

# The Future of Medical Tourism in Saudi Arabia: Current Status, Challenges, and Strategic Directions

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## Abstract

Medical tourism has become a vital global industry, with millions of patients traveling across borders annually to access high-quality healthcare services at competitive prices. As countries worldwide aim to capitalize on this expanding trend, Saudi Arabia is positioning itself as a key player in the sector, leveraging its advanced healthcare infrastructure, world-class medical facilities, and strategic vision under Vision 2030. This paper provides a comprehensive review of Saudi Arabia's current medical tourism landscape, highlighting its strengths, including a modern healthcare infrastructure and government-backed initiatives. It also addresses the challenges the Kingdom faces, including gaps in market perception, cultural barriers, and the need for improved regulatory frameworks and service quality. The study outlines strategic directions to boost Saudi Arabia's competitiveness in the medical tourism market. Key initiatives include targeted marketing and branding efforts to enhance the Kingdom's global recognition, the integration of smart technologies to improve healthcare delivery, and alignment with Vision 2030 to foster sector growth. Additionally, the paper stresses the importance of improving patient experience and healthcare infrastructure to meet international standards. By addressing these challenges and capitalizing on emerging opportunities, Saudi Arabia can establish itself as a premier destination for medical tourism, providing specialized treatments, advanced technologies, and a patient-centered approach to care.

**Keywords:** Medical Tourism, Saudi Arabia, Vision 2030, Smart Technologies, Branding, Healthcare Infrastructure, Patient Experience

## Introduction

One of the most essential and consistently demanded sectors is healthcare. The global healthcare industry exists to assist people and ensure that most individuals enjoy good health. Second only to the agriculture sector in terms of revenue, the health and wellness industry is valued at \$4.2 trillion, as noted by Alkhamis & Miraj (2020). Medical tourism has become a prominent global trend, with patients traveling across borders to access medical care, often

seeking more affordable or specialized treatments that are not available in their home countries (Karadayi-Usta, 2025). This industry has experienced significant growth over the past few decades, driven by factors such as rising healthcare costs in developed countries, the increasing availability of advanced medical services in developing nations, and the integration of tourism with healthcare (Ashrafuzzaman, M., et al., 2024). The worldwide medical tourism market was valued at USD 35.78 billion in 2024 and is expected to reach roughly USD 252.94 billion by 2034, with a compound annual growth rate (CAGR) of 21.60% from 2025 to 2034 (see Fig. 1.0).

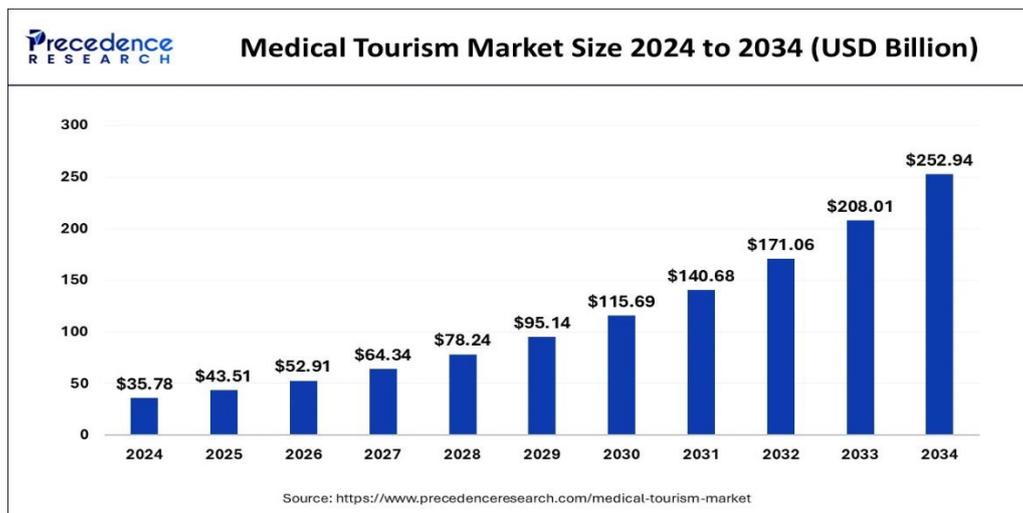


Figure 1.0: Medical Tourism Market Size. Source: Precedence Research, 2025

Medical tourism has emerged as a significant phenomenon on the global stage, intertwining healthcare and tourism in ways that influence national branding and economic growth. This sector enables patients to cross borders to receive medical care, often at lower cost and with shorter wait times than in their home countries. The implications of medical tourism extend beyond individual health outcomes; they also affect public health systems, economic development, and the branding of nations as healthcare destinations.

Saudi Arabia, in particular, has made significant strides in developing its medical tourism sector as part of its Vision 2030 initiative, which aims to diversify the economy and enhance the quality of healthcare services (Yilmaz & Aktas, 2020). The Kingdom is investing heavily in healthcare infrastructure, aiming to attract international patients by offering high-quality medical services and a culturally sensitive environment. The integration of Islamic medical practices and the promotion of wellness tourism are also key components of Saudi Arabia's strategy to position itself as a leading medical tourism destination in the region (Rokni & Park, 2020). As the country continues to develop its capabilities in this sector, it faces the challenge of balancing the needs of domestic patients with the demands of international medical tourists, ensuring that the growth of medical tourism does not compromise the quality of care available to its citizens (Xu et al., 2021).

