



**JAMPRO**  
TRADE & INVESTMENT JAMAICA

# Opportunities for Development of the Medical Tourism Sector in Jamaica



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# Introduction

Medical Tourism is the practice of travelling abroad for medical treatment. Many individuals travel to other countries to access treatments which are less expensive than in their home countries. Many also travel to do specialized medical procedures, including cosmetic surgery – often minimally invasive techniques with quick recovery times, and which may easily be combined with a traditional vacation.

The Government of Jamaica (through the Ministry of Health) is promoting the country as a medical tourism destination, with the aim of attracting over 100,000 medical tourists within the next 10 years. Given its reputation for having world-class medical professionals, a strong network of diagnostic facilities, indigenous natural herbs and mineral spas, great hospitality, and being near-shore to the world's largest source market for medical tourists, Jamaica is uniquely positioned to be successful in this fast-growing industry. This growing global market was valued at approximately US\$45.5- US\$72 billion in 2017.

Relative to traditional tourism, which has an estimated revenue of US\$113/person/day spent by stopover visitors, medical tourism has the potential for significantly higher earnings of about US\$1,300/medical tourist/day. Furthermore, the dismantling of Obamacare and the subsequent increase in under-insured or un-insured Americans, as well as an increasing backlog for medical services in Canada, is expected to generate new demand over the next decade. According to a diagnostic study conducted locally in 2015, the 27 private surgical providers in Jamaica stated that approximately 20 – 30 per cent of their income was derived from foreign patients.

Medical tourists are generally residents of the industrialised nations of the world and originate primarily from the United States, Canada, Great Britain, Western Europe, Australia, and the Middle East. Increasingly, people from other countries are seeking alternative treatment regimens and medical care at more affordable costs.

Medical tourists generally travel abroad for the more elective procedures. These include face lifts, liposuction, tummy tucks, breast augmentation, dental crowns, and LASIK (laser in-situ keratomileusis), commonly referred to as laser eye surgery or laser vision correction. More critical procedures such as joint replacements, spinal disc replacements, hysterectomies, and cardiac bypass surgery are also sought by medical tourists.

In addition to attracting patients who need surgery, Jamaica also wants to persuade foreign doctors to fly in to perform surgeries and other procedures – while enjoying a Caribbean vacation.

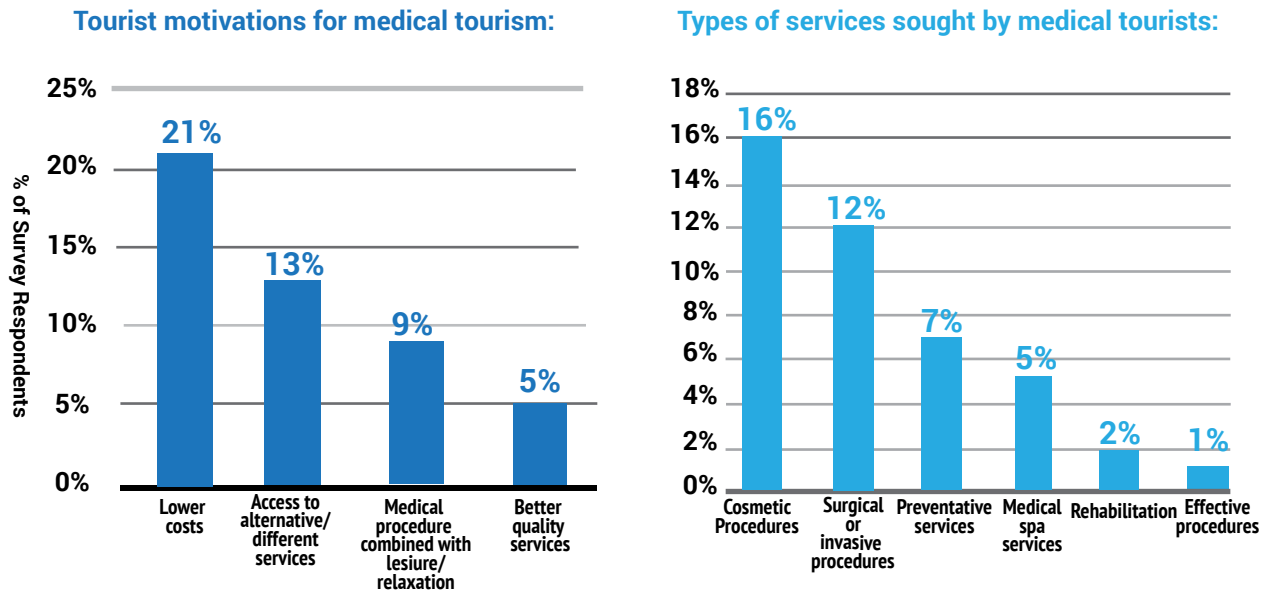
## Medical Tourism Opportunity

The opportunity for Jamaica to offer medical tourism services to North America and other markets is being driven by emerging policies and trends within the medical care industry worldwide. Jamaica is also home to accomplished, world-class scientists and medical professionals who have the requisite skills and resources to establish a thriving health and wellness tourism sector. Some of the global trends that guide the development of the sector in Jamaica include the:

- need for quality health care at lower costs;
- increasing numbers of h seeking medical treatment in foreign countries;
- shift in cultural attitudes towards overseas destinations; and
- growing interest in alternative treatment regimens not available in the patient's home country



Chart 1: Trends in Global Tourism



Patients Beyond Borders estimates the size of the medical tourism market to be approximately US\$45.5-US\$72 billion, within the wider US\$3.2 trillion tourism market. They have also estimated that the medical tourism market is growing by 15-25 per cent, a higher rate than traditional tourism.

### Why Jamaica?

- Jamaica is a world-leading tourism destination with an ever-increasing number of annual tourist arrivals.
- Jamaica is home to a cadre of highly-trained medical professionals who are also English speaking and culturally sensitive to North Americans.
- Surgical procedures in Jamaica are relatively cheaper in comparison to other medical tourism counterparts.
- Investors can benefit from a range of fiscal incentives on development projects.



# 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.

Jamaica's Vision 2030 has identified diversification of the country's tourism product as one of its goals. This includes developing the medical 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 medical tourism market. The first major step taken was charging JAMPRO with the responsibility of establishing a framework for medical tourism, as well as generating interest in the sector.



As the tourism industry grows and Jamaica aims to diversify its product offering, the country can tap into the medical tourism wave that has gained traction over the past ten years. This is associated with increased demand for affordable medical procedures, treatments, surgeries, and dentistry.

The overall objective for developing a medical tourism industry is to drive economic development rather than the provision of health care.



# Global Medical Tourism Market

*Patients Beyond Borders* define a medical traveller as anyone who travels across international borders for receiving medical care. Though the statistics vary depending on the organisation, *Patients Beyond Borders* estimates that the global market size for medical tourism is approximately US\$45.5- US\$72 billion, based on approximately 14-16 million cross-border patients worldwide spending an average of US\$3,800- US\$6,000 per visit, including medical-related costs, cross-border and local transport, inpatient stay, and accommodation. The figures do not include in-country expatriates, tourists in need of emergency medical care, companions of medical travellers, or multiple patient episodes that occur over the course of one medical visit. *Patients Beyond Borders* also estimated that some 1,400,000 Americans travelled outside the US for medical care in 2017 and that the global medical tourism market is growing at a rate of 15 to 25 per cent, with inbound patient flows highest in Mexico, southeast and south Asia.



According to the organisation, the top destinations for medical tourism include Costa Rica, India, Israel, Malaysia, Mexico, Singapore, South Korea, Taiwan, Thailand, Turkey, and the United States. The top specialties sought by medical travellers include:

- cosmetic surgery
- dentistry (general, restorative, cosmetic)
- cardiovascular (angioplasty, CABG, transplants)
- orthopedics (joint and spine; sports medicine)
- cancer (often high-acuity or last resort)
- reproductive (fertility, IVF, women's health)
- weight loss (LAP-BAND, gastric bypass)
- scans, tests, health screenings, and second opinions

The Organisation for Economic Co-operation and Development (OECD) has estimated that 30- 50 million medical tourists (including 750,000 from the US) travel outside of their home country for medical treatment each year.

*Patients Beyond Borders' estimates are conservative in comparison to the Organisation for Economic Co-operation and Development (OECD)*

# Jamaica's Tourism Industry

According to statistics from the Jamaica Tourist Board (JTB), record 4.3 million tourists visited Jamaica in 2017, representing a 12.1 per cent increase over 2016 arrivals. Breaking down the numbers, Jamaica's total stopover arrivals for 2017 exceeded the 2-million mark for the fifth consecutive year, to reach a record of 2.35 million. This represents a 7.8 per cent increase over the 2.18 million stopover arrivals recorded in 2016. Jamaica also welcomed 1.92 million cruise passengers in 2017, a 16.2 per cent increase over the 2016 number of 1.66 million.



The main factors contributing to the growth in Jamaica's tourist arrivals during 2017 have been identified as follows.

