

IMPACT™ Report: Trust, Transformation & the Future of Global Medical Travel

*How patients, leaders, and buyers define
TRUST in cross-border healthcare*



Global healthcare is under strain – medical travel is becoming structural



Health systems face workforce shortages, capacity constraints, and rising chronic disease.



Patients increasingly look beyond borders for timely, specialized, and affordable care.



Cross-border care introduces new risks: safety, continuity, digital fragmentation.



Trust is now the central determinant of success in medical travel.





Structural pressures are reshaping how care is delivered globally



- Projected global shortfall of 10–11 million healthcare workers by 2030 (WHO)
- Capacity and wait-time challenges in both high- and low-income countries
- Rising chronic disease and aging populations increase complexity
- Digital transformation is no longer optional



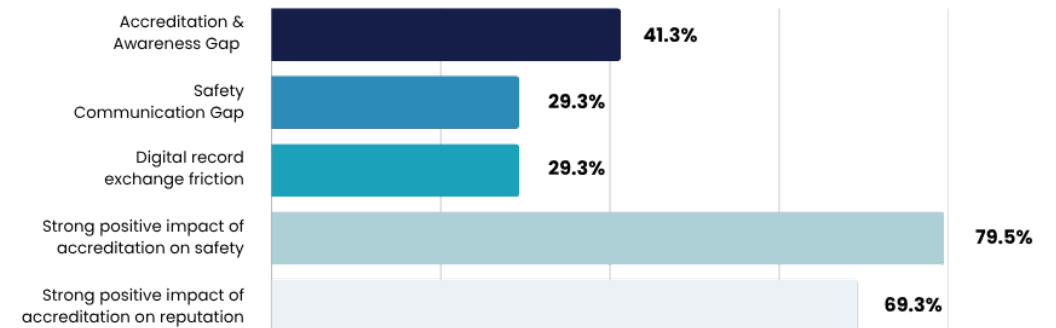


Trust gaps — not demand — are limiting growth

- Accreditation impact is strong — but visibility remains a major gap
- Safety communication breakdowns undermine otherwise strong clinical performance
- Digital fragmentation weakens continuity across borders
- Where accreditation is visible, safety confidence and reputation are significantly stronger



