



UNITED ARAB EMIRATES  
MINISTRY OF ECONOMY

# INVESTING IN MEDICAL AND WELLNESS TOURISM IN THE UAE



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# THE MEDICAL AND WELLNESS TOURISM INDUSTRY CONSISTS OF FOUR SEGMENTS

## Medical Tourism



Medical tourism is when a person travels to another country for necessary medical care. This can be due to better facilities and procedures found elsewhere and/or due to cheaper costs of treatment elsewhere. People may also travel for treatment because a treatment may be unavailable in their nation.

## Elective Treatment



An elective procedure is one that is chosen (elected) by the patient or physician that is advantageous to the patient but is not urgent. The most common elective procedures that people undergo on medical tourism trips include dental care and cosmetic surgery.

## Wellness Tourism

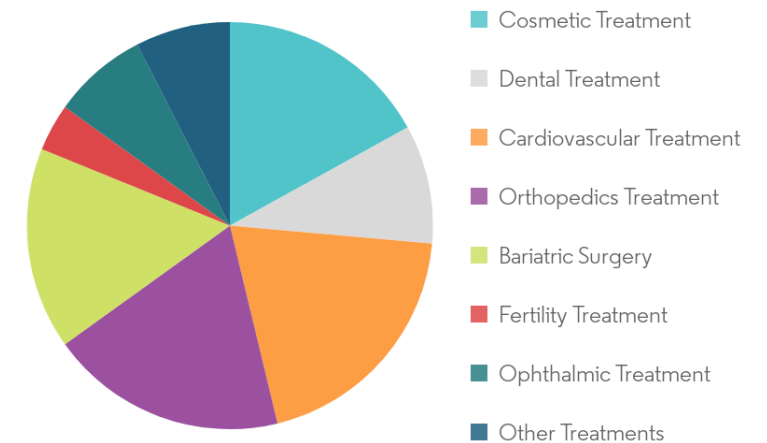


Wellness tourism trips include a variety of activities such as thermal springs, day spa and hotel spa, and exercise.

# GLOBAL MEDICAL AND WELLNESS TOURISM INDUSTRY OVERVIEW

- The global Medical Tourism market, which was estimated at **USD 44.8 billion in 2019**, is predicted to accrue earnings worth **USD 207.9 billion by 2027**.
- The industry is set to record a **CAGR of nearly 21.1% over 2020-2027**.
- In terms of volume, the global medical tourism market accounted for **24,045.80 thousand patients in 2019**, and is projected to reach **74,358.59 thousand patients by 2027**, registering a **CAGR of 15.3%** from 2020 to 2027.
- The period **fertility treatments segment of the medical tourism market is believed to show the fastest growth over the 2021-2026** with an expected **CAGR of 9.7%**.
- The **Asia-Pacific region currently dominates** the medical tourism market and it is expected to continue its stronghold for a few more years.
- Easy access and affordability of high quality healthcare services coupled with the support from tourist departments & local authorities will propel the expansion of the market over the forthcoming years.
- The global market for Wellness Tourism is estimated at **USD 735.8 Billion in the year 2020**, is projected to reach a revised size of **USD 1.2 Trillion by 2027**, growing at a **CAGR of 6.6% over the period 2020-2027**.
- The global spa market size is expected to grow at a **CAGR of 12.1%** during the forecast period from 2021 to 2028 and is expected to reach **USD 117.9 billion by 2028**.

