

MEDICAL TOURISM

Investment Opportunity Brief



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GLOBAL GROWTH

USD 150 BILLION BY 2025

DUBAI TARGETS



500,000
HEALTH TOURISTS
BY 2020



13%
PER ANNUM
GROWTH



USD 708 MILLION
IN REVENUES
BY 2029

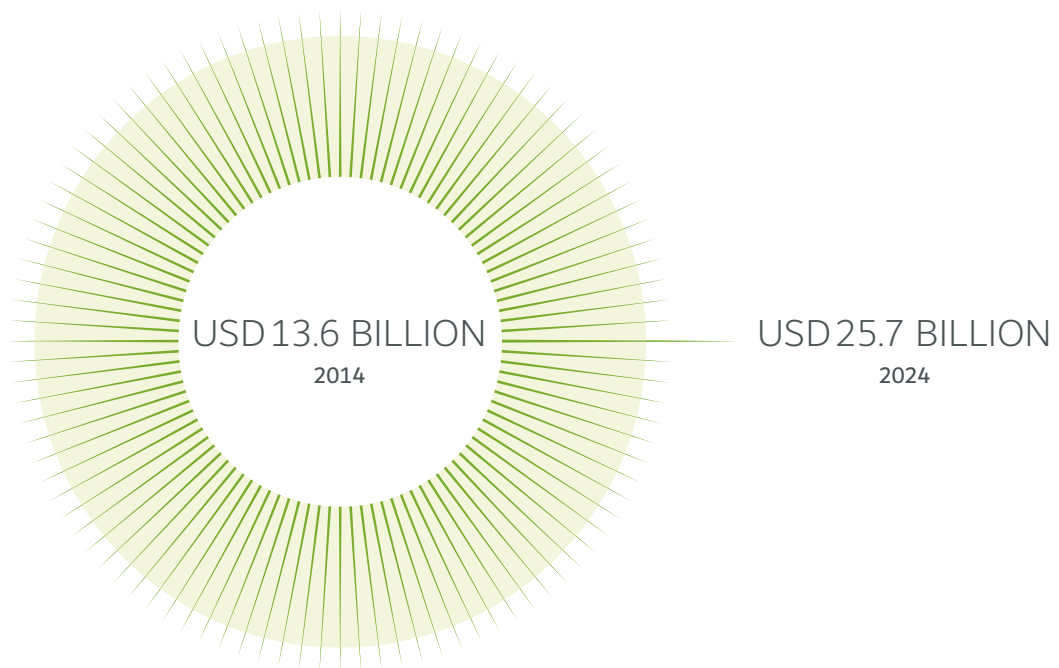
The Medical Tourism Strategy 2017-2021 has built Dubai's position as a global medical destination by introducing a value-based, comprehensive, integrated, and high-quality service delivery system, and to promote public and private collaboration in health care.

The presence of a large number of internationally accredited and renowned medical institutions, infrastructural strength, regulations that promote public-private collaboration in health care, and ease of obtaining a medical treatment visa are part of a comprehensive strategic approach to make Dubai a fast-growing global medical tourism destination.

A set of guidelines and a categorization system for health care providers ensures that private sector partners reach the right markets. The strategic approach focuses on providing patients a unique experience, following the highest standards of medical service, using state-of-the-art technology, and care delivered by specialized and trained staff.

In 2016, 326,649 health tourists visited the country, generating USD 381 million in revenues, a growth of 9.5 percent over the previous year. In 2016, the spend on health care by UAE alone accounted for 26 percent of total spend by the six nations of the Gulf Co-operation Council (GCC) in the sector.

UAE OVERALL HEALTH CARE SPENDING



WHAT THEY SAY

“ BY 2020, WE WILL HAVE 34 INDIGENOUS PHARMACEUTICAL MANUFACTURING FACTORIES. THE MARKET VALUE OF OUR PHARMACEUTICAL INDUSTRY IS SET TO GO UP TO USD 6.8 BILLION BY 2025. IT STANDS AT USD 2.58 BILLION IN 2016. ”

Speaking at Brand UAE's Medical Tourism Vision 2021,
quoted by Gulfnews.com



DR. AMIN HUSSEIN AL AMIRI
ASSISTANT UNDERSECRETARY
FOR PUBLIC HEALTH POLICY
& LICENSING SECTOR

UAE Ministry of Health



وزارة الصحة
MINISTRY OF HEALTH

“ DUBAI’S ATTRACTIVE LOCATION ALONG WITH THE AVAILABILITY OF HIGH QUALITY MEDICAL PROFESSIONALS AND TECHNOLOGY HAS ENABLED THE CITY TO BUILD A STRONG AND FAVORABLE PLATFORM TO BUILD ITS MEDICAL TOURISM CAPABILITIES. WE ARE CONSTANTLY WORKING ON DEVELOPING THIS SECTOR KEEPING IN MIND PATIENT SAFETY, HIGH QUALITY HEALTH SERVICES, AND EXCELLENT PATIENT EXPERIENCE. ”