- Sustained high visibility in traditional source markets through an integrated promotional and communications programme
- Implementation of the "All You Can" digital advertising campaign for the United States market to boost summer arrivals
- Enhanced management and coordination of the JTB's presence online and across social media platforms
- Sales activities which continue to be an integral link with travel trade partners in the marketplace. These activities are facilitated one-on-one as well as through group interactions with travel agents and tour operators who drive tourism business to Jamaica

- Several new and re-branded hotels opened in 2016, resulting in the availability of more rooms
- On-island Travel Agents' Familiarisation tours with reps from the United States, Canada, Europe, and Latin America, continue to educate travel agents on the Jamaican Tourism Product.

With approximately 10 per cent of the Caribbean tourism market, Jamaica is the third most popular destination in the Caribbean, behind the Dominican Republic and Cuba.

In 2017, TripAdvisor Travellers' Choice ranked Jamaica number 12 on the 'World's Best Destinations' list and number 1 in the Caribbean.

Jamaica is expected to remain a strong performer within the Caribbean, being a traditionally popular holiday destination for North American and European tourists, particularly from the United Kingdom. The island is forecast to welcome 2.3 million stop-over visitors in 2018, representing a year-on-year rise of 3.6 per cent on the 2017 level. It is estimated that growth will accelerate to 4.9 per cent in 2021, representing the highest growth rate in a decade.

The Jamaican government aims to grow the tourist market to five million visitors annually in five years. To support the projected growth in visitors, Jamaica is targeting a room stock of 50,000 in five years. Tourism remains an important industry in Jamaica accounting for 5.8 per cent of GDP in 2016 and contributed 0.1 per cent to total GDP growth of 1.4 per cent recorded for that year.

Hotel occupancy rates in 2017 reached a five-year high of 72.5 per cent, while the occupancy rate in 2018 is off to a strong start having recorded 73.7 per cent in January 2018. The demand for hotel rooms has been increasing as evidenced by significant investments by local and international entities. Jamaica has a development pipeline that will see an additional 12,500 guest rooms open between 2018 and 2021.

Jamaica's visitors, on average, spend more nights on the island when compared to other popular markets such as the Dominican Republic, Cuba, and Barbados. In 2017, the average length of stay for stopover tourists in Jamaica was 8.8 days, compared to 8.3 days, 5.5 days, and 6.3 days for the Dominican Republic, Cuba, and Barbados, respectively.

The United States continues to be Jamaica's largest market, accounting for approximately 1.51 million stopover visitors in 2017, or 64 per cent of the total stopover arrivals. Canada and Europe follow with 17 per cent and 14 per cent of total stopover arrivals respectively. These larger markets have been targets of the JTB marketing efforts, as well as the advertising campaigns of the larger hotels chains such as Sandals and RIU, resulting in the sustained growth of these markets. Additionally, a higher quantity of airlifts is available from these markets.

The Jamaican government has established four agencies for the sole purpose of developing and improving Jamaica's tourism product. These are:

- Jamaica Tourist Board (JTB), for the development and marketing of the tourist industry so that Jamaica remains the premier Caribbean tourist destination;
- Tourism Product Development Company (TPDCo), to promote and monitor the attributes of a quality product as part of their continuous efforts to satisfy customer expectations;
- Tourism Enhancement Fund (TEF), enhancing the country's overall tourist experience and providing for the sustainable development of the tourism sector's infrastructure; and
- JAMPRO, which promotes business opportunities in export and investment to the local and international private sector.

The current tax environment is also very investor friendly, with incentives to potential investors. Presently hospitality operations in Jamaica are subject to various taxes including the following.

- Hotel Accommodation taxes – various rates
- Casino taxes – various rates
- General consumption taxes – 10%-20%
- Corporate /Company taxes – 25%
- Trade related taxes – various rates
- Non-tariff barriers – various rates
- CET on importation

- Asset Tax – \$200,000
- Property tax – based on size of the property
- The new omnibus offers some reprieve for hotel to pay less taxes once they operate within the industry rules and regulations.

### Current initiatives in medical tourism in Jamaica

Jamaica does not collect data on arrivals for medical tourism purposes. Moreover, medical facilities do not accept and treat all patients seeking services, whether local, from the Diaspora, or international. Nevertheless, following a diagnostic study conducted locally in 2015, the 27 private surgical providers in Jamaica stated that approximately 20–30 per cent of their income was derived from foreign patients. The majority (some 56%) was said to be derived from the Diaspora, while 27 per cent and 17 per cent were from others – a general mix of other nationalities and the Caribbean, respectively. In no particular order, the main services consumed by foreign patients include:

- general practice services;
- gynecological treatments;
- orthopedic;
- cardiac; and
- cosmetic and neurology.

The study also revealed that there were 252 private dental service providers in Jamaica. Most dentists confirmed that they served the Diaspora medical tourism market. The main services provided to foreign patients were teeth cleaning, dentures, extractions bridge work, and root canals. The non-Diaspora treatments were generally for emergency treatment of tourists or expatriates. No estimates of those earnings are available.

