enable the sector to increase its buoyancy, such as internationally recognized accreditations, training of personnel to serve the industry and the development of world-class facilities.

There is currently a three year strategy in place to promote the growth of the sector, as highlighted in the Service Sector Strategy and Expansion Plan, pillars of which include:

1. Establishment of a national association to support SMEs and policy level initiatives and to adopt international accreditation and certification.
2. Establishment of national policies for wellness tourism that are linked to national promotional campaigns.
3. Implementation of the Omnibus incentives to promote investments in the sector. These are now in effect.

The goal for Jamaica is to gain at least 1% of the global wellness tourism market within five years, generating revenues of at least US\$70 million per year and employing at least 1,500 full-time staff.

### 3. Vision and Objectives

Based on our strong brand image, magnificent and appealing natural environment and human and cultural assets, the Jamaican tourism industry is positioned to continue to drive sustainable economic growth. Since the 1980s, tourism has been one of the leading growth sectors in the economy. The sector has seen immense growth in revenue and employment over the years and is renowned for its diverse visitor accommodations, including world-famous all-inclusive resorts, upscale hotels and villas and a range of distinctive tourist attractions.



As consumer taste and behaviour changes, there is an increased appetite for alternative tourism offerings, evidenced by the increasing trend towards the demand for holistic treatment in tourism. This can be seen as part of the Health and Wellness Tourism wave that has gained traction over the past ten years. This is associated with increased demand for detox treatments (purging of emotional, physical and mental toxins), spa retreats (spiritual and wellness retreats), and family retreats (making tourism a family experience).

Jamaica’s Vision 2030 has identified diversification of the country’s tourism product as one of its goals, which includes developing the health and wellness product offering and providing the requisite incentives to attract investment. Specifically, Vision 2030 directs that Jamaica should not only focus on traditional tourists, but aim to attract those seeking more active, meaningful experiences. The Government of Jamaica has already taken steps towards its goal of transforming Jamaica into the regional health hub and by extension, developing the country’s health tourism market. The first major step taken was charging JAMPRO with the responsibility of establishing a framework for health tourism, as well as generating interest in the sector.

The overall objective for developing a health and wellness industry is driven by economic development rather than the provision of healthcare. The goal for Jamaica is to gain at least 1% of the global wellness tourism market within five years, generating revenues of US\$70 million per year and employing at least 1,500 full-time staff.<sup>1</sup>

The pillars of the Vision 2030 plan for the tourism sector include the following:

Strategy	Actions
<p><b>1</b> <b>Develop an inclusive tourism sector</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Create framework to facilitate awareness, broad participation, business opportunities and access</li> <li><input type="checkbox"/> Expand and promote tourism related entrepreneurial and employment opportunities for communities, including community-based tourism</li> <li><input type="checkbox"/> Increase capacity of stakeholders to participate in the sector</li> <li><input type="checkbox"/> Facilitate the development of tourism enterprises</li> <li><input type="checkbox"/> Increase awareness of the economic and social benefits of the tourism sector</li> </ul>

<sup>1</sup> Three-Year Service Sector Strategies and Expansion Plans, by Michael V Julien