Medical Tourism Market: Revenue Share(%), By Treatment Type, Global, 2019



Source : Mordor Intelligence



Source: Bloomberg, Mordor Intelligence, Business Wire

# GLOBAL SPECIALIZED WELLNESS TOURISM INDUSTRY OVERVIEW

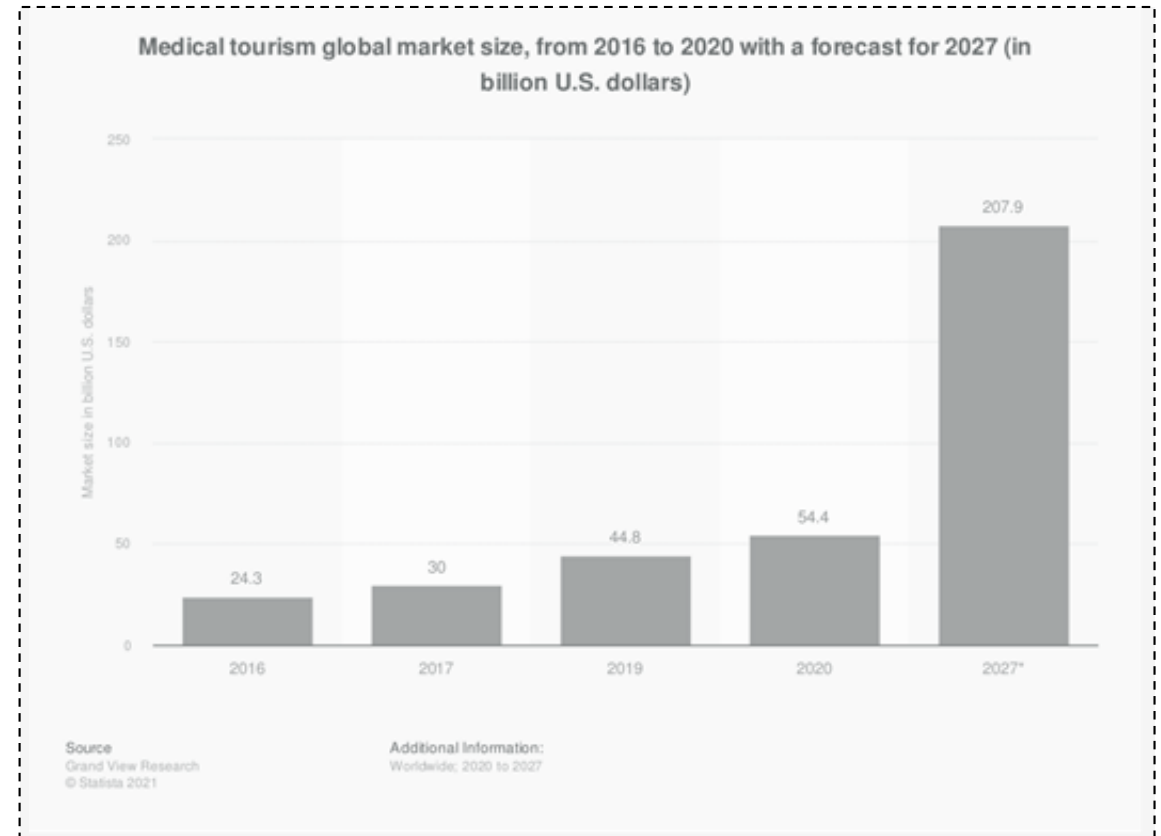
- In 2019, Mental wellness was a **USD 121 billion** global market.
- The Mental wellness market is comprised of four sub-sectors:
  - ✓ Senses, spaces, & sleep which was valued at **USD 49.5 billion (2019)**
  - ✓ Brain-boosting nutraceuticals & botanicals which was valued at **USD 34.8 billion (2019)**
  - ✓ Self-improvement which was valued at **USD 33.6 billion (2019)**
  - ✓ Meditation & mindfulness which was valued at **USD 2.9 billion (2019)**
- The physical activity market which includes the fitness, sports & active recreation, mindful movement, equipment, apparel/footwear and technology markets, is expected to **surpass USD 1.1 trillion by 2023**.
- Within the physical activity market, **mindful movement will be the #1 growth sector growing at 12% annually from 2018–2023**.
- The personal care, beauty, and anti-aging sector make up the **largest part of the wellness market** by holding a **USD 1,083 billion market share** in the wellness industry.
- Overall, the global **specialized wellness tourism industry** which includes visiting centres for weight loss, mental health, and meditation retreats is a growing market that can be **leveraged to grow the industry within the UAE**.



Source: Global Wellness Institute

# MEDICAL AND WELLNESS TOURISM MARKET SET TO RECOVER FROM THE COVID-19 PANDEMIC

- The outbreak of COVID-19 has had an adverse impact on the global medical tourism market, owing to the closed borders of various countries across the globe during lockdowns.
- With the resumption of travel, the market is **expected to recover by 1st and 2nd quarter of 2022**.
- Medical tourism is set to see **growth by the end of 2022 at pre-pandemic rates as demand is being restored**.
- GlobalData estimates that there were **over 14 million inbound visits by medical tourists globally in 2019** and forecasts this number to continue to grow at a **CAGR of 4.5% until 2024**.
- The Covid-19 pandemic has also introduced a new branch of medical tourism known as **vaccine tourism** which involves travel for the purpose of vaccination and tourism. This was most apparent among Canadian medical tourists in late 2020 and early 2021, when many chose to travel to the Southern US because Covid-19 vaccines were substantially more available in the US than in Canada.



