



**CITY HALL OF
SÃO PAULO**



HEALTH TOURISM

**A comprehensive
study conducted
by São Paulo
Negócios.**

November/2025

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1. Introduction

The city of São Paulo is consolidating itself as a vibrant ecosystem of innovation, business and opportunities. With a robust network of entrepreneurs, investors, funding institutions, research centers and a highly qualified workforce, the municipality stands out as one of the leading economic and technological hubs in Latin America.

In this context, São Paulo Negócios acts as a strategic bridge between the public sector and private enterprise, fostering the ideal environment for the development of new businesses, the attraction of investors and the internationalization of companies.

This report emerges as one of these structural initiatives with the purpose of positioning São Paulo as a benchmark in innovation, technology and business generation. The initiative generated from this report seeks to better describe Health Tourism, which proves to be a strategic segment of São Paulo's economy. In 2024 alone, it is estimated that more than 4.2 million people visited the city seeking medical treatment, with a financial volume exceeding R\$ 49.7 billion.

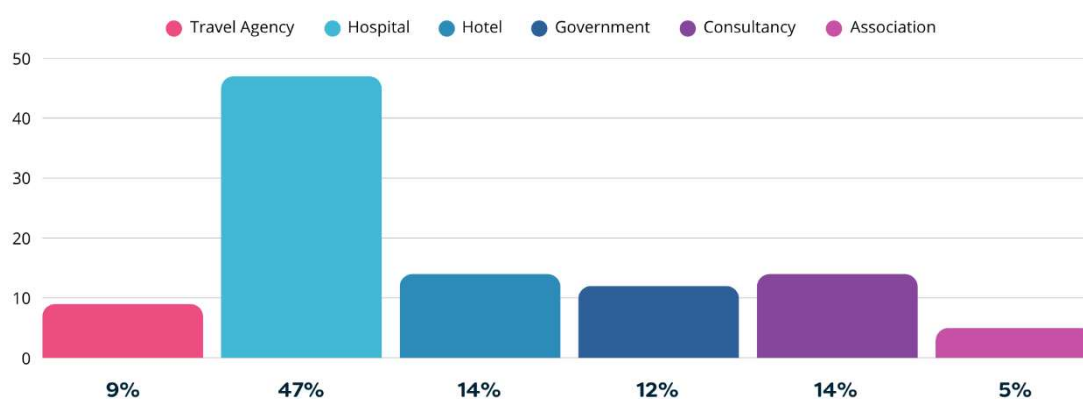
It should be emphasized that this material describes the sector in terms of its dynamics aimed at attracting patients and investments to the private sector, distinguishing itself from occasional or emergency care provided during other forms of visits to the city. In this way, the work reinforces São Paulo's positioning as a national and international reference center in high-complexity medicine and health innovation.

Despite the growth expectations and the advances in this type of tourism, the health tourism market in Brazil faces challenges related to data measurement and availability, especially at the municipal level. The last official data from the Ministry of Tourism on health tourism is contained in a 2010 report.

In this context, São Paulo Negócios, through this initiative, carried out a study with companies in the Health Tourism universe to map challenges, identify opportunities and develop strategies for the sector's growth in the city of São Paulo.

A total of 44 representatives from healthcare institutions, travel agencies, hotels, health insurance providers and government bodies of the São Paulo capital took part. Of these, 47% represent hospitals or healthcare companies, followed by hotels and consultancies, accounting for 14% each.

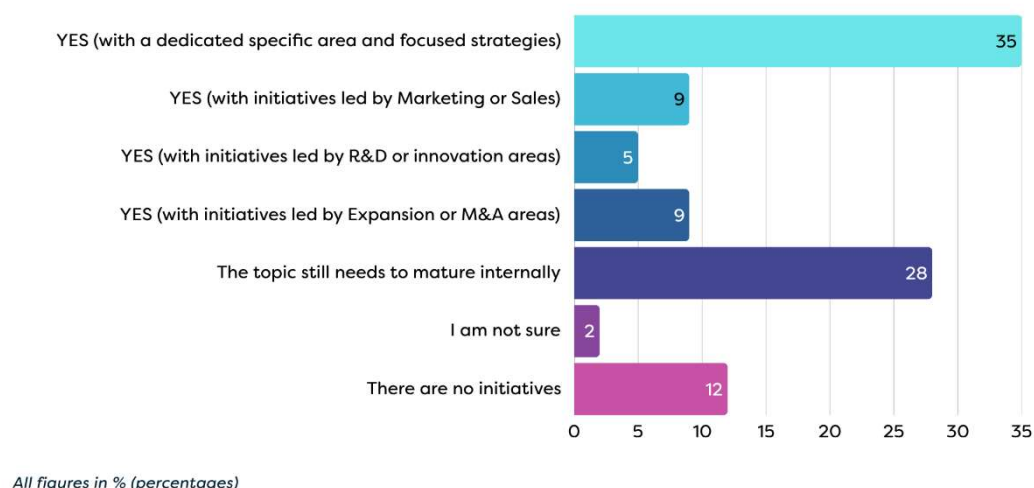
Figure 1 – Types of Participating Companies



Source: Own Elaboration

Among the study participants, 35% indicated that their company has a specific area dedicated to Health Tourism with focused strategies. Another 23% responded that their companies have some type of Health Tourism initiative. These figures show that a large part of the audience participating in the study already has some experience in Health Tourism. On the other hand, 28% indicated that the Health Tourism topic still needs to mature internally.

Figure 2 – Does the Company Have Any Initiatives, Projects or Strategies Focused on This Segment?



Source: Own Elaboration

Regarding the participating hospitals, 60% of respondents indicated that there is some initiative related to the Health Tourism segment, with 40% stating that they have a specific area and focused strategies. However, 30% responded that the topic still needs to mature internally.

Of the participating hotels, 50% indicated that they have some type of initiative geared towards Health Tourism. However, 17% indicated that there is no initiative related to the segment, and another 33% indicated that the topic needs to mature.

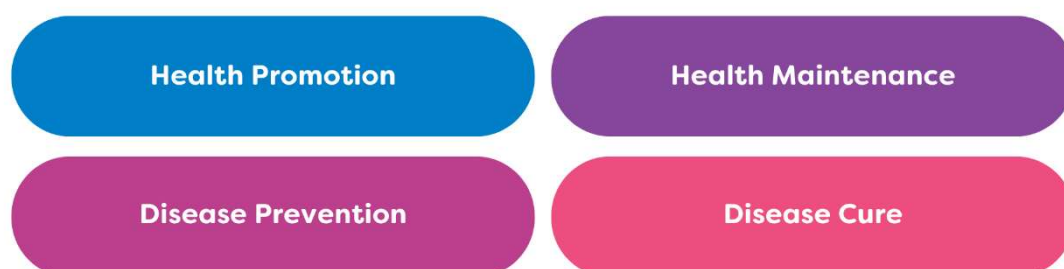
All travel agencies indicated having initiatives directed at the sector. Of the consultancy representatives, 67% indicated that there is some strategy for Health Tourism. About 50% of the associations responded that there is no initiative related to the segment.

Finally, 60% of the public sector representatives present indicated that the Health Tourism topic needs to mature internally. Another 20% indicated that there are no initiatives for the segment. Only 20% answered that there is some kind of initiative led by the R&D area.

2. Health Tourism

Health Tourism comprises all tourist activities associated with the search for hospitals, clinics, doctor's offices and specialized centers for medical, therapeutic and aesthetic purposes. It is a sector undergoing global expansion that combines high-complexity healthcare infrastructure with the tourist appeal and hospitality of destinations that stand out for their quality of care and competitive costs.

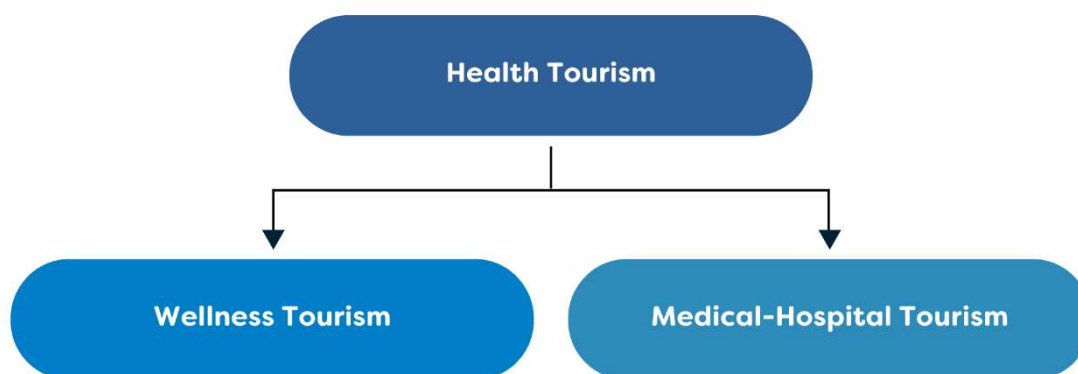
Figure 3 – Health Tourism Motivations



Source: Author's Elaboration

According to Brazil (2010), health tourism can be organized into two modalities, which, for public policy purposes, must be analyzed separately.

Figure 4 – Types of Health Tourism



Source: Own Elaboration

2.1 Wellness Tourism

Wellness tourism involves tourist activities motivated by the search for procedures focused on the promotion and maintenance of health, prevention and well-being. This type of tourism is generally linked to thermal baths, spas, resorts and wellness centers.

