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Review Article

Kingdom of Saudi Arabia: A potential destination for medical tourism



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المخلص

أصبحت السياحة الطبية عنصراً هاماً في الاقتصاد العالمي، بوجود أكثر من ٣٧ مليون رحلة ذات صلة بالصحة وإيرادات أكثر من ٣٣ مليار يورو كل عام. إن السفر للحصول على الرعاية الطبية في ازدياد مستمر في البلدان النامية والمتقدمة على السواء، حيث يسعى الناس في البلدان النامية للحصول على التقنية الجديدة والمهارات في البلدان المتقدمة، وفي المقابل يسعى الناس في البلدان المتقدمة الغنية إلى الرعاية الطبية في أماكن أخرى بسبب ارتفاع التكاليف وقائمة الانتظار الطويلة في بلدانهم. وتهيمن الهند، وماليزيا، وسنغافورة، وتايوان على السوق الآسيوية. جذبت الإمارات العربية المتحدة مع بناء مدينة الرعاية الصحية في دبي الزبائن من الدول الغربية، ودول مجلس التعاون الخليجي، والشرق الأوسط، وشمال أفريقيا. ليست المملكة العربية السعودية من البلدان الأكثر شعبية في هذا المجال، على الرغم من توفر الميزات الأساسية لصناعة السياحة الطبية الناجحة، بما فيها من مستشفيات حديثة مجهزة تجهيزاً جيداً، ووجود قطاع صحي خاص مميز، وأطباء متخصصين ومدربين بالخارج، وبيئة سلمية مستقرة. وهي أيضاً موطن الأماكن المقدسة الرئيسية للإسلام ومركز ديني مهم. يمكن أن تأخذ المملكة العربية السعودية القيادة في هذا السوق من خلال الجمع بين السياحة الطبية والسياحة الدينية. ليس فقط لـ ١.٦ مليار مسلم (٢٣% من سكان العالم) ولكن أيضاً لبقية العالم. يظهر الاعتماد الحديث للعديد من المستشفيات السعودية من قبل اللجنة المشتركة الدولية في الولايات المتحدة الأمريكية التزامهم لتشجيع السياحة الطبية. يمكن أن تفتح السياحة الطبية الباب لثورة في زيادة الإيرادات في المملكة العربية السعودية، إذا ما أُديرَت بشكل صحيح.

الكلمات المفتاحية: الاقتصاد؛ السياحة الطبية؛ السياحة الدينية؛ الشرق الأوسط؛ المملكة العربية السعودية

Abstract

To perform a comparative study of Medical tourism in the Arab world with special reference to Saudi Arabia and find ways to upgrade medical tourism in Saudi Arabia. A comprehensive literature review and analysis of statistical data from Saudi Ministry of Health is performed.

With more than 37 million health-related trips and the generation of more than £ 33 billion each year, medical tourism has become an important element in the global economy. Travelling abroad to seek medical care is increasing steadily in both developing and developed countries: people in developing countries seek new technology and skills in developed countries, while people in rich developed countries seek medical care elsewhere because of high costs and long waiting lists in their home countries. India, Malaysia, Singapore and Thailand dominate the Asian market, and the United Arab Emirates, with the construction of the Dubai Health Care City, attracts clients from western, Gulf Cooperation Council, Middle Eastern and North African countries. Kingdom of Saudi Arabia is not one of the most popular countries, even though it has all the basic attributes for a successful medical tourism industry, including modern, well-equipped hospitals, a well-established private health care sector, foreign-trained doctors and specialists and a stable, peaceful environment. It is also home to the main holy places of Islam and an important religious center. Kingdom of Saudi Arabia could take the lead in this market by combining medical tourism with religious tourism, not only for the 1.6 billion (23% of the world's population) Muslims but also for the rest of the world. Recent accreditation of many Saudi hospitals by the Joint

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Commission International in the United States shows their commitment to promoting medical tourism. If properly managed, medical tourism could open the door for an income generation revolution in Kingdom of Saudi Arabia.

Keywords: Economy; Kingdom of Saudi Arabia; Medical tourism; Middle East; Religious tourism

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Introduction

Medical tourism is the practice of travelling to another country with the purpose of obtaining health care, including elective surgery, dental treatment, reproductive treatment, organ transplant and medical check-ups. It is not the same as “wellness tourism”, which involves visiting spas and undertaking homeopathic treatment and traditional therapies.¹ Carrera and Bridges² described health tourism as “the organized travel outside one’s local environment for the maintenance, enhancement or restoration of an individual’s well-being in mind and body”.

