



MOHAMMED BIN RASHID SCHOOL OF GOVERNMENT

POLICY ANALYSIS EXERCISE

Summary

The UAE healthcare system has seen exponential growth in the past few decades, as population demand on local medical services increased. In response, the UAE government channeled efforts and funding into developing a comprehensive healthcare system operating on high quality standards. Despite the UAE government spending millions of dirhams every year on providing quality healthcare and financially supporting medical treatment for Emiratis, many still prefer to receive medical care overseas. This policy brief sheds light on the growing number of Emirati medical tourists and patients seeking medical treatment and services overseas. The brief provides insights into the circumstances encouraging the spread of this phenomenon and aims at identifying motivational factors as experienced by Emirati medical tourists. It relies on in-depth qualitative data elicited from Emirati overseas patients exploring their experiences, reasons for travels, decision-making processes, type of sought medical treatment, choice of destination country and their perspectives on medical tourism.

The brief is based on a study that was conducted in 2019 which aimed to determine and identify motivational factors that encourage Emirati medical patients to travel overseas seeking medical treatment, facilities, and services. The study consisted of interviews conducted with (15) Emirati adults who experienced medical tourism. The study findings feed into a set of the policy recommendations which can be a useful source for informing policymaking by UAE government officials, policymakers, medical service providers, medical tourism-related industries, and private businesses to enhance the UAE's overall healthcare system and medical tourism policies and marketing strategies.

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Motivational Factors in Emirati Patients' decision-making for seeking overseas medical facilities and services

Introduction

The growth of the medical tourism in the UAE has transformed the country into one of the popular medical tourism hubs in the region. The government increased its spending to develop the quality and quantity of its healthcare infrastructure ensuring best standards for healthcare service providers.. In the UAE, there is a variety of specialized services and facilities offered along with wellness treatments, including sports medicine, orthopedics, ophthalmology, dermatology, plastic surgery, rehabilitation, dental surgery, preventive health check-ups, wellness, and long-term care (Sadaqat, 2018). The medical tourism industry in UAE generated revenue of AED 43.7 billion from international patients in 2016, which contributed to reinforcing the national GDP growth of the sector.

About the PAE Series

The Policy Analysis Exercise (PAE) series is a student-led policy publication series. The PAE Series is a platform that highlights the contribution of MBRSG postgraduate students to policy. The Policy Briefs in this series identify and analyze real policy issues and provide concise advice and solutions for policymakers. The Series contributes to bridging the gap between educational output and real policymaking. It highlights the impact of MBRSG's educational output on policy through high quality research outcomes by MBRSG students. For policymakers, the Series provides valuable practice-driven policy analysis, advice, recommendations and solutions that can contribute to better quality of government.

According to the Ministry of Health and Prevention (MOHAP) and the Health Authority of Abu Dhabi (HAAD), the UAE's total expenditure on overseas Emirati patients reached AED 623 million in years 2016 and 2017. The number of patients amounted to around 1,994 in 2016 and 1,582 in 2017, with an average cost of AED 3.12 million and AED 2.7 million per patient respectively. Overseas medical care expenditure per patient in the UK amounted to AED 3.45 million, in Germany to AED 4.24 million, and in the USA to AED 1.17 million. The most sought after overseas treatments were in Oncology (24.2%), followed by Neurology and Neurosurgeries (17%), Orthopedics (11.3%), and Cardio-surgeries (6.2) (Zain, 2018).

The UAE Government has worked collaboratively with all local health authorities to ensure that all public and private hospitals in the country are accredited according to international quality standards for medical services and staff. Around AED 4.40 billion was allocated for the healthcare sector from a total federal budget of AED 60.3 billion in the year 2019. This expenditure aimed at expanding and improving the healthcare system to support economic diversification and meet the population's growing medical needs and expectations (UAE Government, 2019). Despite the UAE government spending millions of dirhams every year on providing quality healthcare and financially supporting medical treatment for Emiratis, many still prefer to receive medical care overseas. Therefore, it is crucial to examine the factors influencing Emirati patients' decision making process involved in choosing overseas medical treatment.

