Will Hong Kong be the Asia Pacific medical tourism centre?

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This dissertation could not have been written without Monica Law who served as my supervisor and gave me many valuable advices in my project. She is a good supervisor who willing to spend extra time to guide our project. I would like to say thanks to her. Without her guiding and attribution, the project can not be finished.

In addition, I would like to thanks my parents, friends- Yedda, May, Jeff and Andy who always gave me spiritual support and brave to finish this project.

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Executive Summary

The purpose of this project aims to find out whether Hong Kong has potential to be an Asia medical centre by identifying the existing resources. Through the finding of Lam (2007) and Reisman (2010), the main criteria to become a medical tourism are identified. They are quality of medical product and services, price, quality of tourism elements, spatial distance and waiting time. Archive analysis in qualitative mode will be used as research method. The author will use those criteria to access whether Hong Kong has ability to become medical tourism destination with existing resources. The reason of using quantitative as research method is because it is not possible to conduct data by any questionnaires and experiments. After analyzing all secondary data, author found that Hong Kong has advantages to become an Asia medical tourism. Those advantages are medical industry excellence, culture affinity, transportation hub and high quality of tourism elements. However, Hong Kong had found problems on medical manpower shortage, long waiting time and high cost. It is suggested that the Hospital Authority should improve the welfare policy of medical expert in public hospital to avoid manpower leakage. More medical faculty should be operated by different educational bureau to increase medical expert intake. To shorten the waiting time, the approval of new hospital establishment should be approved as fast as
possible. Some medical tourism package is suggested to lower the total expense of medical tourist which drives them to Hong Kong as their destination. Although these problems can not be solved within short period of time, Hong Kong still has potential to be the Asia medical hub if the problems above can be solve with effective measurement and win the support of every stakeholders.
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Chapter 1 Context and objectives

1.1 Introduction

Since the government brings up the issue of medical tourism and announces it again as one of the big important industries to develop in Policy Address 2009, the author has great interest to know whether Hong Kong has the abilities to gain well performance in the aspect of developing medical tourism industry. This project aims at assess the capability of Hong Kong to be the medical centre of Asia.

Medical Tourism is a kind of traveling that access medical, dental, surgical or other health care service by crossing borders. And nowadays medical tourism is defined as a term to describe a booming business where people travel across borders for both medical care service and sightseeing (Connell, 2005).

Although medical tourism is now become more popular nowadays, however, the concept of medical tourism is nothing new. USA enjoyed a rich history of providing Yoga instruction, spiritual enlightenment, and Ayurvedic healing to seekers from around the world that long before the first American cardiac patient stepped onto Indian soil. And centuries before that, the sick and the ailing came from all across the Mediterranean to the Asclepia Temples in search of cures for every malady...
imaginable; from headaches to gonorrhea. From the aristocratic patrons of Bath to the pilgrims of Japanese hot spring, history is full of travelers who made therapeutic trips for improved health (Healism.com 2005).

Rafferty (2010) point out that worldwide medical tourism by 2010 is expected to generate annual revenue; of US dollar 100 billion and about 5 billion people a year are thought to travel abroad for medical care. Hong Kong is one of the Asia regions with well development in medical system since Hong Kong's medical services excel in Asia. Furthermore, the biggest advantage that Hong Kong lies in is its medical professionals being fluent in Putonghua and English. They are able to communicate with mainlanders and foreigners. With such a good will and well development in medical system, Hong Kong has great potential to develop as Asia Pacific medical tourism centre.

Although Hong Kong has excellent conditions to develop medical tourism, However, Hong Kong's main rival, Singapore, set up Singapore Medicine in 2003 to boost medical tourism, which generated around US$900 million in 2006. Thailand and Korea are also working hard to promote medical tourism. Both countries are renowned for quality plastic surgery. It is necessary to know that whether Hong Kong have enough ability to become Asia Pacific medical tourism centre under the threat of
neighboring countries. Find out references from other neighboring countries that favor in developing the medical system are worthwhile for Hong Kong to develop medical tourism.