The reasons for medical tourism include^{3–5}: lack of availability of a particular facility in the home country; health care in the home country too expensive⁵; health need or procedure not covered by health insurance in the home country; desire to avoid long waiting lists controlled by the government^{6–8}; privacy and confidentiality in a far-off setting (for e.g. plastic or cosmetic surgery, fertility treatment, gender assignment procedures and drug rehabilitation)⁹; lack of availability of a specific diagnostic manoeuvre in the home country, regardless of whether treatment is required; combining tourism with an elective procedure (e.g. in Israel, people can have medical treatment and also visit some of the holiest places in the world)^{10–12}; annual or routine medical check-up for healthy people¹³; and screening for specific diseases in cases of a family history.¹⁴

Choice of a suitable country for medical tourism

When a person decides to undertake medical tourism, the first step is to select a destination. This depends primarily on the availability of the desired facility, cost and technical excellence. A blind decision to select a more developed country for medical tourism is being replaced by local and regional hubs or centres of medical tourism, which attract people from specific regions. Medical tour operators play an important role in choosing countries and may also persuade people to go to specific hospitals and hotels with which they have business contracts.⁷ As far as professional excellence is concerned, the hospital chosen should be assessed and accredited by a dependable, independent external accreditation body. In international health care accreditation, the quality of health care providers and programmes is ascertained globally. These bodies certify not only hospital services but also a wide range of health

care programmes, including primary care, medical transport and ambulatory care. Accreditation Canada (formerly known as the Canadian Council on Health Services Accreditation) is the oldest of such agencies. Others include the Joint Commission International based in the USA, QHA Trent Accreditation in the United Kingdom, the Australian Council for Healthcare Standards and the Society for International Healthcare Accreditation. Some hospitals have multiple international accreditations in order to attract people from many regions. Many countries are applying for international accreditations in order to boost their medical tourism industry. For example, in 2007, at least 15 hospitals in India and 5 in Thailand had Joint Commission International accreditation, whereas there are now 20 hospitals in India and 18 in Thailand,¹⁵ to meet the growing demand. The accreditation is reviewed every 3 years. Table 1 lists the numbers of hospitals with accreditation by Joint Commission International in August 2012.

It should be noted that affiliation with a reputable agency does not necessarily mean that a country or hospital will receive more clients; this also depends on tourism authorities, who use their own tactics to attract patients, regardless of accreditation, such as by offering full services, including any bookings that patients and their families might require, flights, car services, accommodation, clinic appointments, interpreters and recreational activities. Hospitals may also advertise themselves, and tour operators and hospitals may have mutual agreements. Sometimes, the popularity of a region may influence the selection of destination. For example, although China has few accredited hospitals, it attracts many patients from neighbouring countries such as Pakistan and Viet Nam, where people consider that China is more advanced than their own country. Regional or global impact is important and can sometimes surpass accreditation. For example, Germany has few accredited hospitals but

Table 1: Countries and numbers of hospitals with Joint Commission International accreditation in August 2013.

Country	Number of accredited hospitals
Bahrain	1
Bangladesh	1
China	16
Egypt	3
Germany	3
Indonesia	5
Israel	7
Jordan	9
Kuwait	2
Lebanon	2
Malaysia	6
Qatar	5
Pakistan	1
Republic of Korea	13
Kingdom of Saudi Arabia	42
Singapore	14
Taiwan	12
Thailand	18
Turkey	39
United Arab Emirates	39

attracts many Gulf nationals to its health centres and specialist hospitals. The main reason is that it has an established reputation for high standards of care and advanced medical treatment.¹⁶

Economic value of medical tourism

Medical tourism is an important source of revenue: the report of the Tourism Research and Marketing Group shows that 37 million health-related trips are taken each year, generating €33 billion.¹⁷ The economic value is not only in the direct health budget but also in indirect factors, as foreign patients are often accompanied by family members or friends, who are likely to use facilities such as hotels, restaurants, tourist attractions and tour operators. The numbers of patients from richer nations going abroad for medical treatment is substantial; according to a McKinsey report based mainly on US citizens, the figure is between 60 000 and 85 000 annually.¹⁸ The annual number of patients travelling from the United Kingdom for this purpose elsewhere in Europe and internationally is estimated by industry sources to be 50 000.¹⁹