Strategy	Actions
<p><b>2</b> Develop an adequate workforce</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Develop a dynamic and flexible demand-driven education and training system for tourism</li> <li><input type="checkbox"/> Promote and facilitate access to education and training opportunities</li> <li><input type="checkbox"/> Build capacity of tourism education to international standards</li> <li><input type="checkbox"/> Strengthen the legislative and regulatory framework to protect workers' health, safety, remuneration and rights</li> <li><input type="checkbox"/> Create a working environment that leads to increased productivity</li> </ul>
<p><b>3</b> Develop a highly integrated sector</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Identify, create awareness of and facilitate opportunities for linkages between tourism and other sectors</li> <li><input type="checkbox"/> Establish appropriate marketing systems to bring together purchasers in the tourism sector and producers in linkage sectors and industries</li> <li><input type="checkbox"/> Develop sector-specific plans to expand linkages including for agricultural produce and manufactured items for boutique hotels</li> <li><input type="checkbox"/> Strategically position the tourism sector as a national development priority</li> <li><input type="checkbox"/> Promote and enhance investment opportunities in the sector for local and international investors</li> <li><input type="checkbox"/> Promote efficiency of bureaucracy regarding approvals and facilitation of investments and operation of the industry</li> <li><input type="checkbox"/> Strengthen regional approaches to marketing and trade negotiations</li> </ul>
<p><b>4</b> Develop a competitive Jamaican tourism product</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Develop a variety of accommodations</li> <li><input type="checkbox"/> Promote development of authentic attractions utilizing the country's natural and cultural resources</li> <li><input type="checkbox"/> Establish a supporting environment for the development of various types of attractions</li> <li><input type="checkbox"/> Expand domestic tourism market</li> <li><input type="checkbox"/> Integrate airlift requirements for tourism sector into transport policy, planning and implementation</li> <li><input type="checkbox"/> Develop new tourism market segments (health and wellness tourism, inter alia)</li> <li><input type="checkbox"/> Promote dual-destination markets with other Caribbean countries</li> <li><input type="checkbox"/> Promote a diversified cruise industry with increased value</li> <li><input type="checkbox"/> Facilitate improved ground transportation and travel trade</li> <li><input type="checkbox"/> Ensure that all the tourism product benefits from and builds on Brand Jamaica</li> </ul>
<p><b>5</b> Develop a sustainable natural, social and built environment</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Ensure that the activities of the tourism industry protects and promotes the protection of natural and cultural heritage</li> <li><input type="checkbox"/> Promote the application of local sustainable development planning to resort areas</li> <li><input type="checkbox"/> Ensure that the implementation of a national security strategy that addresses the concerns of the tourism industry</li> </ul>

## 4. Role of JAMPRO

JAMPRO works closely with local and global entrepreneurs seeking to tap into the many investment and trade opportunities in Jamaica. In facilitating both local and foreign direct investment, JAMPRO guides investors through the necessary processes and offers support in partnership with key government agencies and ministries, even after their investments are operational.

JAMPRO provides an array of services to the export community – including export registration, and provides export development advice and export promotion (exposure for goods and services entering the export markets). JAMPRO is also an integral partner in Jamaica’s implementation of the World Trade Organization’s (WTO’s) Trade Facilitation Agreement that will ensure the country reaps the benefits of standardized trade/border practices that will result in reduced transaction costs.

The Government of Jamaica has charged JAMPRO with the responsibility of developing the health and wellness tourism framework of Jamaica. As part of its mandate, JAMPRO has undertaken activities to assess the competitiveness of Jamaica’s health and wellness sector and will be crafting a comprehensive strategic plan for the development of the sector.

## 5. Investment Opportunity

### 5.1. Overview of health and wellness industry

There is often confusion between the concepts of medical tourism and health and wellness tourism. Medical tourism is a component of the broad umbrella of health and wellness tourism. However, it involves travelling overseas to seek medicinal treatment. Wellness tourism on the other hand seeks to promote health through targeting fitness of the mind and body and by so doing, ensure disease prevention. The two have very distinct, however sometimes overlapping target markets. For this reason it is important to distinguish between medical tourism and health and wellness tourism markets.

Wellness relates to the state of a person's physical, mental and emotional health; it is sought through the use of spas, fitness centers and healthy hotels<sup>2</sup>. Wellness tourism therefore involves travel with the intention of improving ones state of health – be it mentally or physically. Some common wellness destinations and activities include:

- Healthy hotels and resorts (offer superior indoor environmental quality standards);
- Spas;
- Natural baths;
- Wellness cruises

The Jamaica Coalition for Service Industries (JCSI), which is a JAMPRO affiliate for developing growth strategies for service industries, lists the following as existing health and wellness service providers:

- 40 boutique and private spas in Kingston
- 20 spas in tourism areas
- 25 hotel and destination spas and wellness centers in the larger hotels
- 15 other establishments
- Traditional spas including Milk River, Bath, Rockfort and Black River

Many of these facilities require upgrades in order to achieve world class status. The existing spas vary in terms of physical condition, and are currently geared towards the small local market, as opposed to tourists.