1.2 Objectives of this project

The main purpose of this project is to analyzing was the potential of Hong Kong to develop as the medical centre of Asia. The objectives of this project are:

✔ Identify which criteria is needed to develop as a Asia medical tourism centre

✔ To analysis Hong Kong medical resources (both software and hardware) to see in what extent Hong Kong can reach the successful criteria to be the Asian media tourism centre

✔ Identify which obstacle that will hinder the development of medical tourism in Hong Kong

✔ Making recommendations to Hong Kong medical tourism
Chapter 2 Literature Review

2.1 Medical Tourism-introduction

According to Connell (2005), medical tourism is defined as people travel often long
distances to overseas countries to obtain medical, dental and surgical care while
simultaneously being holidaymakers, in a more conventional sense. Bookman (2007)
also make similar definition on medical tourism with Connell. He defined medical
tourism as travel with the aim of improving one’s health and acting an economic
activity that entails trade in services and represents the splicing of at lease two sectors:
medicine and tourism. Base on Robinson and Novelli’s (2005) description, Bookman
(2007) also classified medical tourism as a type of niche tourism since such tourism
do not draw masses but rather it appeals to select a number of people whose demand
is big enough to generate sufficient business.

2.2 The classification of service that provided by medical tourism

Henderson (2004) proposed health-care tourism should be divided into three
categories: spas and alternative therapies (such as massage, yoga, and beauty care),
cosmetic surgery which is other nonessential medical procedures, and medical
tourism such as health screening, heart surgeries, joint replacements, cancer treatment.
However, Bookman (2007) did not agree much with Henderson since Henderson gives prominence to diagnostic services. Bookman had divided medical tourism services into more detailed categories: invasive, diagnostic, and lifestyle. Invasive procedures refer to those that are performed by specialists for people with noncommunicable disease like dental work. The diagnostic sector means blood screening, bone density testing, heart stress tests, lipid analysis and electrocardiograms. Lifestyle services focus on wellness, nutrition, stress reduction, weight loss, antiaging, and quite simply pampering.

2.3 Type of medical tourist

People who demand in medical tourism across border can be divided into 2 types: incidental medical tourist and medical tourists seeking medical tourism.

2.3.1 Incidental Medical Tourists

Incidental medical tourist include people who stay long outside their home country because of work and study and the ordinary tourist who travel short period for vocation purposes. Constantine (2006) points out that some eight percent of travelers travel to developing countries for medical care while on their trip and their treatment is unplanned. Most of the reason that these kinds of tourist obtain the medical care is
because fall ill or get involve into the incident.

As they did not plan to buy health care services but force to do so, emergency care services are the services that they usually need. It is because routine care or minor health concerns will be shelved until they return home.

2.3.2 Medical Tourists Seeking Medical Tourism

Tourists who seek for medical treatment always have full schedule or plan with the medical purposes. Base on Bookman (2007) and Connell (2005) analysis, the reason why tourist travel across borders to seek for medical services can be summarized into several reasons: demographic (aging problem), medical (advance medical technology), economic (people become more wealth or found cost problem) and social (advance information technology).

2.3.2.1 Reason for medical seeking

Demographic

✔ Aging Population

The postwar baby-boom generations are the group who commonly aged over 60. They are highly concern on health problem. The demand of medical care also
increases. Most of baby-boom generations are affluent and willing to pay on medical
and travel expense.

Medical

✓ Advance Medical Technology

With the rapid improvement of health care system in some key countries, many new
medical technologies like robotic surgery, minimally invasive surgery etc have been
adopted. Patients who come from less medical developed country and suffer serious
disease are attracted to pay a visit for medical treatment.

Economic

✓ People in less developed countries become more wealthy

As the financial crisis did not affect Brazil, Russia, India, and China (BRIC) so much,
their people have more disposable income and willing to pay for better overseas
medical treatment and tourism product.

✓ Price consideration

On the contrary, some people (especially more developed country) take part in
medical tourism may because of the cost factor. People who live in more developed
country may need to pay a high price for local medical service. However, those patients can use a third-world price to receive first-world high-tech medical service in Asian countries like Thailand and India which help them to save a lot of medical expenses.