2.2 Medical-Hospital Tourism

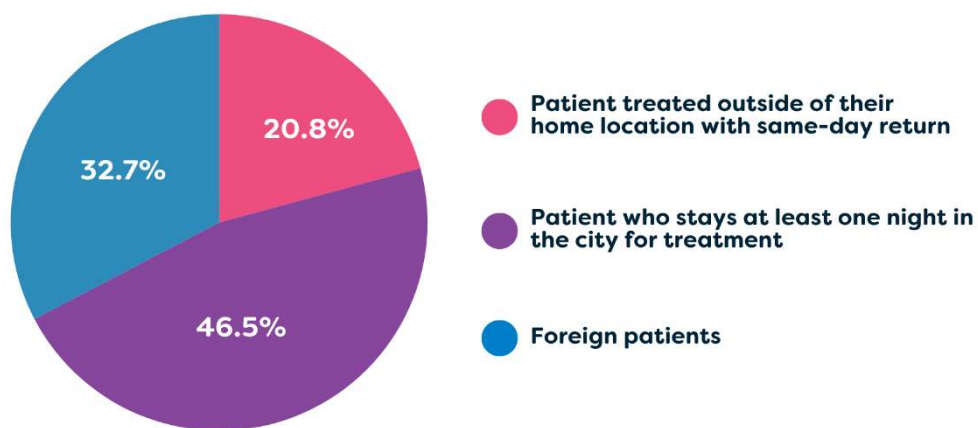
Medical-hospital tourism takes place motivated by the performance of treatments and examinations accompanied by specialized professionals (BRASIL, 2010). The aim of these tourists is to seek the cure or alleviation of effects caused by different pathologies.

Medical-hospital tourist activities encompass medical, dental, surgical and non-surgical procedures and treatments that take place in hospitals, doctor's offices, aesthetic clinics and dental clinics.

2.3 Health Tourist

Given the definition of health tourism, the study participants answered what they understood as a health tourist. For 47% of respondents, a health tourist is considered to be the patient who stays at least one night in the city of treatment. However, 33% consider that only foreigners can be designated as health tourists.

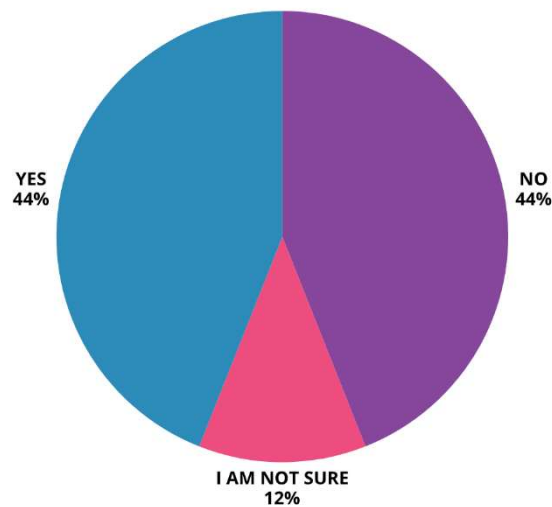
Figure 5 – What Do You Consider a Health Tourist?



Source: Own Elaboration

However, the results also indicated that 56% of respondents do not track or are unsure about tracking data on health tourists.

Figure 6 – Does the Company Track Any Data on Health-Tourist Clients?



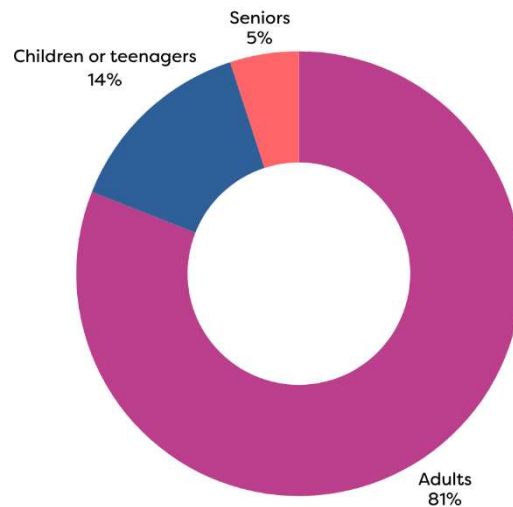
Source: Own Elaboration

About 40% of hospitals track data on health tourists. However, 45% of them indicated that they do not perform any type of monitoring. 67% of consultancies and 100% of associations do not track any data on health tourists.

On the other hand, most travel agencies (75%), government (60%) and hotels (50%) indicated that they track data on health tourists.

Even so, it was possible to obtain some characteristics about health tourists. About 81% of respondents indicated that most traveling patients are adults and the smallest share, 5%, are elderly.

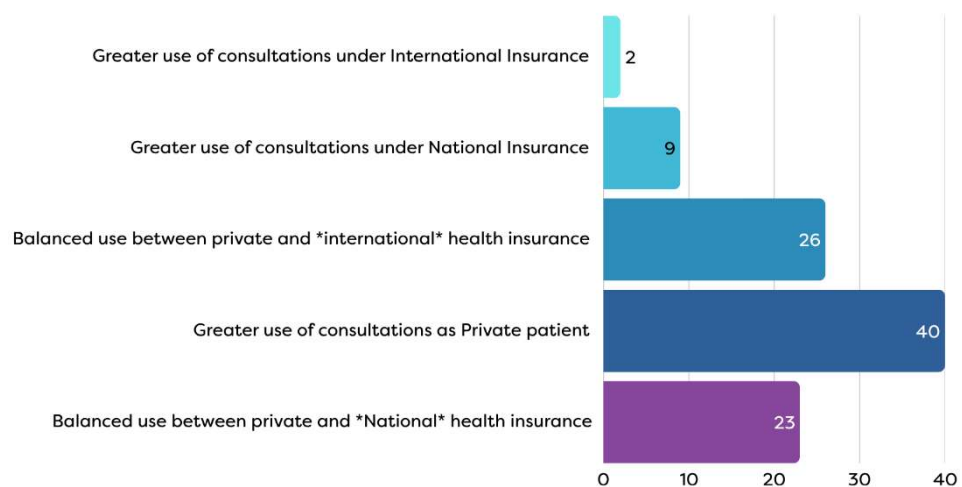
Figure 7 – Traveling Patients are Mostly



Source: Own Elaboration

According to 40% of the study participants, most traveling patients are seen as private patients, without any link to health insurance plans. However, 49% indicate that consultations of traveling patients are balanced between private and insurance-covered (national or international) appointments.

Figure 8 – Regarding Traveling Patients, It Is Observed That Most Use

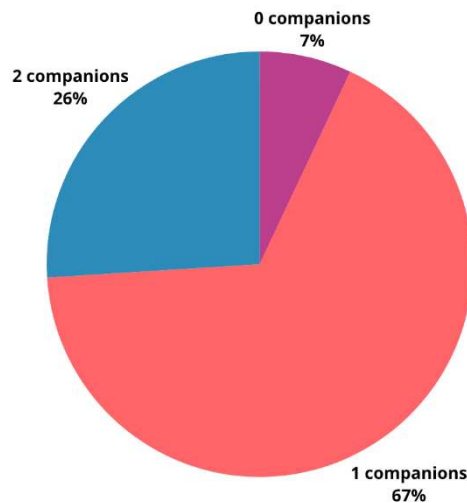


All figures % (percentages)

Source: Own Elaboration

Approximately 67% of respondents indicated that these health tourists are accompanied by only one person.

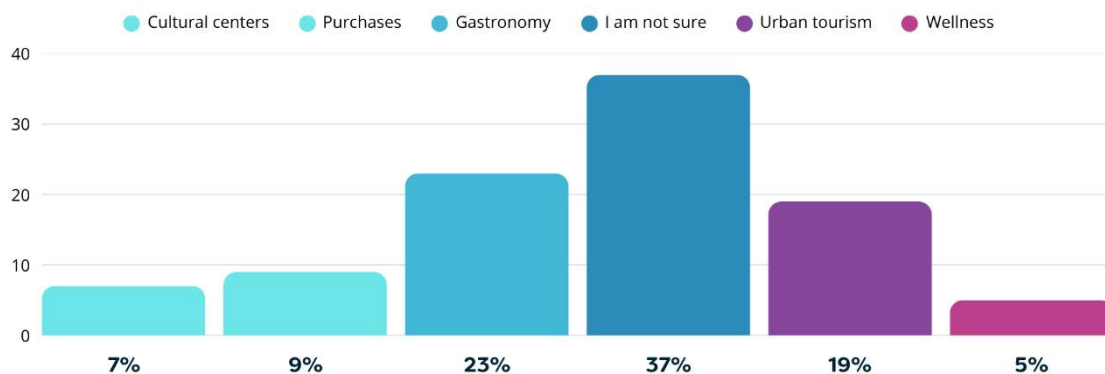
Figure 9 – How Many Companions Usually Come With the Traveling Patient?



Source: Own Elaboration

However, the vast majority is unsure about the activities sought by these companions. Of those who responded, gastronomy is reported as the most sought-after activity, at 23%.

Figure 10 – What Are The Activities Most Sought By Patients' Companions During The Treatment Period?



Source: Own Elaboration

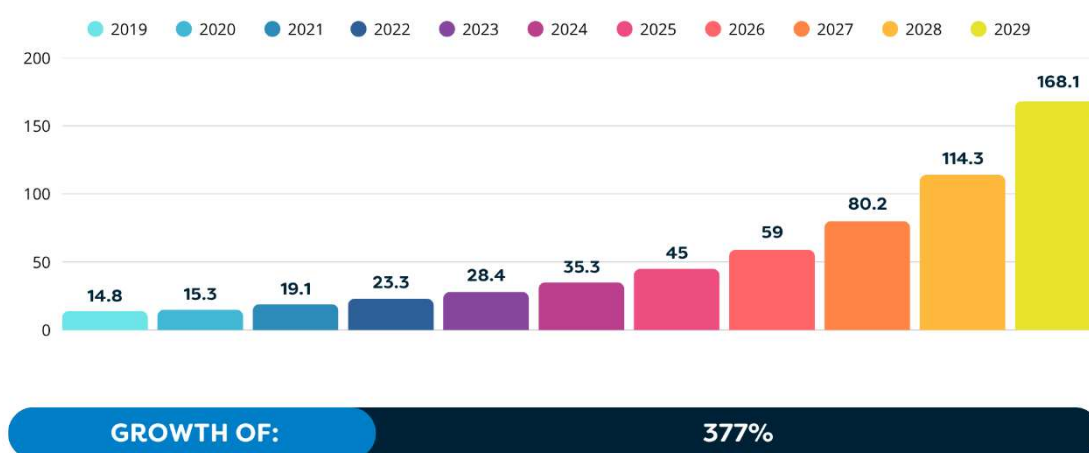
3. Global Health Tourism Landscape

The health tourism market has been expanding strongly in recent years. However, there is little data and information on the economic and financial movement of the sector worldwide. One of the few studies that exist is from Technavio Consultancy (2024), which calculated the revenue obtained by hotels, resorts and cruises from health tourism.