#### 5.1.1. Market size and opportunities in health and wellness

*The Global Spa and Wellness Summit estimates the size of the health and wellness market to be a US\$438.6 billion global market within the wider US\$3.2 trillion tourism market. They have also estimated that the wellness tourism market will grow by 9.1% per year through 2017, at a higher rate than traditional tourism.*



<sup>2</sup> Provide guests with the assurance of a healthy guest room by modern indoor environmental quality standards. For accommodation providers, it is a catalyst for maintaining the healthiest of guest room standards.



Currently, wellness tourism also has synergies with other niche segments that are found in Jamaica such as sports tourism (for example Reggae Marathon), ecotourism (e.g. Black River Safari), cultural tourism and culinary tourism (e.g. Jerk Festival). As wellness tourism is a subset of traditional tourism, the performance of one directly correlates to the other. This is particularly beneficial to Jamaica as tourism continues to grow, and is being boosted by initiatives such as the legalization of marijuana (for medicinal purposes) and the passing of pro-casino legislation.

There are two types of health and wellness tourists, namely:

- Primary-purpose wellness tourists, whose primary objective for their trip is wellness; and
- Secondary-purpose wellness tourists, who seek to maintain wellness but that is not the main motivation of their trip.



Research suggests that primary purpose tourists are the smaller of the two groups but they spend the most per trip. The Global Spa and Wellness Summit estimates that primary-purpose visitors spend roughly US\$2,000 per trip, as opposed to secondary-purpose visitors who spend \$600 per trip. In 2014, the average daily spend of tourists in Jamaica was US\$117 while the average length of stay was approximately 9 days. This equates to an average spend of \$1,024 per tourist, which is half of what is estimated to be spent by primary-purpose wellness tourists. This difference in amounts spent presents a solid rationale for Jamaica’s interest in attracting these types of tourists to the island.

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### Market value for Medical Tourism

There are a number of estimates of the size of the global medical tourism market.

Source	Year	Estimated Value (US\$' billions)
Patients Beyond Borders <sup>3</sup>	2014	\$39-\$55
Frost and Sullivan <sup>4</sup>	2014	\$50-\$65
My Med Holiday <sup>5</sup>	2014	\$40
Deloitte Forecasts <sup>6</sup>	2014	\$100

### 5.1.2. Services that attract health and wellness tourists

It is estimated that almost 17 million US hotel guests seek to maintain a healthy lifestyle while traveling. Global hotel groups have developed and promoted programs to attract these health-conscious guests. Some of the key programs offered to guests include:

- Healthy menu options;
- Relaxation programs;

<sup>3</sup> <http://www.patientsbeyondborders.com/medical-tourism-statistics-facts>

<sup>4</sup> <http://www.forbes.com/sites/reenitadas/2014/08/19/medical-tourism-gets-a-facelift-and-perhaps-a-pacemaker/>

<sup>5</sup> <http://www.mymedholiday.com/article-info/50/585/medical-tourism-advantages-disadvantages>

<sup>6</sup> [http://www.deloitte.com/assets/Dcom-unitedStates/Local%20Assets/Documents/us\\_chs\\_MedicalTourismStudy\(3\).pdf](http://www.deloitte.com/assets/Dcom-unitedStates/Local%20Assets/Documents/us_chs_MedicalTourismStudy(3).pdf)

- Spa services; and
- Fitness facilities and classes.

According to a study conducted by SRI International in conjunction with the Global Spa & Wellness Summit, non-spa related, healthy travel represents the majority (59 percent) of the wellness tourism market, with spa tourism representing the remaining 41 percent.



The non-spa offerings include:

- Healthy hotels (offer superior indoor environmental quality standards);
- Wellness cruises;
- Baths / springs;
- Fitness;
- Yoga or lifestyle retreats; and
- Integrative medicine.

