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Leading Light of Health Tourism Türkiye

Tourism investments have increased significantly throughout Türkiye since the 1980s.

Since the second half of the 1980s, especially around Antalya and Muğla, thanks to tourism incentives and land allocation policies, there has been a severe increase in the accommodation capacity and subsequently the number of visitors, along with the tourism facilities built on public lands allocated to the private sector by the state for 49 years.

In the following years, with the rapid increase in the number of both domestic and foreign tourists, the tourism sector started to constitute a considerable role in the Turkish economy.

Besides, there has been a significant increase in volume in the tourism sector as many airports have been built throughout the country and access to holiday resorts has become much easier than in the past with the completion of the highway investments.

Although the tourism sector in Türkiye has a fragile nature due to the economic and political factors of the region, we see that tourism has diversified at the point reached today, thanks to the historical and geographical richness of our country. There are various sub-branches that attract different groups, such as summer tourism, winter tourism, health tourism, cultural tourism, business tourism, faith tourism, gastronomic tourism. As a result, foreign tourists from very different socio-economic profiles visit Türkiye. Likewise, there is a growing market in domestic tourism.

According to TÜİK (TÜİK) data for the first 11 months of 2022, it was revealed that 40 billion USD revenue was obtained from 42 million visitors. The fact that tourism is divided into such different sub-categories is one of the strongest aspects of tourism in our country. As a result of this, we see that Turkey has been receiving visitors for 12 months, tourism has gone beyond being a seasonal concept and seasonal fluctuations in the number of visitors have decreased.

Baki BUDAKOĞLU
Denge Real Estate Valuation and
Consultancy Inc.
Chairman of the Board



It should be noted that health tourism has a significant contribution to the success of the tourism sector. Türkiye is gaining more recognition in the health sector day by day, but when we analyze the data for the first three quarters of 2022, 876 thousand 521 people came to Türkiye for health services, generating income of 1 billion 603 million 478 thousand USD.

In Türkiye, health tourism has been divided into several categories, including in vitro fertilization, plastic surgery, orthopaedic operations, oncological treatment, hair transplantation, and aesthetics, but in recent years, our country has gained worldwide recognition in plastic surgery, hair transplantation, and aesthetics among other fields. While Istanbul is the leading city in health

tourism, cities such as Izmir, Ankara, Kayseri and Gaziantep are other cities that receive a significant number of visitors. The proximity of cities to international airports, their location within a 3-hour flight distance, the adequacy of accommodation facilities in the city, and the cultural and social opportunities of the city stand out as other determining factors.

On the other hand, it would be true to say that health tourism creates a strong multiplier effect on the economy. In addition to the value it creates in terms of investment and employment in the health sector, health tourism also contributes directly to many sectors such as real estate, tourism & accommodation, and transportation.

As visitors who travel to our country for health tourism purchase houses in the future, it also creates a high demand and contributes to an increase in occupancy rates in the accommodation sector.

A combination of factors has led to Türkiye becoming an international brand in health tourism, including its qualified workforce, quality and capacity of facilities, and cultural background that influences patient care. Türkiye's position in the health sector is likely to be strengthened further in the near future thanks to potential developments in different fields, such as thermal treatment and elderly care.



Health Tourism and its Effects on the Sector

Health Tourism is a sector that has substantially gained ground in our country and is increasing its potential day by day.

As Oruçoğlu Thermal Resort, we are one of the representatives of Thermal Tourism, which is included in the spectrum of health tourism.

The desire of people to reach healing resources for therapeutic purposes, the motto of healthy and quality life that came to the fore with the pandemic, and in this context, the understanding of rest and vacation of people has led to more Wellness, Health, and Thermal Tourism.

It is necessary to evaluate thermal tourism not only as healing waters but also by including elements such as nature, spa, sports, meditation, entertainment, and nutrition.

All these actions can also be evaluated as the effect and benefit of health thermal tourism on other tourism sectors.

The advantages of our country in thermal tourism are that there are many geothermal resources and high mineral values in water, using advanced technology in health and treatment and manpower can be supplied more appropriately, the ability of diversifying thermal tourism with the branches of tourism such as nature, culture, belief, medical, gastronomy in most of our cities, good physical condition and good service level of our facilities located in the thermal cities.

We can summarize the problems experienced by our country in thermal tourism as the state monopoly of geothermal center licenses, the non-availability of qualified personnel, the lack of foreign language, the

weak advertising and marketing, the transportation problems of the tourists who will travel, and the need for transfer services, the lack of sufficient health institutions for accreditation.

While a healthy and quality life is the main goal of each individual, and in this regard, in the face of increasing demands, making the right promotion of the right cities while our geographical location, climate conditions, and tourism diversity are so high, efficient use of resources, training qualified personnel in sufficient standards, and through the incentives, regulations, and standards provided by the state, the thermal future of our country will reach to much stronger point.