This study did not take into account the revenue of the private healthcare segment and the gains for the economy as a whole. But the results show that, in 2019, health tourism generated US\$ 14.8 billion for hotels, resorts and cruises, reaching US\$ 35.3 billion in 2024, which represents an expansion of 138.5% over the period.

Since the Technavio study does not consider the revenue obtained by private healthcare companies and other sectors from health tourism, the sector's overall movement may be much larger.

Figure 11 – Estimated Revenue of Hotels, Resorts and Cruises from Health Tourism Worldwide 2019-2029 (US\$ billions)



Note: Values 2025–2029 are revenue estimates by Technavio (2024).

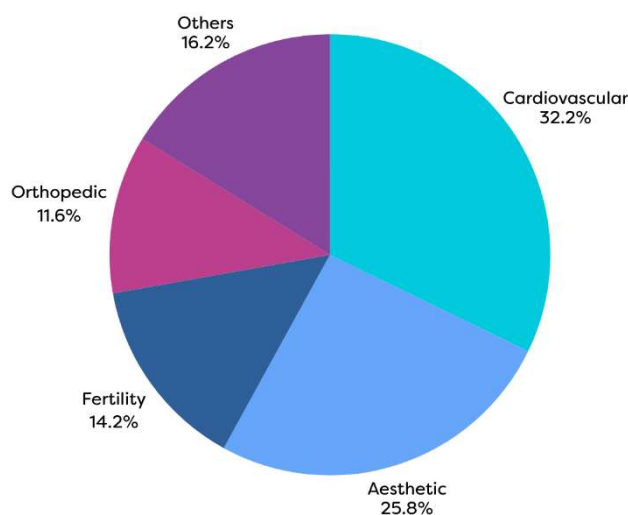
Source: Own Elaboration based on Technavio (2024) data.

Between 2024 and 2029, growth in the sector is expected to be even more significant. Over the period, the expansion is expected to be around 377%, with an average of 75% growth per year.

Among the main procedures performed by health tourists worldwide, as identified by Technavio (2024):

- cardiovascular treatments;
- aesthetic procedures;
- fertility;
- orthopedic;
- others¹.

Figure 12 – Share of the Most Sought-After Medical Treatments by Tourists Worldwide (2024)



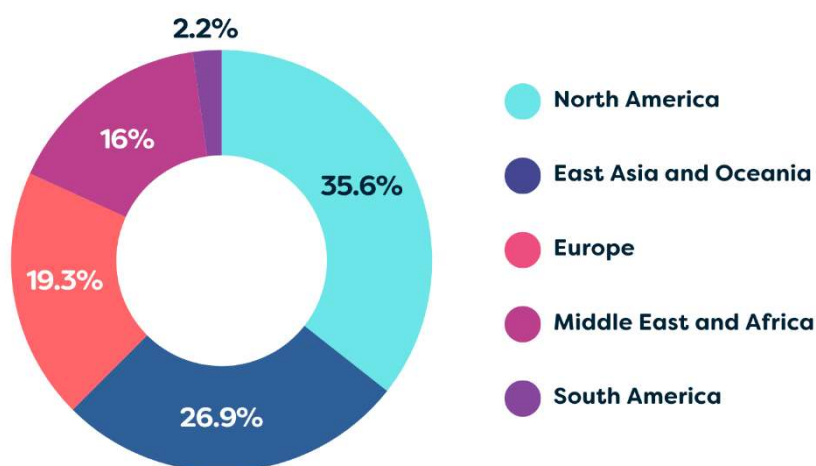
Source: Own Elaboration based on Technavio (2024) data.

The health tourism market is concentrated in North America, East Asia and Oceania, accounting for 62.5% of all movement expected in hotels, resorts and cruises in 2025.

¹ Dental, oncology, ophthalmology, neurological surgery, organ transplants and bone marrow.

On the other hand, South America is the region with the smallest share of this market, representing only 2.2% of the revenue obtained by hotel, resort and cruise companies.

Figure 13 – Share of Global Regions in Health Tourism (2024)



Source: Own Elaboration based on Technavio (2024) data.

The main treatments sought by tourists in South America are:

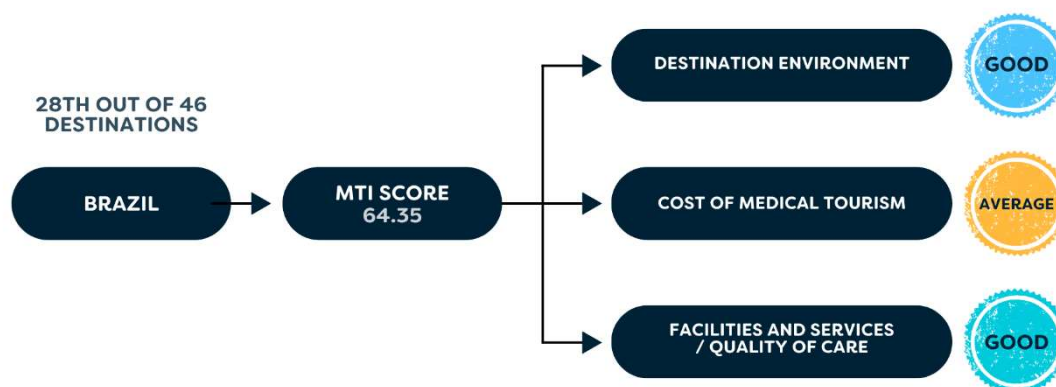
- Oncology treatments;
- Cardiovascular treatments;
- Bariatric surgeries;
- Orthopedic treatments;
- Aesthetic surgeries;
- Ophthalmology treatments;
- Dental treatments.

4. Health Tourism Landscape in Brazil

Brazil ranks 6th among the best-rated countries in the Americas for medical tourism, behind only Canada, Costa Rica, the Dominican Republic,

Argentina and Colombia, according to the Medical Tourism Index (MTI)² for 2021.

Figure 14 – Brazil’s MTI Ranking and Evaluation Criteria (2021)



Source: Own Elaboration based on MTI (2021) data.

Main advantages of Brazil compared to other countries:

- The country has highly qualified professionals;
- Existence of several state-of-the-art hospitals and clinics offering excellent care to Brazilians and foreigners;
- Easy and speed of medical care;
- Healthcare costs in the country are considered low by tourists from regions such as the USA, Canada and Europe.

² The Medical Tourism Association is a non-profit trade association that has been active in the global medical tourism industry for over 17 years and is dedicated to curating and disseminating the most reliable and comprehensive information for individual consumers, healthcare professionals, and leading organizations worldwide.

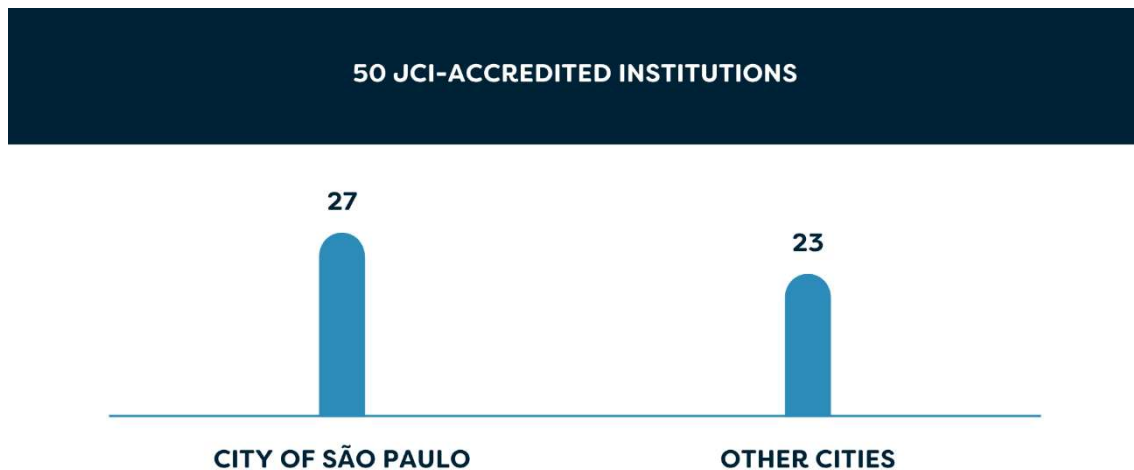
22 Brazilian hospitals

are on the list of the world's best in 2026, with
17 of these located in the city of São Paulo

Source: Newsweek, 2025.

Brazil is the Latin American country with the largest number of hospitals accredited with the Joint Commission International (JCI) certification.

Figure 15 – Number of Institutions with JCI Certification in Brazil



Source: Own Elaboration based on JCI (2025) data.

Added to this is the lower cost of procedures, which is sometimes five or six times cheaper than in the United States.

Figure 16 – Magnitude of Healthcare Procedure Costs in Brazil Compared to the United States



Source: Own Elaboration.

In addition, Brazil offers certain innovative procedures and techniques that are difficult to find elsewhere, especially in the areas of gender-reassignment, reproduction and women's health. The combination of these factors can contribute to the growth of the medical tourism industry in the country. Among the procedures most sought by foreign patients in Brazil are (Global Health Intelligence, 2025):

- aesthetic surgeries,
- dental treatments,
- bariatric surgeries.

About 480,000 aesthetic procedures performed in Brazil are carried out on patients from other countries, according to the International Society of Aesthetic Plastic Surgery (ISAPS).