On the other hand, wellness resorts and retreats offer short-term, residential programs to address specific health concerns, reduce stress, or support lifestyle improvement.

### 5.1.3. Medical centers and hospitals

Hospitals are a significant provider of destination wellness programs. The offerings often emphasize:

- Lifestyle improvement
- Prevention of illnesses attributable to lifestyle choices, or
- Health screening to early detect and treat curable diseases and/or other abnormalities.

Hospital and hotel partnerships usually work in tandem to support these programs.

The Bahamas Medical Center in Nassau offers anti-aging treatments, nutraceuticals and yoga.



Similarly, Ras Al Khaimah (RAK) Hospital, a specialty clinic in Dubai, also has a wellness center within its facility, called The Spa at RAK Hospital. It provides its patients with alternatives to traditional clinical care, with its services covering the areas of wellness, hair care and aesthetic therapies.

### 5.1.4. Travel destinations

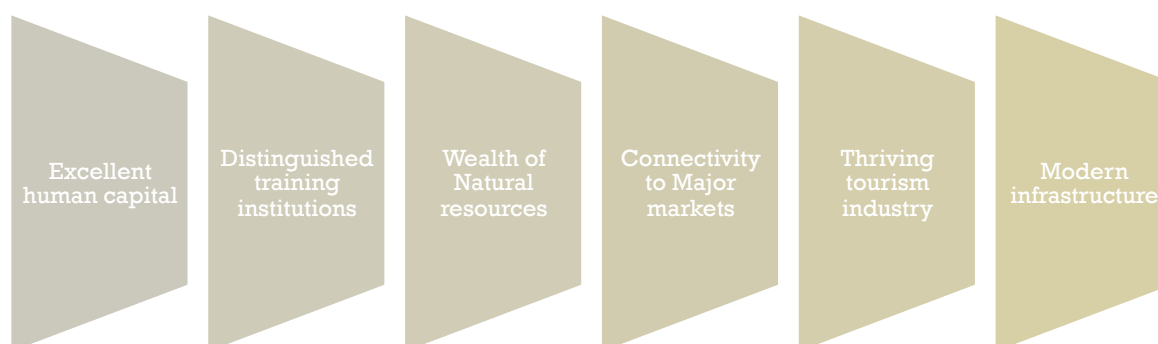
Wellness tourism is an identifiable market niche. According to an article entitled Wellness and Wellness Tourism: More Than a Lifestyle Choice (published by Patients without Borders), healthcare consumers can select

an array of mental and physical improvement programs, in some 30 destinations worldwide.

The top five countries alone (United States, Germany, Japan, France, and Austria) account for over 50% of the market. However, the regions ranked in order of highest market share are North America, Europe, Asia-Pacific, Latin America-Caribbean, Middle East and Africa respectively.

Regions	Performance
North America	As of 2014, the US is the largest wellness tourism market, with over \$180 billion in annual, combined international and domestic expenditures. <b>Europe and high-income Asian countries are the primary sources of wellness tourists traveling to the US</b>
Europe	Europe is the second largest wellness tourism market, with over \$158 billion in annual, combined international and domestic expenditures. Europeans have long believed in health benefits derived from mineral baths, saunas, thalassotherapy and other natural and water-based treatments.  Thermal resorts and hotels in Turkey and Hungary cater to wellness tourists, many of whom are subsidized by host countries such as Norway and Denmark seeking to mitigate costs of medical procedures for patients with chronic conditions requiring expensive surgeries
Asia-Pacific	The Asia-Pacific region ranks as the third largest with over \$6 billion in annual combined international and domestic expenditures. Wellness traditions date back thousands of years in this region, and some of those wellness practices incorporate preventive, curative, and therapeutic aspects that lie in the cross-over area between wellness and medical tourism (e.g. Ayurveda, traditional Chinese medicine, yoga, Thai massage).
Latin America-Caribbean	Latin America-Caribbean is the fourth largest region for wellness tourism in terms of number of trips and expenditures. Domestic tourism accounts for about 71 percent of wellness tourism trips and 54 percent of wellness tourism expenditures.
Middle East and Africa	The Middle East and Africa are currently the smallest regions for wellness tourism, where international tourists account for the majority of wellness trips and wellness expenditures. The Middle East has a long tradition of bathing associated with Turkish baths, and some older facilities are being modernized to serve spa-bound tourists.  In Africa, wellness tourism is concentrated in a few regions and is dominated by international tourists. South Africa reports significant domestic wellness tourism. <b>Tunisia and Morocco have a resort spa sector primarily serving leisure vacationers from Europe.</b>