Given the wider net cast by the medical tourist, their average spend exceeds that of the regular tourist across the industry. By making a few assumptions based on international experience of medical tourism and current tourism spending in Jamaica, the expected revenue per medical tourist can be estimated through a simple medical tourism value chain based on the following assumptions.

- Average cost of medical tourism is estimated by the mid estimate value of global medical tourists (US\$55 billion) divided by the estimated number of global medical tourists (10 million), which equates to US\$5,500 per treatment.
- Airport transfers in Jamaica for high-end limousine service (as medical tourists, in general, will look for luxury or specialist treatment) of US\$75.



- Hotel costs will equate to US\$150 per night on a shared room basis. An average length of stay of five days will represent a spend of US\$750.
- If we assume that patient and companion will mostly seek to eat well at good places, restaurant and meal costs for five days at US\$100 per day will represent a spend of US\$500

Based on a five-day average stay, the total non-medical costs amount to US\$1,500 and would total US\$6,500 or average daily revenue per medical tourist of US\$1,300. This is very conservative and assumes companions and patients spend on nothing else. Compared with the average revenue per tourist in Jamaica of US\$113 per person per night, this means that medical tourist revenue could be more than 10 times that of mainstream tourists.

### Medical Specialties

- Dentistry
- Ophthalmology
- Gynaecology
- Cosmetic Surgery
- Orthopedic
- Cardiology
- Bariatric Surgery
- Diagnostic Services
- In Vitro Fertilization (IVF)



### Medical Tourism Index (2016)

In the latest Medical Tourism Index report, Jamaica ranks 17th on the list of top countries for medical tourism, while Canada, the United Kingdom, and Israel topped the rankings.

*Table 1: Jamaica's ranking in Medical Tourism Index Report*

Position	Country	MTI Overall	Country Environment	Medical Tourism Industry	Facility & Services
1	Canada	76.62	78.69	74.14	77.1
2	United Kingdom	74.87	77.30	70.38	76.94
3	Israel	73.91	67.56	72.58	81.60
17	Jamaica	67.17	66.65	72.83	63.03

2. Medical Tourism Industry: they have advantages in health care costs, attractiveness of the destination, etc.
3. Facility & Services: they have technologically advanced healthcare systems, with highly equipped modern facilities

Jamaica is not far behind, comparatively, in these metrics. In fact, Jamaica ranks ninth in the Medical Tourism Industry category, with a score more competitive than both the United Kingdom and Israel. The country is also competitive in the Country Environment category, ranking ninth, with scores not far off the top three. Jamaica has also been steadily improving its governance, political, and economic stability, evidenced by the significant reduction in its debt to GDP (almost 40% in the last five years) and decreasing unemployment and poverty levels.

The area in need of improvement for Jamaica is Facilities & Services, in which it ranks 28th. To this end, the Government of Jamaica and private sector medical stakeholders have been working hard to improve the existing facilities and to open modern and fully equipped centres.

Canada, United Kingdom, and Israel were ranked highest based on the advantages highlighted below.

1. Country environment: they are wealthy, democratic, and developed nations with solid governance and anti- corruption mechanisms, etc.

# Enabling Environment for Medical Tourism

Jamaica's tourism sector has proven to be resilient. At the height of the global economic crisis beginning in 2008, Jamaica was the only island in the entire Caribbean region that did not suffer declines in tourist arrivals. We recorded increases during that period, a testament to the quality of the Jamaican tourism product.

The Medical Tourism Index (MTI) Report 2016 states that Jamaica has maintained average scores in the three most important factors of the medical tourism industry, namely, health care costs, attractiveness of the destination, and technology, thus giving the country competitive advantage over its competitors, such as Colombia, Panama, and Costa Rica among others. In fact, Jamaica is ranked 17th overall on the MTI 2016 report. Additionally, Jamaica has maintained its number two ranking on the destination attractiveness sub-index since 2014.

## Legislative Framework

According to Patients Beyond Borders, the making of a premier health care destination requires a number of contributors, including the following.

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

In recognition of the above, the government is committed to embarking on reforms that will aid in further developing an environment for medical tourism to thrive in Jamaica. The government acknowledges

that the country needs a regulatory environment that promotes and creates the right conditions for investment, as well as the full adaptation of standards that are required by the target medical tourist market.

The development of the medical tourism sector depends upon creating the environment to ensure it responds to the demands of medical tourists and investors, whilst also maintaining the quality of health care provision for local Jamaicans. Consequently, the government's policy response is based primarily on enhancing the response to the key drivers of the global medical tourism market: cost savings, instant medical care, high standards, post procedural care, and the opportunity to explore new destinations and culture.

The government's medical tourism policy will focus on several components.