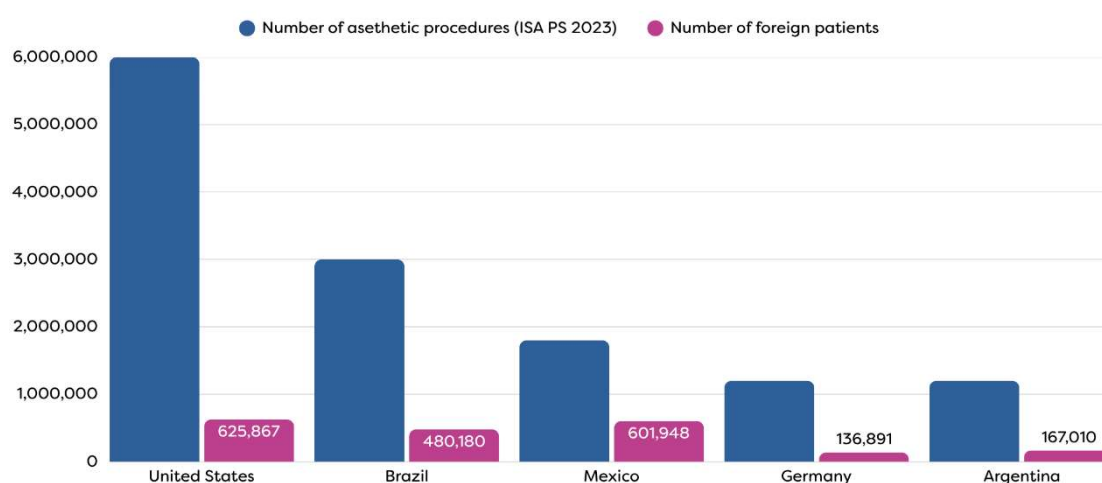
Table 1 – Countries that perform aesthetic procedures (2023)

Country	Number of aesthetic procedures (ISAPS 2023)	Number of foreign patients	Percentage of foreign patients	Main patient origin countries
United States	6,196,701	625,867	10%	Canada; United Kingdom; Brazil
Brazil	3,381,551	480,180	14%	Argentina; United States; France
Mexico	1,714,952	601,948	35%	United States; Canada; Spain
Germany	1,244,466	136,891	11%	Netherlands; Switzerland; United States
Argentina	1,210,216	167,010	14%	Brazil; United States; Paraguay

Source: Own Elaboration based on ISAPS (2023) data.

It is estimated that, in 2019, Brazil received around 250,000 patients from other countries, being a popular medical tourism destination for patients from South America, Portuguese-speaking African countries and Brazilians living abroad.

Figure 17 – Number of Aesthetic Procedures and Patients by Country (2023)

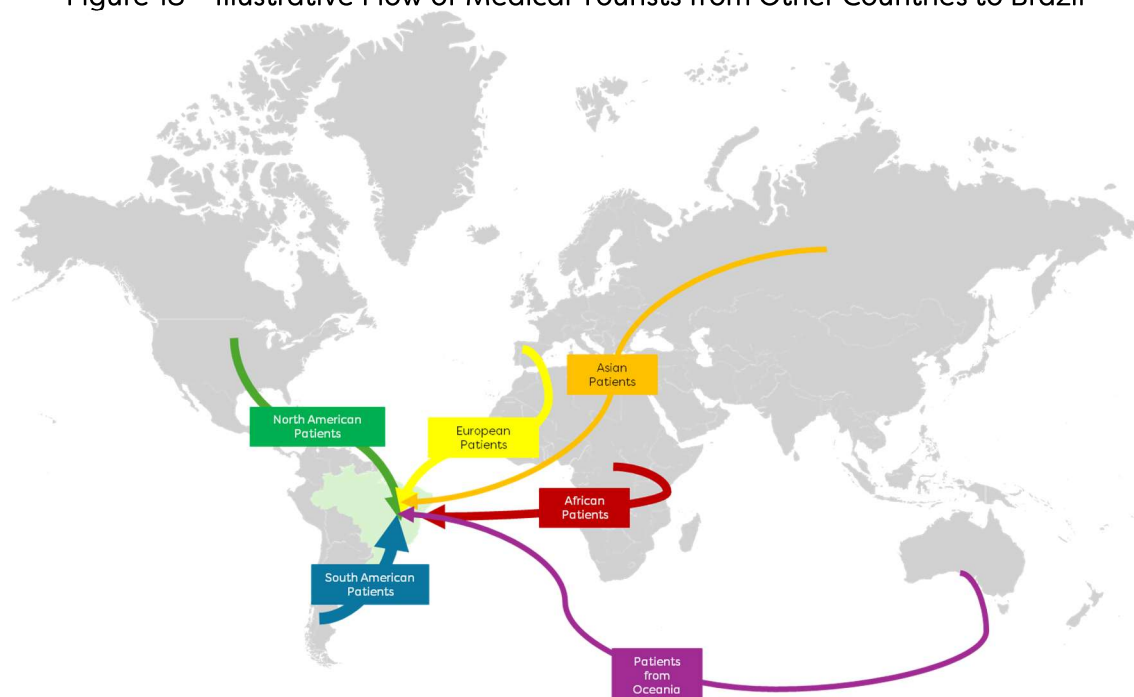


Source: Own Elaboration based on ISAPS (2023) data.

Even patients from countries with a good public healthcare system, such as England and Canada, seek treatment in Brazil because of the ease and

speed of care. These patients stay, on average, 22 days in the country and spend between US\$ 3,000 and US\$ 15,000.

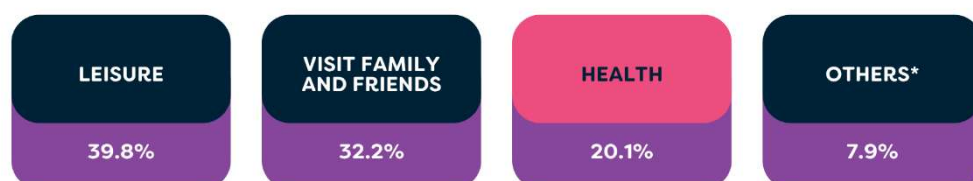
Figure 18 – Illustrative Flow of Medical Tourists from Other Countries to Brazil



Source: Own Elaboration.

Among domestic tourists, data from the Continuous National Household Sample Survey (PNAD Contínua) indicate that health tourism is the third reason for travel among Brazilian families. About 20.1% had health as the main motivation for travel, behind leisure (39.8%) and visits to family and friends (32.2%) in 2024.

Figure 19 – Reasons for Personal Travel in Brazil in 2024



Source: Own Elaboration based on PNAD Contínua data (IBGE, 2025).

Despite the expectation of expansion of health tourism in the country, the market still faces challenges related to data measurement and availability, especially at the municipal level. As already mentioned, the latest official data from the Ministry of Tourism on health tourism dates from 2010.

5. Health Tourism Landscape in the City of São Paulo

The city of São Paulo is the main hub for attracting tourists in the medical segment in Brazil: about 12% of the tourists who visit the city of São Paulo seek medical treatment in the capital. In 2024, based on data from the SPTuris Tourism and Events Observatory, this represents a universe of 4.2 million people.

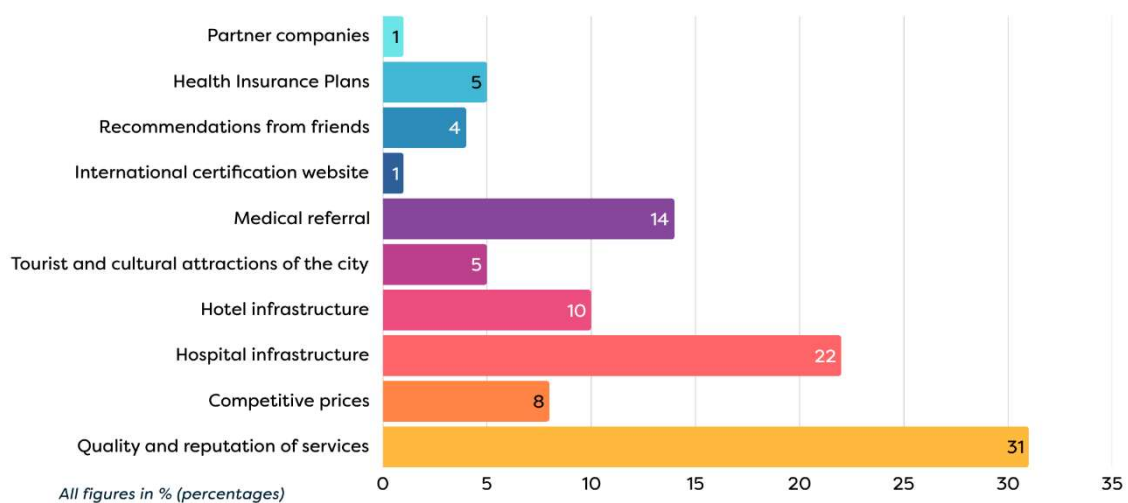
About 27 hospitals in the municipality hold the JCI certification. In addition to its state-of-the-art hospitals, the city stands out for hosting major medical congresses.

12% of Tourists

visiting the city of São Paulo seek medical treatment in the capital

The representatives of health tourism institutions who participated in the study conducted by São Paulo Negócios indicated that the city of São Paulo is chosen by 31% of traveling patients because of the quality and reputation of its services. The second reason cited is the hospital infrastructure, at 22%. The third reason for choosing São Paulo is medical referral, with 14% of responses.

Figure 20 – Why does this Traveling Patient choose the city of São Paulo as the destination for their treatments?



Source: Own Elaboration.

5.1. Flow of Health Tourists in the City of São Paulo in 2025

The city of São Paulo has intelligence tools for monthly monitoring of tourist and visitor flows in specific areas of the municipality through the work of the Tourism and Events Observatory (OTE) of São Paulo Turismo (SPTuris)³, with support from the Municipal Secretariat of Tourism (SMTur).

Based on this information, it was possible to analyze the movement of people in the strategic areas of the Health Tourism segment of the city of São Paulo, which are areas where treatments, procedures and consultations take place in the municipality's private hospital market. The data record the number of distinct people who made at least one visit to the demarcated polygon area during the analyzed period, segmented by place of origin.