Kerim GENELİOĞLU

Oruçoğlu Thermal Resort
Vice Chairman of the Board



Health Tourism in Turkey

Turkey has always been a country with high tourism potential with its climate, beaches, thermal resources, regions with high tourism attractiveness, historical background, and transportation opportunities. In our country, with the hospital investments made by both the private sector and the state in the last 30 years, the health tourism sector has accelerated and was moved to a completely different dimension with the addition of the advertisement activity, and investments of the private clinics' intermediary institutions. Investments in health tourism have increased in many cities, especially in Istanbul, Ankara, Antalya, and Izmir. According to the latest data of the Head of the Department of Health Tourism dated 05.01.2023, 2554 health facilities and also 606 agencies of Tursab continue their activities as certified authorized institutions for health tourism.

Most of the tourists who come to our country for health purposes prefer our country in almost every field of medicine such as hair transplantation, dental treatments, aesthetic surgery, cancer treatments, cardiology, orthopedics, and eye treatments. We are the country preferred by patients from almost every region of the world, especially in Europe, the Middle East, Africa, and the Turkic Republics. The motive behind the choice of patients can be listed as affordable treatment costs, quality service, close flight distance, expert personnel, modern medical technologies, no waiting time, socio-cultural similarity and the variety of touristic activities accompanying it, and professional assistant services.

While the pandemic was continuing in 2020, our company, which invested in the field of health tourism with the brand "Istanbul Medassist", started its activity in December 2020 by obtaining an international health

tourism authorization certificate from the Ministry of Health. Based in Istanbul, we serve our patients in hospitals and clinics that we have contracted with in all fields of medicine with our expert team of approximately 20 people. As a Tursab-certified travel agency, we provide support to our patients and their attendants to facilitate their needs during their stay in Turkey with our expert team.

Although the majority of health tourists stay in our country for a maximum of 1 or 2 weeks, this period takes 1 to 3 months, sometimes even longer, for patients whose treatment is long. This situation increases the need for apartments, hotels, and furnished houses, especially in our big cities. Therefore, the real estate sector will need to make accommodation investments that can serve foreign patients and their companions in areas close to hospitals, taking into account this need that will arise in the coming years.

Rıza DURDU
İstanbul Med Assist
CEO



Value-Based Health Tourism

The Health Tourism sector continues to grow by accelerating especially in the last fifteen years, as it is in the whole world. Although health tourism is a concept that is frequently used, many health professionals are concerned about the use of this concept. The use of this concept is avoided because the words health and tourism are conflicting ethically and the concept of health tourism does not fully meet the conditions that require advanced treatment. Instead, the concepts of medical travel or health travel are rapidly becoming widespread.

Health Tourism is only called for the travels of patients for the purpose of getting health care service, other than the country of residence of patients. In other words, people not only use the possibilities of their country of residence or the power of a physician but also consider the best solution, the most advanced technology, the most competent physicians, and the most effective price options. Based on this, all international activities for medical purposes are called health tourism.

Not only treatment, but Health Tourism is a kind of tourism allowing the growth of health institutions by using international patient potential as well as those who need physical therapy and rehabilitation.

When we list the types of health tourism:

1. Tourist Health: These are the tourists who receive medical services and treatment due to illness or accident during the travel of the people who come to the country for travel purposes.
2. Thermal Tourism: It includes services for treatment and rehabilitation purposes, especially for the elderly people to benefit from hot springs, healing mud, and springs.
3. Tourism for the Elderly and Disabled People: It is a type of tourism that includes a geriatric treatment center or social activities as well as long-term stays.
4. Medical Tourism: It refers to coming to hospitals for entire treatment or surgery.

In the world, health tourism is considered as a national sector in 51 countries. It has a turnover of \$300 billion and it is estimated that 14 million people worldwide

travel annually for health or alternative health-related conditions. When we look at the countries that have been successful in health tourism in the world, we see that health tourism has become a country policy in these countries.

In our country, health tourism has developed after the health transformation program, with the increase in the quality of health services and the search for alternative financing by private hospitals. However, we see that in the tenth and eleventh development plans, specific targets for health tourism were determined and included in the country's agenda. In 2013, the 'Directive on Health Tourism and Health Services to be provided within the Scope of Tourist Health' was created. In order to reach the targets set in the development plans, the Ministry of Commerce introduced a communiqué on receiving incentives under certain conditions for organizations engaged in health tourism in 2015. Ushas was put into service as a concerning institution of the Ministry of Health in 2019 to promote the services offered in Turkey in the field of international health services, to support and coordinate the activities of the

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public and private sectors for health tourism, to make recommendations to the Ministry on policies and strategies regarding international health services, service delivery standards, and accreditation criteria. With Ushas, the concentration of health tourism increased in all public hospitals, and patients were transferred from many countries with government agreements. Establishing the Health Turkey health tourism web portal in 2022, Ushas has been acting as an umbrella organization in the entire sector and promoting all health institutions operating in Turkey with a certificate of authority over the platform. Providing interaction with advertisements on digital platforms all over the world, the platform is the first in terms of providing the promotion of all health institutions in Turkey through a single channel.