Regional examples show a similar trend. Currently, India, Singapore and Thailand and, in the Gulf, Jordan and the United Arab Emirates (UAE) are paying greater attention to medical tourism, increasing their hold on the market in the region. These countries find significant economic development potential in this emerging field. The Indian, Malaysian, Singaporean and Thai governments have all sought to promote their comparative advantages as medical tourism destinations at large international trade fairs, by advertising in the overseas press and providing official support as part of their economic development and tourism policy.²⁰ For example, 150 000 medical tourists visited India in 2004, according to the Confederation of Indian Industries, and medical tourism may have brought in US\$ 2 billion by the end of 2012.²¹

Medical tourism in the Arab region

The UAE has achieved notable successes in medical tourism and a documented increase in the number of patients coming from abroad to seek medical treatment. According to newspaper reports, Dubai Health Care City showed a sharp growth in medical tourism during the past 3 years. Of 502 000 patients in 2011, about 15% were medical tourists, compared with 10% of 412 000 patients in 2010 and an estimated 5% of 231 000 patients in 2009. Each month, the City Hospital in Dubai receives 10–15 foreign patients, and Al Noor Hospital in Abu Dhabi receives 15% of patients from abroad. The UAE has focused on becoming the hub among Gulf Cooperation Council countries and tries to divert the flow of foreign patients towards the UAE by continuous, efficient advertisement, introducing legislation to facilitate the visa process, building infrastructure, hiring top-class foreign-trained doctors and staff from all over the world with attractive packages and facilities, and international cooperation with medical tour operators.²²

Jordan has gained a reputation in the region for its commitment to offering services for medical tourism in an emerging, strong medical services sector.²³ In 2005, nearly all

foreign patients coming to Jordan were from the Middle East, with the highest percentages arriving from Yemen (29%), Libya (16%), Palestine (12%), Sudan (7%) and other countries in the Middle East and North Africa, i.e. mainly from neighbouring Arabic-speaking countries. According to Jordan's competitiveness report in 2010, medical tourism brings in a revenue of US\$ 1 billion annually, with a steady increase of about 10% more foreign patients each year.²³

Medical tourism in Kingdom of Saudi Arabia: current situation and future scope

Tourism is Kingdom of Saudi Arabia's second largest source of income after oil, generating approximately US\$ 13.8 billion annually, and it is the third largest source of employment. Income from international travel and tourism to Kingdom of Saudi Arabia is predicted to reach US\$ 63.7 billion by 2019. In Kingdom of Saudi Arabia, religious tourism is the heart and soul of all tourism. It represents the largest economy in the region, with a national budget of US\$ 144 billion and a surplus of US\$ 20.4 billion. Currently, Kingdom of Saudi Arabia is investing intensively in its health system, most of the financing coming from Government bodies, which places a continuous strain on the Government. According to WHO,²⁴ total health expenditure as a percentage of gross domestic product was stable in 2009–2011 (latest data available) at about 4.0%, at a total of 79.795 million Saudi Arabian riyals (Table 2). With 386 hospitals, 54 724 hospital beds and 55 000 physicians, a successful health care infrastructure is well on its way to being fully established.²⁵ Fast-growing health needs in a changing global economic situation demand new ways of health care financing, and medical tourism is a globally tested solution. The recent trend of obtaining accreditation from the Joint Commission International resulted in more than 40 accredited hospitals by August 2012.¹⁵ Although accreditation is not designed to attract more patients from abroad but rather to upgrade national health facilities, the authors believe that this will develop more trust among foreign patients choosing a hospital. Most doctors in Saudi hospitals have been trained in western countries with well-

Table 2: Gross health expenditure in Kingdom of Saudi Arabia, 2011.

Indicator	2011 value
Total health expenditure (% gross domestic product)	4
General Government expenditure on health (% total health expenditure)	69
Private expenditure on health (% total health expenditure)	31
Total expenditure on health per capita at purchasing power parity (riyals per US\$)	901
Total expenditure on health (million riyals)	79 795
General government expenditure on health (million riyals)	55 003
Private expenditure on health (million riyals)	24 792

known, trustworthy training systems, which may attract patients from abroad.