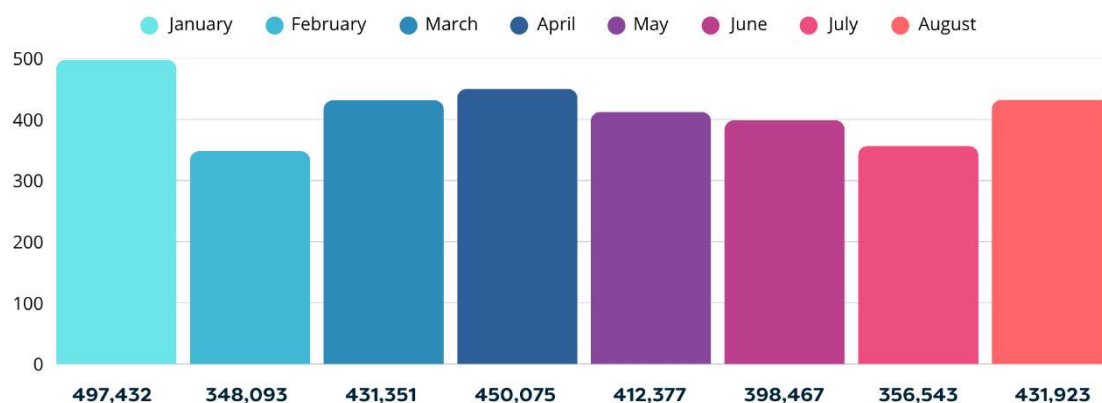
This information indicates how many people are residents of the city itself, of the São Paulo Metropolitan Region, of the rest of the state of São Paulo, of other Brazilian states and of other countries.

Therefore, the data on how many people from other Brazilian states and from other countries visited the polygons studied between January and August 2025 were analyzed. The figures show that almost 3.6 million people circulated through these areas during the period, of whom 92.6% are domestic tourists and 7.4% international tourists.

The record of 3.6 million domestic and international health tourists in the city of São Paulo corresponds to 12% of the 30.5 million tourists who visited the city between January and August 2025 (OTE/SPTuris, 2025).

³ SPTuris is the official tourism and events company of the city of São Paulo. It is responsible for the planning, organization and production of the city's events.

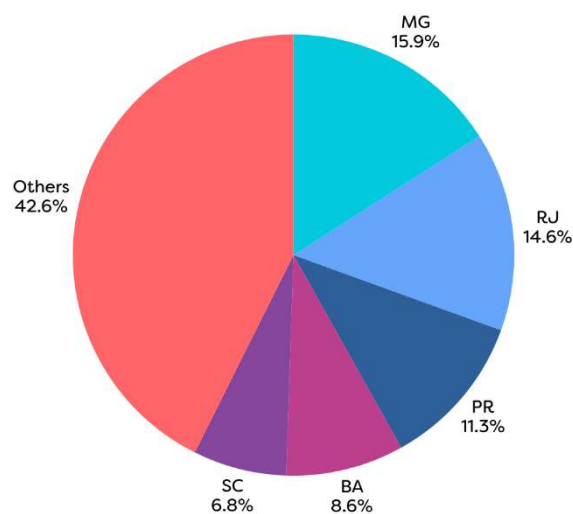
Figure 21 – Flow of Domestic Health Tourists between January and August 2025 in the city of São Paulo



Source: Own Elaboration based on OTE/SPTuris and SMTur (2025) data.

In the analyzed period, more than 3.3 million domestic health tourists were observed within the hospital perimeters. The months with the highest traffic were January, April and August.

Figure 22 – States of Origin of Health Tourists in the City of São Paulo between January to August 2025

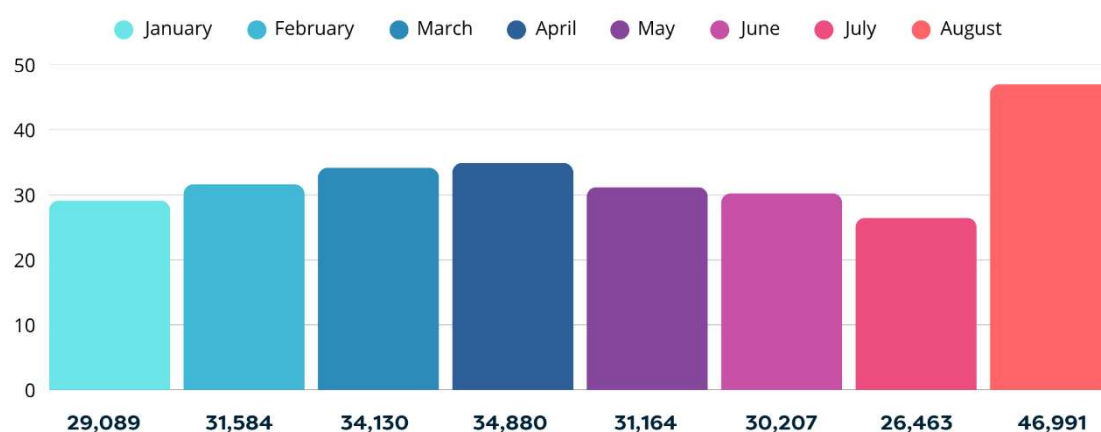


Source: Own Elaboration based on OTE/SPTuris and SMTur (2025) data.

Among the states of origin of these tourists, the highlights are Minas Gerais (MG), Rio de Janeiro (RJ), Paraná (PR), Bahia (BA) and Santa Catarina (SC).

Regarding international tourists, movement of more than 264,500 people from other countries was identified. The months with the highest traffic were August, April and March.

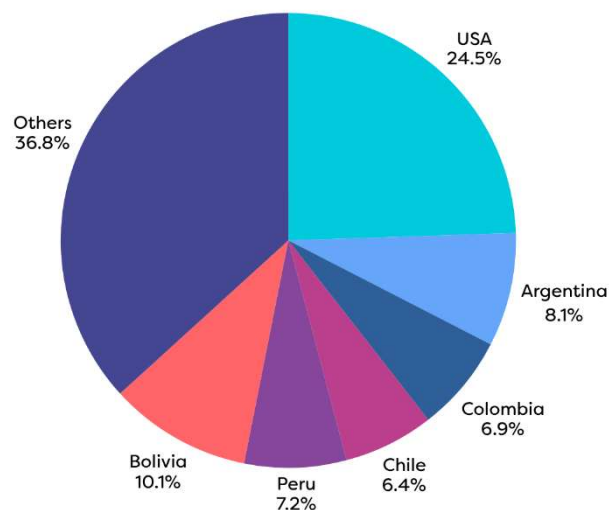
Figure 23 – Flow of International Health Tourists between January and August 2025
in the city of São Paulo



Source: Own Elaboration based on OTE/SPTuris and SMTur (2025) data.

The main countries of origin of these health tourists are the United States (USA), with 24.5% of occurrences, Bolivia (10.12%), Argentina (8.09%), Peru (7.24%), Colombia (6.9%), and Chile (6.42%).

Figure 24 – Countries of Origin of Health Tourists in the City of São Paulo between January and August 2025

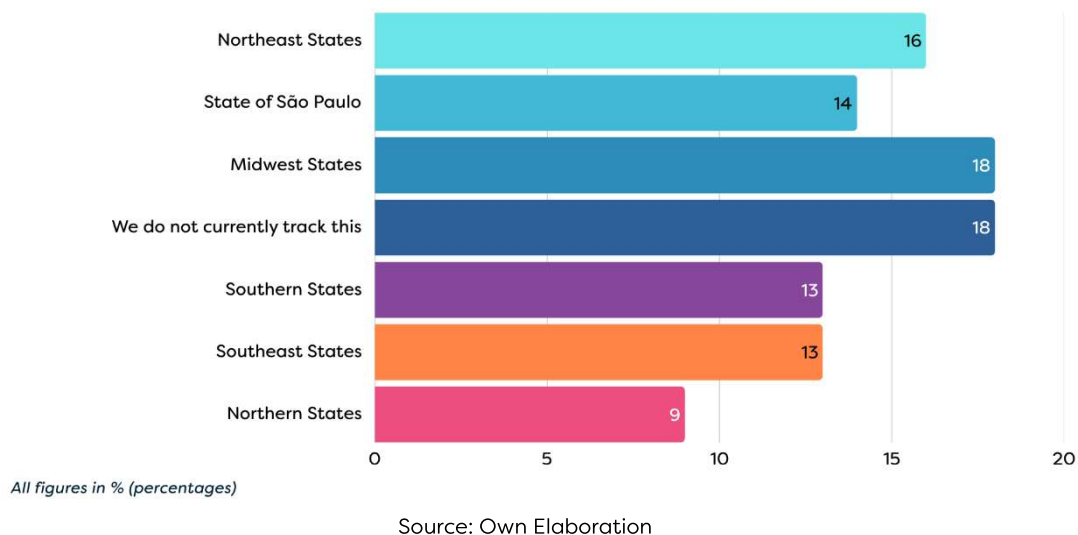


Source: Own Elaboration based on OTE/SPTuris and SMTur (2025) data.

The information obtained through representatives of health tourism companies who participated in the study conducted by São Paulo Negócios partially corroborates the observed data.