Medical tourism in the UAE

Medical tourism in the UAE generated a revenue of USD11.8 billion (AED 43.7 billion) from international patients in 2016 which contributed to the national GDP growth in the sector. Dubai scored higher revenue amounting to over USD 381 million (AED 1.4 billion) and received more than 325,000 medical tourists from which 37% came from Asian countries, 31% from Arab and Gulf Cooperation Council (GCC) countries, and 15% Europeans. Furthermore, the UAE is aiming to boost the economy by USD 707 million (AED 2.6 billion) through hosting 500,000 medical tourists by 2020 from countries such as Russia, India, Pakistan, the Commonwealth of Independent Countries (CIS), the United Kingdom (UK), Angola, and Nigeria (Dubai Health Authority, 2017).

The UAE has tremendous potential to become one of the world's top destinations for quality healthcare serving medical tourists. Dubai ranked 1st in the MENA region and ranked 16th in best medical tourism global destinations, while Abu Dhabi ranked 25th (Medical Tourism Index, 2016). Likewise, Dubai and Abu Dhabi were respectively ranked globally as 10th and 16th in quality of facilities and services, 18th and 22nd in destination environment and 22nd and 31st in the medical tourism industry (Medical Tourism Index, 2016). These high ranks are the consequence of having a wide range of medical technology, strategic locations, highly specialized physicians, along with affordable treatments and services (Sadaqat, 2018).

Factors influencing patients' decision to receive healthcare abroad

Several researchers analyzed travel motivators to gain a better understanding of tourist travel behavior. Understanding travel motivators is an essential part of examining travel behavior, as these motivators influence tourists' decision-making processes and personal significance such as motivation variables, tourists' attitudes, and environmental and situational factors (Vuuren & Slabbert, 2012).

The equation is not different in medical tourism where the push and pull factors play a crucial role in influencing patients' choice for seeking alternative medical treatment and facilities when abroad. The push factor is psychological encouragement (internal motives) directing someone's behavior to travel, such as a desire to escape, self-explore, have new experiences, relax, engage in adventures, and socially interact with others. On the other hand, the pull factor manifests itself in the quality of the destination's environment and qualities which attract tourists to visit, such as local services and hospitality, safe and secure environments, affordable trip costs, and travel convenience (Said & Maryono, 2018; Antara & Prameswari, 2018).

Accordingly, several studies by (Khan & Alam, 2014; Adams, et al., 2015; Hopkins, et al., 2010; Behrmann & Smith, 2010) explained factors which motivate medical tourists to travel from their home country to other countries. These factors include the absence of specific medical and health facilities inside their countries. Another factor is high medical expenses and limited insurance coverage in home countries. In this case, medical tourists choose overseas treatment to reduce the cost of health care paid for out of pocket. Other factors are ; avoiding

long waiting queues for specific diagnosis and/or treatment, seeking privacy and confidentiality for some treatments- like cosmetic surgery, fertility treatment and rehabilitation treatment for alcohol, tobacco and substance abuse, combining tourism packages with healthcare-seeking medical treatment or routine check-ups along with tourist activities such as sight-seeing, visiting monuments, museums and holiest places. However, citizens of middle-income countries can be motivated to seek medical care abroad due to lack of confidence in their health system domestically, lack of high-technology services, reliability of all types of diagnostic services, and the abundance of treatment options offered abroad (Snyder, et al., 2015).

Evidence from a recent study (AlHashar & AlZakwani, 2018) highlights numerous factors encouraging citizens to travel abroad to seek medical care such as ineffective or unavailable domestic treatment, overseas medical consultations when domestic healthcare fails to provide accurate diagnosis, dissatisfaction with domestic medical services. . On the contrary, patients abroad can receive less expensive procedures, more luxurious facilities, shorter waiting time, and more options for inpatient treatment. Moreover, they rely on conventional methods, such as word of mouth from trusted family members and friends, to get information and advice on treatment abroad. On the other hand, medical tourism offices, advertisements, the Internet are the least used sources of information (AlHinai, et al., 2011).

Methodology

This policy brief is based on an exploratory study utilizing qualitative approaches to data collection consisting of semi-structured interviews. The purpose of the study is to provide in-depth insights on the phenomenon of medical tourism by examining medical tourists' decision-making processes involved in seeking medical care abroad. Interviews were conducted to figure out the experiences, attitudes, and perspectives in outbound medical tourism and motivation factors which affecting and influencing their decision-making process.