Furthermore, both governmental spending (74.2%) and the private sector (25.8%) drive Saudi Arabia's healthcare market, with a compound annual growth rate (CAGR) of 12.3%. The private sector's share is predicted to rise to 28.1% by 2025 (Alkhamis & Miraj, 2020). This

implies that Saudi Arabian medical facilities have consistently improved, not only through government efforts but also through private hospitals.

Despite the rapid advancement of healthcare services in Saudi Arabia, the academic and policy literature on medical tourism within the Kingdom remains fragmented and primarily descriptive. Existing studies tend to emphasize achievements and promotional efforts without providing a comprehensive, evidence-based evaluation of the current situation, core challenges, and long-term strategic directions for the sector. More importantly, there is a lack of integrated frameworks that connect medical tourism to national transformation goals, such as Vision 2030, healthcare privatization, attracting international patients, and global competitiveness. This absence of thorough assessment creates a significant knowledge gap for policymakers, healthcare investors, and industry stakeholders who need data-driven insights to promote medical tourism as a sustainable economic and healthcare pillar.

Therefore, this review paper is both timely and significant, as it synthesizes current evidence to assess where Saudi Arabia stands today, identify the barriers impeding progress, and outline future strategies to maximize benefits for the healthcare system, the economy, and global patient inflows. The study not only contributes to academic discourse but also supports national decision-making by providing a forward-looking roadmap for strengthening Saudi Arabia's position in the global medical tourism landscape. To achieve this objective, the study will be guided by the following research questions, which will be examined comprehensively in the subsequent sections:

1. What is the current status of medical tourism in Saudi Arabia?
2. What are the key challenges facing the development and expansion of medical tourism in Saudi Arabia?
3. What strategic directions can be recommended to advance medical tourism in Saudi Arabia?

Thus, in the following sections, we will address these research questions comprehensively, providing a detailed analysis of the current state, the challenges it presents, and the strategic pathways forward.

#### *Current Status of Medical Tourism in Saudi Arabia*

Medical tourism in Saudi Arabia is emerging as a significant, fast-growing segment of the broader tourism and healthcare landscape. The market size was valued at approximately USD 0.20 billion in 2024 and is projected to reach USD 0.68 billion by 2030, reflecting a strong compound annual growth rate (CAGR) of 22.5% (Better, 2025). This anticipated growth is driven by increased government focus on healthcare, sustained investment in modern medical infrastructure, and the Kingdom's strategic positioning as a destination that combines advanced medical services with cultural and religious tourism. Saudi Arabia hosts millions of religious pilgrims annually, many of whom seek healthcare services during their visits, highlighting a unique interplay between religious and medical tourism (S. M & Alam, 2014).

Globally, health-related travel has expanded rapidly, with more than 37 million health-related trips generating a substantial economic impact. Despite having modern, well-

equipped hospitals and a stable, peaceful environment, Saudi Arabia has historically been less prominent than some neighboring Gulf Cooperation Council (GCC) states and Asian countries in attracting international medical tourists (S. M & Alam, 2014). However, recent policy directions and institutional reforms, including international hospital accreditation by bodies such as the Joint Commission International, signal a strong commitment to capitalizing on this growing market (S. M & Alam, 2023). If these initiatives are effectively integrated with religious and general tourism, medical tourism has the potential to contribute to a broader “income revolution” in Saudi Arabia (S. M & Alam, 2014).

Saudi Arabia is increasingly viewed as a high-potential destination, particularly for patients from the Gulf region, North Africa, and parts of Asia. Its combination of advanced healthcare infrastructure, generous government funding, and a strong commitment to patient care positions the Kingdom as a serious alternative to more established Western medical hubs. Major urban centers such as Riyadh, Jeddah, and Dammam host modern hospitals equipped with advanced technologies, highly trained medical staff, and centers of excellence in multiple specialties.

#### *Key Medical Services and Clinical Strengths*

To enhance its competitiveness in the medical tourism sector, Saudi Arabia has been developing specialized, high-complexity medical services. Key treatment areas include cardiology, oncology, fertility treatments, orthopedics, and other high-demand specialties, mirroring global trends in medical tourism. Hospitals increasingly provide advanced diagnostic tests, elective surgeries, and reproductive technologies, including components of cross-border reproductive care. Fertility tourism is particularly notable, given the growing demand among GCC nationals who frequently travel abroad for advanced reproductive treatments that may not be widely available or accessible domestically (Simopoulou, et al., 2022). Cardiology services are also expanding, supported by regional collaboration efforts to strengthen both pediatric and adult cardiac care.

In oncology, the country has experienced significant growth in cancer care centers; however, challenges still exist regarding quality control, access to clinical trials, and specialized training. These gaps highlight ongoing needs for targeted infrastructural and educational investments to meet international standards (Mazzetto et al., 2022) fully. Orthopedic services, including elective surgeries for musculoskeletal conditions, are being improved through the adoption of advanced medical technologies and the hiring of highly skilled, often Western-trained, specialists.