Roadmap with Data Callouts



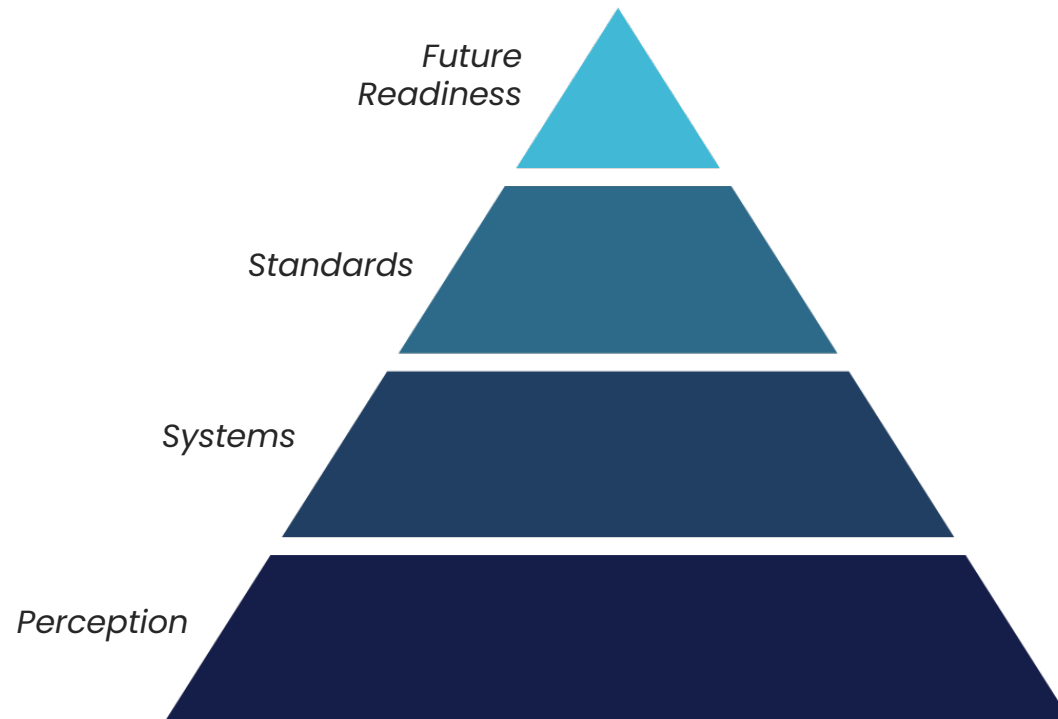
Source: ©GHA IMPACT Report, 2026

Key Takeaway:

Closing the accreditation awareness and trust gaps is the fastest path to strengthening patient confidence and accelerating medical-travel growth.



x+ The IMPACT Study goes beyond satisfaction — it measures Trust infrastructure



• • • • •

- Captures trust drivers, not just patient satisfaction
- Integrates patients, healthcare leaders, and buyers/referrers in one framework
- Links perception to accreditation, safety, digital readiness, and aftercare
- Designed to align with global healthcare delivery trends, not just medical travel marketing
- Creates a foundation for benchmarking, standards evolution, and policy dialogue



Medical travel is evolving as a system solution

- Patients seek reliability, safety, and continuity, not just price sensitivity
- Providers must manage care before, during, and after travel
- Reputation and risk now matter as much as clinical outcomes
- Accreditation becomes strategic infrastructure, not merely a badge of honor



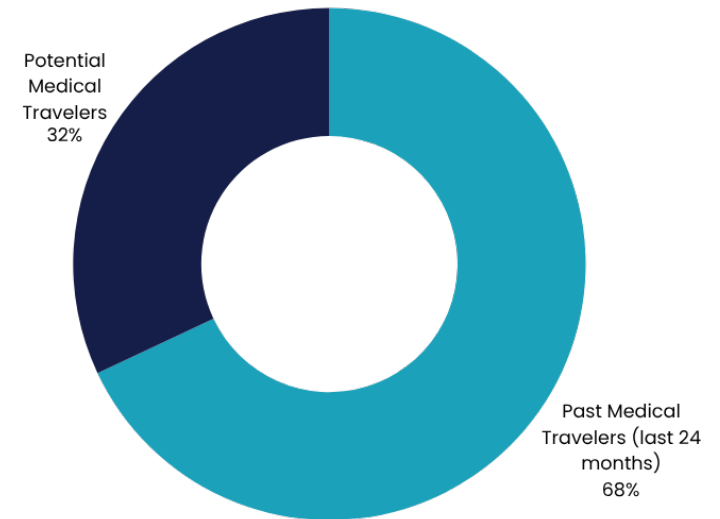


The majority of respondents represent future demand

- **32%** are past medical travelers (last 24 months)
- **68%** are potential medical travelers
- Insights reflect forward-looking demand, not retrospective satisfaction
- Trust and risk signals are predictive of future growth



Patient Experience Mix



Source: ©GHA IMPACT Report, 2026

Why This Matters

The majority of respondents are future demand, not hindsight — this makes trust and risk signals more predictive.



