

Medical Tourism and Its Changing Trends in Arabic Speaking Countries

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Submitted: 27 Oct 2018; Accepted: 03 Nov 2018; Published: 22 Nov 2018

More than 10 million patients travel every year seeking either better or affordable healthcare treatments abroad. The industry is called medical tourism, valued at a market size of \$65 Billion in 2017 and its growing at 25% YOY. This is getting highly popular in people who are uninsured or underinsured.

Considering the inbound and outbound medical tourism – there are regions which we divide to better understand the current situation. Americas, European, Middle East / GCC, African and Asian. The growth of this industry is exceptional due to one fact – 1st world medical treatment quality at 3rd world prices and this is the reason that most of Americas and European patients are travelling to Asian countries like India and Thailand to access best in class medical treatment while saving up to 40% of the cost.

Medical Tourism Destinations are broadly classified into three categories – Value Driven, Quality of treatment and Tourism focused.

Middle East / GCC outbound medical tourism comes fourth in the list, having share of 22% of total outbound medical tourism market and still growing at 30% YOY. The main factors behind this are:

1. Non availability of treatment in home country
2. Long waiting list
3. Cost of treatment
4. Higher trust in foreign country's medical facilities

The inbound medical tourism is emerging as only Dubai and Abu Dhabi are investing to emerge as medical tourism destination. Which has seen more than 325,000 patients coming to Dubai adding almost \$380 Million as revenue – as per the DHA report for 2016. They have taken right step by adding specialised free zones like – Dubai healthcare city and adding another bigger facility in coming years. They have also launched Dubai Health Experience (DXH) which ensures every patient know the cost and quality accreditation before their arrival.

Even after such tremendous initiatives, UAE is acting as both medical tourism destination and origin as most of its high earning citizens travel to USA and Germany seeking better quality of healthcare services and others to Thailand, India and Turkey to mix travel, cost effective treatment plans while accessing best of quality. UAE is establishing its ground as a popular medical tourism destination but most of the treatments undertaken are related to reconstructive,

cosmetic and wellness procedures. For specialized treatments in areas like oncology, cardiology and neurology and other tertiary care many patients travel to other destinations including citizen and residents.

As per IMTJ, Arab Medicare and individual GCC MOH's reports- all the GCC comprise \$3 Billion of outbound medical tourism which is just 5% of total market size and definitely there is much more potential to grow this in coming years. The USA and Europe take highest percentage of overall outbound medical tourism market of 38% (year 2016).

As per Alpen Capital - The ageing population and an expected increase in the frequency of visits to clinics for treatment and preventive care, the outpatient market size in the region is predicted to grow at an annualized average rate of 7.4% to US\$ 32.0 billion between 2017 and 2022. The inpatient market is anticipated to increase at a CAGR of 6.9% to US\$ 45.4 billion.

The recent development in technology / IoT is also fuelling-up the medical tourism (inbound/outbound) such as use of Telemedicine will not only ease the patients to access primary healthcare facilities, this will also help hospitals to convert patients while offering them remote consultation and second opinion at nominal cost. Presence of many online start-up platforms providing free quotes from multiple hospitals to help patients compare cost of treatment from various hospitals in different countries and enable them to take firm decision while offering other ancillary services such as travel plan, visa and translators.

With the use of advance facilitates through online MTF's patients are accessing all the information about hospital, doctor's profile, checking all the credentials and accreditation online to avoid any surprises after landing to the foreign land. They learn about country's culture, food, accommodation types and people while selecting places to visit and buy travel packages at the destination country.

This is even more convenient when few of the MTF's are available in local languages like Arabic and Russian as well. Online MTFs have open a whole new channel of communication and supporting the medical tourism industry to grow further. There are many new additions are yet to come which will further ease the patients to travel abroad for best of medical treatment without any hassle and issues, medical tourism is fuelling up both the industries - travel and healthcare.

Challenges in Medical Tourism

1. Being sure about the cost of treatment
2. Travel plans and choosing the right option
3. Language, lifestyle and food
4. Assurance about treatment quality
5. Companion's recommendation (at times)

Suggestions for medical tourists

1. Use internet to contact online facilitators
2. Get multiple quotes from different sources to compare
3. Ask for complete travel plan, translator and check the accommodation offered
4. Never pay in advance for treatment
5. Always check quality accreditation at hospital such as JCI, CA, ACHS or local healthcare accreditation (at least)
6. Mix the medication with travel and leisure to make it a true medical tourism (to keep the companion happy)

Most important suggestion for patients/patient's companion - ASK, ASK and ASK as many questions as possible before you travel to any destination regardless of the treatment package.

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