Social reason

By the rise of internet, it facilitates patients to receive and search the most updated information in medical industry. There are no health specialists anymore but broker between international patients and hospital networks which favor the development of medical tourism (Connell 2005).

2.3.2.2 Types of medical seeking tourist

The type of medical service that obtain by medical service seeker are varies. Basically the medical services that patients obtain are always determined by their income. Usually rich patients will seek for elective invasive, diagnostic and lifestyle medical services at the same time accompanied by an exotic vacation. Preferred consumer.com had classified elective medical procedure as “not being medically necessary”.

Therefore, most elective medical care is not covered by major medical insurance. Once some types of elective care are covered, the coverage is usually very limited.
The most typical example of elective medical service is cosmetic surgery. Also, wealthy patients rarely receive medical care in the border areas, but drawn to the large medical centers that tend to be urban or resort based. And poor patients just obtain low-tech medical services and tend not to be lifestyle oriented because those high-tech medical services are expensive. They usually purchase basic services through public health facilities. Some of them use the closest facilities, immediately across the border from their homes (border medicine) so as to save the transportation cost. They also do not vacation before or after their medical treatment. Although both rich and poor patients are consumer of medical tourism however the services that they purchase have big difference (Connell 2005).

Table 1 Medical tourism by patient income

<table>
<thead>
<tr>
<th></th>
<th>Rich patients</th>
<th>Poor patients</th>
</tr>
</thead>
<tbody>
<tr>
<td>From more developed</td>
<td>Elective invasive, diagnostic and</td>
<td>Low-tech invasive, diagnostic and</td>
</tr>
<tr>
<td>countries</td>
<td>lifestyle e.g.</td>
<td>lifestyle, Border medicine</td>
</tr>
<tr>
<td></td>
<td>cosmetic surgery, lasik eye surgery,</td>
<td></td>
</tr>
<tr>
<td>From less developed</td>
<td>hair replacement etc</td>
<td>Border medicine</td>
</tr>
<tr>
<td>countries</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Medical Tourism in developing countries (2007)
2.4 The main criteria to become a medical destination

Besides basic infrastructures like hotel and transportation, Lam (2007) and Reisman (2010) had found out the key factors of affecting patients choose destination which are main criteria to make a place become a medical destination.

- Quality of medical product and service

Patients who travel cross aboard to seek for medical service usually because the destination can provide high quality medical product and services which they may not obtain from their home country.

- Price

Price is always the key factor the patients need to consider since they have to pay high price for medical services in their home country. To attract budget anxious patients, the medical service price of the destination must place lower their home country.

- Quality of tourism elements

As medical tourism is the combination of medical tourism and tourism facility, beside medical services, patients also think highly of the tourism attraction or tourist facility. It is because when patience receiving medical services, their families or friends are
feel free to looking around the destination. Therefore tourism facilities of the destination are important since it need to satisfy the needs of the patient’s spouse.

- **Spatial distance**

Patients always select destination by the consideration of distance. It is because the farther destination they pick means they have to spend more on transportation fee and time. This can explain why most of the American like travel to Costa Rica to seek for medical services.

- **Waiting time**

Waiting time means the duration of a patient have to wait for the medical service. From the study of Garcia-Alter (2005), long-waiting time is the main problem of the healthcare system in the developed countries all over the world. And as the same time Connell (2005) point out that patients in UK who wait for a non-emergent surgery like knee reconstructions may need as long as 18 months. Destinations where can provide medical surgery within short period of time will become patient’s priority choice.
2.5 The medical services in Hong Kong

There are totally over 40 hospitals provide different type of medical services under both public and private operations which provide different kind of medical services to patients. By Lau (2010) findings, it shows that Hong Kong have several advantages to become an Asia medical hub.

✔ Industry Excellence

Pangaea Medicine points out that the private hospitals in Hong Kong have been accredited by the Trent Accreditation Association in the United Kingdom. This accreditation scheme works closely with medical hospitals that they assess, to generate standards which are acceptable around the world. This scheme always uses a combination of Hong Kong sourced as well as UK sourced surveyors. Hospital standards in HK have been improved to a great extent, using this unique and co-operative approach.