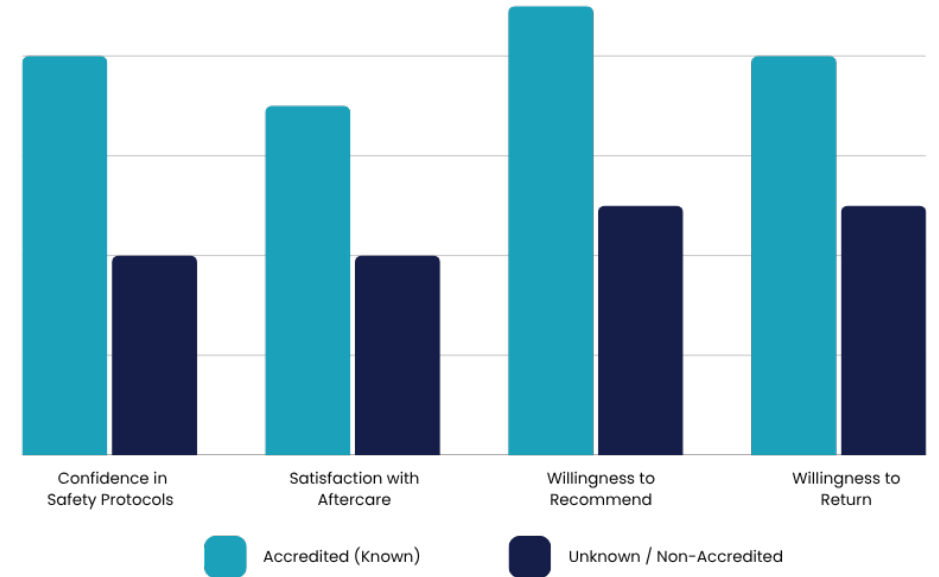


Accreditation visibility directly increases trust and satisfaction

- Patients who knew their facility was accredited reported higher confidence in safety protocols
- Satisfaction with aftercare is higher when accreditation is known
- Willingness to recommend and return is stronger among those aware of accreditation
- Visibility amplifies accreditation's impact on patient experience



Patient Experience by Accreditation Awareness

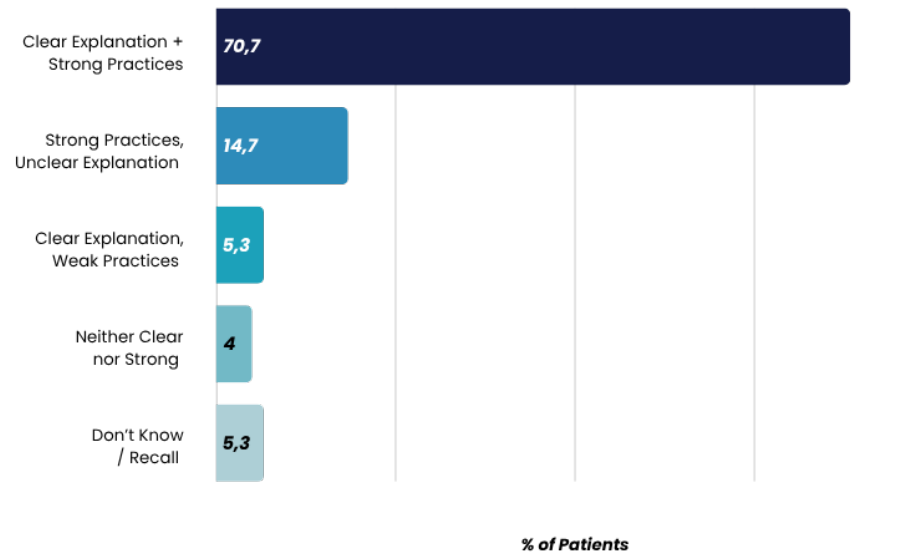


Source: @GHA IMPACT Report, 2026

Key Takeaway:

Knowing a facility is accredited materially improves **trust, loyalty, and referral potential.**

Clarity of Safety Protocols (Past Travelers)



Source: ©GHA IMPACT Report, 2026

Key Takeaway:

Nearly **3 in 10 patients** experienced unclear or inadequate safety communication

Medical travel implication:

Safety failures are often **communication failures**, not clinical ones.