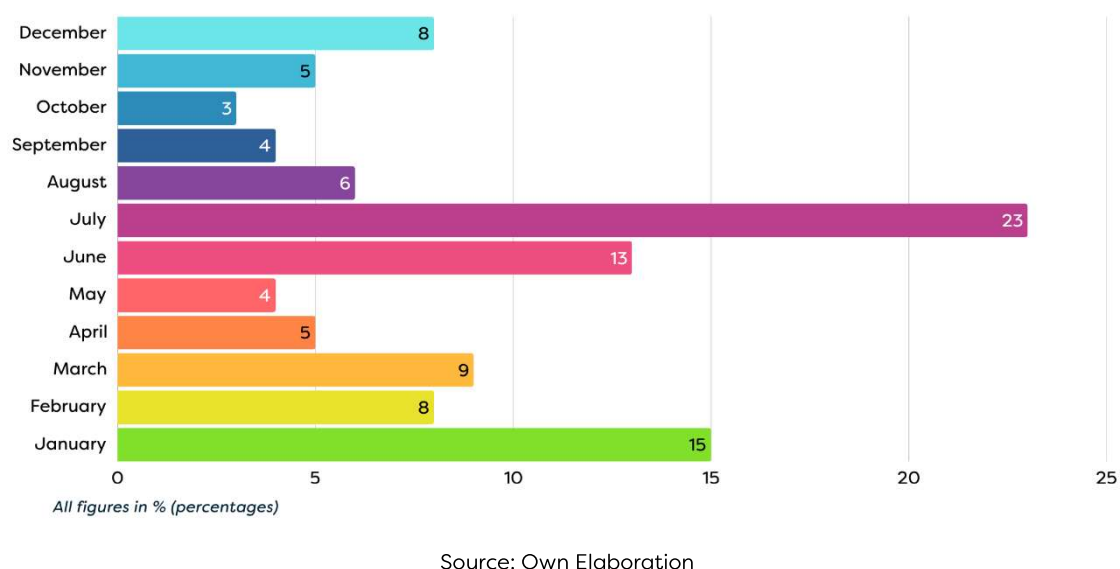
Regarding the origin of the domestic audience, respondents indicated that 18% of domestic traveling patients come from the Midwest region, followed by the Northeast, with 16% of responses. The third origin of these patients is the state of São Paulo itself, with 14% of responses.

Figure 25 – What are the 3 main origins of the domestic health tourist audience?



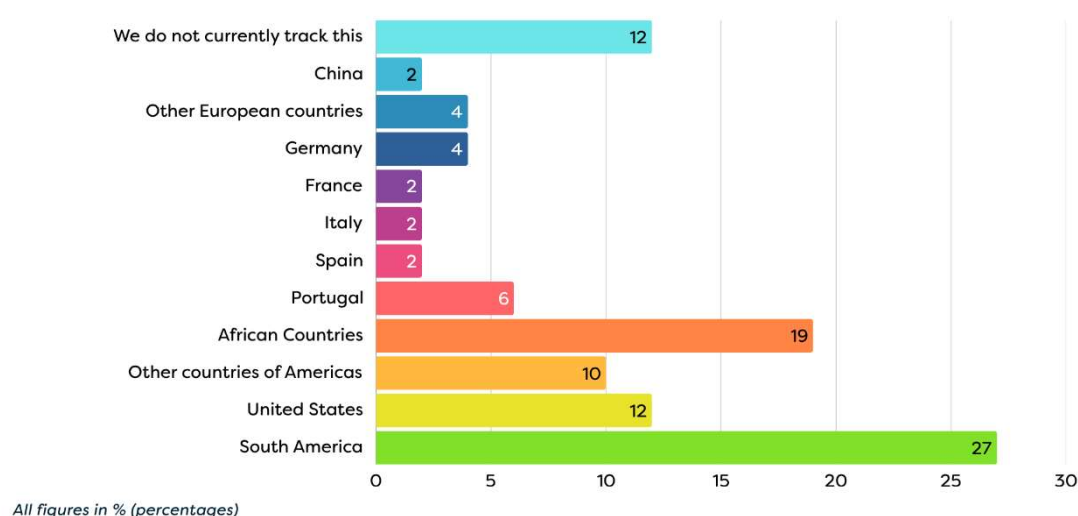
Among the months in which patients most travel for treatment, the holiday months were the most cited, such as July with 23% of responses, followed by January with 15%. The third month with the highest flow of traveling patients is June, cited by 13% of respondents.

Figure 26 – What are the 3 months with the highest flow of domestic Traveling Patients?



Regarding the origin of the foreign audience, respondents indicated that 27% of international traveling patients come from South American countries, followed by African countries, with 19% of responses. The third origin of these patients is the United States, with 12% of responses.

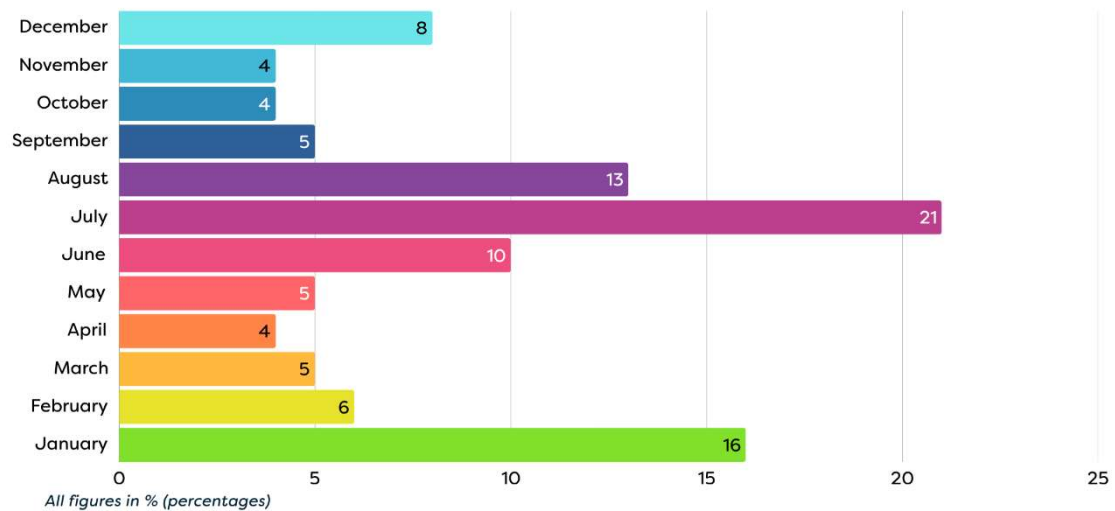
Figure 27 – The 3 main nationalities of the health tourist audience



Source: Own Elaboration

The flow of international patients is similar to that of domestic patients, according to the study participants. The month with the highest flow is July with 21% of responses, followed by January with 16%. The third month with the highest flow of traveling patients is August, cited by 13% of respondents.

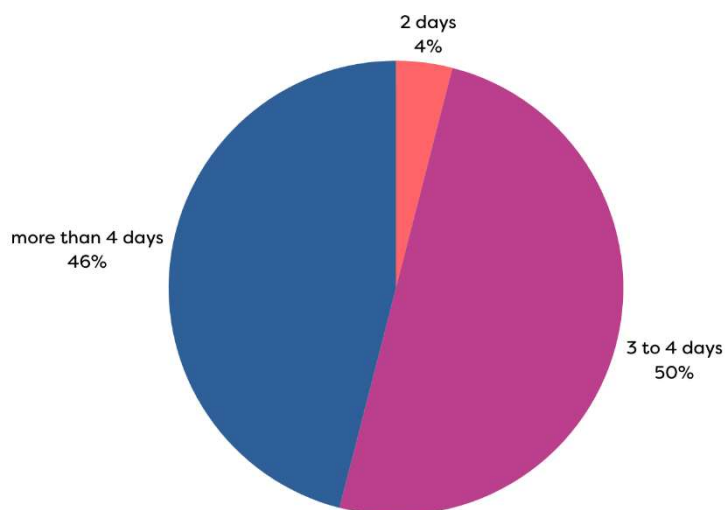
Figure 28 – What are the 3 months with the highest flow of international Traveling Patients?



Source: Own Elaboration

In addition, about 50% of respondents indicated that traveling patients stay, on average, 3 to 4 days in the city of São Paulo. Another 46% stay more than 4 days, and only 4% of traveling patients stay just 2 days in the city.

Figure 29 – What is the average length of stay of the Traveling Patient in the city?



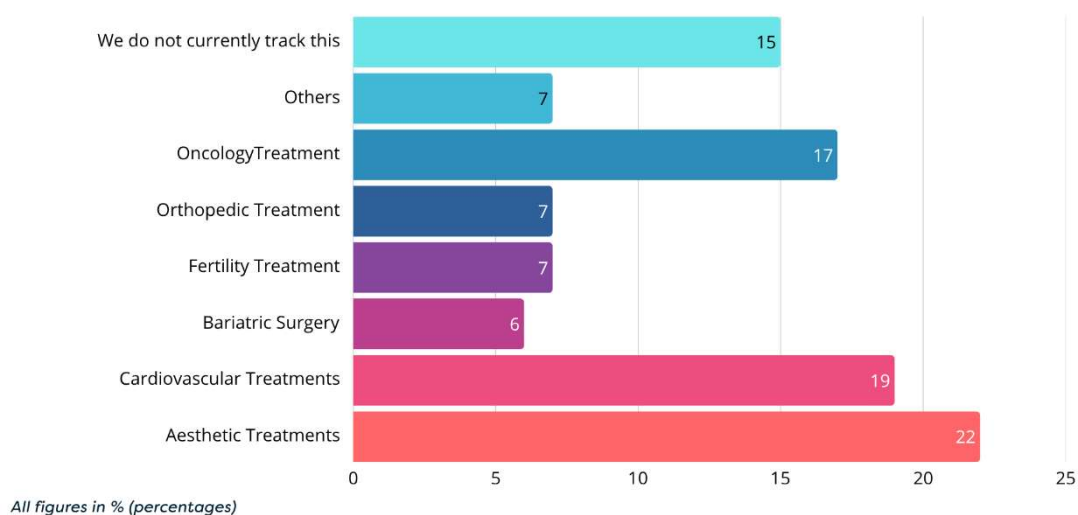
Source: Own Elaboration

5.2. Main Medical Treatments and Procedures Sought by Health Tourists in the City of São Paulo

According to GHI (2025), aesthetic surgeries are also the main market in the city, accounting for 20.4% of procedures of this type in the country, with 7% performed on foreigners. The study participants indicated that aesthetic treatments are the services most sought after by health tourists in the São Paulo capital, both domestic and international.