DHA News



HUMAID AL QUTAMI
CHAIRMAN OF THE BOARD
AND DIRECTOR GENERAL

Dubai Health Authority



“ DUBAI’S EFFORTS ARE AIMED AT EASING THE ENTIRE PATIENT JOURNEY. THE OBJECTIVE IS TO PROVIDE PATIENTS WITH A UNIQUE EXPERIENCE, THE HIGHEST MEDICAL SERVICE STANDARDS USING STATE-OF-THE-ART TECHNOLOGY ACCOMPANIED BY HIGHLY SPECIALIZED AND EDUCATED STAFF. THE STRATEGY IN 2018 IS TO CONTINUE TO DRIVE AWARENESS OF DUBAI AS A DESTINATION FOR HEALTH AND WELLNESS TOURISM THROUGH INTERNATIONAL TRADE EVENTS AND WIDER COLLABORATION WITH HEALTH AND MEDICAL INSTITUTIONS, MEDICAL PROFESSIONALS AND GOVERNMENT BODIES. ”

DHA News



DR. LAYLA AL MARZOUQI
DIRECTOR

Health Tourism Council





FOCUS SPECIALTIES



ORTHOPEDICS AND
SPORTS MEDICINE



PLASTIC
SURGERY



OPHTHALMOLOGY



DENTAL
PROCEDURES



DERMATOLOGY
AND SKIN CARE



AESTHETIC
SURGERY



PREVENTIVE
HEALTH



WELLNESS



FOCUS SOURCE COUNTRIES



RUSSIA



CIS COUNTRIES



GCC COUNTRIES



INDIA



PAKISTAN



NIGERIA



ANGOLA



UNITED KINGDOM

WHY CHOOSE DUBAI TO TAP INTO THE MEDICAL TOURISM OPPORTUNITY



ACCREDITED FACILITIES:

Internationally accredited hospitals attract the best medical talent from around the world. The UAE ranks first globally for the number of health care establishments accredited by Joint Commission International (JCI), the world's largest health-care accrediting agency. The American Hospital Dubai was the first private hospital in the Middle East to be awarded Joint Commission International (JCI) accreditation, in May 2000.



WIDE-RANGING TALENT POOL:

35,000 health professionals from 110 nationalities work in Dubai's health sector, speaking more than 40 languages among them.



EASE OF MEDICAL VISA:

For treatment in accredited medical centers, visitors can obtain a health visa within 48 hours, which can be renewed by presenting a medical report.



GATEWAY FOR THE REGION:

Dubai is the hub for medicine and scientific study in the broader MENA region. One of the many advantages the city enjoys is its location and transport infrastructure.



HEALTH TOURISM BRAND:

Dubai Health Experience (DXH), a brand conceived by the Dubai Health Authority (DHA), is a digital one-stop shop and delivers formal information on the health care facilities and other stakeholders providing services to health tourists.



PARTNER BENEFITS:

45 providers including hospitals, specialized clinics, and day-surgery centers are members of DXH, ensuring quality, safety, and service standards for Dubai's inbound medical and health tourists.



PATIENT-FRIENDLY:

Access to pool of multi-disciplinary medical professionals, world-class facilities, short waiting periods, cost-effective treatments, and a pleasant environment for recovery make Dubai popular with overseas patients.