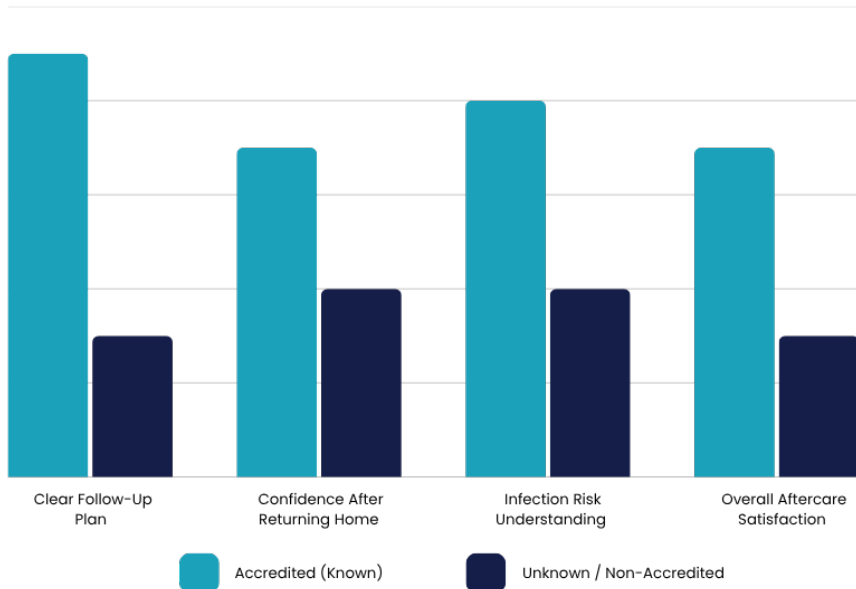
Safety is experienced through communication – not policy alone

- **71 %** - experienced both clear explanations and strong safety practices
- **30 %** - Did not experience both clear explanation and strong safety practices
- Nearly 3 in 10 patients experienced unclear or inadequate safety communication
- Communication failures can erode trust even when care is clinically sound





Aftercare Satisfaction by Accreditation Status



Source: ©GHA IMPACT Report, 2026

Key Takeaway:

Aftercare is where **trust is won or lost** in cross-border care.

Why it matters:

Most medical-travel complications occur **after** the patient returns home.



Aftercare is the most decisive factor in perceived safety

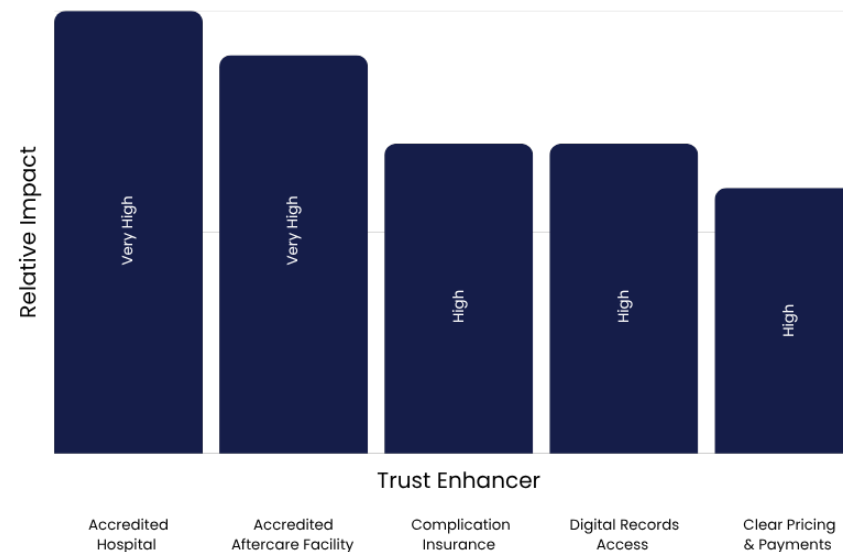
- Accredited facilities outperform in aftercare clarity and follow-up communication
- Patients who know a facility is accredited report higher confidence after returning home
- Clear follow-up instructions and infection-risk understanding are stronger in accredited settings
- Aftercare quality influences overall satisfaction and willingness to recommend