✔ Culture Affinity

Hong Kong is a multi-culture community and most of the Hong Kong people are multi-lingual. Mostly visitors will not found communication difficulties as English is one of the official languages in Hong Kong. Furthermore Hong Kong has hired many
international management expertises to manage the operation of public and private hospitals to ensure patients can enjoy high quality of medical products and services.

✔ Transportation Hub

Hong Kong situated on the southern coast of China and enclosed by the Pearl River Delta and South China Sea which is the largest Asia hub of Europe, Asia and Oceania flight transfer. In addition, the flights of Hong Kong International Airport provide access to most of the flights from Asia key cities and are able to reach half population of the world.

✔ High quality of tourism elements

As a mutual tourism destination in Asia, Hong Kong has excellence tourism products like theme parks (Ocean Park and Disney Hong Kong), hotel, shops, restaurants etc. In the past few years, Hong Kong had developed various new tourist spot like Ngong Ping 360, Star Avenue etc. Also, the tourism practitioners in Hong Kong always provide high quality service to all tourists.
Chapter 3 Methodology

This chapter aims to show how the author collects the secondary data for the project. It also spotlights the significance and limitations of the data collection ways.

3.1 Basic information research

Archive analysis in qualitative mode will be used as research method. Analysis of whether Hong Kong can become the Asia medical tourism centre base on information obtained from books, journals and articles in order to understand the main criteria of being an Asia medical centre, evaluate the obstacles of Hong Kong medical tourism resources and making recommendation. The reason of using quantitative as research method is because it is not possible to conduct data by any questionnaires and experiments. Conducting questionnaires are not the suitable way to conduct right data. And at the same time it is hard to conduct an interview with local medical tourism expertise to gain primary data. That’s why this dissertation mainly base one secondary data which collected books, articles and journals although it may be challenged as subjective and little bit lack in rigor. Also, all data collected from articles and journal which wrote by university professors and industries expertise. The reliability and validity of all data and resources are high that ensure the direction of analysis is right.
3.2 Scope of research

The secondary data are mainly collected from books, journal articles, magazine, newspaper and video. These data chosen were based on their availability, relevancy, reliability and validity. The author review those relevant documents and literatures to obtain the information of medical tourism. All data are connected through the following channel:

Books

- Medical Tourism in developing countries
- Health Tourism-Social Welfare through International Trade
- Health Tourism: An Introduction

Journal articles

- Tourism Management
- National Reference Center for Bioethics Literature
- U.S. National Library of Medicine

Newspaper

- South China Morning Post
3.3 Advantages

The major advantage of the analysis of secondary data was that it has very rich insight for the research focus. Also, it allowed resources of information which contain large number of valuable information. The author was easily to find relevant information from different sources such as electronic databases and international journals.

Furthermore, the qualitative research method in terms of the cost, time, and personal
bias. Finally, the qualitative research method has assisted us to identify further research needs.

### 3.4 Limitations

Since all data are secondary data and base on other’s finding, the available data may be inaccurate, inappropriate, incorrect or biased as the secondary data are not tailor-made for the project. Besides, the huge number of information found from various sources took much time of the researcher to scan and select the relevant information.
Chapter 4 Finding and Analysis

Figure 1

A conceptual framework of medical tourism development in Hong Kong

Medical tourist requirement

- Good quality of medical product and service
- Good distance care
- High quality of tourism elements
- Low price
- Short waiting time

The resources available in Hong Kong

<table>
<thead>
<tr>
<th>Industry Excellence</th>
<th>Culture Affinity</th>
<th>Transportation Hub</th>
<th>High quality of tourism elements</th>
</tr>
</thead>
</table>

18
Figure 1 shows a framework of medical tourism development in Hong Kong.

Summing up the points of Lam (2007) and Reisman (2010), the main criteria to become a medical destination are defined; they are quality of medical product and service, price, quality of tourism elements, distance care and waiting time. And at the same time, Hong Kong has several advantages to become an Asia medical tourism destination; they are industry excellence, culture affinity, transportation hub and high quality of tourism elements. Here are the analyses of whether Hong Kong condition is possible to be an Asia medical destination.