Beyond these core areas, Saudi Arabia has made significant progress in organ transplantation, cosmetic and reconstructive surgery, bariatric surgery, ophthalmology (e.g., LASIK and cataract surgery), dental implants, dermatological treatments, and robotic-assisted surgeries. Advanced radiology, precision medicine, and AI-assisted diagnostics are increasingly common, further strengthening the Kingdom’s competitive position in the global medical tourism market.

#### *Infrastructure, Facilities, and Travel Logistics*

Saudi Arabia’s healthcare infrastructure is advancing rapidly to support the growth of medical tourism. The Kingdom hosts numerous modern hospitals and wellness centers, many

of which have obtained Joint Commission International (JCI) accreditation, signaling adherence to rigorous international standards of quality and patient safety (S. M & Alam, 2023). These accreditations assure international patients regarding the reliability and safety of healthcare services.

As part of Vision 2030, a strategic national plan to diversify the economy and expand tourism (including medical tourism), the government is investing heavily in state-of-the-art medical facilities and broader infrastructure. Projects such as the Makkah Metro aim to improve mobility and facilitate seamless access to healthcare and wellness services, especially in pilgrimage cities that already attract millions of visitors annually (Brdesee et al., 2013).

Travel logistics and patient comfort are further supported by well-connected international gateways such as King Khalid International Airport (Riyadh), King Abdulaziz International Airport (Jeddah), and King Fahd International Airport (Dammam). Visa facilitation mechanisms, including the Saudi eVisa system for eligible nationalities and dedicated medical visas for long-term treatment, simplify access for medical tourists. Many hospitals and private providers offer concierge-style services for international patients, including airport pick-up, translation, and transport between hospitals and accommodations.

The development of a patient-centered environment is also evident in the provision of multilingual staff (particularly Arabic and English), gender-sensitive care options, halal-certified meals, and prayer facilities. This alignment with cultural and religious expectations creates an environment of comfort and dignity that can strongly appeal to patients from Muslim-majority and culturally similar countries.

Workforce development is another critical aspect of the current status. Saudi Arabia has placed greater emphasis on professional accreditation, continuous training, and empowerment of healthcare workers, including expanding roles for female professionals, in line with national socio-economic reforms. Nonetheless, persistent workforce challenges, such as integrating expatriate healthcare professionals and retaining highly skilled national staff, remain essential policy issues (Brdesee et al., 2013).

### **Government Initiatives, Regulatory Framework, and Quality Standards**

The Saudi government plays a pivotal role in shaping the medical tourism ecosystem through policies, investments, and public-private partnerships. Vision 2030 explicitly targets tourism diversification, with medical tourism recognized as a key growth area (Tamsyah, et al., 2025). The Ministry of Health (MoH) provides approximately 60% of the nation's health services. In comparison, the remaining 40% comes from other governmental bodies, such as the Ministry of Defense (MoD), Aviation Medical Services, Ministry of Interior Medical Services, National Guard Health Affairs, and the private sector (MoH Report, 2017; Alkhamis & Miraj, 2020). This mixed delivery model is designed to ensure access, affordability, and availability of healthcare across the population.

A key element of Saudi Arabia's strategy is enhancing service quality and strengthening regulatory oversight. Service quality, defined as how customers perceive a company's specific services, is widely acknowledged as a critical determinant of patient satisfaction and behavioral intentions (Pervaiz et al., 2024). Quality-related dimensions, such

as reliability, responsiveness, empathy, and tangibles, function as diagnostic indicators for identifying strengths and weaknesses in healthcare delivery (Siripipatthanakul, 2021). With increasing competition among healthcare providers, the Saudi healthcare sector is undergoing substantial transformation and facing multiple challenges, particularly in sustaining high-quality, patient-centered care (Ghali et al., 2023).

The Saudi healthcare system, as outlined in Article 31 of the Saudi Constitution, guarantees citizens access to healthcare, emphasizing the state's fundamental responsibility to safeguard public health (Alkhamis & Miraj, 2020). This constitutional mandate reinforces the significance of healthcare quality not only for maintaining domestic legitimacy but also for enhancing the Kingdom's attractiveness as a destination for international medical tourists. The perceived quality of healthcare services plays a crucial role in shaping patient satisfaction, promoting positive word-of-mouth, and enhancing patient retention. Such dynamics have been well-documented in various healthcare contexts, including dental clinics, where high service quality directly influences revisit intentions and patient loyalty (Siripipatthanakul, 2021). These factors are even more pronounced in the realm of medical tourism, where expectations regarding service quality are heightened due to the cross-border nature of healthcare seeking.

To support the growing medical tourism sector, the Saudi government has introduced several strategic initiatives. These include hospital accreditation and regulatory reforms aimed at aligning healthcare facilities with international standards, ensuring that the Kingdom's hospitals meet globally recognized benchmarks for safety and quality (Tamsyah, et al., 2025). Additionally, digital transformation strategies, such as the integration of healthcare information systems for Hajj and Umrah management, have been implemented. These systems not only streamline healthcare delivery during the pilgrimage season but also strengthen the synergy between Saudi Arabia's religious tourism sector and its healthcare services, offering medical solutions to a large influx of international visitors (Shafi et al., 2016).