First-time medical travelers prioritize risk reduction

- Hospital accreditation has a very high impact on willingness to travel
- Accredited aftercare facilities significantly increase confidence
- Complication insurance strengthens perceived safety
- Digital records access and clear pricing & payments are important trust enhancers



What Would Increase Willingness to Travel (Potential Travelers)



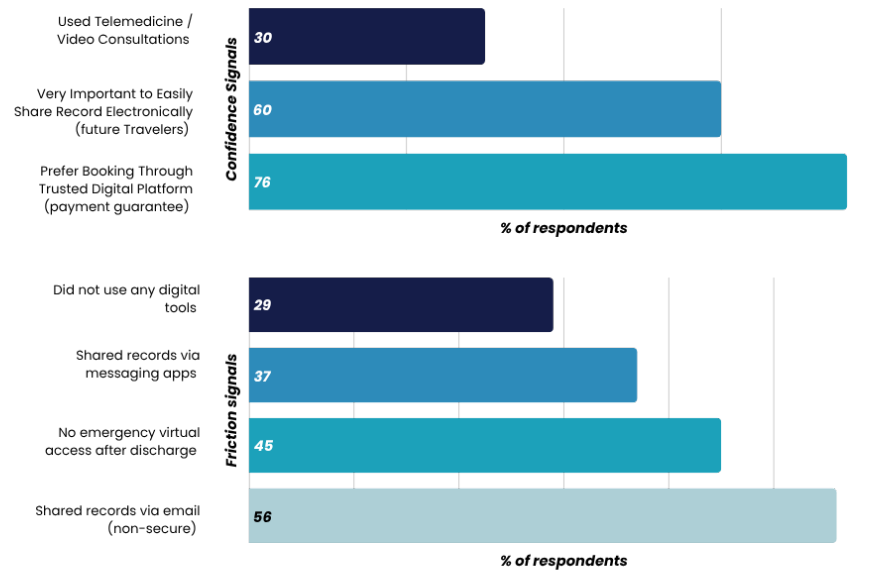
Source: ©GHA IMPACT Report, 2026

Key Takeaway:

First-time medical travelers are risk-focused, not price-focused.



Clarity of Safety Protocols (Past Travelers)



Source: ©GHA IMPACT Report, 2026

Key Takeaway:

Digital increases trust and confidence — but record-sharing and follow-up gaps weaken continuity.

Medical travel implication:

Digital maturity is now a trust differentiator, not just an operational feature.

Digital tools build confidence — but continuity gaps remain

- **33 %** used telemedicine or video consultations
- **60 %** of future travelers say easy electronic record sharing is very important
- **76%** prefer booking through a trusted digital platform (payment guarantee)
- **29 %** of past travelers used no digital tools
- Medical records are primarily shared via email (**56 %**) and. Messaging apps (**37 %**)
- **45%** report no emergency virtual access after discharge



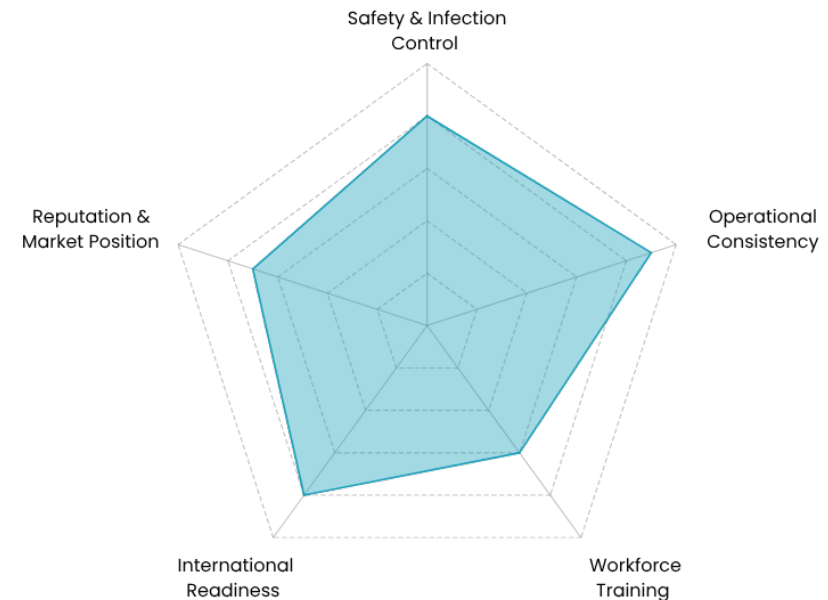
Digital tools are driving trust — but fragmentation in data sharing and follow-up remains a critical barrier to seamless care.