4.1 Quality of medical product and service

Lam (2007) had pointed out that tourist are very concern on quality of medical product and service. It is believed that a destination where can provide high quality of medical product and service by professional medical expertise can be the priority choice of tourist. Hong Kong has high standard in medical service and product. All private hospital in Hong Kong had accredited by the Trent Accreditation Association in the United Kingdom (Pangaeamedicine.com, 2007). the hospital has been awarded full accreditation status for four years by the Australian Council on Healthcare Standards (ACHS) (Press Release of Information Service Department. 2011).

Moreover, the advance medical facilities and technology brings Hong Kong stand at
the top in Asia medical industry especially in the aspect of cancer treatment, heart
disease treatment and liver transplantation.

Hong Kong Adventist Hospital (HKAH) had equipped a frameless robotic
radiosurgery system “Cyberknife” as a tool for cancer treatment. This system that
HKAH own is the only system in the Asia Pacific which equipped with the function
of “X-Sign Lung”. The “X-Sign Lung” function is very effective in dealing lung
cancer. With the help of this system, HKAH had received several cancer patients who
come from Mainland China, Macau and even Australia (hkah.org.hk, 2011)

The medical technology and talents of are also score high rank within the industry
(Wenweipo 2007). The technique of liver transplantation in Hong Kong is playing a
leading role in the global. Mingpo (2005) pointed out that since 1994 Hong Kong had
already started using left living liver in transplantation surgery in order to solve the
problem of cadaveric liver shortage. In 2005, Hong Kong is the first place to start the
right living liver transplantation surgeries which bring a definition in transplantation
industry. Also, the medical crew of Queen Mary Hospital had finished the heart and
liver transplantation surgery simultaneously in August 2010 which shocks the whole
medical transplantation field in Hong Kong (Mingpo 2010).
Since Hong Kong is a multi-culture destination, most of the Hong Kong people are multi-lingual (like English and Mandarin). Tourist will not find communication difficulties or barrier when consuming services. An effective communication is important because it helps to built mutual trust between patients and service providers which can ensure the medical service in high quality level.

Although the medical experts in Hong Kong are all professional, however, with the great demand of medical services, there is a problem of manpower shortage occur in public hospital. Long working hours and no overtime paid cause the manpower leakage in every public hospital. This problem must go worst if the management board does not take any measures to resolve the problem and the interest of patients may be threaded in the end.

4.2 Price

One of the purposes that people cross beyond the border to seek for medical tour is due to the price. They want to have a lower price for medical treatments. And the neighboring countries like India use “low price” as their attractive point in providing medical service. To know whether Hong Kong has the advantage to become price
leader, it is better to compare the price of medical services with the neighboring countries. Table 2 shows the price of private hospital body check package of neighboring competitors:

Table 2 Price of body check package from different private hospital of neighboring competitors

<table>
<thead>
<tr>
<th>Country/City</th>
<th>Body check package price (on average)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hong Kong</td>
<td>USD$330</td>
</tr>
<tr>
<td>Taiwan</td>
<td>USD$500</td>
</tr>
<tr>
<td>Philippines</td>
<td>USD$480</td>
</tr>
<tr>
<td>Singapore</td>
<td>USD$479</td>
</tr>
<tr>
<td>Malaysia</td>
<td>USD$392</td>
</tr>
<tr>
<td>India</td>
<td>USD$90</td>
</tr>
<tr>
<td>Thailand</td>
<td>USD$500</td>
</tr>
</tbody>
</table>

Source: Reader’s Digest (March 2011 HK)

India is the price leader among all places. It is surprised that Hong Kong has offer a relative low price in body check package by comparing to other neighboring competitors, especially some which have advance medical services and facilities like
Singapore. Although spending USD$330 to enjoy world-class professional medical service and facility seems cheap. However, beside medical fee, medical tourist has to consider other cost like accommodation and transportation cost. Sometimes, accommodation and transportation cost may occupy large proportion of the total expense. In case of Hong Kong, even the body check package is relatively low compare with the neighboring countries; however, the prices of tourism amenities like hotel are high in comparing with the neighboring countries which may increase tourist’s spending. Let’s take a look on the hotel room price of different places:

Table 3 Grand Hyatt room rate (2 single bed room)

<table>
<thead>
<tr>
<th>Country/City</th>
<th>Room rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hong Kong</td>
<td>USD$500</td>
</tr>
<tr>
<td>Taiwan</td>
<td>USD$309</td>
</tr>
<tr>
<td>Philippines</td>
<td>USD$162</td>
</tr>
<tr>
<td>Singapore</td>
<td>USD$332</td>
</tr>
<tr>
<td>Malaysia</td>
<td>USD$109</td>
</tr>
<tr>
<td>India</td>
<td>USD$282</td>
</tr>
<tr>
<td>Thailand</td>
<td>USD$219</td>
</tr>
</tbody>
</table>

Source: Grand Hyatt official website (2011) - www.grandhyatt.com
By comparing room rate of Grand Hyatt, the table shows that the room rate of Hong Kong Grand Hyatt get the highest among the neighboring countries. Tourists who seek medical services in Hong Kong have to bare high accommodation fee. Hong Kong may on longer be their priority chose as the accommodation fee has occupied large proportion of their total expense.

4.3 Waiting Time

Lam (2007) mentioned that some tourists who come from more developed countries want receive medical service faster may consider seeking medical service across the boarder since they have to wait for a long period for the medical service in their home countries. In condition of Hong Kong, the requests of medical service are always suffered in short supply condition for both domestic and foreign needs. Shenzhen post (2011) point out that all pregnancy service appointment of private hospital has been fully booked to the end of the year. And according to the document of “Hospital Capacity in Respect of Antenatal Booking for Non-local Pregnant Women” from Hospital Authority, all booking of pregnancy service are nearly full. Also, Mingpao (2011) reported that there were “bed shortage” in both public hospital and private hospital during the breakthrough of influenza. All non-emergency services like
obstetrics and gynecology, orthopedics, surgical are suspended. These 2 reports show that the medical services in Hong Kong are always in big request by domestic in emergent medical service. Therefore, most of the medical tourists who plan to have treatment in Hong Kong usually need to wait more time. There medical tour planning may easily be changed due to special occasion like the breakthrough of influenza.

4.4 Spatial distance

Hong Kong is located at the centre of the Asia. Over half of the world population can be reached with 5-hour time of flying time from Hong Kong. Travel to Hong Kong is an easy task since most of the major cities have direct flight to Hong Kong. Base on the “Hong Kong: The Facts” from Civil Aviation Department, here are some 90 international airlines operating about 5 100 scheduled passenger and all-cargo flights each week between Hong Kong and some 150 destinations worldwide, including about 40 mainland cities. About 70 per cent of these flights are operated with widebodiedjets. There is also an average of approximately 300 non-scheduled passenger flights each week. It is convenience for visitor to visit Hong Kong, especially the Asian countries. Hong Kong Government continues to enhance Hong Kong’s accessibility. Nationals from some 170 countries can visit Hong Kong visa free for periods ranging from seven to 180 days.
Hong Kong is situated on the southeast coast of China at the mouth of the Pearl River facing the South China Sea. The northern part of Hong Kong is connected with Shenzhen. Most of the Mainland resident can travel to Hong Kong within 4-hour time by air transport or land transport (especially the resident of Guangdong). “Hong Kong: Facts” point out that after SARS, the “Individual Visit Scheme” (IVS) launched to allowed travelers from Mainland China to visit Hong Kong and Macau on an individual basis. This scheme allowing residents of designated cities to visit Hong Kong as free and independent travelers, introduced in July 2003. It has been gradually extended and now covers 49 Mainland cities, including all the 21 cities in Guangdong province, Shanghai, Beijing, Chongqing, Tianjin, Chengdu, Dalian, Shenyang, Jinan, Nanchang, Changsha, Nanning, Haikou, Guiyang, Kunming, Shijiazhuang, Zhengzhou, Changchun, Hefei, Wuhan and a total of nine cities in Fujian (Fuzhou, Xiamen, Quanzhou), Jiangsu (Nanjing, Suzhou, Wuxi) and Zhejiang (Hangzhou, Ningbo, Taizhou). It is believed that convince of IVS and free visa policy can attract more tourist visit Hong Kong.