1. **Ethics:** ensuring that Jamaica's medical tourism industry does not have a detrimental effect on national health care provision, and where possible, has a positive impact.
2. **Standards:** ensuring the standards of medical facilities in Jamaica are more than adequate and appropriate for the target market segments being promoted. Developing the island's sea ports and airports to promote easy access to the country.
3. **Incentives:** adequate incentives to the private sector to encourage development of the sector, as well as ensuring its global competitiveness through the implementation of tax incentives to promote investments in the sector.
4. **Regulation:** ensuring that the medical services and service providers in Jamaica are of a high quality for both local and international patients.

**Promotion:** assisting in developing the marketing necessary to attract the niche segments of consumers. Ensuring that medical tourism in Jamaica is properly promoted to facilitate investment opportunities and to cascade the benefits and impact of medical tourism to the wider economy.

**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.**

### Strengths Of Jamaica In Facilitating Medical Tourism

With a cadre of highly-qualified professionals (nurses, doctors, technicians etc.) and 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 and specifically medical tourism.

*Table 2: Strengths of Jamaica in Facilitating Medical Tourism*

STRENGTH	DESCRIPTION
 <p><b>People</b></p>	<p>Jamaica boasts a dynamic talent pool with the ability to deliver at world-class standards. Jamaican-trained nurses are in demand and are highly regarded as evidenced by the fact that Jamaican nurses are sought after by developed countries. The World Bank estimates that the US saves US\$26,000 in training costs for each Jamaican nurse employed.</p> <p>Jamaica is the third largest English-speaking country in the Caribbean and given the proximity to North America, our people are compatible with North Americans culturally.</p>
 <p><b>Educational Institutions</b></p>	<p>The University of the West Indies (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 expected from its income level.</p> <p>Our locally-trained doctors are renowned across the world, particularly in many big cities. 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.</p> <p>Jamaica has the largest and most diverse 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. In addition, there are currently eight registered general nursing schools in Jamaica.</p>
 <p><b>Tourism Industry</b></p>	<p>The country's reputation as a first-class tourism resort location catering to over two million stay-over visitors annually, including a large diaspora population, offers immediate opportunities for marketing and service synergies. This is especially the case as tropical tourism shifts from sun, sea, and sand to wellness, health, and physical relaxation.</p>
 <p><b>Modern Infrastructure</b></p>	<p>There is easy connectivity to two international airports 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 an extensive road network, including Highway 2000, which connects major towns and provides multiple connectivity points between parishes. Other infrastructures include water, electricity, and cable.</p>
 <p><b>Location</b></p>	<p>With close geographic proximity to North America, Jamaica has direct air links to most major US gateways. It is just over an hour from Miami and three hours from New York.</p>
 <p><b>Cost-effective Procedures</b></p>	<p>Surgical procedures in Jamaica are relatively cheaper in comparison to other medical tourism counterparts.</p>
 <p><b>Transparent Incentives Framework</b></p>	<p>Investors can benefit from a range of fiscal incentives on development projects.</p>

# Value proposition for Investment in the Medical Tourism sector in Jamaica



## Jamaica’s Medical Practitioners

Jamaica is renowned for its highly trained doctors, nurses and medical technicians. These professionals are considered among the country’s most valuable resources and are central to the development of the medical tourism industry in Jamaica. In 2015, approximately 444 medical doctors, 561 nurses, 38 physiotherapists, and 46 dental nurses and assistants graduated from the Faculty of Medical Sciences at the University of the West Indies

The Jamaican medical tourism product will include three main segments which will be further developed:

- Medical surgeries
- Dentistry
- Medical diagnostic services

### Medical surgeries

The following areas of services are listed as major areas for which medical tourists travel:

- Cardiovascular
- Orthopedics
- Cosmetic surgery
- Reproductive
- Weight loss

Jamaican surgical centres provide the full range of services for these major medical tourism areas. Comparison between United States and Jamaican prices (a main driver of medical tourism) show that

Jamaica is competitive in these areas.

*Table 3: Comparative surgical treatment costs (in US\$)*

Medical Procedure	Jamaica	USA
<b>Cardiovascular</b>		
<i>Heart Bypass</i>	\$18,000	\$144,000
<b>Orthopaedics</b>		
<i>Hip Replacement</i>	\$16,000	\$50,000
<b>Cosmetic Surgery</b>		
<i>Breast Implants</i>	\$4,300	\$10,000
<i>Rhinoplasty</i>	\$13,000	\$8,000
<i>Face Lift</i>	\$13,000	\$15,000
<b>Weight Loss</b>		
<i>Gastric Sleeve</i>	\$10,400	\$28,700
<i>Gastric Bypass</i>	\$13,000	\$32,927
<i>Tummy Tuck</i>	\$2,600	\$9,750

While the pricing of cosmetic surgery does not appear to be competitive, price is only one of the few market drivers for this sub-sector. Surgeries and post-operative recovery away from home is a more compelling driver than price.

