



# EXECUTIVE SUMMARY

SECOND HEALTH AND WELLNESS  
TOURISM STUDY

OF THE DOMINICAN REPUBLIC

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The Second Health and Wellness Tourism Study of the Dominican Republic aims to update sector statistics and identify opportunities, challenges, and competitive advantages that the country offers for coordinated actions to enhance its sustainable development and level of competitiveness.

The first Health and Wellness Tourism Study and Diagnosis of the Dominican Republic was a significant contribution and an important starting point to assess the sector, establish a proposal for a local seal of quality, and provide guidelines for its strategic planning. However, it encountered considerable levels of underreporting of international patients, given that many health tourism centers did not have consistent and updated statistics. Additionally, during that period, some specialized medical societies lacked consolidated data that would allow them to share information.

In this new approach, there has been a perception of an environment with higher levels of transparency and a willingness to share information, driven by Executive Order 787-21 issued by President Luis Abinader in December 2021. This executive order instructs the Ministries of Public Health and Tourism, along with other entities, to develop short, medium, and long-term policies and strategies that promote the sustainable development of health and wellness tourism in the country.

This second study has been based on primary research and consultations with local and

international experts, interviews, surveys, as well as the analysis and inferences from documents using processes such as benchmarking using comparative patterns and systematization of processes. It exposes the current generalities of health tourism in the country, the characteristics of supply and demand, and legal and institutional aspects.

Challenges related to infrastructure, technology, and sustainability are also presented, highlighting the requirements necessary to continue the development and growth of health tourism.

The analysis clearly highlighted the importance of promoting wellness tourism and retirement tourism. Therefore, it is imperative to continue working to position the country as an attractive and diverse health destination, attracting more investments, foreign exchange, and creating higher-paying jobs.

In challenging times, the Dominican Republic has been an example of resilience, innovation, and public-private multi-sectoral synergies. This earned the country recognition from the World Tourism Organization (UNWTO) in 2022 as the nation with the best recovery in the sector during the pandemic.

The tourism sector is a fundamental part of the national economy and development. Therefore, it is crucial to diversify its offerings and strengthen its ties to the healthcare sector to strengthen the country's positioning as a safe destination.



Health tourism is an activity that has been consolidating worldwide, especially due to the globalization of healthcare services, population aging, and the trend of patients seeking affordable and cost-effective medical treatments. Global health tourists seek medical services such as dental care, cosmetic surgery, general surgery, bariatric surgery, robotic surgery, cardiovascular procedures, orthopedics, dermatology, as well as ophthalmological treatments, infertility treatments, and cancer care. This includes medical consultations, diagnostic studies, and general preventive evaluations.

In the realm of wellness, the most sought-after services are those related to a healthy lifestyle and diet, yoga, meditation, hydrotherapy, cosmetology, massages, spa treatments, workshops on Ayurvedic cooking, tasting of local organic products, hiking, among other alternatives.

The high costs of medical procedures in developed countries, long waiting lists for some treatments, many uninsured individuals, or the technological gap in some destinations create new opportunities for countries like the Dominican Republic. The country has a privileged private healthcare offering in the Caribbean region, with new projects and centers beginning to earn international accreditation.

The medical tourism industry was severely impacted during the pandemic, affecting its growth, and changing the profile of health tourists.

However, this situation has been successfully reversed, and the sector has recovered, resuming its usual pace of growth.

People are now more aware of the importance of having local, international, and traveler's medical insurance, and countries have recognized the strategic value of having a strong health, insurance, agricultural, and pharmaceutical sector to be better prepared for disasters or health emergencies.

Health has become globalized, interconnected, and digitized, with telemedicine, mobile applications, portable and interoperable medical records, and health-related travel becoming increasingly common. Health tourism has logistical, cultural, bioethical, and legal implications that need to be considered. Similarly, the rights and responsibilities of health tourists and the quality of services offered must be considered when providing medical tourism services. In this regard, it is of utmost importance to have clear regulations along with specialized and bilingual human resources.

The transversal impact of medical tourism in a country enables the strengthening of local healthcare through the transfer and access to cutting-edge technologies for the population. This boosts the quality of services to meet required standards and compliance with international regulations, certifications, and accreditations, promoting innovation and world-class outcomes.





Additionally, it encourages the construction of new outpatient centers, high-tech hospitals, and wellness hotels, attracting foreign and local investment, generating new jobs, and fostering productive linkages.

According to Patients Beyond Borders, the most prominent medical tourism destinations globally include India, ranking first, followed by Mexico, the United States, Singapore, Thailand, Brazil, Turkey, South Korea, Malaysia, and Taiwan.

The key qualities of these destinations lie in the establishment of policies and programs to promote local quality seals, international certifications and accreditations, and the formation of public-private partnerships and clusters that bring together the value chain members for better adaptation of offerings to benefit the local population and visiting tourists.

Crucial factors also include public and private investment in the sector, supportive public policies, cost savings, clinical excellence, and innovation, as well as access to internationally trained reputable professionals.

The Dominican Republic has become the primary medical tourism destination in the Caribbean, the second in Latin America, and the 19th worldwide, according to the Medical Tourism Index (MTI) by The International Healthcare Research Center (IHRC), in collaboration with the Medical Tourism Association (MTA). This biennial ranking highlights as an improvement opportunity to reinforce the quality and safety of the offerings, emphasizing the importance of more centers pursuing international accreditation.

The offering of the Dominican Republic for the assistance of international patients is primarily based on private hospitals with state-of-the-art technology, plastic surgery clinics, and dental offices, some of which have international accreditations such as Joint Commission International (JCI), Accreditation Canada, and Accreditation Commission for Health Care (ACHC).