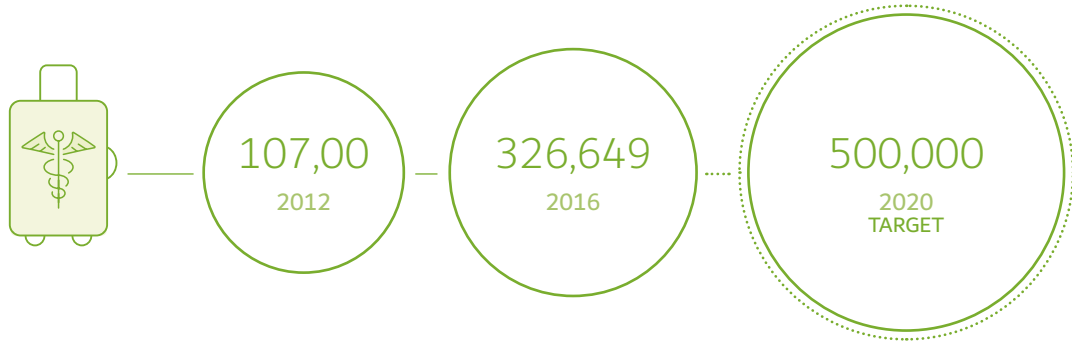
A STRONG AND INCLUSIVE MARKETING THRUST

- Group members' marketing collateral, packages, and campaigns are included in the promotional strategy of the Health Tourism Council.
- Focused campaigns allow for deeper penetration into the target market. A recent specialty campaign in the GCC market targeted dental, orthopedic, wellness, and fertility treatment packages.
- DXH collaborates with Dubai Tourism and the Ministry of Economy to promote the Dubai Health Experience to the travel and business sector, driving awareness about medical travel and wellness of visitors.
- The future-ready strategy reaches out to potential patients via a comprehensive list of packages – combining both leisure and health – including hotel accommodation, visa, and insurance.
- DXH also offers options to request an appointment and 24x7 live chat. The mobile app enables health tourists to access information about hospitals and clinics, doctors, and medical packages at any time.

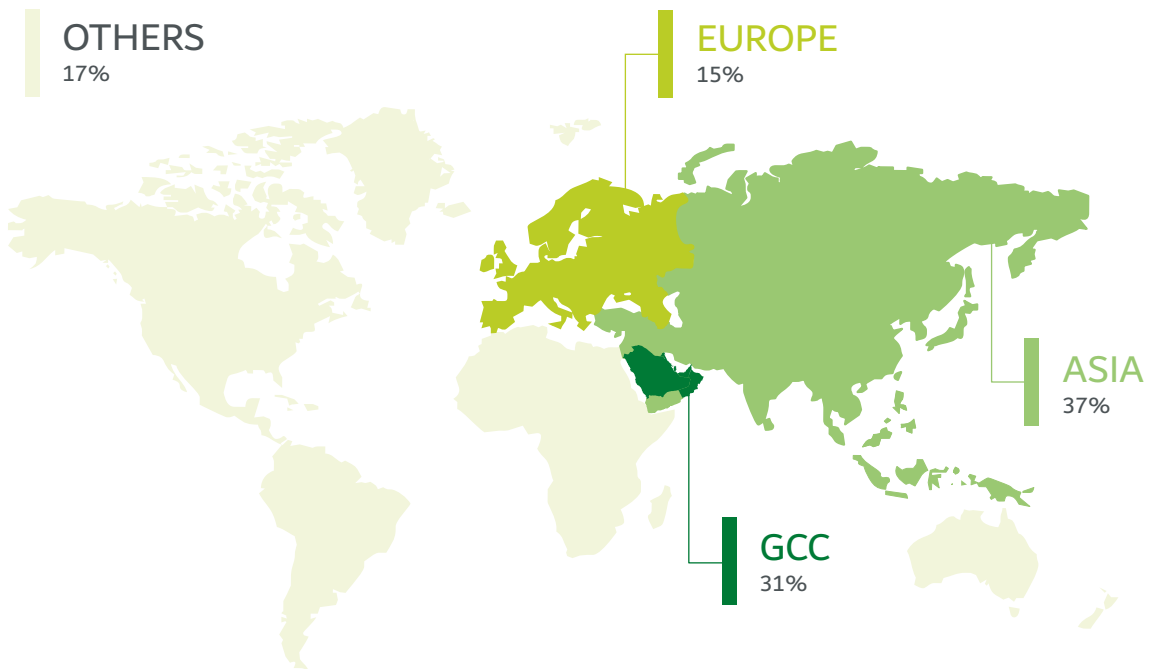
A VIBRANT AND EVOLVING ECOSYSTEM

- Significant investments are being made in new health care facilities, technology, and medical training in order to provide world-class patient care.
- DHA Medical Fitness Services is the first Network of Medical Fitness Centers in the world to receive Joint Commission International (JCI) accreditation for ambulatory care.
- In May 2017, Dubai won the chairmanship of the Global Healthcare Travel Council (GHTC).
- Medical insurance backed by Alliance Global and Lloyds of London is tailored for health visitors to the UAE. Any individual receiving treatment is automatically covered for additional expenses in the event of an unexpected complication stemming from a planned procedure in any facility included in Dubai's medical tourism program.
- DXH has tied up with global health management company Health Bank to offer SmartCare, which provides health tourists a single point of contact for seamlessly combined health care coordination, flight booking, visas, accommodation, airport transfers, leisure activities, and post-treatment support.

NUMBER OF MEDICAL TOURISTS TO DUBAI (2012 – 2020)



SOURCE REGIONS OF MEDICAL TOURISTS TO DUBAI (2016)



| | | | |
|--|--------------------------|--|---------------------------------------|
| | <p>326,649 TOTAL</p> | | <p>9.5% GROWTH RATE OVER 2015</p> |
|--|--------------------------|--|---------------------------------------|

A DYNAMIC MEDICAL MEETING PLACE

- Dubai has been host for more than four decades to the annual Arab Health Exhibition & Congress, the largest event of its kind in the Middle East, attracting health care professionals for business and knowledge exchange.
- A medical events calendar covers international conferences and congresses in ophthalmology, critical care, neuro-oncology, radiology, primary health care, cardiovascular pharmacology, cosmetology, and healthcare innovation.
- Dubai hosts the annual GCC Health Care Innovation Congress and Building Health Care conferences.