## Dentistry

Medical tourists travel primarily for the following services:

- Dental implants
- General dental (Root canal, bridges, crowns)
- Restorative cosmetic surgery



**Table 4: Comparative costs of dental care in Jamaica and the USA**

Medical Procedure	Jamaica	USA
Dental Implant	\$1,256	\$2,800

## Medical Diagnostics

The main services sought by medical tourists in the area of medical diagnostics are: scans/imaging, blood tests, health screenings, and second opinions.

For imaging, Jamaican diagnostic centres appear to be highly competitive. Even when the cost of travel for relatively low-priced services is factored in the savings can be significant. Moreover, waiting times for diagnostics is a critical driver, especially for the US uninsured, where waiting times can be three months, whereas Jamaican facilities can often provide same-day service.



**Table 5: Comparative costs for medical diagnostic services between Jamaica and the USA**

Medical Procedure	Jamaica	USA
Ultrasound	\$ 46	\$ 182
X-Ray	\$ 35	\$ 990
MRI	\$ 261	\$ 870
CT	\$ 174-\$348	\$ 896
Mammography	\$ 65	\$ 110







The cost for medical procedures outside of the United States is generally 50 to 80 per cent less and this provides an opportunity for patients from that region to access specialists based in exotic parts of the world and, further, to recuperate in these locations. The greatest savings is typically found in cardiac procedures with fees being 75-90 per cent lower in Jamaica than in the United States.

The cost for health care is dependent on variables such as the country's wage rates, consumer's ability to pay, cost of living, regulations governing the industry, and insurance costs. These factors influence the rates charged for health yet, in most cases, have no real impact on the quality of the health care which is in large part dependent on the physician delivering the care. Jamaica's favourable mix of variables has created an environment of quality health care at competitive rates.

**Table 6: Savings accrued through medical tourism**

Country	Treatment	Approximate Savings (%)
Antigua	Addiction and Recovery	40
Barbados	Fertility	40-50
Brazil	Cosmetic surgery	20-30
Costa Rica	Dentistry	30-70
Hungary	Orthopedics and	40-75
India	Restorative Procedures	50-85 for restorative and cosmetic procedures
Israel	Fertility/IVF	30-50
Malaysia	Health Screening	70
Mexico	Dentistry	30-60
Singapore	Cancer	30-40
South Africa	Cosmetic surgery	40

# Investment Opportunities

	<b>Mainstream medical tourism for surgical treatment</b>
	<b>Mainstream medical tourism for non-invasive treatment</b>
	<b>Diaspora medical diagnostics and treatment</b>
	<b>Dentistry</b>
	<b>Spas &amp; Wellness Centres</b>
	<b>Aromatherapy</b>

What are the opportunities to participate in Jamaica's developing medical tourism industry?

- Medical travel planners recommend Jamaica as a destination for medical treatments in dentistry, ophthalmology, cosmetic surgery, orthopedic, cardiology, and bariatric surgeries, diagnostic, and other procedures.
- Joint Ventures/partnerships with existing private sector medical service providers to establish treatment facilities.
- Greenfield Development to create centres of excellence for quality and cost-effective health care.

## Investment Opportunities

- Infrastructure Development
- Joint Venture Partnerships for Patient Care
- Centres of Excellence
- Concierge Services

## Milk River and Bath Fountain Investment Opportunities

The Milk River Mineral Bath (MRMB) and Bath Fountain Hotel and Spa (BFHS) are two small hotels with mineral spas owned by the Government of Jamaica (GOJ) and operated under the umbrella of the Ministry of Tourism (MOT). The MOT wishes to implement a public-private partnership (PPP) approach to develop the two sites into world-class health and wellness (H&W) facilities that may also cater to medical tourism.