Further bolstering the Kingdom's medical tourism ambitions, public diplomacy and nation-branding efforts are actively underway. Saudi Arabia is hosting high-profile international events and engaging in sports diplomacy and cultural exchanges as part of its Vision 2030 initiative. These initiatives aim to position the Kingdom as a modern, attractive, and safe destination, extending beyond religious tourism to encompass a broader appeal that includes medical tourism (Tamsyah, et al., 2025).

The Kingdom's operational capacity in healthcare, especially in managing large-scale events such as Hajj and Umrah, further strengthens its readiness to serve international medical tourists. During these pilgrimages, Saudi Arabia coordinates multi-agency efforts to provide high-quality, free medical services to millions of visitors, including emergency and intensive care. This experience in managing complex healthcare needs for a diverse and transient population enhances Saudi Arabia's ability to deliver specialized care to international patients requiring complex treatments (Louati et al., 2024).

While these advancements are promising, the private healthcare sector in Saudi Arabia, though expanding, remains underutilized relative to its potential. To address this, Vision 2030 strongly advocates for greater private-sector involvement through public-private

partnerships. These efforts reflect the government's commitment to not only ensuring universal access to healthcare but also to reducing inequalities and financial burdens within the system (Alkhamis & Miraj, 2020). For international medical tourists, this dual structure of government-funded healthcare security, coupled with private-sector innovation, offers a compelling proposition. Many physicians in Saudi Arabia are Western-trained, and several top-tier hospitals are affiliated with prestigious international institutions, which further enhances the Kingdom's appeal as a global healthcare destination.

### **Challenges Facing Medical Tourism in Saudi Arabia**

While Saudi Arabia has made significant progress in establishing itself as a key player in the Middle East healthcare sector, challenges remain in reaching its full potential in medical tourism. Despite ongoing efforts, the country still lags behind regional competitors in attracting and retaining international patients. According to the Arab Medical Index 2021-2022 (See Figure 1.1), Saudi Arabia is ranked 7th among Arab countries, behind destinations like Dubai, Abu Dhabi, Oman, Egypt, and Morocco. Additionally, when evaluating factors such as the medical tourism environment, industry growth, and service quality, Saudi Arabia ranks 9th in industry and medical tourism dimensions and 3rd in service quality (Medicaltourism.com, 2020-2021) (See Figure 1.2). Globally, the Kingdom's position on the Overall Medical Tourism Index (MTI) is 35th, considerably behind competitors like Oman (13th) and Dubai (6th), and far from leaders such as Canada and Singapore (Medicaltourism.com, 2020-2021) (See Figure 1.3). Despite significant investments and bold ambitions under Vision 2030, these rankings reveal ongoing challenges.

#### *Infrastructural Challenges*

Saudi Arabia's healthcare infrastructure is undergoing rapid transformation as part of its Vision 2030 agenda. However, existing limitations still hinder the country's ability to capitalize on its medical tourism potential fully. While improvements have been made in the travel and tourism sector, certain infrastructural and cultural factors continue to be barriers to growth (Ali & Salameh, 2021). A well-developed infrastructure, including efficient transportation networks and state-of-the-art medical facilities, is crucial to attracting international patients. Although the Business Model Canvas (BMC) framework has been used to identify key resources and value propositions in medical tourism, a more comprehensive planning approach is needed to address current infrastructural deficiencies (Alharethi & Kabil, 2024). Effective planning in both physical infrastructure and patient-centric services will be essential to bridging the existing gaps and improving Saudi Arabia's attractiveness as a medical tourism destination.

#### *Market Perception and Branding*

A key challenge for Saudi Arabia's medical tourism industry is market perception. Despite providing high-quality healthcare services, the Kingdom's medical tourism brand has not yet gained significant global recognition. To address this, targeted and consistent branding efforts are needed to increase awareness of Saudi Arabia's medical services. Under Vision 2030, the government has taken major steps to diversify its tourism offerings, with medical and wellness tourism now playing a leading role in these initiatives (Alnajim & Fakieh, 2023). However, improving service quality to meet the expectations of international tourists requires a better understanding of their specific healthcare needs and preferences (Alharethi & Kabil, 2024).

Effective communication strategies are also essential in shaping Saudi Arabia's market perception. With the growth of electronic word of mouth (e-WOM), online reviews and social media play a significant role in influencing consumer decisions about medical services. Using digital marketing can boost Saudi Arabia's visibility, build trust, and ultimately attract more international patients (Beyari & Garamoun, 2024). Additionally, understanding cultural and lifestyle dynamics within Saudi Arabia is key to creating a successful medical tourism brand. This involves integrating societal attitudes toward health and wellness into marketing strategies, while engaging the local community's support for tourism initiatives (AL-Hazmi & Alkhateeb, 2020). By aligning tourism development with local cultural values, Saudi Arabia can improve its credibility and overall perception in the global medical tourism market.