Of the domestic traveling patients, 22% travel in search of aesthetic treatments. Next, the treatments most sought after by them are cardiovascular, with 19% of responses, followed by oncology treatment, with 17%.

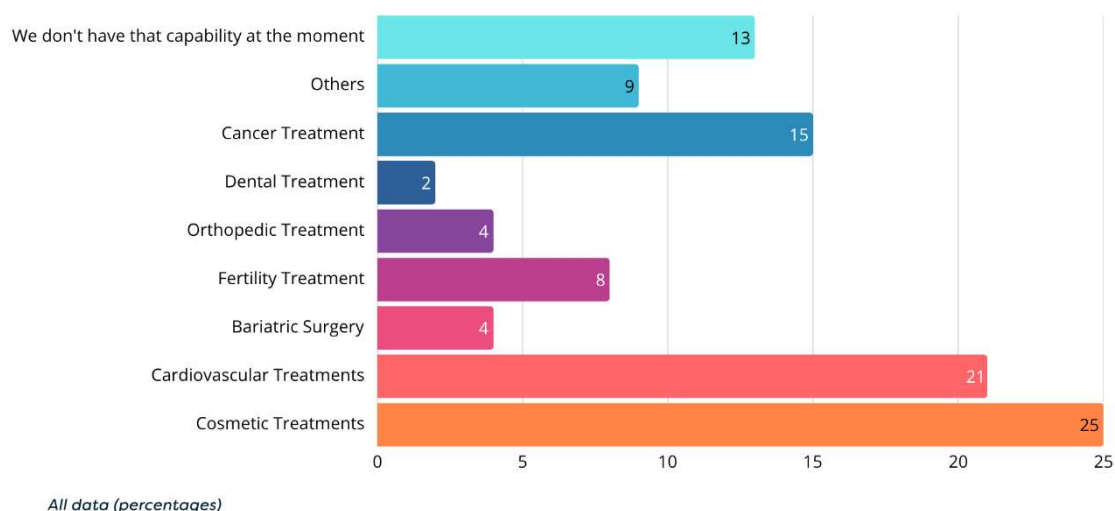
Figure 30 – What are the services most sought by domestic health tourists?



Source: Own Elaboration

Respondents indicated that about 25% of international traveling patients travel in search of aesthetic treatments. Next, the treatments most sought after by them are cardiovascular, with 21% of responses, followed by oncology treatment, with 15%.

Figure 31 – What are the services most sought by international health tourists?



Source: Own Elaboration

6. Challenges of the Health Tourism Sector in Brazil

Although it has increased its share in health tourism, Brazil still loses ground to other countries such as Singapore, Costa Rica, Turkey, Thailand, Malaysia and India. These are considered the main medical tourism destinations, according to the organization Patients Beyond Borders.

According to information from the MTI, Brazil presents challenges related to the perception of safety and urban infrastructure in some locations. Another factor that negatively impacts the country's ranking position is the disparity in hospital infrastructure and service quality among Brazilian regions.

Furthermore, healthcare treatment costs in the country are higher than in neighboring countries, which causes Brazil to lose traveling patients to countries such as Costa Rica and Colombia.

Table 2 – Ranking and Criteria Evaluated in the MTI (2021)

Country	Overall MTI (global ranking)	Destination Environment	Cost of Medical Tourism	Facilities & Services / Quality of Care
Brazil	64.35 (28th out of 46 destinations)	GOOD	AVERAGE	GOOD
Canada	76.47 (1st)	EXCELLENT	POOR	EXCELLENT
Singapore	76.43 (2nd)	EXCELLENT	POOR	EXCELLENT
Costa Rica	71.73 (7th)	EXCELLENT	POOR	GOOD
India	69.8 (10th)	GOOD	EXCELLENT	GOOD
Thailand	66.83 (17th)	EXCELLENT	GOOD	GOOD
Dominican Republic	66.32 (19th)	EXCELLENT	AVERAGE	GOOD
Argentina	66.26 (20th)	EXCELLENT	POOR	GOOD
Colombia	64.95 (25th)	GOOD	AVERAGE	GOOD
Turkey	63.91 (30th)	AVERAGE	GOOD	GOOD

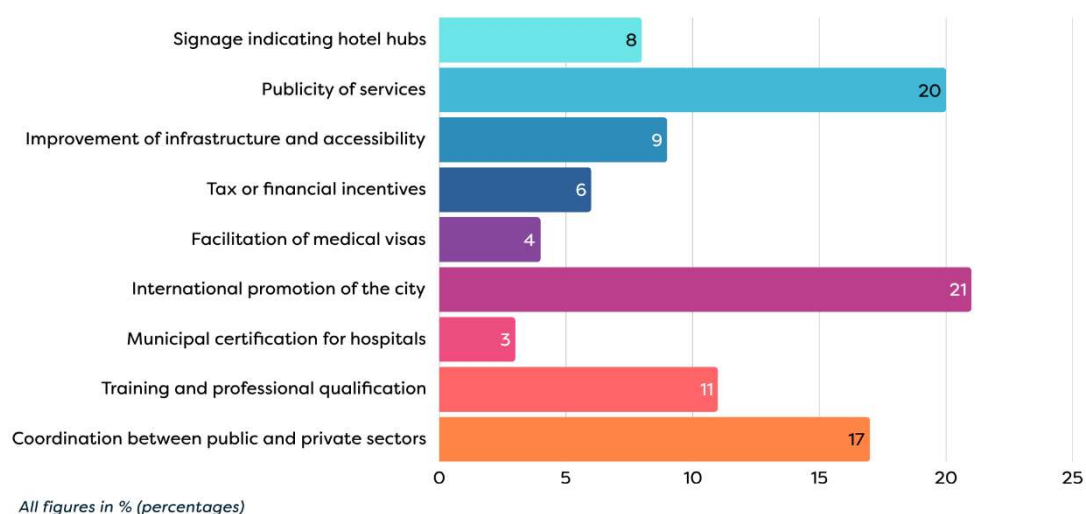
Source: Own Elaboration based on MTI (2021) data.

7. Challenges of the Health Tourism Sector in the City of São Paulo

Among the biggest bottlenecks listed by the study participants for the expansion of Health Tourism in the city of São Paulo, international promotion of the city was the most cited bottleneck, with 21% of responses. The second-highest cited bottleneck was the publicity of services, mentioned by 20% of respondents.

Of the study participants, 87% indicated that there is no or little promotion of Health Tourism services in the São Paulo capital. These results indicate that the main obstacle to the growth of Health Tourism lies in the publicity of both the services and the city

Figure 32 – Greatest bottlenecks for the expansion of Health Tourism in the city of São Paulo



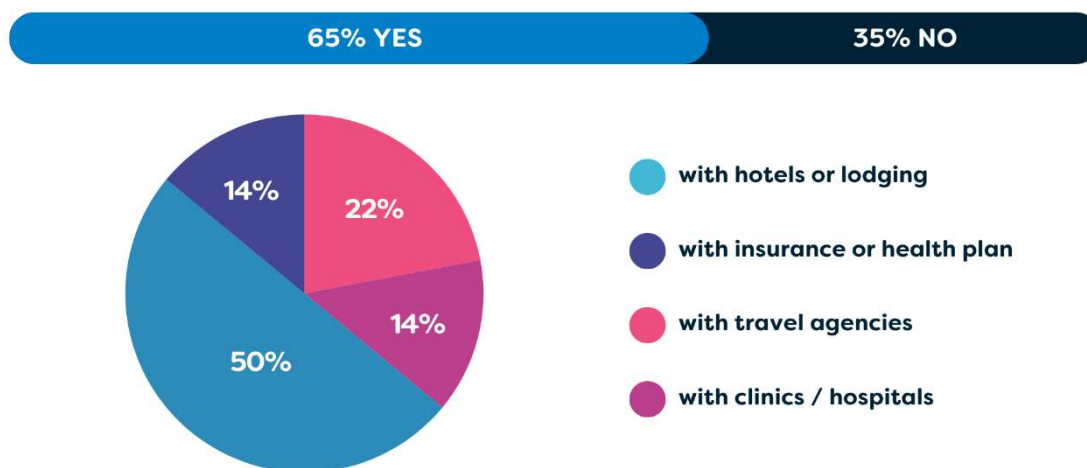
Source: Own Elaboration.

Coordination between public and private sectors was cited by 17% of participants as a bottleneck for the expansion of Health Tourism in the city of São Paulo. 84% of respondents also indicated that there is no coordination or very little coordination among the sector's players in the city of São Paulo.

Even so, 65% indicated that they have partnerships with other players in the health tourism sector, while 35% indicated that they have no partnership with other institutions.

Of the institutions that have partnerships with other sector players, 50% have partnerships with hotels or lodgings and 22% with travel agencies.

Figure 33 – Does your institution have partnerships with other sector players? If so, with which institutions?



Source: Own Elaboration

The information obtained in the study on Health Tourism in São Paulo reveals a robust diagnosis: the city has medical excellence and state-of-the-art infrastructure, but lacks an integrated strategy and public leadership to transform this potential into a structured tourist flow.

Sector players pointed out that the main obstacles to the segment's advancement are the lack of specific municipal and national policies, the absence of coordination among players in the chain, and the lack of international promotional actions presenting São Paulo as a health destination.

The study also validates important hypotheses, since the public is aware of the quality of São Paulo medicine, and there is real and growing demand from high-complexity patients, both domestic and foreign. However, part of these tourists who come to the city of São Paulo for health treatment do not perceive themselves as a "tourist".

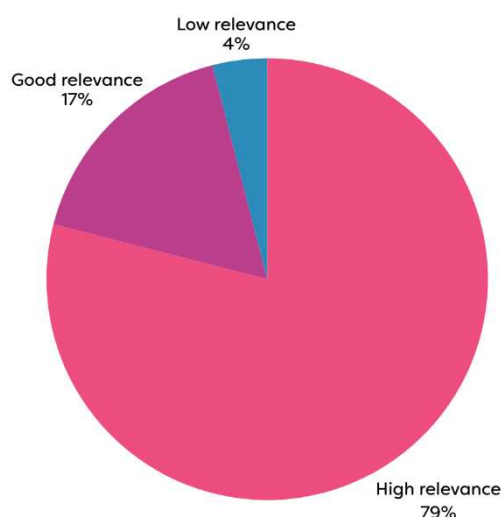
7.1 Opportunities for the City of São Paulo

By understanding the challenges and perceptions of the segment, opportunities arise for improving data collection and expanding business in the city.

