

# USCIPP annual market update: 2016–2017



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The US Cooperative for International Patient Programs (USCIPP)—an organizational membership program of the National Center for Healthcare Leadership—is an association of 64 American academic medical centers, hospitals, and health systems that share a focus on providing care to international patients; cross-border education and training; joint international clinical research; the provision of management and consulting services to hospitals and governments abroad; and other forms of international collaborations in healthcare.

USCIPP conducts an annual survey of its members to evaluate the international patient and global healthcare collaborations markets. This annual survey collects information about provider services offered, financial metrics, operational metrics, volumes, and more. The results can be used by survey respondents to benchmark their program's operations against programs at peer institutions.

The 2016–2017 Annual Survey of International Patient Programs in the United States surveyed 59 hospitals and health systems with established international patient programs that were USCIPP members to collect information about their program structures, operational and financial performance, patient volumes, and geographic regions of home residence for patients traveling to the US for care.

It is important to note that while USCIPP's membership comprises most US hospitals with established international programs, it does not include all of them. Additionally, while the vast majority of USCIPP members complete the survey, not all organizations are able to report data for every question. Accordingly, the following figures should be considered as a lower bound for the actual size of the US market:

- Overall, nearly 61,000 unique patients were reported by 50 organizations
- Forty-four (44) organizations reported a total of 17,140 inpatient hospital discharges and 152,304 outpatient visits
- Pediatric patients represented 24% of inpatient hospital discharges and 30% of outpatient visits

Of the 59 hospitals that participated in the 2016–2017 survey, 54% of international programs or departments were established prior to 2011, and 14% were established prior to 2000. In addition to scheduling and coordinating appointments, international patient programs uniformly provided interpretation services; 86% provided travel facilitation, such as air and ground transportation and hotel bookings, and 68% provided translation services to international patients.

The most common payment sources for international patient care included, in no particular order, international commercial insurance coverage, foreign embassy and government sponsorship, and self-payment, with the three payment sources representing over 80% of total international patient charges in 2016–2017.

Overall, from July 2016–June 2017, 58 international programs reported employing 1,167 full-time equivalent (FTE) staff members. The median number of FTEs across all reporting programs was 12. Positions in international programs included roles such as:

- Clinical support staff, such as nurses, case managers, and social workers
- Non-clinical support staff, such as coordinators, schedulers, and patient referral liaisons
- Financial and account services staff
- Medical directors
- Interpreters
- Program directors
- Out-of-country business development representatives

In no particular order, the most common service lines for international patients were:

International adult inpatient care	International adult outpatient care	International pediatric inpatient care	International pediatric outpatient care
Cancer care	Cancer care	Cancer care	Cancer care
Cardiology	Cardiology	Cardiology	Cardiology
General surgery	Neurosciences	Digestive health	Neurosciences
Neurosciences	Orthopedics	General surgery	Orthopedics
Orthopedics	Primary care	Neurosciences	Radiology

In no particular order, the top five countries of home origin for international patients were:

Unique adult patients	Unique pediatric patients	Adult inpatient discharges	Pediatric inpatient discharges	Adult outpatient visits	Pediatric outpatient visits
Canada	Kuwait	Canada	China	Bermuda	Kuwait
China	Mexico	China	Kuwait	China	Mexico
Kuwait	Qatar	Dominican Republic	Qatar	Kuwait	Qatar
Mexico	Saudi Arabia	Kuwait	Saudi Arabia	Saudi Arabia	Saudi Arabia
Saudi Arabia	UAE	Saudi Arabia	UAE	UAE	UAE

Finally, nearly all organizations—93%—reported offering some kind of international collaboration or training beyond the provision of international patient care. In no particular order, the top five modes of international collaboration were:

- Fellowships for international clinicians or managers
- International advisory and/or consulting services
- International physician observerships
- Joint ventures with an organization abroad
- Short courses in the US