In light of all these efforts, the health tourism sector, led by the private sector in our country, has become one of the most important sectors with an annual income expectation of 25 billion dollars.

However, the conditions of having a health tourism authorization certificate in our country are not compelling and distinctive. According to the data of

December 2022, 2.439 health facilities were granted a "health tourism authorization" certificate by the Ministry of Health. However, the lack of data collection, the fact that some health institutions do not declare all health tourism revenues, and working with intermediaries instead of official institutions are among the biggest problems encountered in this sector.

While the tourism sector in our country carries out tourism activities, the sector focuses on the sale of the full pension concept in hotels. However, it is observed that the hotels with minimum standards in Europe are of no importance in the purpose of visiting that country, that the structure belonging to that country's culture is marketed in the capitals or other cities, that the food culture is promoted, and tourism is made to feel the natural texture of the lifestyle. Just for these reasons, we observe that the tax collected under the name of city tax in cities with a high brand perception is actually a sale of value belonging to that country. In our country, marketing activities are continued for the tourists coming for holiday in Turkey by emphasizing the full pension holiday concept to meet the basic holiday needs, not for creating value while presenting the tourism activities.

When we examine the foreign marketing activities in health tourism, rather than creating value, we see that fiction is not a mechanism that measures the satisfaction of patients in areas that are currently popular in Turkey, where patients are admitted as soon as possible, treated and discharged as soon as possible. However, every patient comes with at least one companion. Based on the idea that the companion is also a value brought to the country, all processes of the patient and his/her relatives are organized, and the implementation of activities related to the reflection of social and cultural values that will leave a mark on the patient and his/her relatives upon coming to Turkey should be the focus of everyone involved in this process. Elimination of the factors that cause competition between health institutions that develop strategically oriented programs, not in terms of the quality of the service offered, but in price conditions, the establishment of this awareness in every organization engaged in health tourism, the health institutions that focus on quality and give importance to international certification, provide service beyond the expectations of the patient by maximizing patient satisfaction from the patient's admission to the institution, have a managerial understanding that looks at the process

from a 360-degree perspective and that allow the development of innovative services in health and the updating of services within this scope will have built permanent health tourism elements that create value in the future. In this respect, these activities constitute the most important efforts to be permanent in the field. I believe that with this restructuring, Turkey's income target of 20 billion USD in health tourism will be reached without any difficulty, by emphasizing high value-added, qualified business and transactions, emphasizing high-quality manpower, and creating a holistic promotion strategy.

The future of health tourism in Turkey will make progress with medical tourism and elderly care tourism. The national and religious values of Turkish people cause them to approach elderly care with high sensitivity. With effective and successful policies that will include the employment of many care personnel trained in this field, the quality of elderly care services will provide Turkey with a very serious advantage in this area. In the face of the rapidly aging population in the world, Turkey's relatively young population, qualified manpower, modern and contemporary structures, and important breakthroughs with pro-active and agile approaches will contribute significantly to Turkey's earning foreign currency from service trade in this

direction. Turkey will continue to have a greater say in health tourism, featuring thermal facilities and with the cure treatments to be applied there.

One of the most important elements that create value in health tourism is the planning, organization, and delivery of personalized health services to the patient. Today, while personalized medicine is one of the important concepts, the perception of the 'Valuable Individual' is becoming more common day by day. After the provision of certain standards, the provision of privileged and different services and treatments according to the individual's cultural, personal, and health status is important in terms of creating value in health tourism.

The high quality of the personnel working in the International Departments, the one-to-one care and assistance of the patient and his/her relatives, the offering of alternative language options, the patient's access to consent forms in his/her mother tongue, the application of post-service satisfaction surveys and the sharing of the results at regular intervals, the speed in getting back to the patient, the fact that the visits of the physicians are conducted on a certain systematic basis, success in online health services can be considered among the factors creating value in health tourism.

In this context, despite the desire to provide more qualified services in the sector and to move the sector further each year with the efforts to create value in health tourism, the strict perspective of European countries and Turkey's not being a member of the EU cause to a serious obstacle for the sector. In addition, the attitude towards spending the revenues obtained in Europe within the borders of the European Union renders the efforts of many health institutions in Turkey ineffective and, in this sense, harms the institutions. The efforts of the Health Institutions for making an agreement with European municipalities, local governments, and insurance companies have not yet been met. It seems that the most successful projects and business models that will be presented without solving the financial problem will be left unsettled. Presenting the defined, planned, internationally accredited, sustainable models to these countries in the presence of the state and being under the guarantee of the state, and the long-term policies to be made in this field together with the institutions that have become leaders in the private sector with these qualities and have a high brand perception will lead the Turkish Health Tourism sector to success and will strengthen the image of our country's Health Tourism.



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