The study of installed capacity identified 19 establishments in the five subregions, with data obtained from thirteen (13) of them, equivalent to a representative sample of 68%. The healthcare centers providing health tourism services that were interviewed are 77% private and 23% under patronage or other management structures.

The services for health tourism in the Dominican Republic are primarily offered in the Southeast region, specifically in Santo Domingo, Punta Cana, and La Romana, and in the North or Cibao region, in Santiago and Puerto Plata.

The qualification of medical staff in the Dominican Republic is considered positive according to the interviewees. However, it is important to promote innovation and an effective system of medical recertification to ensure their continuous updating. Nevertheless, the qualifications of technical and nursing staff was assessed at a medium-low level. While Dominican hospitality and warmth are evident, there are weaknesses related to language proficiency, the presence of multiple employments, and an apparent need to strengthen their problem-solving and technological capabilities, and the verifiable updates to their knowledge.

In the Dominican Republic, there are medical tourism facilitators, recovery houses, and other actors who also require clear regulations to ensure transparency and the quality of their offerings.

The new investments in health and wellness tourism projects in the Dominican Republic exceed 20 billion Dominican pesos, with traditional banking and the stock market playing a noticeable role through Investment Funds.

The highest demand for medical services and health tourism assistance in the Dominican Republic is primarily based on dental treatments, plastic surgery, other surgeries, and ambulatory and preventive medicine. The average cost of medical services is generally around US\$5,000.00, considering that an international patient may undergo multiple procedures in a



single trip. Therefore, the estimated average travel expenditure of a health tourist in the Dominican Republic (without a companion) is approximately US\$7,500.00, including accommodation, internal transfers, meals, among others. This average spending by a health tourist is six times higher than the average spending by a regular tourist.

The country offers competitive prices compared to similar medical services in recognized health destinations in other Latin American countries. Regarding the demand for medical services in the Dominican Republic, health tourists come mainly from the Caribbean islands and the United States, with a significant number being Dominicans not residing in the country.

According to information provided by Specialized Medical Societies and the results of this study, it is noted that in 2022, the Dominican Republic received 262,902 medical tourists, of which 179,085 came for dental treatments; 40,000 for plastic surgery; 26,290 for other surgeries; and 17,527 for ambulatory and preventive medicine. In general, this represents that 3.7% of passengers arriving in the country came for health and wellness tourism. In 2022, a total of 7,163,394 non-resident passengers arrived in the country by air. Additionally, approximately 75,845 conventional tourists needed medical assistance resulting in a total of 338,747 international patients.

In 2022, the Dominican Republic generated in medical tourism an average income of one billion three hundred twenty-one million twenty-three thousand four hundred US dollars (US\$1,321,023,400.00), equivalent to an economic impact of seventy-two billion seven hundred seventy-five million one hundred seventy-nine thousand one hundred six Dominican pesos (RD\$72,775,179,106.00), considering the average exchange rate of RD\$55.09 for the US dollar in 2022.

In tourism medicine (conventional tourists who require medical assistance) the average expenditure is around US\$1,200 and approximately 80% of these cases have travel insurance

according to the interview health centers. Many credit cards come with the benefit of travel insurance, but tourists are often unaware of it. Therefore, international departments serve to raise awareness in this regard and help minimize out-of-pocket expenses.

For tourism medicine in 2022, the revenue amounted to ninety-one million fourteen thousand US dollars (US\$91,014,000.00).

Meanwhile, the Medical Tourism Association (MTA) reports that medical tourism generates approximately 100 billion dollars annually worldwide.

Regarding the satisfaction level of medical tourists, according to the surveys conducted in this study, 75% rated their experience as excellent, 10% as very good, 9% as good, 5% as regular, and 1% as unsatisfactory.

The Dominican Republic has the conditions to establish itself as a true health tourism destination. However, it is essential for the national Executive and key sector stakeholders to consider the recommendations from this study and incorporate best practices from other successful countries in the region.

Also, it is of the utmost importance to maintain fiscal incentives for health tourism projects in the Dominican Republic since these incentives contribute to the development of internationally accredited healthcare centers with state-of-the-art medical equipment and highly trained personnel. This, in turn, enhances the quality of medicine and technology for the local population as well.

It is foreseen that the strengthening of the health tourism sector in the Dominican Republic could result in favorable projections, being able to estimate that by the year 2028 approximately 500,000 international patients would be received, representing a 47% increase with respect to 2022 and subsequently a 30% increase every five years thereafter could be reached, positioning the country as a competitive destination.

With this projection, by 2043 it would be possible to attend over 1 million international patients. It is worth noting that, if 70% of the international tourists travel with a companion, the impact would result in 1.7 million tourists for this concept.

The future is promising, but it depends on present actions to capture this potential market.

The Dominican Republic has experienced significant growth in health tourism, and the integration of artificial intelligence (AI) can play a crucial role in this development. Digital transformation continues to impact various aspects of life, and efforts should continue to drive this trend forward.

The development of health tourism in the Dominican Republic requires the attention to thirteen (13) major challenges, identified and related to regulatory and incentive frameworks, well-trained human resources, foreign languages, unfair competition, internationally accredited health and wellness centers, control of infections, cost-effective services, discrediting campaigns, intrusion, disaster risk management, climate change adaptation, competitiveness with other regional countries, digital transformation in the health sector, and promotion of the sector abroad.

To achieve sustainable development in health and wellness tourism in the Dominican Republic, it is necessary to have a critical path based on adequate public and private investment in healthcare infrastructure, a verifiable commitment to international accreditation, assurance of quality and result transparency, as well as assuring cost savings in medical procedures for individuals visiting the country, a well-maintained tourism infrastructure, progress in innovation and technology, and the training of highly competent medical, technical, and nursing personnel of international quality, in order to maintain an important flow of patients aiming to generate income to the country through sustainable tourism practices.









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