Source: MedicalTourism

# MENA MEDICAL AND WELLNESS TOURISM INDUSTRY OVERVIEW

- Wellness tourism trips **grew from 5.5 million in 2015 to 11 million in 2017** in the MENA region.
- Wellness tourism expenditures grew dramatically from **USD 8.3 billion to USD 10.7 billion** between 2015 and 2017, marking a **13.3% annual growth** in the MENA wellness tourism market—more than twice as fast as the global average of 6.5%.
- The Global Wellness Institute projected the wellness tourism expenditures CAGR for the 2017-2022 period to be **11.8%** in the MENA region.
- The size of the MEA Medical Tourism Market is projected to be **USD 1.35 billion by 2026**, growing at a **CAGR of 8.5% from 2021 to 2026**.
- Huge investments by governments bodies in the hospital sector to promote better quality treatment procedures for the people are key driving factors for the market to grow in this region.
- Growth opportunities for the market lie in the emergence of advanced technologies in the medical sector.

## Top Ten Wellness Tourism Markets in Middle East-North Africa, 2017

	Number of Arrivals/Trips (thousands)			Receipts/Expenditures (US\$ millions)
	Inbound/Intl.	Domestic	Total	
UAE	1,191.2	652.7	<b>1,843.9</b>	<b>\$3,750.0</b>
Morocco	1,320.1	1,473.4	<b>2,793.6</b>	<b>\$1,717.8</b>
Israel	319.1	625.7	<b>944.8</b>	<b>\$1,131.3</b>
Jordan	306.9	157.4	<b>464.3</b>	<b>\$604.3</b>
Bahrain	271.1	57.1	<b>328.2</b>	<b>\$563.8</b>
Saudi Arabia	119.9	538.6	<b>658.5</b>	<b>\$492.2</b>
Oman	211.9	168.7	<b>380.6</b>	<b>\$473.5</b>
Egypt	635.5	588.0	<b>1,223.4</b>	<b>\$427.3</b>
Iran	272.3	328.1	<b>600.4</b>	<b>\$388.5</b>
Tunisia	397.1	180.2	<b>577.3</b>	<b>\$313.8</b>

*Note: These figures include both primary and secondary wellness trips. Expenditures data combine both international/inbound and domestic wellness tourism spending. Source: Estimates by the Global Wellness Institute, based upon tourism industry data from Euromonitor International*



**GLOBAL WELLNESS  
INSTITUTE™**

Source: Global Wellness Institute, Market Data Forecast

# MEDICAL AND WELLNESS TOURISM FUTURE TRENDS

## The Growth of Private Health Cities

- Foreign investment has grown significantly in this industry paving the way for private health cities to emerge.
- Patients from different countries are becoming attracted to multi-specialty hospitals. These hospitals offer both health and hospitality.

## Cultivation of Skilled Medical Tourism Professionals

- The growth of the industry can be attributed to a surge of qualified health care personnel including doctors, surgeons, translators, physiotherapists, and other facilitators.
- Medical schools and training centers are also expected to rise with the need as these professionals learn specialized procedures, such as rhinoplasty and angioplasty, that are favored by medical tourists.

## Asian Expansion

- Medical tourists bound for Asia are expected to increase in number because Asian countries provide high standards of hospitality and care that is cheaper than in many developed countries and other regions.
- Plus, they are always updating to the latest technology.

## Establishment of New Destinations

- The UAE, Greece, and Taiwan have shown promising growth over the past years in part due to their attractive tourist landscapes that draw in patients during their visit.





