

Middle East Medical Tourism Industry Outlook to 2016 - Advanced Medical Infrastructure Paving the Way for Future Growth

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Abstracts

EXECUTIVE SUMMARY

The report titled “Middle East Medical Tourism Industry Outlook to 2016- Advanced Medical Infrastructure Paving the Way for Future Growth” provides a comprehensive analysis of the medical tourism industry in the Middle East countries in terms of the medical tourist arrivals, revenue generated by the medical tourists in the respective countries. The countries that attract most of the medical tourists in the region are Jordan, Turkey, Saudi Arabia, Israel and Iran. UAE is trying to establish itself as a destination for medical tourism in the region. Factors that influence the medical tourist arrivals such as the hospital network in the country, healthcare personnel in terms of doctors, nurses, midwives and pharmaceutical personnel have been extensively covered in the report.

Middle East:

The medical tourism revenue of the Middle East region has increased from USD 1,240 million in 2006 at a CAGR of 4.7% from the year 2006-2011. The medical tourism revenue of the Middle East region has risen from 456,000 medical tourists in 2006 to ~ medical tourists in 2011 at a CAGR of ~% for the years 2006-2011. Jordan is the market leader in terms of medical tourist arrivals and the medical tourism revenue in 2011. The low cost quality treatment being provided by the state of the art medical infrastructure has augmented the medical tourist arrivals in the region. The relaxation of international norms such as visa documents in some countries such as UAE and Jordan has attracted medical tourists within the region. The rise in the private hospitals in the region is also one of the factors for the rise in the medical tourists in the region.

Environmental factors such as political instability, civil wars and anti-west feelings within the region have had negative consequences for the countries in the region. The improvement of the medical infrastructure has complimented the growth of medical tourism in the region. The medical tourism industry in the Middle is projected to attract 753,500 medical tourists and will generate revenue of USD 2 billion by 2016

Jordan:

Jordan is the leader in the medical tourism industry in the Middle East region. The country serves medical tourists from Iraq, Syria, Yemen and other countries in the region. The country offers state of the art medical treatment in all of the 106 hospitals in the country. The health centre in Amman receives most of the medical tourists in the country. The country has 10 hospitals with JCI certification in 2011. The medical tourist arrivals have risen from 175,000 in 2006 to ~ in 2011 whereas the revenue generated by the medical tourism has surged from USD 920 million in 2006 to USD ~ million in 2011 at a CAGR of 1.6% for the years 2006 to 2011.

Turkey:

Turkey has a strategic location that makes the country a well known destination for the medical tourism in the region. The country is the second largest country in terms of the medical tourist arrivals and also the second largest in terms of revenue generated through medical tourism. In 2011, the medical tourism revenue was valued at USD ~ million as compared to USD 192 million in 2006 thereby growing at 6.8% per annum during the period 2006-2011. The creation of the health zones in the country by 2014 are expected to attract more medical tourists to the country. The medical tourism industry is estimated to attract ~ medical tourists thereby generating revenue of USD 408 million by 2016.

Iran:

The government had set up its first health tourism office in 2010. The health tourism office in association with medical universities in Iran is expected to boost the medical tourism industry in the country in the coming years. Iran treated ~ thousand medical tourists in 2011. The revenue generated by the medical tourism in 2011 in Iran was USD ~ million. Iran has the second highest number of hospitals in the entire Middle East region next to Turkey in 2011. The major challenge for Iran is order to promote its medical tourism is the harsh political outlook to the western countries. In the coming

years, the country is expected to attract ~ thousand medical tourists from Iraq, Syria and Lebanon thereby generating revenue of USD ~million.

Israel:

Israel has positioned itself as a pioneer in the IVF treatments, cancer treatments and nuclear medicine. With rising number of medical tourists an upsurge in number of government and private hospital has been witnessed. There were more than 190 government hospitals in the country in 2010 with major hospitals located in Tel Aviv, Jerusalem and Herzliya. The country received ~ medical tourists in 2011. The medical tourist arrivals have increased from 15,000 in 2006 to ~ in 2011 at a CAGR of ~% for the years 2006 to 2011. The growth in the medical tourist arrivals can be attributed to the world class amenities in the hospitals. The medical tourism revenue is expected to grow at 5.7% for the years 2012-2016.

Saudi Arabia:

The people from UAE, Yemen, Kuwait and Syria constituted most of the medical tourists in Saudi Arabia in 2011. The country received ~ medical tourists in 2011 and the medical tourism industry was valued at USD 135 million during the year. The Ministry of health of Saudi Arabia had proposed several plans to build a supervisory authority to control private healthcare facilities thereby promoting medical tourism through these initiatives. The medical tourist arrivals in the country are projected to increase from ~ in 2012 to 105,000 by 2016 at a CAGR of 20% for the years 2012-2016.

UAE:

The UAE is promoting its medical tourism in the world by the creation of the Dubai Healthcare City (DHCC). The country has the highest number of JCI certified hospitals in the region. In the coming years the UAE is expected to play a significant role in the medical tourism industry in the Middle East region.

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