## 5.2. Value proposition for investment in the health and wellness sector in Jamaica



With a cadre of highly qualified professionals (nurses, doctors, technicians etc.), connectivity to major markets via reliable airlift services and cost-competitive advantages, Jamaica is poised to serve as a major destination for health and wellness (including medical tourism) within the region.

People	<p>Jamaica boasts a dynamic talent pool with ability to deliver at global standards level, as articulated by many major international investors in Jamaica.</p> <p>“The Jamaican people have the ability to significantly drive the performance of companies under good leadership” – Adam Stewart, CEO of Sandals Resorts International and the ATL Group.</p> <p>Jamaican trained nurses are in demand and are highly regarded as is evidenced by the high migration rates of nurses to developed countries. The World Bank estimates that the US saves US\$26,000 in training cost for each Jamaican nurse employed by them.</p>
Educational institutions	<p>UWI, the premier tertiary institution in the Caribbean, began operations in Jamaica in 1948 as a medical school. UWI has contributed directly to Jamaica having a much higher level of physician coverage and better health statistics than would be predicted by its income level.</p> <p>In 2013, UWI academics (Dr. Coore &amp; Dr. Ramphal) invented the cardiac simulator, prototypes of which were requested by Mayo Clinic, Johns Hopkins and Stanford University, among others. Our local trained doctors are well recognised in world particularly in many big cities.</p> <p>Jamaica has the largest and most variegated tertiary system in the English-speaking Caribbean, with over fifty (50) tertiary educational institutions. The University of Technology (UTECH) has a strong reputation in technology and entrepreneurship incubation and research. While, NCU has the largest student enrolment of any university in the Seventh Day Adventist (SDA) educational system, which is the second largest denominational educational system in the World and operates in over 100 countries.</p> <p>There are 8 Registered General Nursing schools in Jamaica.</p>
Tourism industry	<p>The country’s reputation as a first class tourism resort location catering to 2 million stay-over visitors annually offers immediate opportunities for marketing and service synergies as tropical tourism shifts from sun, sea and sand to wellness, health and physiological relaxation.</p>
Modern infrastructure	<p>There is easy connectivity to nearby international airport to provide passenger services to worldwide markets. Jamaica also has excellent sea ports that accommodate a myriad of cruise ships each year. It also has a fairly good road network (Highway 2000 connects major towns and provides multiple connectivity points between parishes). Other infrastructures include water, electricity and telecommunication.</p>

From the summary on travel destinations, it can be deduced that a significant number of European tourists have an interest in wellness tourism, as evidenced by their expenditure on wellness services in their own region, North America and Africa. Given Jamaica’s proximity to North America, a well-developed health and wellness sector would provide a great alternative destination for such tourists. Also, Europe already represents Jamaica’s third largest market region, based on the number of cruise ship passengers visiting Jamaica, which again represents a ready pool that can be tapped into.

*There have been a number of key developments that will positively impact the health and wellness market, inclusive of the \$3.5 billion expansion of the medical school at the University of the West Indies (UWI), current tax reforms and international trade agreements.*

Jamaica is also an ideal location for investment in health and wellness projects given the wealth of natural resources in the country (plants and herbs with therapeutic qualities, pristine beaches, private and public hospitals equipped with modern state of the art equipment and natural spas like Bath Fountain and Milk River etc.).