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# GROWTH OUTLOOK FOR MEDICAL & WELLNESS TOURISM INVESTMENTS IN UAE

**AED 12.1 billion (US\$ 3.29 billion)**  
Medical tourism proceeds in the UAE  
(2018)

**350,118**  
International tourists for medical  
purposes in the UAE (2018)

**US\$ 16 billion**  
Total UAE healthcare expenditure (2019)

**AED 19.5 billion (US\$ 5.31 billion)**  
Expected medical tourism proceeds by 2023

Wellness Tourism's contribution to  
total Tourism industry in 2018 :  
**12-13% of US\$ 36 billion**

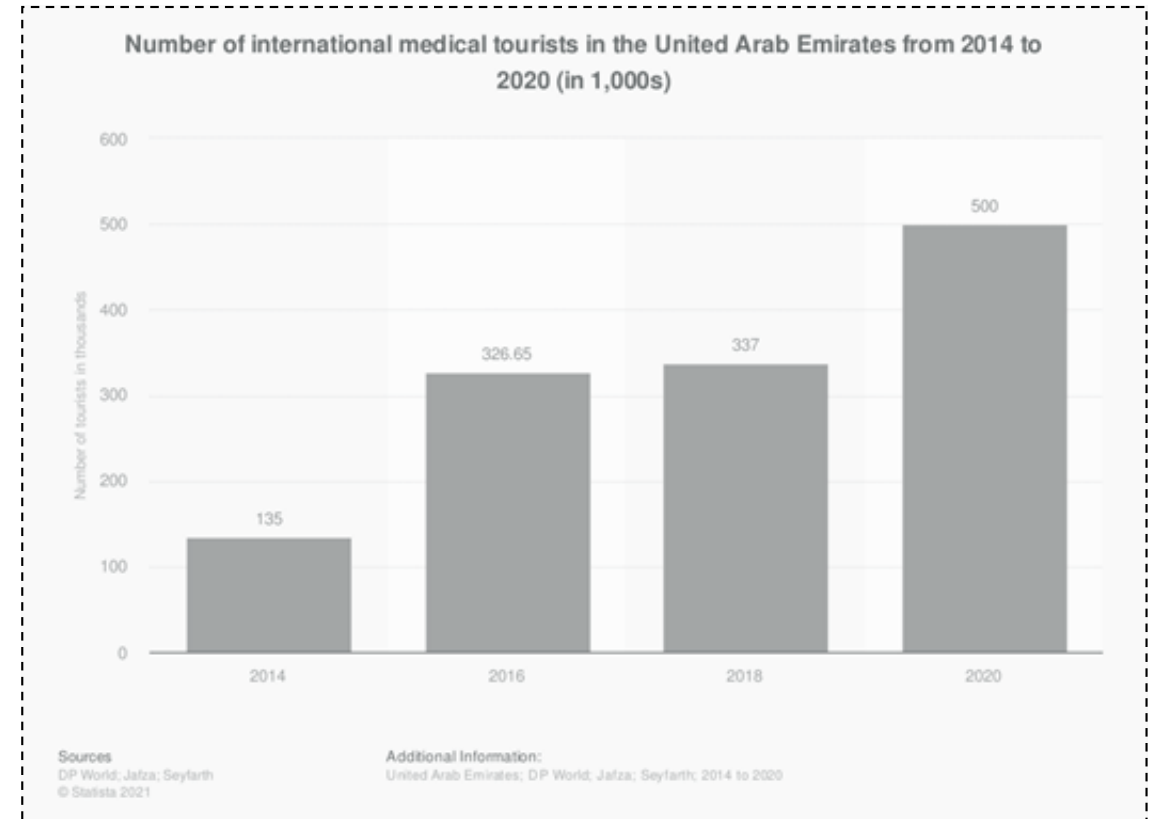
**10.7%**  
Average CAGR of this sector in the  
UAE for the next five years

Source: WAM, KPMG

# MEDICAL AND WELLNESS TOURISM INDUSTRY GROWTH ENVIRONMENT IN THE UAE

Over the last decade, the healthcare industry has emerged as one of the key industrial sectors for economic growth in the UAE.