### *Regulatory and Policy Challenges*

A strong regulatory framework is crucial for the success of Saudi Arabia's medical tourism industry. Although significant investments have been made in healthcare infrastructure, the regulatory environment remains unstable. The introduction of the Unified Medical Insurance System (Nphies) is one such effort aimed at enhancing healthcare quality, though its full effects are still being assessed (Alnajjar, 2024). Additionally, despite rapid growth in healthcare facilities, there is no cohesive strategy specifically targeting medical tourism. Clearer guidelines and procedures for private healthcare providers are needed to create an environment that attracts international medical visitors (Alasiri & Mohammed, 2022). Policymakers should prioritize medical tourism as a separate sector, actively engaging stakeholders to develop an attractive regulatory environment and ensure sustainable sector growth.

### *Cultural Barriers*

Cultural factors also present a considerable obstacle to the expansion of medical tourism in Saudi Arabia. Although the local healthcare workforce is skilled, cultural differences can influence the experience of international patients. These differences may sometimes discourage potential visitors who might doubt whether their cultural and language needs will be accommodated. To make Saudi Arabia more appealing as a medical tourism destination, it is crucial to understand patient preferences and incorporate international patient experiences into service delivery. Additionally, marketing and outreach efforts should aim to dispel misconceptions and promote Saudi Arabia as a healthcare destination that meets international standards (Pratiwi & Muslikhati, 2024).

### *Service Quality Issues*

A persistent obstacle that affects Saudi Arabia's ability to become a top medical tourism destination is service quality. Although the Kingdom offers a variety of high-quality healthcare services, perceptions of healthcare quality differ, especially when compared to other Gulf Cooperation Council (GCC) countries. For example, studies have indicated that some GCC countries deliver more reliable and efficient healthcare services, which can influence patients' decisions to seek treatment elsewhere (Alsubahi et al., 2024). A systematic review of patient perspectives on healthcare quality emphasizes the need for regular improvements and investment to boost service delivery. Without continuous efforts to raise healthcare standards, Saudi Arabia may lose its competitive edge in the medical tourism industry (Alsubahi et al., 2024).

### *Addressing the Gaps*

Despite having the foundational elements in place, Saudi Arabia faces several gaps in its ability to fully harness the potential of the medical tourism market. Important areas that need attention include ensuring consistent service across healthcare institutions, tackling workforce shortages, especially in specialized fields—and improving accessibility and transparency of costs for international patients. Additionally, market perception and branding remain key hurdles. While Saudi Arabia has made progress in medical tourism, it is critical to develop a more cohesive and sustained branding strategy aimed at international patients. This involves leveraging digital marketing and electronic word-of-mouth (e-WOM) to build trust and boost visibility, as well as fostering a cultural shift to make healthcare services more accessible and inviting to international patients tourists.

### *Emerging Opportunities*

Despite the challenges, there are considerable opportunities for Saudi Arabia to grow its medical tourism sector. Combining wellness tourism with medical services offers a great chance for diversification. By leveraging the Kingdom's cultural heritage and natural resources, along with its expanding healthcare capabilities, Saudi Arabia can attract a broader range of international visitors seeking both medical treatment and wellness experiences. Additionally, the use of emerging technologies such as artificial intelligence (AI) and machine learning holds promise for personalized healthcare and sustainable practices in medical tourism (Al-Haimi et al., 2024); (Zahidah & Al-Haimi, 2024). These innovations could improve service quality and help Saudi Arabia become a more appealing and competitive destination for medical tourists over time (Louati et al., 2024).

In short, although Saudi Arabia's medical tourism sector shows promise, several obstacles need to be addressed to realize its full potential. Challenges such as infrastructural and regulatory barriers, service quality issues, and cultural differences pose significant hurdles for the Kingdom. However, with targeted investments in infrastructure, marketing, and service delivery, along with strategic adoption of emerging technologies, Saudi Arabia could position itself as a leading global medical tourism destination. By leveraging its cultural assets, enhancing service quality, and increasing international engagement, the Kingdom can meet the rising demand for medical tourism and bolster its standing in the global healthcare industry.



Figure 1.1: Medical Tourism Index Arab Destination  
 Source: Medicaltourism.com 2020-2021



Figure 1.2: Medical Tourism Index Arab Destination -Based on Dimensions  
 Source: Medicaltourism.com 2020-2021



Figure 1.3: Overall Medical Tourism Index. Source: MedicaTourism.com 2020-2021

*Strategic Directions for Advancing Medical Tourism in Saudi Arabia*

Saudi Arabia is well positioned to capitalize on significant potential in medical tourism, underpinned by its modern healthcare infrastructure. While the country has well-equipped hospitals offering high-quality medical services, the sector faces challenges in fully realizing its potential for medical tourism. The development of the private health sector is critical to attracting international patients, and substantial progress has already been made. This includes the presence of foreign-trained medical specialists and highly skilled professionals who enhance the quality of care and elevate Saudi Arabia’s reputation as a medical tourism destination (Khan & Alam, 2014). The accreditation of many hospitals by the Joint Commission International (JCI) further strengthens the Kingdom’s commitment to adhering to international standards of care, enhancing patient confidence and positioning Saudi Arabia as a credible healthcare destination (Alnajim & Fakieh, 2023).