### 5.3. Enabling environment for health and wellness

Jamaica's tourism sector has proven to be resilient. During the heights of the economic crisis that plagued the world beginning in 2008, the entire Caribbean region suffered declines in tourist arrivals, with the exception of Jamaica, which actually recorded increases during that period. This feat is testament to the quality of the Jamaican tourism product.

According to Patients Beyond Borders<sup>7</sup>, the making of a premier healthcare destination requires a number of contributors, including:

- Government and private sector investment in healthcare infrastructure
- Commitment to international accreditation, quality assurance and transparency of outcomes
- Potential for cost savings on medical procedures
- Political transparency and social stability
- Excellent tourism infrastructure
- Sustained reputation for clinical excellence
- History of healthcare innovation and achievement
- Successful adoption of best practices and state-of-the-art medical technology
- Availability of internationally-trained, experienced medical staff

In recognition of the above, the Government is committed to embarking on reforms that will aid in developing an environment for health and wellness to thrive in Jamaica. These will include:

- Creation of a growth platform for the sector by establishing a national association to foster and support key small and medium enterprise (SME) and policy level initiatives and to adopt an international accreditation and certification system for wellness training, in addition to supporting the development of professional certification
- Establishment of national policies for wellness tourism and a framework for the promotion of the sector, by including it in national promotional campaigns
- Assisting in developing the marketing necessary to attract the niche segments of consumers
- Implementation of tax incentives to promote investments in the sector
- Developing the island's sea ports and airports to promote easy access to the country
- Providing support in identifying the products and services that are in demand by health and wellness tourists, to guide investors in making profitable decisions.

The Government acknowledges that the country needs a regulatory environment that promotes and creates the right conditions for investment, as well as to adopt standards that are required by the targeted medical tourist market.

In December 2013, the Omnibus Incentives Legislation was passed which seeks to provide a competitive regime for all sectors. The suite of legislation comprises the:

- Fiscal Incentives Act;
- Income Tax Relief (Large-Scale Projects and Pioneer Industries) Act;
- An amendment to the Customs Tariff (Revision) Resolution; and
- An amendment to the Stamp Duty Act.

<sup>7</sup> <http://www.patientsbeyondborders.com/medical-tourism-statistics-facts>

The Omnibus Incentive legislation repeals the Hotels (Incentives) Act and the Resort Cottages (Incentives) Act, inter alia. The incentives applicable to potential investments in the health and wellness sector include:

- Employers' Tax Credit (ETC) – investors could benefit from corporate income tax rates capped at 30% of income tax liability. Corporate income tax could however be as low as 17.5%;
- Duty-free Importation of Equipment and Machinery – persons operating within the sector can benefit from duty free importation of industry-related consumer goods , as well as revised tariff rates ranging from 0% to no higher than 20% (with some exceptions);
- Productive Input Relief (PIR) – the sector will benefit from duty free importation of certain industry-related items that would have normally attracted customs duties and the Additional Stamp Duty (ASD) when these are being purchased for productive use. It will also be exempted from environmental levy on productive inputs;
- Capital Allowances – the legislation has broadened the definition of 'industrial buildings', allowing players in the sector to benefit from additional Capital Allowance incentives.

*JAMPRO is actively involved in the design of a framework for medical tourism and wellness facilities. Given the success of other regions and the anticipated expansion in this sector, the decision to seek a relatively small share of this market, is guaranteed to have a positive impact on employment opportunities for Jamaicans and profitability for investors who choose to invest in this area.*

### ***Trusted Facilitators***

The growth in the global health and wellness market coupled with Jamaica's scope to attract a modest share of it, make the contemplated entry into this segment a lucrative venture. JAMPRO remains committed to improving, promoting, stimulating and facilitating the development of industry and trade, improving the nation's business climate and fostering economic relationships with key players in international markets.

JAMPRO stands ready to assist all potential investors in taking the next steps to share in the success of the burgeoning health and wellness tourism market in Jamaica.

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# ***Appendix A. - Documents Reviewed***

## ***A.1. List of References***

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