- The medical tourism industry in the UAE generated **AED 12.1 billion (USD 3.29 billion) in 2018**, witnessing a **5.5% annual growth rate**.
- The country saw around **350,118 visitors**, registering a **rise of 4%** in the health tourism arrivals in 2019 from the previous year.
- In 2019, individuals spent approximately **AED 727 million (USD 197.9 million)** on procedures across a number of medical fields.
- **Dubai ranked 6<sup>th</sup> globally**, with a score of **71.85**, in the 2020-2021 Medical Tourism Index Overall Ranking.
- **Abu Dhabi ranked 9<sup>th</sup> globally**, with a score of **70.26**, in the 2020-2021 Medical Tourism Index Overall Ranking.
- **The UAE ranks 1<sup>st</sup> globally** in terms of number of accredited health facilities with **205 hospitals, medical centres, and health facilities, according to Joint Commission International (JCI)**.
- **Orthopaedics, sports medicine, dermatology and skin care, dentistry and fertility treatment** are the top specialities attracting health tourists to the country.
- In 2021, medical facilities in the UAE treated patients from **153 countries**.



Source: Dubai Chamber of Commerce, WAM

# IMPORTANCE OF THE ELECTIVE TREATMENT MARKET IN THE UAE

**UAE has become an attractive destination to people who want to take a bespoke approach to medical procedures and overall wellbeing.**

- Many well known doctors such as those from the television reality show Dr 90210 have opened practices in Dubai and spend part of their time consulting in the region.
- In 2018, **Dubai was named the Middle East's plastic surgery hub** by CNN, with a reported **236 licenced plastic surgeons, 386 licenced dermatologists and 277 facilities.**
- According to the Emirates Medical Association, 47% of the number of people who had cosmetic surgery in 2014 were men, which translates to an approximate **USD 82 million expenditure on various procedures, including liposuction, rhinoplasty and face lifts.**
- The expenditure on elective treatment in the UAE rose to **AED 1 billion (USD 272.3 million)** in 2018 of which **60% of procedures focus on liposuction, tummy tucks and arm lifts that are done mainly after weight loss.**
- As of 2021, Dubai has the **highest number of plastic surgeons per capita**, eclipsing Brazil, which used to be the global leader.



# GROWING WELLNESS AND SPA TRAVEL MARKET IN THE UAE

The UAE has been at the forefront of global health-tech innovations for years now

- The **UAE wellness and spa travel market**, comprising both inbound and domestic travellers, represents roughly **15% of the total tourism market**.
- Authentic Middle Eastern spas, wellness experiences and beauty traditions such as hammam, are gaining traction signifying the growing importance of this sector.
- In 2017, the UAE spa industry was estimated to be valued at **AED1.7 billion (USD 462.8 million)**, accounting for **14% of the MENA spa market**, and is expected to surpass **AED1.85 billion (USD 503.7 million) by 2025**.
- The number of 5-star hotel spas in Dubai increased from **107 in 2017 to 157 in 2021**, in close correlation with the emirate's hotel pipeline.
- Post lockdown and restrictions in 2021 saw a **50% increase in spa bookings** compared to 2019.

Top Ten Wellness Tourism Markets in Middle East-North Africa, 2017

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*Note: These figures include both primary and secondary wellness trips. Expenditures data combine both international/inbound and domestic wellness tourism spending. Source: Estimates by the Global Wellness Institute, based upon tourism industry data from Euromonitor International*

Wellness Tourism Spending Premiums in the Top Ten Markets, 2017

	Average Spending per INBOUND/INTERNATIONAL Trip		Average Spending per DOMESTIC Trip	
	Wellness Trip	Average Trip	Wellness Trip	Average Trip
UAE	<b>\$2,046</b>	\$1,451	<b>\$2,011</b>	\$1,284
Morocco	<b>\$956</b>	\$636	<b>\$309</b>	\$197
Israel	<b>\$2,453</b>	\$1,621	<b>\$557</b>	\$354
Jordan	<b>\$1,701</b>	\$1,138	<b>\$523</b>	\$334
Bahrain	<b>\$1,821</b>	\$919	<b>\$1,229</b>	\$784
Saudi Arabia	<b>\$940</b>	\$626	<b>\$705</b>	\$443
Oman	<b>\$1,904</b>	\$1,217	<b>\$416</b>	\$265
Egypt	<b>\$601</b>	\$398	<b>\$78</b>	\$50
Iran	<b>\$1,168</b>	\$785	<b>\$215</b>	\$137
Tunisia	<b>\$623</b>	\$255	<b>\$367</b>	\$241