In addition to these developments, the integration of telemedicine and intelligent power systems marks Saudi Arabia's move towards more innovative practices in healthcare delivery. These technologies not only improve patient outcomes but also enhance operational efficiency (Alharethi & Kabil, 2024). However, challenges remain, particularly regarding the uneven distribution of healthcare professionals across the country, which affects accessibility to specialized services, especially in peripheral areas (Alharethi & Kabil, 2024). As shown in Figure 1.4, the following subsections will detail each dimension of the strategic directions.

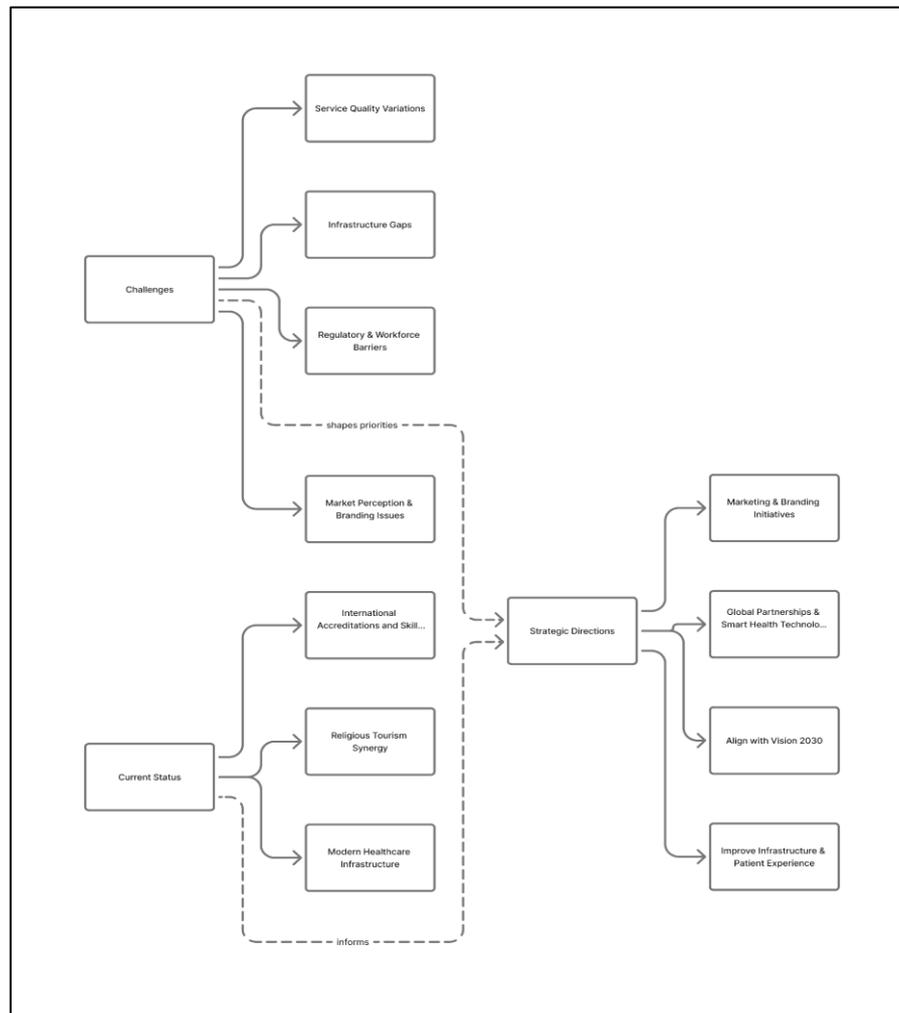


Figure 1.4: Framework for Advancing Medical Tourism in Saudi Arabia.

Source: Authors

### *Leveraging Saudi Arabia's Unique Competitive Advantages*

One of Saudi Arabia's key competitive strengths is its connection with religious tourism. As the home of Islam's two holiest cities, Mecca and Medina, Saudi Arabia benefits from millions of Muslim pilgrims who visit each year, often combining religious journeys with medical treatments. This blend of religious and medical tourism offers a unique value proposition for international medical tourists, especially from Muslim-majority countries. Moreover, Saudi Arabia's stable political climate increases its appeal as a safe destination for medical travelers, particularly those from regions experiencing instability (Alkhamis & Miraj, 2020). Geographically, Saudi Arabia's strategic location in the Middle East makes it easy to attract patients from the Gulf Cooperation Council (GCC) states, North Africa, and beyond (Altamimi,

H., & Al-haimi, B.,2025). The Kingdom's role as a regional hub enables it to draw from a large catchment area for medical tourists, supported by ongoing investments in infrastructure to improve healthcare travel services (Alnajim & Fakieh, 2023). These factors give Saudi Arabia a strong foundation to leverage its geographic and cultural assets to attract more medical tourists.