Table 7. Strengths and Opportunities of Milk River Mineral Bath

<b>The Milk River Mineral Bath (MRMB)</b>	
<b>Strengths</b>	<b>Opportunities</b>
<ul style="list-style-type: none"> <li>• World-class mineral spa on site</li> <li>• Historic facility with unique character that can provide distinctive visitor experience</li> <li>• One of the few spas in the world with therapeutic radioactive (radon) water. The chemical composition of the waters provides a high-quality therapeutic experience. This mineral mix is considered one of the best in the world for treatment of ailments</li> <li>• A substantial land base around the property, albeit either in the flood zone or on upland slopes of 15%–30%</li> <li>• Sloped features of Round Hill provide interesting and scenic options for accommodation units.</li> <li>• Access to forested landscape surrounding the mineral springs.</li> <li>• Within 1 to 1.5 hours from the Norman Manley International Airport (NMIA)</li> <li>• Availability of qualified management and staff</li> </ul>	<ul style="list-style-type: none"> <li>• Purchase/negotiate rights to access/lease/purchase additional land near to existing facility for locating upwards of 70 units, multipurpose facilities, access to road, hiking trails and cycling trails. The potential to expand the property across the location creates very exciting site planning and accommodation development opportunities with excellent views</li> <li>• Floodplain provides adequate land base for multiple recreation activities including court games, volleyball, etc.</li> <li>• Access to local beach for coastal recreation activities including sea kayaking and swimming</li> <li>• Potential access to attractive pristine arid forest vegetation and landscape</li> <li>• Potential for the investor to use existing facilities for domestic/lower price clients while building a separate facility for upmarket guests</li> <li>• Focus of a “Spa Town” concept, including a number of other potential attractions in the area</li> <li>• Significant annual growth rate of health &amp; wellness (H&amp;W) tourism (9%); 48.6 million H&amp;W trips (2015) to the Latin America/Caribbean Region</li> <li>• Jamaica is one of the top 10 H&amp;W destinations in Latin America and the Caribbean, with upwards of 600,000 H&amp;W arrivals</li> <li>• Jamaica is a safe haven compared to destinations in the Middle East and North Africa – competing destinations which are subject to terrorist attacks Increasing linkages to the local community – jobs, business opportunities</li> <li>• Access to at least 60 WHO certified nutraceuticals</li> <li>• Legal use of cannabis for medical purposes</li> <li>• Potential to use sea water to add a thalassotherapy component to the spa experience</li> <li>• Brackish water provides a “flotation tank” experience that could be exploited</li> <li>• Jamaica has excellent training facilities for new H&amp;W and medical skills</li> </ul>

Table 8. Strengths and Opportunities of Bath Fountain Hotel and Spa

Bath Fountain Hotel and Spa (BFHS)	
Strengths	Opportunities
<ul style="list-style-type: none"> <li>• Historic facility, well maintained, with potential to upgrade to high standard, provides a distinctive heritage character</li> <li>• Rainforest biodiversity, river valley location creates a very appealing atmosphere and ambience</li> <li>• Scenic Sulphur River as a focal point</li> <li>• World-class mineral spa on site</li> <li>• Waters have a high content of desirable elements</li> <li>• Location offers a unique atmosphere and ambience that is not available elsewhere in the Caribbean</li> <li>• Within 1 to 1.5 hours of the NMIA. Upgraded road will reduce traveling time</li> <li>• Availability of qualified management and staff</li> <li>• Proximity to Bath town (facilities, attractions, source of employees)</li> <li>• Heritage character is evident and a source of the current facility's attractiveness</li> <li>• Jamaica is a safe haven compared to destinations in Middle East and North Africa – competing destinations which are subject to terrorist attacks</li> <li>• Increasing linkages to the local community – jobs, business opportunities</li> <li>• Access to at least 60 WHO certified nutraceuticals</li> </ul>	<ul style="list-style-type: none"> <li>• There are opportunities to build additional accommodation directly adjacent (north) to the current facility, as well as a second site approximately 200m north of the central building. This mix of accommodation experience could be a positive</li> <li>• Potential to expand further on adjacent corporation land up the Sulphur River Valley, providing an alternative natural setting for the accommodation units</li> <li>• Construction of new bar could strengthen links with the local community and increase revenues</li> <li>• Bottling and sale of the mineral water</li> <li>• Other potential attractions in the area</li> <li>• Significant 9% annual growth rate of H&amp;W tourism. 48.6 million H&amp;W trips (2015) to the Latin America and Caribbean Region</li> <li>• Jamaica is one of the top 10 H&amp;W destinations in Latin America and Caribbean, with upwards of 600,000 H&amp;W arrivals</li> <li>• Focus of a "Spa Town" concept</li> <li>• Legal use of cannabis for medical purposes</li> <li>• Jamaica has excellent training facilities for new H&amp;W and medical skills</li> </ul>



Currently, medical, health and wellness tourism also have synergies with other niche segments that are found in Jamaica such as sports tourism (e.g. Reggae Marathon), ecotourism (e.g. Black River Safari), cultural tourism, and culinary tourism (e.g. Jerk Festival). As medical tourism is a subset of traditional/health and wellness tourism, the per-

formance 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 legalisation of marijuana (for medicinal purposes) and the passing of pro-casino legislation. Some of these segments of tourism can be packaged as additional experiences along with the of-

**Jamaica has received international recognition as a 'Tourism Location of the Future' by the Financial Times' FDI intelligence magazine. Of the 43 countries assessed by the publication, Jamaica received four Editor's Choice specialist awards for the country's efforts in Medical Tourism, Community Tourism, Accommodation Upgrades and the Shovel Ready Investment Programme, which promotes pre-packaged tourism investment properties.**

## Medical Centres and Hospitals

Hospitals are a significant provider of destination medical, health and wellness programmes. The offerings often emphasise:

- surgical procedures;
- dentistry;
- lifestyle improvement;
- prevention of illnesses attributable to lifestyle choices; and
- health screening to early on detect and treat curable diseases and/or other abnormalities. Hospital and hotel partnerships usually work in tandem to support these programmes.