Promoting the city of São Paulo as a health hub, creating a Municipal Health Tourism Observatory and establishing quality seals appear as consensus among the interviewees.

The vast majority of respondents - 79% - pointed out that the creation of a Municipal Health Tourism Observatory is highly relevant.

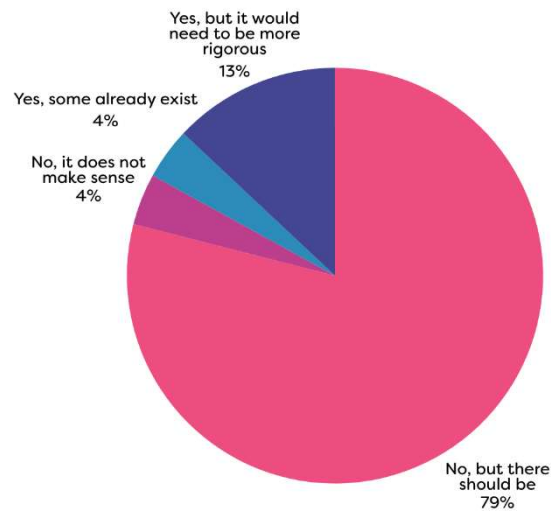
Figure 34 – How useful for the sector would the creation of a Municipal Health Tourism Observatory be



Source: Own Elaboration

Furthermore, 79% of them also pointed out that there is no certification for hotels qualified to receive patients, but that one should exist.

Figure 35 – Is there any certification for hotels qualified to receive patients?



Source: Own Elaboration

Some actions were suggested by the study participants:

- “Creation of a platform and a quality seal by São Paulo Negócios and the City Hall for all the players in the chain, such as hospitals, laboratories, restaurants, hotels and companies providing healthcare logistics, supplies and people transportation”;
- “Seek a way to measure data on international travelers through the country-entry form applied by the Federal Police. Make the "health" option for the reason of travel clearer in this form”;
- “More information about the reason for guests’ stay in hotels”;
- “Differentiate luxury medical tourism from mid-range medical tourism”;
- “Partnership between the public sector and the Regional Council of Medicine to facilitate medical advertising and joint partner advertising”.

These initiatives, combined with the structured collection of data and the expansion of international publicity, would be able to reduce the lack of information about health tourism and support evidence-based policies.

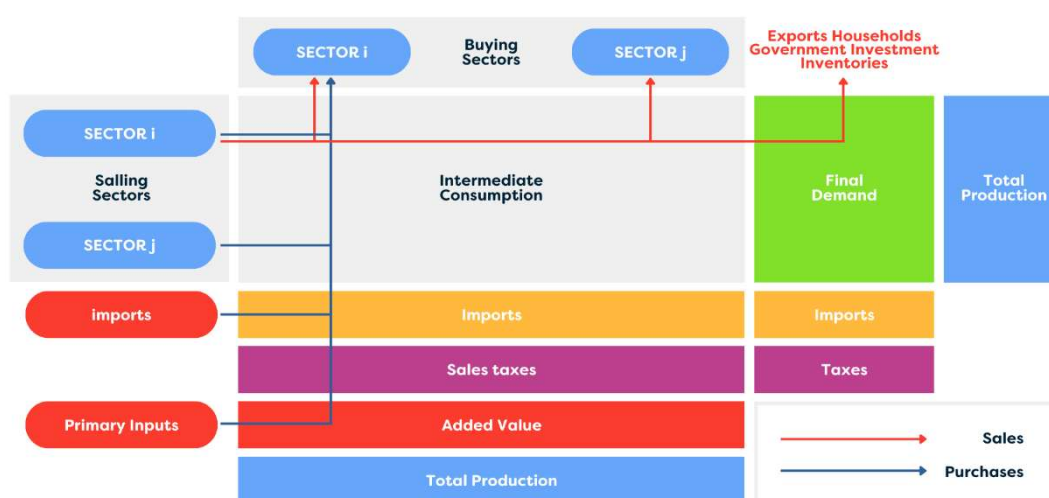
8. Economic Impact Analysis

This study also conducted an economic impact analysis, with the aim of understanding the health tourism sector in the city of São Paulo. The analysis was carried out using the Input-Output Matrix, to evaluate the economic impact of the revenue from healthcare treatments and procedures performed for domestic and international health tourists in the private network of the city of São Paulo.

8.1. The Input-Output Matrix (IOM)

The Input-Output Matrix (IOM) was developed by Russian economist Wassily Leontief in the 1930s. This matrix presents the relationships between the sectors of the economy, that is, it describes how the various sectors are connected to one another through the production and consumption of goods and services.

Figure 36 – The Input-Output Matrix



Source: Center for Studies in Urban and Regional Development – NEDUR (UFPR, 2020)

The study used the Brazilian IOM from the Center for Regional and Urban Economics of the University of São Paulo (NEREUS-USP). The most recent version is from 2018 and is divided into 68 activity sectors of the economy.

8.1. Results

The economic impact analysis was carried out using the 2018 Input-Output Matrix methodology to evaluate the impact of health tourism revenue for private companies in the city of São Paulo.

To perform the calculation, it was considered that 4.2 million tourists⁴ visit the city per year and the following assumptions:

- For 40% of these tourists, the average price was considered for the treatments indicated in Figures 30 and 31, charged by the main private healthcare establishments in the city of São Paulo;
- For the other 60%, an average ticket value of US\$ 1,000 was considered for domestic tourists and US\$ 5,000⁵ for international tourists.

This would total a movement of R\$ 49.7 billion per year from health tourism in the private healthcare sector of the São Paulo capital.

The results indicated that health tourism brought gains to the economy of the city of São Paulo in 2024, with gains of:

⁴ Calculated from the information that the city of São Paulo received 35 million tourists in 2024 (SPTuris) and that 12% of these tourists seek medical treatment.

⁵ R\$/US\$ exchange rate of 5.45 on October 15, 2025.



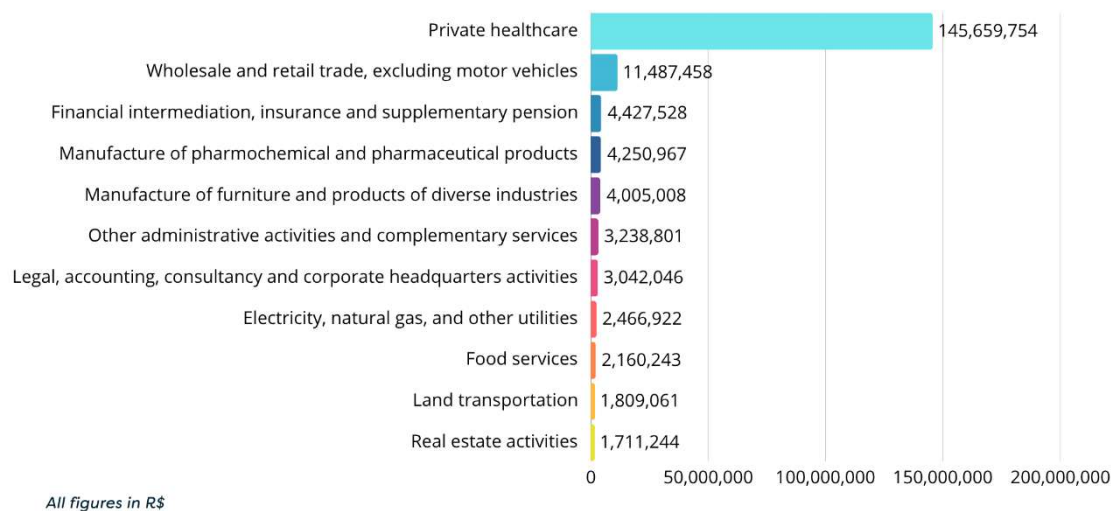
The R\$ 49 billion increases in private healthcare service revenue generates a strong internal impact within the sector itself, but a low multiplier effect on the rest of the economy. That is, it generates substantial economic gains within the sector itself, but the effects on the rest of the economy are modest.

The sectoral analysis indicates that private healthcare is the sector with the greatest revenue gain derived from health tourism, with an increase of R\$ 145.6 million, followed by trade (R\$ 11.5 million) and financial intermediation, insurance and supplementary pension (R\$ 4.4 million).

These results indicate that the private healthcare sector has a high direct impact but with low economic diffusion power. In other words, it is an activity that concentrates economic benefits within the sector itself, without radiating significantly to other segments of the economy.

Even so, the entire economic chain is moved and benefited by this, which leads to increased revenue for companies, the generation of employment and income for the population, and tax collection for the municipality.

Figure 37 – Sectors with the largest revenue gains from Health Tourism in the city of São Paulo



Source: Own Elaboration

The figures from the economic impact analysis of health tourism in the city of São Paulo indicate that the health tourism market in the São Paulo capital presents great growth potential in the coming years.

For this reason, structuring the collection of information and data on the sector through an observatory can be an ally in sizing health tourism in the municipality, supporting the creation and expansion of businesses and the development of public policies.

9. Conclusion

The study brought many advances to the Health Tourism sector by understanding the concept, the figures and the current landscape of the segment in the country, especially in the city of São Paulo. Thus, during the process, it was possible to understand that health tourism takes place from the temporary movement of people in search of medical, therapeutic and aesthetic treatments in hospitals, clinics and doctor's offices.

The participation of the different players in this sector was fundamental to identify the challenges and opportunities for new businesses, with the aim of consolidating the city of São Paulo as an international Health Tourism hub.

Therefore, the city has a unique opportunity to strengthen its position as the main Health Tourism hub in Brazil and one of the leading hubs in Latin America.

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