### **Aligning Medical Tourism Strategy with Saudi Vision 2030**

#### *Health Sector Transformation Goals*

Saudi Arabia's Vision 2030 is a transformative plan for healthcare that directly impacts the medical tourism industry. Central to this change is the privatization of healthcare, with a strong focus on preventive care and a shift toward patient-centered services, all aimed at improving healthcare quality and access (Better, 2025). This aligns with broader goals to enhance the Kingdom's appeal as a medical tourism destination by modernizing, streamlining, and making healthcare services more patient-friendly. Additionally, community pharmacies are becoming key parts of healthcare delivery under Vision 2030. Going beyond their traditional roles, these pharmacies now offer services such as medication therapy management and chronic disease screening, thereby helping to make the healthcare system more efficient (Alnajjar, 2024). The adoption of digital infrastructure, including electronic health records (EHRs) and telehealth platforms, is designed to simplify healthcare delivery, ensuring a smooth patient experience and supporting data-driven decision-making (Alkhamis & Miraj, 2020).

#### *Economic Diversification through Medical Tourism*

Medical tourism has been strategically positioned as a key driver of economic diversification under Vision 2030. As the country seeks to reduce its reliance on oil revenues, the government plans to leverage healthcare and tourism connections to create comprehensive visitor experiences that combine medical treatment with leisure and cultural tourism. This approach is expected to boost overall tourism revenue and stimulate new economic sectors (Better, 2025). Foreign direct investment (FDI) plays a crucial role in this strategy, with the government offering incentives to attract private-sector involvement not only in healthcare infrastructure but also in hospitality and related services that strengthen the medical tourism ecosystem (Alnajjar, 2024). Through these efforts, Saudi Arabia aims to create jobs, diversify its economy, and improve its global competitiveness in the medical tourism market.

#### *Policy and Governance Support*

The success of medical tourism relies on strong policy frameworks and effective governance mechanisms that promote private sector involvement. Policymakers are working on creating regulations that support healthcare privatization, ensure patient safety, and simplify administrative procedures to facilitate the movement of international patients (Alnajjar, 2024). Ensuring national health security is also vital to building trust among medical tourists and reducing the risks posed by cross-border health threats (Alkhamis & Miraj, 2020). To achieve sustainable growth, collaboration among government agencies, private healthcare providers, and local communities is crucial. This cooperation creates synergies that support long-term success in medical tourism (Alasiri & Mohammed, 2022).

## **Infrastructure and Service Quality Enhancement**

### *Modernizing Healthcare Facilities*

To attract international patients, Saudi Arabia is investing heavily in modernizing healthcare facilities. This includes adopting advanced technologies and establishing specialized medical cities and centers of excellence. These centers will serve as hubs for state-of-the-art treatments and research, enhancing the Kingdom's ability to deliver world-class care (Alnajjar, 2024). The integration of smart power systems, combined with AI-powered diagnostics and patient monitoring, underscores Saudi Arabia's commitment to technological innovation, which not only improves patient outcomes but also streamlines healthcare delivery (Better, 2025). This modernization initiative is crucial for positioning Saudi Arabia as a leader in advanced medical services.

### *Improving Service Quality and Patient Experience*

Service quality remains a key factor in success within medical tourism. To gain a competitive edge, Saudi hospitals are increasingly adopting internationally recognized clinical standards and hospital accreditations to showcase their dedication to global best practices (Alkhamis & Miraj, 2020). Enhancing the patient experience is also a top priority, with hospitals focusing on personalized services that meet specific cultural preferences, reduce wait times, and offer individualized care. Workforce training programs are being rolled out to improve skills and ensure healthcare professionals meet the expectations of international patients, especially in terms of cultural sensitivity (Alharethi & Kabil, 2024). These initiatives will encourage patient loyalty, promote repeat visits, and strengthen their global reputation in the competitive medical tourism industry.

### *Development of Complementary Tourism Facilities*

Complementary services such as accommodation, catering, and recreational amenities are crucial to enhancing the appeal of medical tourism destinations. Saudi Arabia aims to improve these facilities to provide medical tourists with a smooth, comfortable experience. This involves integrating tourism and healthcare services, allowing patients to recover in environments that support well-being and comfort (Alnajjar, 2024). Eco-friendly tourism initiatives are also being launched to attract environmentally conscious travelers while ensuring that Saudi Arabia remains committed to sustainable tourism practices (Carvalho et al., 2019).

## **Marketing and Promotion Strategies for Medical Tourism**

### *Branding Saudi Arabia as a Medical Tourism Destination*

Saudi Arabia's branding strategy for medical tourism emphasizes its unique blend of religious tourism and high-quality healthcare. By promoting its identity as the home of Islamic holy sites and showcasing its modern medical facilities, Saudi Arabia aims to position itself as a leading destination for medical travelers. Additionally, successful case studies from JCI-accredited hospitals can further enhance the country's reputation as a trusted medical tourism hub (Khan & Alam, 2014). Competitive pricing strategies that align with global standards also significantly contribute to making Saudi Arabia a more appealing destination for medical tourism compared to other destinations (Better, 2025).

### *Global Expansion*

Targeting international markets beyond the Middle East, such as Asia and Western countries, is central to Saudi Arabia's growth aspirations. The Kingdom seeks to learn from successful medical tourism models in India, Malaysia, Singapore, and Thailand, adopting their best practices in service delivery and marketing (Khan & Alam, 2014). Emphasizing international healthcare standards and accreditation schemes further aligns Saudi provision with global expectations, facilitating patient trust and attraction ( Barač Miftarević, S, 2022).