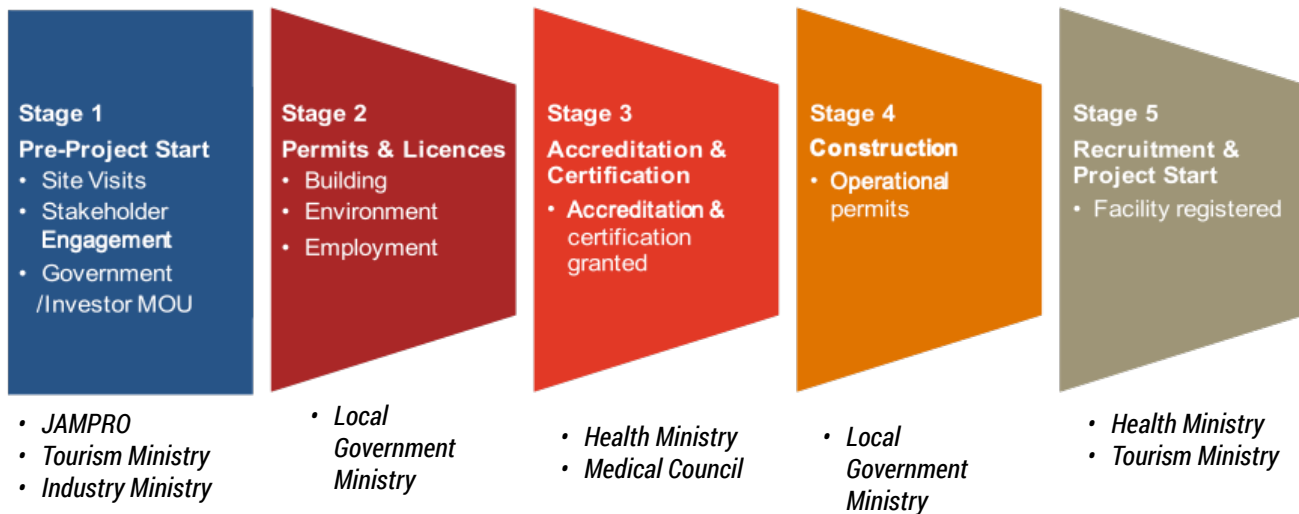
# Making Investment Happen

## Engaging the Players

Jamaica’s strategic decision to develop the burgeoning medical tourism industry was based on a collaborative public-private sector consultative mechanism.



## Facilitating Investors: The Jamaica Model





# JAMPRO

TRADE & INVESTMENT JAMAICA

## Role of JAMPRO

JAMPRO is the national trade and investments promotions agency in Jamaica. One of our key functions is the packaging and promotion of investment opportunities and the conversion of investment prospects into viable projects. JAMPRO was first established in 1988 to stimulate, facilitate, and promote the development of trade and industry, export and investment activities in all sectors of the island's economy. The agency drives this process through focusing on a number of targeted sectors which include tourism.

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 Organisation's (WTO's) Trade Facilitation Agreement that will ensure the country reaps the benefits of standardised trade/border practices that will result in reduced transaction costs.

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

## Resources

1. <http://www.thelessinstitute.com/>
2. <http://www.jamaicaobserver.com/news/Jamaican-doctor-pioneers-disc-replacement-procedure- 88960>
3. <https://www.medicaltourismindex.com/overview/>
4. <https://patientsbeyondborders.com/medical-tourism-statistics-facts>
5. <https://www.jamstockex.com/wp-content/uploads/2017/11/Gwest-Junior-Market-Prospectus-Nov.302017- FINAL.pdf>
6. <http://jis.gov.jm/record-4-3-million-tourist-arrivals-2017/>
7. <http://www.jamaicatradeandinvest.org/sites/default/files/American%20Global%20MD.pdf>
8. [\*Health and Wellness Tourism Investment Opportunities in Jamaica April 2015 Jampro Report\*](#)
9. [\*Government of Jamaica Medical Tourism Policy Green Paper September 2017\*](#)
10. [\*Jamaica: The Caribbean's future Medical Tourism Hub Jampro Report\*](#)



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