4.5 Quality of tourism elements

Base on the Travel & Tourism Competitiveness Report 2011 from World Economic Forum, Hong Kong ranks 4th place in the area of “Travel & Tourism regulatory
framework, 13th place in the area of “Travel & Tourism business environment and infrastructure, 24th place in the area of “Travel & Tourism human, cultural and natural resources” by comparing 139 places. It shows Hong Kong do great job on in the aspect of regulation, tourism infrastructure & facilities.

✓ Regulation

The data above shows that Hong Kong had good tourism industry regulation system, nice tourism infrastructures and outstanding manpower in the industry. In the aspect of regulation, empowered by “The Consumer Council Ordinance”, Consumer Council is the only statutory body who receives and examines complaints and giving advice to consumers of goods and services and purchasers, mortgagors and lessees of immovable property. It offers a convenient service to consumers in making enquiries and lodging complaints, providing them with pre-shopping advice and help mediate disputes as they occur (Consumer.org.hk, 2010). This provides a very good channel for consumer to defense their interest once they experience unfair purchase. It is believed that the interest of medical tourist can be protected under the regulation of Consumer Council.

✓ Tourism infrastructure and facilities

In the aspect of tourism infrastructure, members of Hong Kong tourism industry
continuously put effort in enhance the tourism facilities to maintain Hong Kong competitive position by the support of Government. Base on “Hong Kong: The Facts”, the Ocean Park is implementing its redevelopment plans. Upon completion of this phased project by 2012, it will become a world-class marine themed park featuring more than 70 attractions. Hong Kong Disneyland, another popular theme park, will embark on its expansion plan which is expected to be completed in phases by 2014. Besides, theme parks, leveraging Hong Kong’s ecological richness and diversity, Hong Kong Government had started to development different kind of tourism families like The Hong Kong Wetland Park and Ngong Ping 360 to attract environment lovers. It is believed that the expansion of tourism facilities can fulfill the needs of medical tourists and their spouse after medical treatment.
Chapter 5 Conclusion

5.1 Strength

By summarizing all the findings from chapter 4, it is found that there are comparative advantages that make Hong Kong have potential to become medical tourism hub in Asia. Hong Kong has high quality of medical facilities and experts which give big confidence to medical tourist. High accessibility is also one of the attractive points in the eye of medical tourist as the flights of Hong Kong International Airport provide access to most of the flights from Asia key cities and are able to reach half population of the world. All medical service and tourism service provide can handle more than one foreign language (English and Mandarin) which ensure that there are no communication difficulties found in Hong Kong. Tourism elements in Hong Kong like hotels, theme parks have always provided high standard of service to tourist.

5.2 Limitation

However, after analyzing the framework of medical tourism development in Hong Kong, some limitations are found in Hong Kong medical system and tourism industry which may hinder the development of becoming medical tourism destination. They are manpower shortage, long waiting time and high cost.
5.2.1 Manpower shortage

Although the medical service of Hong Kong score high ranking, however, currently there are some voices said that public hospital may found difficulties in maintaining high quality of service due to the manpower shortage problem which hinder the development of medical tourism. As the demand of the medical service by medical tourism increase steady in past few years (especially the maternity service), more and more experience medical experts are hunted by private hospitals which cause manpower shortage in public hospital. To retain doctors, relieve workload and strengthen workforce, The Hospital Authority (HA) announces that a basket of measures to address the concern of frontline doctors workload and career development including recruit more part-time doctors, have special call arrangement for pregnant staff, provide more 24-hour phlebotomist services, reinforce the examination leave arrangement etc. It is believed that those measurements can retain the manpower in certain extent (Press Release of Information Services Department, 2011). To maintain high quality of service, the authority is forced to limit the registrations for plastic surgeons and cardiothoracic (heart, chest and lung) surgeons from overseas and handle the domestic cases as priority. The suspension of overseas patient’s medical service is not an effective way to maintain medical service quality in the long run as it wills hind the development of medical tourism (Press Release of
Nevertheless, the fundamental problem still not been solved due to the heavy demand of medical service by residents and non-residents. The most important thing to do is to increase the manpower in the medical field. Although the two universities (Hong Kong University and The Chinese University of Hong Kong) with medical faculties will also increase medical intakes in coming years, it takes six years to train a doctor (Lee, 2011). If the manpower shortage can not be solved in the long run, it must hinder the development of medical tourism in Hong Kong. And it is worthwhile to go further study on the solution of solving manpower shortage.