Leaders see accreditation as a performance enabler across safety, operations, and global readiness.

- Stronger safety and infection control practices (*High impact*)
- More consistent operations across departments (*High impact*)
- Improved readiness for international patients (*High impact*)
- Supports workforce training and accountability (*Moderate–High impact*)
- Enhances reputation and market position (*High impact*)



Leader-Reported Impact of Accreditation

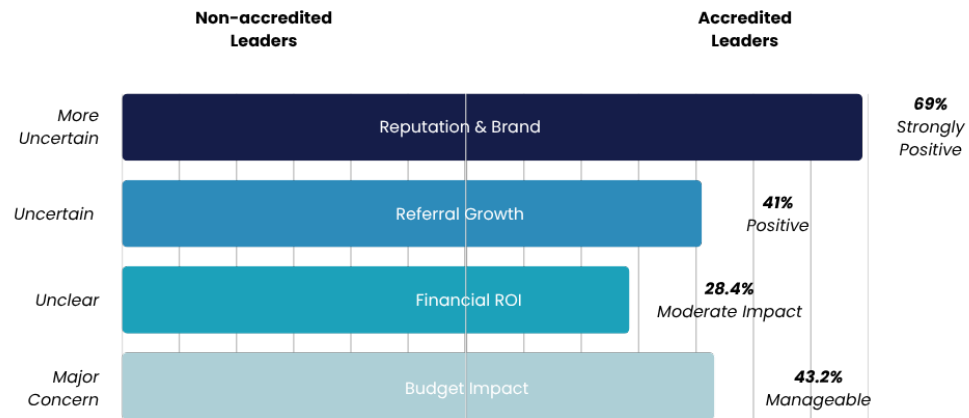


Source: ©GHA IMPACT Report, 2026

Key Takeaway:

Leaders see accreditation as a system-wide performance lever, not compliance.

Leader-Reported Impact of Accreditation



Source: ©GHA IMPACT Report, 2026

Key Takeaway:

The ROI debate is not about whether value exists — it's about **how it's measured and communicated.**

Accreditation drives measurable revenue confidence — especially in brand and referrals.

What the data shows

- Leaders at accredited organizations report:
- 69% strongly positive impact on reputation & brand
- 41% positive referral growth
- 28% financial ROI
- 43% manageable budget impact
- 43% manageable budget impact
- Non-accredited leaders are significantly more uncertain across all ROI dimensions.