Merging religious and medical tourism

Surveys and research suggest that most foreign patients coming to Kingdom of Saudi Arabia have a spiritual life and regard their spiritual and physical health as equally important. Furthermore, during illness, people may have greater spiritual needs. Several studies have shown a potential impact of religious or spiritual activity on physical and mental health. Most have shown that religious involvement and spirituality are associated with better health outcomes, including faster recovery, greater longevity, better coping skills and feelings of optimism and hope, with reduced feelings of depression and anxiety.^{26,27} The fact that Kingdom of Saudi Arabia is home to the most important holy places of Islam makes religious tourism the backbone of Saudi tourism. With proper arrangements, patients (especially those for elective surgery) could be offered medical or surgical treatment packaged with religious tourism, such as visits to holy places for prayers or *umrah*. Israel is a good example, as many medical tourists select Israel as a destination because of its attractive sites, such as the Dead Sea.¹³ Moreover, most Muslims believe that God hears their prayers and grants health in the holy places, and they believe that spiritual activities in the holy places boost their healing process. Many old patients with terminal stage diseases or geriatric problems would like to spend time in the holy places during treatment. The spiritual element is an essential component of palliative and end-of-life care.²⁸

Kingdom of Saudi Arabia's achievements in health care

Kingdom of Saudi Arabia has made notable achievements in some health care-related fields, which could lead the nation's potential health-related progress. For example Kingdom of Saudi Arabia has a well-developed organ transplant set up and has a good history of successful transplants (Table 3); however, many Saudis seek transplants in other countries, underestimating their own capability. A recent study showed high mortality and morbidity rates in Saudi and Egyptian patients who received transplants in China when compared with those transplanted in King Faisal Specialist Hospital and Research Centre during the same period.²⁹ As described earlier, Saudi hospitals are equipped with well-trained professionals and the most advanced technology, and this edge could be used to market medical tourism. The facilities include well-equipped critical

care units such as for burns, surgical intensive care, endoscopy, neurosurgery and general surgery. All these are attractive reasons for the people of the region to select Kingdom of Saudi Arabia as their destination for meeting their health requirements. Neurological rehabilitation for the handicapped, rehabilitation with both occupational therapy and physiotherapy and rehabilitation for people with neurological disorders due to stroke and cerebral palsy are particularly suited for the Arab population of the region, who require not only professional and technological proficiency but also cultural and language similarities, which can hasten their recovery. Kingdom of Saudi Arabia's capacity can be judged from the fact that, in 1 year, 463 481 cases were treated in Ministry of Health hospitals and 949 876 cases in other Government sector hospitals, with physiotherapy, speech therapy and various types of rehabilitation.³⁰ Moreover, 353 203 disabled children were successfully rehabilitated, including speech therapy, physiotherapy and psychological consultations.³¹ A successful record in surgery, especially for separating Siamese twins,³² could be a focus for medical tourism.

Barriers to medical tourism in Kingdom of Saudi Arabia

Underestimation of the country's potential

The authors consider that the main problem in the emergence of Kingdom of Saudi Arabia as a hub of medical tourism is that it is neglected by the Government and the private sector, which underestimate the importance of medical tourism. Major medical tour operators are of the opinion that Kingdom of Saudi Arabia has not made a significant mark in the inbound medical tourism business.³³ The authors suggest that the relevant authorities should make a consolidated, joint effort to build a long-term plan and infrastructure for medical tourism.

Difficult documentation and visa processes

It is difficult to acquire a medical visa for a number of reasons.³³ A delay in acquiring a visa is unfavourable in the case of medical ailments, when one of the first priority of patients is early diagnosis and treatment. This delay cannot be reduced until the Government recognizes the importance of medical tourism and makes special arrangements and policies for this activity.

Insufficient information

Although many milestones have been achieved in the concept of E-health, special attention is required for foreign patients intending to obtain medical care in Kingdom of Saudi Arabia. This includes clear-cut information from the medical unit to which the patient wishes to go. Special information portals should be dedicated solely for this purpose, and a more efficient national health information system³⁴ should be set up, from which the international community could also benefit.