RECOGNITION

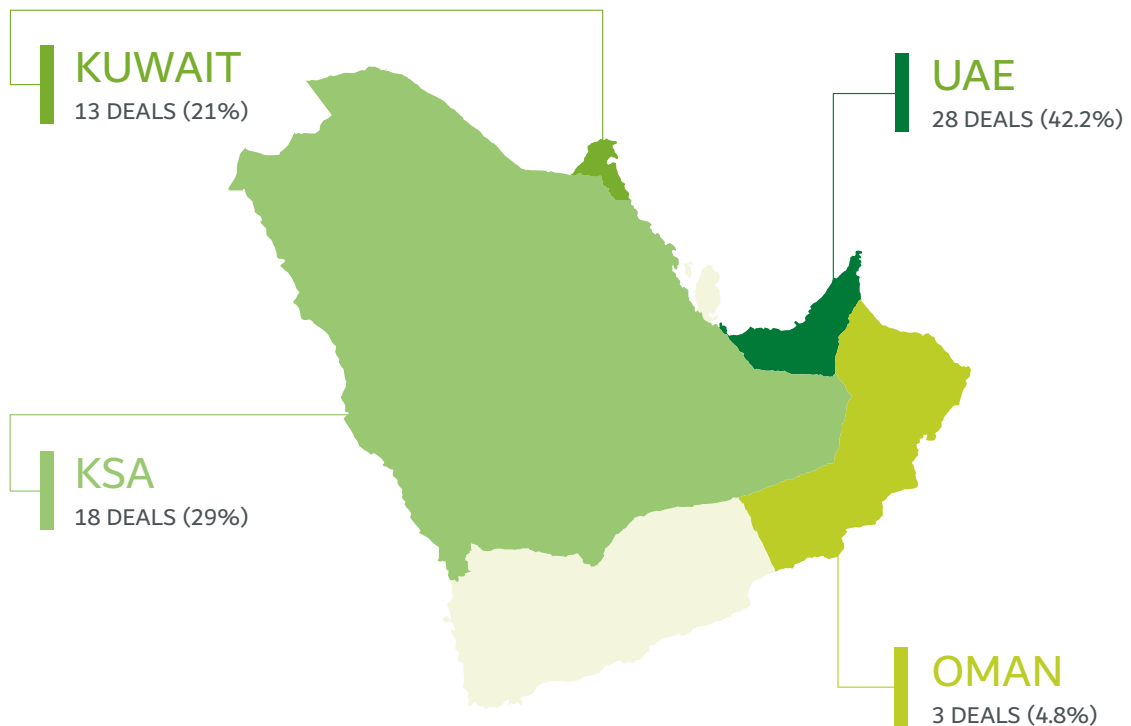
- In September 2015, Dubai received the award for the Best Integrated Destination for Medical Tourism, at the Tenth International Exhibition and Conference on Medical Tourism.
- In 2016, Dubai was named a Highly Commended Destination of the Year by the International Medical Travel Journal (IMTJ) Awards.

A THRIVING INVESTOR HUB

Dubai's health care sector is a magnet for investors seeking to fill service opportunities in the fast-growing region. Between 2006 and 2016, the Middle East witnessed 62 M&A deals in the sector, valued at USD 3.2 billion. The UAE was the prime destination for health care deals during the period. Private equity investments reached USD 697.2 million, with the UAE commanding a lion's share.

UAE-based company NMC Healthcare and Al Noor Hospitals listed on the London Stock Exchange in 2013. In 2015, South Africa-based Mediclinic International acquired Al Noor Hospitals Group for USD 2.2 billion in a reverse takeover deal, the largest such deal in the GCC health care sector.

GCC HEALTH CARE M&A WORTH USD 3.2 BILLION FROM 2006 - 2016



STAKEHOLDERS



DUBAI HEALTH AUTHORITY



DUBAI HEALTHCARE CITY



VISIT DUBAI



GENERAL DIRECTORATE OF RESIDENCY
& FOREIGNERS AFFAIRS



DUBAI AIRPORTS



DNATA



DUBAI ECONOMIC DEPARTMENT

SIZE OF DUBAI'S HEALTH CARE INFRASTRUCTURE



NUMBER OF HEALTH FACILITIES



NUMBER OF HEALTH SPECIALISTS



USEFUL LINKS

[Medical Tourism Strategy](#)

[Dubai Clinical Services Capacity Plan 2015-2025](#)

[World Health Tourism Congress 2018](#)

[Dubai Annual Health Statistics Report 2016](#)

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