



Turkish-American Chamber of Commerce
US Medical Tourism to Turkey
April 2009



Agenda

- WorldMed Assist overview
- Medical Travel now and in the future
- Current high volume destination countries
- Patient motivation
- Turkey as a destination



WorldMed Assist Overview

- Founded in 2006
- Cross functional team of experts in Healthcare, Process Reengineering/IT, Insurance, Marketing/Communications
- Ethics/morals
- Customer focused – a high touch, high quality experience
 - E.g. Case management provided by registered nurses
 - Triple digits # patients
 - Over 99% of respondents would use WMA again
 - Over 98% would recommend WMA to a close friend or relative
- Select network of high quality hospitals, audited in person
- First pure-play company to partner with US insurance company on national level: Re-Insurer Swiss Re



A Company with Experience, a Brand Name



WorldMed Assist and Turkey

- Personal ties with Turkey
- First WMA hospital signed up: Anadolu Medical Center





WMA's Vision of Medical Travel

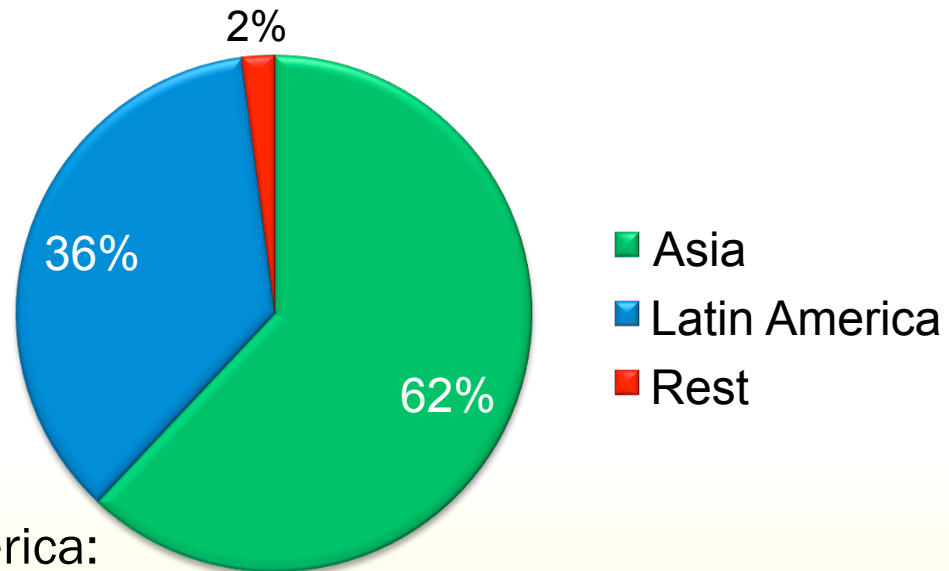
- Right now, uninsured individuals and uninsured procedures make up the medical tourism market
- As the medical travel market matures, we see a high-quality, low-cost, niche opportunity
 - Involvement of insurance companies
 - Involvement of self insured businesses





Current high volume destinations

- Destinations from North America:



Popular destinations in Asia:

- Thailand: Cosmetic, other
- India: Cardiac, Orthopedic, Spine, Transplant
- Malaysia: Cosmetic, Orthopedic

Popular destinations in Latin America:

- Mexico: Bariatric, Cosmetic, Dental, Orthopedic, Cardiac
- Costa Rica: Cosmetic, Dental, Bariatric, Orthopedic
- Brazil: Cosmetic
- Argentina: Cosmetic, Dental

Source: McKinsey: Medical Tourism 2008



Why do Americans go?

Cost Savings

- Up to 90% cost savings

Access to procedures difficult to find in US

- Hip resurfacing

Access to best doctors in their field, worldwide

- Super specialists, some UK or US board certified

High quality overall experience

- High staff/patient ratio
- Extended hospital stay
- Deluxe private rooms
- Comfortable recovery



The uninsured patient comparison process

1. What is the quality?
2. What is the cost?
3. Will I be safe as an American?
4. Will they speak my language?
5. How do I get there/hassle factor?
6. Are there any tourism opportunities?

| | Heart Bypass | | | Hysterectomy | | |
|---------------|--------------|--------|--------|--------------|--------|--------|
| | India | Mexico | Turkey | India | Mexico | Turkey |
| Quality | + | + | + | + | + | + |
| Costs | + | - | - | + | + | + |
| Image | + | - | - | + | - | - |
| Language | + | 0 | - | + | 0 | - |
| Hassle factor | - | + | 0 | - | + | 0 |
| Tourism | + | + | + | + | + | + |



Patient responses to Turkey

- Where is Turkey?
- Oh no, I won't go there. They don't like Americans there
- That's a fundamentalist country
- Will I be flying over Irak to get there?
- Why would I go all the way to Turkey when I can be in Mexico in 2 hours and pay less?





How to make Turkey more attractive

- Quality
 - Turkey is part of Europe, not the Middle East
 - Largest # JCI accredited hospitals in the world
 - Large number of European, regional patients
 - Many US trained surgeons
 - Partnerships with Johns Hopkins, Harvard Medical International
- Costs
 - Get government subsidies to reduce medical costs
 - Reduce travel costs
- Image
 - Turkey is part of Europe, not the Middle East
 - Turkey is a secular democracy
- Language
 - Train staff
- Hassle factor
 - On campus recovery
 - Continuum of care by involvement of US doctors in pre/post care
- Tourism
 - Turkey is the cradle of modern civilization



IT'S ABOUT PUBLIC RELATIONS
AND COSTS



Targets for consideration

- Uninsured/underinsured Americans
 - Viable if advice taken, but difficult
 - Emphasize super specialties/specialists
- Turkish-Americans
 - Not viable short term: Turkish Americans have insurance
 - Very viable long term: develop targeted insurance programs
- US self insured business and insurance companies
 - Very viable
 - Decision making process more rational and less focused on costs
 - Image still a problem: focus on international companies





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