Revenue Implication

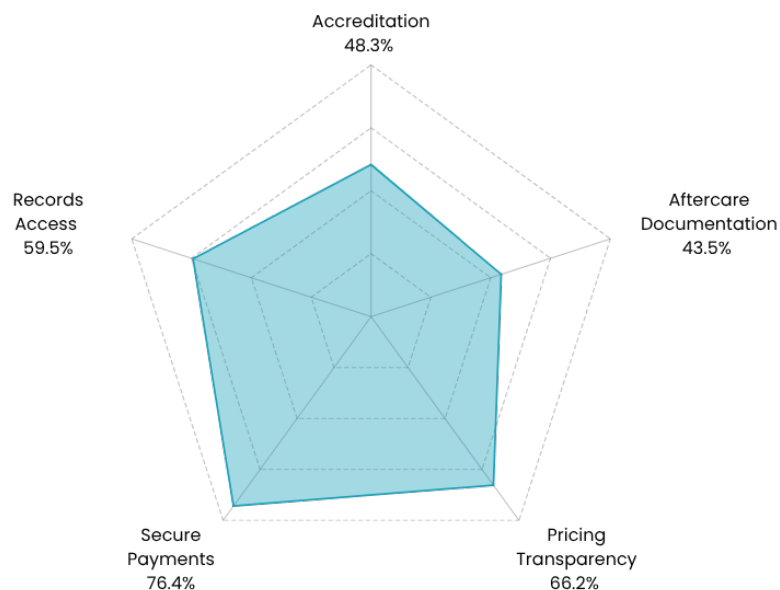
- Brand impact is the strongest and clearest ROI signal (69%).
- Referral growth follows brand confidence (41%).
- Financial ROI is moderate but tangible.
- Budget impact is manageable for nearly half — contradicting “cost burden” assumptions.

IMPACT Tie

Closing accreditation visibility and measurement gaps unlocks immediate top-of-funnel revenue and referral lift.



Leader-Reported Impact of Accreditation



Source: ©GHA IMPACT Report, 2026

Key Takeaway:

Buyers evaluate risk across multiple factors — **accreditation is a primary trust signal that strengthens every other decision filter.**

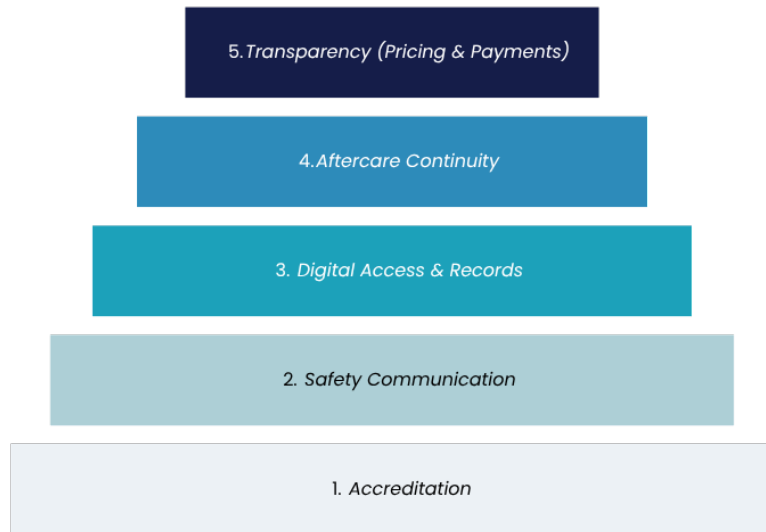
Accreditation is a core risk-management tool

- Used as referral filter and liability safeguard
- Buyers prioritize multiple trust signals — all rated high importance:
- Priorities:
 - Secure payments
 - Transparent pricing
 - Reliable record access
 - Accreditation status
 - Aftercare documentation





What Drives Trust Across Stakeholders



Source: ©GHA IMPACT Report, 2026

Key Takeaway:

Trust is **architected**, not assumed.

A shared language of trust is emerging. Trust is built in layers across the patient journey

- Accreditation anchors trust across all stakeholders
- Safety communication reinforces confidence in care
- Digital access and record transparency reduce friction
- Aftercare continuity sustains loyalty and referrals
- Pricing and payment transparency complete the trust equation

From survey to global benchmark

- Connects trust to system design
- Aligns patients, leaders, and buyers
- Informs standards, accreditation, and policy
- Positions GHA as global authority on medical travel trust

• • • • •



Medical travel is defined by trust — not borders

- Accreditation, communication, digital maturity, and aftercare define success
- Organizations investing now will shape the next decade of global care



GLOBAL HEALTHCARE
ACCREDITATION®

www.globalhealthcareaccreditation.com