The study sample consisted of fifteen (15) Emirati nationals, aged between 27 to 59 years living in different cities including 13 male participants and 2 female participants who experienced in outbound medical tourism, whereas 12 of them were married and 3 were singles with different levels of education, 5 participants were bachelor's degree holders, 3 with Diploma, 6 with high school, and 1 preparatory school certificate holder.

Findings & Discussion

The interviews identified nine motivational factors affecting medical tourism decision-making process:

(1) Expert Physicians: all of the 15 participants mentioned that finding expert physicians is the primary motivational factor influencing their decision making process for seeking overseas medical treatments. Their answers revealed that doctor's expertise in their field is the main influence which was reflected in some of the terms they used to describe their overseas physicians; such as excellent, professional, highly experienced,

efficient, and specialized doctors. Physician's expertise has been highlighted in literature as one of the most important components in medical tourism decision-making (Heung, et al., 2011).

(2) Quality of Care and Services: according to all 15 participants, quality of care and services is another significant factor for choosing medical tourism. Customers are motivated to visit overseas medical destinations when the quality of medical services available at destination country is top-notch making the quality of care and services one of the most influential factor in the decision-making process of medical tourists (lajevardi, 2016) and (Heung, et al., 2011).

(3) Medical treatment Cost: 13 participants indicated that government support for overseas treatments is the second leading factor influencing their decision in seeking medical care abroad, where overseas medical care is fully funded for UAE nationals by the UAE government. Normally, funding for overseas medical travel is provided by the ministry of health and departments of health, in the absence of appropriate medical care in UAE hospitals.

(4) Sources of Information: the participants revealed that they rely heavily on 'word of mouth' as a primary source of information for obtaining hospital recommendations. Most of their decisions for seeking medical care abroad were influenced by opinions and recommendations provided by family members or friends who received medical treatment overseas. This finding indicates that 'word of mouth' plays an essential role in motivating patients to travels overseas for medical reasons.

(5) Tourism facilities: around 10 participants stated that they prefer to visit destinations where various tourist facilities can be easily found. This indicates that quality of supporting

infrastructures, such as transportation, cultural and tourist attractions and shopping services, are influential factors involved in decision making when it comes to choosing medical tourism (Said & Maryono, 2018; Ahmed, et al., 2018; Antara & Prameswari, 2018).

(6) Excellent vacation spots: 10 participants expressed their desire to combine medical care with excellent vacation spots, while the rest thought that receiving medical treatment is the most important focus. This finding manifested itself through the language used by some participants when describing their medical tourism experience, such as “wonderful nature,” “explore new places,” “nice weather,” “various tourist places,” “food and traditional cuisine,” and “sightseeing locations.”

(7) General health improvement: the participants also stated that combining medical treatment with a good opportunity for vacation helped them generally improve their health by relaxing and escape from the daily stress of life.

(8) Risks: only 4 participants out of 15 expressed their opinion on the role of risks in influencing their decisions on overseas travel for medical treatment. The risks associated with medical tourism stems from either the risk of traveling abroad or from surgery procedures (post-operative or during the procedure) (AbdMutalib, et al., 2016).

(9) Communication and Language Barriers: lack of communication skills and language barriers may be very challenging for medical tourists which can restrict their travel options. However, none of the participants pointed out major miscommunication incidents with physicians while receiving overseas medical care.

The findings from this study suggests that the

quality of care and services, expert physicians, sources of information and general health improvement are the primary factors which affect patients’ final decision. Recommendations via ‘word of mouth’ from family and friends play an essential role in decision-making as they pass detailed information about quality of treatment experience. Other critical motivational factors include the availability of quality tourist facilities, vacation spots, and treatment costs. Moreover, the findings suggest that risks, communication, and language barriers do not affect patients’ motivational factors and their decision-making process for medical tourism and overseas treatments.

Policy Implications and Recommendations

Policy implications

The findings of this study can be a matter of interest to various stakeholders in medical tourism, such as medical service providers, policymakers, academics, medical tourists, medical tourism related industries and private businesses. The recommendations in this brief can be particularly useful for UAE government officials and policymakers as it could inform medical tourism policies enhancing the understanding of Emirati medical tourists and their expectations.