### *Policy Frameworks for Cross-Border Healthcare*

To support cross-border healthcare flows, Saudi Arabia is developing policy frameworks that encompass bilateral agreements and patient referral systems with partnering countries (Al-Abri et al, 2020). These agreements address critical legal, ethical, and health security issues intrinsic to medical tourism, enabling smoother patient transitions and continuity of care across borders (Khan & Alam, 2014). A focus on traveler health preparedness and vaccination programs also enhances the safety and quality of outbound and inbound medical travel Haji Ahmadi et al., 2017).

### *Cost Competitiveness and Pricing Strategies*

Cost competitiveness is a critical determinant attracting international patients. Saudi Arabia is developing transparent pricing models that align closely with regional and global benchmarks to foster international patient trust (Khan & Alam, 2014). Pricing strategies are carefully balanced to ensure profitability for healthcare providers while maintaining accessibility for a diverse patient demographic, thereby broadening the market base. Additionally, competitive pricing is complemented by quality assurance initiatives that ensure value for money.

### *Use of Digital and Social Media Platforms*

In an increasingly digital world, Saudi Arabia is actively engaging in online marketing campaigns to target potential medical tourists. Social media platforms and digital channels offer cost-effective channels for communication, enabling the Kingdom to disseminate information about its healthcare services and tourism offerings efficiently. By leveraging public relations efforts, the country is enhancing the reputation of its hospitals and the overall healthcare sector as part of its broader strategy for promoting medical tourism (Arous et al., 2024). In short, Saudi Arabia has great potential to become a global leader in medical tourism. By addressing infrastructure issues, improving service quality, and aligning its plans with the goals of Vision 2030, the Kingdom can attract more international patients. Smart investments in healthcare innovation, top-notch service, and effective marketing will help Saudi Arabia grow steadily in the medical tourism industry.

### *Stakeholder Collaboration in Promotion Efforts*

Effective promotion requires collaboration among diverse stakeholders, including government bodies, private healthcare providers, community organizations, and the tourism sector (Hassan, T, et al, 2022) . Partnerships with travel agencies and international health facilitators are being developed to provide comprehensive packages and ease logistical challenges for patients Haji Ahmadi et al., 2017) . Moreover, cross-border cooperation with neighboring countries within the GCC and beyond helps expand the regional patient base and promotes shared standards and referral practices (Khan & Alam, 2014). Such multi-actor

engagement ensures coordinated messaging and resource pooling, enhancing promotional reach and effectiveness.

### **Human Resource Development and Training**

A significant challenge for Saudi Arabia's future in medical tourism lies in overcoming workforce imbalances. The uneven geographic distribution of specialists, such as ophthalmologists, results in regional disparities in healthcare access and service quality (Aldebasi, T et al, 2024). Strategies are being designed to increase Saudization of healthcare professions, thereby reducing reliance on expatriate labor and fostering sustainable capacity building within the Kingdom (Khan & Alam, 2014). Redistribution policies aim to incentivize the deployment of skilled professionals to underserved peripheral regions, closing service gaps and enhancing national healthcare equity (Ahmad, A. E. M. K., 2012).

### **Conclusion and Future Research Directions and Policy Recommendations**

#### *Identifying Research Gaps and Data Needs*

To facilitate informed decision-making, there is an urgent need for detailed data collection on the demographics of medical tourists, their clinical outcomes, and patient satisfaction (Vovk et al, 2021). Conducting longitudinal studies on the economic, social, and health impacts of medical tourism will yield important insights into the sector's sustainability (Haji Ahmadi et al., 2017). Additionally, assessing the success of technology adoption and workforce development programs will guide future strategic planning (Khallaf et al., 2025).

#### *Policy Development Recommendations*

Integrated national strategies that align the objectives of healthcare and tourism ministries are essential for cohesive development (Alqahtani & Albabtain, 2025). Strengthening accreditation and quality assurance systems, along with regulatory oversight, ensures high standards and patient safety (Khan & Alam, 2014). Supporting comprehensive training programs focused on cultural sensitivity and clinical skills further improves service quality and patient experience (Hassan, T. H, et al., 2022).

#### *Enhancing Stakeholder Collaboration and Public Awareness*

Multi-sector partnerships among government agencies, private sector entities, and civil society are vital for coordinated implementation and resource optimization (Hassan, T. H, et al., 2022). Public awareness campaigns that highlight Saudi Arabia's medical tourism advantages help attract both international patients and investors (Khan & Alam, 2014). Engaging international organizations for benchmarking and setting standards encourages continuous improvement and enhances global competitiveness (Haji Ahmadi et al, 2017).

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Khalid Alruwaili participated in writing the first draft of the paper, study design, and information gathering. Basheer Al-Haimi participated in the conception of the research idea,

revised and edited the manuscript, and supervised. Salman Alenzi made other revisions and participated in gathering information and literature. All the authors agreed on the final version to be published.

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