Poor cooperation between medical tour operators and medical units

Strong partnerships with medical tour operators are of key importance, as these organizations are not only specialized in travel services but can also assist in related services before and throughout a trip. Depending on the agreements with medical units, they can take on most of the

Table 3: Organs successfully transplanted in Kingdom of Saudi Arabia, 1983–2009.

Transplanted organ	Period	Total
Lung		32
Cornea	1983–2008	18 225
Kidney	1979–2009	6 143
Heart valves	1986–2009	497
Heart	1986–2009	168
Liver	1990–2009	828

burden of scheduling appointments, booking hotels and providing assistance in getting a medical visa.

Inadequate marketing

As Kingdom of Saudi Arabia's neighbours are emerging giants in medical tourism, Kingdom of Saudi Arabia should undertake a well-planned, continuous, worldwide publicity campaign through sources such as the Internet, social media and print and e-media.

Suggested remedies

Identify specific areas for medical tourism

Although providing all types of medical services is a fascinating target, focussing on a few areas first and mastering them would be more commercially practical in establishing a position. For example, Thailand has focused on gender defining and cosmetic surgery, Israel on in-vitro fertilization, China on stem cell treatments, India on alternative medicine, bone-marrow transplant, cardiac bypass surgery and eye surgery.³⁵ Kingdom of Saudi Arabia must explore which field its hospitals should focus on.

Identify the target population

As mentioned earlier, certain populations are attracted more to certain locations. This might be due to a similar ethnic and racial background: Taiwan attracts mainly Chinese patients, Jordan mainly Arabs from the Middle East and North Africa, and India and Pakistan mainly South-East Asians. Kingdom of Saudi Arabia has the edge, in that it can attract not only patients from Gulf Cooperation Council, Middle Eastern and North African countries but also, if packaged with religious tourism and wisely advertised, the entire Muslim world.

Make policy and legal issues easy and systematic

Legal regulations and laws related to medical tourism, visa issuance, medical tour operators, private sector involvement, health insurance, medico-legal aspects of malpractice and related issues should be revised and clear enough for the convenience and safety of incoming patients. The ministries of health, tourism and information should initiate comprehensive, multi-ministerial efforts.

More international cooperation

Cooperation with foreign governments and private bodies will have dual benefits, such as publicity at the cross-border level and, more importantly, direct access to Saudi health facilities. The Ministry of Health has tried a number of strategies in this regard, including cooperation with the governments of Germany, the Netherlands and Thailand. One possibility is operation of selected medical units or complete hospital systems by well-known foreign health care companies. Bearing in mind the pros and cons of this approaches, the Ministry of Health has instituted a pilot system for 31 public hospitals across the country, which are

continuously monitored. Expansion of the policy will depend on the outcome of this study.³⁴

Expanded use of Internet-based health information and E-health

e-Health and electronic information systems are already functional in many Saudi hospitals, such as the King Faisal Specialist Hospital and Research Centre, the National Guard Health Affairs and Medical Services of the Armed Forces.³⁶ The Ministry of Health understands the importance of E-health and undertook a 4 billion-riyal project between 2008 and 2011.³⁷ To emphasize the importance of e-health and to explore future strategies and infrastructure, a series of conferences on e-health is organized by the Saudi Association for Health Informatics every 2 years (the latest one was in 2012).³⁸ Yet another success in bringing the benefits of information technology to medical care is the creation of 'telecare' systems to follow up patients with chronic diseases after discharge from hospital. A telecare system is already functioning in the country. For example, the telecare system for managing diabetes at the Saudi National Guard Hospital in Riyadh is a web-based programme that allows diabetes patients to communicate online with their clinic in order to follow their blood sugar levels, without having to visit the clinic.^{39,40} This system would be of great benefit to foreign clients, who would feel secure and attached to the hospital even after discharge.

Conclusion

Kingdom of Saudi Arabia has good potential for becoming a hub of medical tourism in the region. It has most of the infrastructure and facilities with high standards, many of which are already accredited internationally. The unique position of the Kingdom in religious and archaeological history and its political stability give it advantages over competitors in the field. Having learnt lessons from the achievements of neighbouring countries, it is now time that Kingdom of Saudi Arabia become motivated and initiate a well-planned, long-term plan for the medical tourism industry. The current era of global economic turmoil is the right time to take advantage of medical tourism and reduce the heavy dependence of the country on oil.

Conflict of interest

The authors have no conflict of interest to declare.

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