As the medical tourism industry in UAE is a significant source of income generating a revenue of USD11.8 billion (AED 43.7 billion) and contributing to the national GDP growth of the country. Therefore, strategies focusing on promoting the country’s medical tourism competitive advantage have great importance in public policy. It is crucial to shift future efforts to developing medical tourism and directing

service providers (such as medical experts and marketing professionals) to understanding customers' decision-making process and their needs and expectations to help nurture medical and non-medical businesses in the country.

Recommendations

The recommendations in this brief were drawn by medical tourism experiential and analytical evidence and framework to help improve the quality of the medical healthcare system in the country. The findings suggest that hospitals in UAE need to consider investing in high-quality medical care and services and hire trained and diverse medical staff to meet the demand on medical tourism. Also, this strategy can reduce the numbers of local patients seeking medical tourism abroad.

- Through the UAE Ministry of Health and Prevention, public and private hospitals should collaborate with international medical institutions to enhance the quality of medical services. This can be achieved by funding and sending local physicians and medical staff abroad to get training to become more qualified to treat conditions that normally requires foreign consultations. Moreover, connecting local physicians and promoting physician-exchange programs with renowned medical institutions can bring skilled expertise from around the world to join UAE medical crew. This can open opportunities for conducting advanced surgeries and sharing medical techniques, knowledge and expertise.

- The Ministry of Health and Prevention should build an information system and a digital network to enable medical staff and physicians to exchange information, medical decisions, ideas, and advice for enhancing the quality of

medical services. Medical records can be linked via Emirates ID card which allow other healthcare providers to access patients' healthcare data.

- The Ministry of Health and Prevention should build a medical service network with reputable international hospitals to bring highly skilled physicians to work within UAE public and private hospitals to deliver outstanding medical care and services. This can be fostered through signing public-private partnership agreements (PPP), memorandum of understanding (MOUs) and mutual aid agreements (MAA)

The consequences of such collaboration include: 1) facilitating potential collaboration among healthcare entities (e.g. hospitals, clinics, rehabilitation centers and facilities) which will help promoting the population's health, 2) helping in Hospital Cost Reduction and reduce operational cost by allowing sharing resources between hospitals (e.g., personnel, equipment, supplies) and 3) providing logistical support (e.g., continuity of communications) to meet patient surges during emergencies, disasters, or public health emergencies.

- The Ministry of Health and Prevention should introduce mandatory regulations to direct hospitals toward improving the quality of their services aligning with local and international medical standards by obtaining ISO certification for Quality Management Systems, implementing rating program (5 or 7 stars rating system) and ensuring delivering high quality healthcare.

- UAE public and private hospitals should focus on building a follow-up system such as post-operative service and establish a rehabilitation center to offer physiotherapy services for Emirati patients after complicated surgeries. This follow-up system provide patients with proper consultations about their health and treatment

to enhance their recovery. Moreover, the system should allow patients to receive suitable medical treatments from local physicians and access their medical records (inbound and outbound) to reduce risks and other health-related concerns.

- The Ministry of Health and Prevention, in addition to public and private hospitals, should collaborate with the Department of Tourism and Commerce Marketing to help in assigning objectives within the Dubai medical tourism program. Such collaborative approach can enhance the medical tourism sector and develop a marketing strategy in UAE. As a consequence, Emirati patients can be informed of medical services and facilities in the UAE equivalent to the ones they seek overseas.
- Collaboration between the Ministry of Health and Prevention and the Department of Tourism and Commerce Marketing can also create local measuring indices and scales for evaluating the medical tourism sector growth in UAE. These indicators can include the number of patients visiting hospitals, number of local and expat physicians and type of treatment which patients receive. It can also include patients' evaluation of their experiences, their comments, and feedback which can be later used to create a dashboard approach for sharing medical documents and knowledge.

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The Mohammed Bin Rashid School of Government (MBRSG) is a research and teaching institution focusing on public policy in the Arab World. Established in 2005 under the patronage of HH Sheikh Mohammed Bin Rashid Al Maktoum, Vice President and Prime Minister of the United Arab Emirates and Ruler of Dubai, in cooperation with the Harvard Kennedy School, MBRSG aims to promote good governance through enhancing the region's capacity for effective public policy.

Towards this goal, the Mohammed Bin Rashid School of Government also collaborates with regional and global institutions in delivering its research and training programs. In addition, the School organizes policy forums and international conferences to facilitate the exchange of ideas and promote critical debate on public policy in the Arab World.

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- Executive education for senior officials and executives; and,
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