*Note: These figures include both primary and secondary wellness trips. Source: Estimates by the Global Wellness Institute, based upon tourism industry data from Euromonitor International*

Source: Arabian Business, Global Wellness Institute

# INITIATIVES FOR THE GROWTH OF MEDICAL AND WELLNESS TOURISM IN THE UAE

## Etihad Airways and Cleveland Clinic Abu Dhabi

- Etihad Airways (the emirate's principal airline), and Cleveland Clinic Abu Dhabi, the multi-specialty hospital, signed an agreement in 2019 to promote the UAE as a premier medical travel destination.
- As part of the agreement, Etihad will offer specific medical travel packages to key markets around the world, delivering a single solution for booking flights, accommodation and medical treatments at Cleveland Clinic Abu Dhabi, which covers more than 40 medical and surgical specialties.
- The deal is a first of its kind in the region between an airline and a medical provider.



## Abu Dhabi Medical Tourism e-portal

- The Department of Health Abu Dhabi and Department of Culture and Tourism – Abu Dhabi, have launched the Abu Dhabi Medical Tourism e-portal, a digital platform that provides visitors to Abu Dhabi with all medical offerings and healthcare facilities available throughout the duration of their visit.
- The e-portal provides a list of 40 healthcare facilities included in the medical tourism network, as well as more than 287 medical treatment packages from over 173 doctors across the Emirate.
- Through the e-portal, users can also access medical tourism insurance packages, the first of its kind in the region, along with a wide range of touristic services such direct contact with healthcare providers, visa issuance, as well as booking appointments, hotels, transportation and other recreational activities.



# INITIATIVES FOR THE GROWTH OF MEDICAL AND WELLNESS TOURISM IN THE UAE

## Dubai Health Experience

- The Dubai Health Experience is the the world's first medical tourism portal.
- The portal allows visitors to book medical procedures and take advantage of discounted air fairs, visa, medical insurance, hotels stays, leisure activities and more.
- Patients can consult doctors through the portal, seek second opinion, get visa information, and can view deals and offers available.



# RENOWNED HOSPITALS IN THE UAE

Illustrative, non exhaustive





# RENOWNED CLINICS FOR ELECTIVE PROCEDURES IN THE UAE



Illustrative, non exhaustive



Aesthetics International Plastic Surgery Clinic



THE PRIVATE CLINIC  
MEDICAL & AESTHETIC CENTRE

EUROPEAN  
MEDICAL CENTER  
& Aesthetic Surgery



المركز الطبي  
الأوروبي  
و جراحة التجميل

# RENOWNED SPAS IN THE UAE

Illustrative, non exhaustive

## Armani/Spa at Armani Hotel Dubai



The 12,000-square-foot Armani/SPA offers unique spaces and services including personal fitness, sequential thermal bathing, or private and social relaxation areas.

## Eastern Mangroves Hotel Spa & Wellness, Abu Dhabi



The spa offers experiences derived from traditions from across Arabia and Asia such as some of the most extensive hammam rituals in the region.

## CHI, The Spa, Abu Dhabi



CHI, The Spa offers massages and treatments based on authentic natural healing methods found in traditional well-being practices shared by many Asian cultures. Treatment can be customised according to personal health and wellness goals.

## O Spa by L'Occitane at InterContinental, Fujairah



O Spa, the first spa in the UAE by L'Occitane offers an extensive menu of treatments combining local ingredients and rituals with international wellness therapies.

# RENOWNED WELLNESS RETREATS IN THE UAE

Illustrative, non exhaustive

## The Lighthouse Retreat, RAK



A Wellness & Detox Retreat based in Ras al Khaimah, UAE. The Lighthouse Retreat focuses on well-being and rejuvenation where you reset mentally, emotionally and physically.

## Al Maha Luxury Tented Camp by Marriott, Dubai



The desert resort and spa at Al Maha combines healing practices drawn from cultures around the world.

## Stay Pura Wellness Retreat, Abu Dhabi



Located in Jubail Island, Abu Dhabi Pura Eco is an eco-friendly retreat focusing on reviving the old-age traditions and bringing their community closer to nature. This wellness retreat focuses on disconnecting and allowing us to experience a sustainable yet mindful experience.