5.2.2 Long Waiting Time

Long waiting time is always being the problem in hindering the development of medical tourism. The medical services registration that obtains by foreign may suspended once the hospital do not have enough manpower or space to provide service. Fortunately, the situation mostly occur in public hospital but rare in private hospital. However, there is exceptional case. RTHK News (2011) point out that the service quota of maternity department provided by public and private hospital had already saturated. Hospital Authority is forced to decrease the maternity registration
quotas for non-residents which give medical tourism a shock.

To shorten the waiting time, the government had allotted 4 pieces of land for building new private hospital which can provide more than 1200 service quotas to public within 5-10 years. It is believed that this measure can relieve space pressure of public hospital and enlarge the market of medical tourism. That is good news for the medical industry if the manpower shortage problem can be solved in the long run. After new hospital established, large amount of manpower is needed. Sun Post (2010) reflected that there are only one education institute provide dispensers training courses which can not satisfy the future medical recruitment market. Government and medical industry have to ensure all supportive measurement can match the medical system.

5.2.3 High cost

Table 3 from chapter 4 shows that the room rate of Hong Kong is much expensive than its neighboring countries. Although the medical service like body check in Hong Kong may cheaper than other competitors, however, it doesn’t means tourist can save more by choosing Hong Kong as their destination. Other costs like accommodation cost, transportation cost are also included into the total expense. With the threat of the neighboring countries who have the price advantage (like India and Malaysia), Hong
Kong cannot be the priority destination of poor medical seekers.

5.3 Recommendation

This project has highlighted the opportunities and existing medical resources of Hong Kong in developing medical tourism. However, it is important to caution that the limitation of medical system (manpower shortage, long waiting time) and cost problem must hinder the further development of medical tourism industry. If Government and the whole industry (include medical and tourism) can not take the limitation into the account, it is afraid that Hong Kong will be substituted by its competitors in one day. To maintain Hong Kong comparative advantages in medical tourism industry in the long run, the following recommendation are made:

1. Beside Hong Kong University and The Chinese University of Hong Kong, the government should empower more education institute to start up medical courses to solve the manpower shortage in the long run. For the short term measurement, the government should consider to hire overseas surgeons to relieve the local surgeon’s workload. Besides, in these few years, many experience medical experts are hunted by private hospital because of its welfare policy which can receive better offer. The Hospital Authority should always review the welfare policy of public hospital medical expert and make
adjustment time to time to decrease manpower leakage.

2. The Government should ensure that the establishment of new hospitals should be started operate one by one as the medical industry manpower can not satisfy the needs of the 4 new hospitals.

3. It is unavoidable that medical tourist have to bear high accommodation cost if they chose Hong Kong as their destination. The medical industry should consider selling its product in the form of comprehensive package by cooperating with travel agents. The tourist can receive all they need (like air ticket, medical fee, accommodation fee) in a discount price by taking the package. This strategy can raise the interest of budget medical tourist in the short term. For the further development, the medical tourism in Hong Kong should target on some rich patients who come from less developed countries like China as high accommodation and medical fee will not affect them much. They are the group who willing to pay for better service quality.

4. Besides, maternity services, Hong Kong medical industry has provide outstanding service on the cancer treatment, heart disease treatment and liver transplantation. The government and the industry should put more effort on promoting services on these three professional criteria. This 3 professional criteria are belongs to high value product. It is believed that the whole medical
tourism industry can gain more benefit if these professional criteria being promoted properly.
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