## ZOYA, Ajman



Zoya, a Health & Wellness Retreat, is the region's first fully integrated wellness experience, offering a unique and holistic approach to mind and body rejuvenation.



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# ECO SYSTEM COMPONENTS – INSTITUTIONAL FRAMEWORK

- DXH Group was founded in the year 2014 by Dubai Health Authority (DHA) as a consortium of healthcare facilities within the Emirate of Dubai that are recognized and evaluated by DHA.
- The Health Tourism Council seeks to build long-term collaborated relationship with other stakeholders within the region and internationally to develop a continuous care process by understanding the services needed to promote health tourism.
- Fulfilling the vision of a strategic plan for health tourism, these facilities will promote comprehensive and competitive healthcare packages for in-bound health tourists through the DXH Website/Mobile App thereby strengthening the public-private partnership in Dubai.
- The group currently comprises of 76 healthcare providers offering a wide range of comprehensive health services in Dubai



# EVENTS BY THE UAE GOVERNMENT IN MEDICAL AND WELLNESS TOURISM SECTOR

Illustrative, non exhaustive



- Gulf Medical Tourism brings together key stakeholders in the medical tourism sector. The event will play a key role in showcasing the capabilities of the UAE as a key destination for medical tourism and patients around the world.



- International Medical Travel Show Dubai is an advanced networking and educational platform that was created by international team with 10+ years of experience in medical tourism and business event organizing and management to give to participants the result they are seeking for by joining the medical tourism event.



- The Arabian Travel Market (ATM) is the leading trade fair for the Middle East's inbound and outbound travel industry.
- The annual business-to-business exhibition showcases thousands of products and destination offerings from around the world to influential buyers and trade visitors.



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# MEDICAL AND WELLNESS TOURISM SECTOR GOVERNANCE



<https://www.dha.gov.ae/en/Pages/DHAHome.aspx>

- The Dubai Health Authority (DHA) was created, in June 2007, by Law 13 issued by His Highness Sheikh Mohammed bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE, Ruler of Dubai, with an expanded vision to include strategic oversight for the complete health sector in Dubai and enhance private sector engagement.
- In addition to overseeing the health sector for the Emirate of Dubai, the DHA also focuses on providing services through DHA healthcare facilities including Latifa, Dubai, Rashid and Hatta Hospitals, its 12 primary healthcare centres, 17 medical fitness centres and its 6 specialty centres.



<https://www.doh.gov.ae/en/>

- Department of Health - Abu Dhabi is the regulative body of the Healthcare Sector in the Emirate of Abu Dhabi and ensures excellence in Healthcare for the community by monitoring the health status of the population.
- DoH defines the strategy for the health system, monitors and analyses the health status of the population and performance of the system.
- In addition DoH shapes the regulatory framework for the health system, inspects against regulations, enforce standards, and encourages adoption of world – class best practices and performance targets by all healthcare service providers in the Emirate.



# MEDICAL AND WELLNESS TOURISM SECTOR GOVERNANCE



<https://tcaabudhabi.ae/en/default.aspx>

- The Department of Culture and Tourism - Abu Dhabi drives the sustainable growth of Abu Dhabi's culture and tourism sectors, fuels economic progress, and helps achieve the UAE capital's wider global ambitions.
- The Tourism sector is charged with reinforcing Abu Dhabi as a world-class destination, in line with the commitment to conserving, promoting, and leveraging the emirate's heritage, culture, and tourism assets.
- The Tourism Sector is also responsible for issuing licenses for all hotel and tourism organisations, events, and conferences.



<https://dubaitourism.gov.ae/en/>



- Recently, the merger of the Dubai Economy and Department of Tourism and Commerce Marketing has been announced, it will be under the leadership of His Excellency Helal Saeed Al Marri.
- The Department of Tourism and Commerce Marketing – Dubai promotes the dynamic evolution of the city and its delivery of customisable experiences for every visitor.
- Dubai Tourism is the principal authority for the planning, supervision, development, and marketing of Dubai's tourism sector.
- Dubai Festivals and Retail Establishment (DFRE), within DTCM, aims to position Dubai as an international events and entertainment hub.
- The Dubai Corporation for Tourism and Commerce Marketing (DCTCM) is dedicated to working with private and public sector tourism and commerce partners to promote Dubai's position as a leading business and leisure destination around the world.