

The Determination of the Status of Turkey in the Medical Tourism Market in Accordance with the Demands of Health Tourist*

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Abstract

Aim: Medical tourism is the process that people, who need surgical intervention, travel from their region to another region at the request of receiving more professional and cheaper medical services. The main purpose of this study is to provide a better understanding of consumer demand in the medical tourism market and to find out what can be done to gain a competitive advantage in the medical tourism market of Turkey in accordance with these conclusions. This study is important in terms of proper guidance on investments of medical tourism in Turkey, in the future.

Method: Medical tourism practices in the world and Turkey have been analyzed and comparisons have been made in line with this purpose. In the study, SWOT analysis has been used to reveal the current situation of Turkey by compiling the secondary data.

Findings: It is found that Turkey has not yet got the share which it wants in the medical tourism market. In addition to keeping up with the technological developments in health tourism, Turkey has been also making new investments in health tourism. At the same time, there are studies that aim to develop health tourism by including it in development plans. These studies will enable health tourism to institutionalize and to be planned in a coordinated way.

Discussion: Considering the wealth of alternative tourism in Turkey, the increase in investments and the research of the demands of health tourists will also bring a competitive advantage. National and international publicity activities should be planned. Inferences should be made by analyzing the marketing and publicity activities of competing countries. In marketing and publicity activities, factors that can put Turkey at the forefront of health tourism should be used.

Keywords: Health Tourism, Medical Tourism, The demands of Health Tourists.

Sağlık Turistlerinin Talepleri Doğrultusunda Türkiye'nin Medikal Turizm Pazarındaki Durumunun Saptanması

Özet

Amaç: Medikal turizm, cerrahi müdahaleye ihtiyaç duyan insanların, daha profesyonel ve daha ucuz sağlık hizmetleri alma isteği üzerine, buldukları bölgeden başka bir bölgeye seyahat etmeleridir. Araştırmanın temel amacı, medikal turizm pazarındaki tüketici talebinin daha iyi anlaşılmasını sağlamak ve bu çıkarımlar doğrultusunda Türkiye'nin medikal turizm pazarında rekabet avantajı elde etmesi için neler yapılabileceğini ortaya koymaktır. Bu bağlamda araştırma

* The summary of this study was presented at the 5th International West Asia Congress of Tourism Research.

Türkiye'nin gelecekte medikal turizme yapacağı yatırımların doğru yönlendirilmesi açısından önem taşımaktadır.

Yöntem: Çalışmada betimsel araştırma yöntemi kullanılarak medikal turizmin mevcut durumu incelenmiş ve SWOT analizi yapılmıştır. İkincil veriler derlenerek Türkiye'nin mevcut durumunu ortaya konmaya çalışılmıştır. Bu amaç doğrultusunda dünyadaki ve Türkiye'deki medikal turizm uygulamaları incelenmiş olup karşılaştırmalar yapılmıştır.

Bulgular: Araştırma sonuçları bir bütün olarak değerlendirildiğinde Türkiye'nin medikal turizm pazarında henüz istediği payı alamadığı görülmüştür. Türkiye, sağlık turizminde teknolojik gelişmelere ayak uydurmakla birlikte sağlık turizmi konusunda yeni yatırımlar da yapılmaktadır. Aynı zamanda kalkınma planlarında sağlık turizmine yer verilerek geliştirilmesi yönünde çalışmalar vardır. Bu çalışmalar sağlık turizminin kurumsallaşmasını ve koordineli bir şekilde planlanmasını sağlayacaktır.

Tartışma: Türkiye'nin alternatif turizm bakımından zenginliği göz önüne alınarak sağlık turizmi konusunda yatırımların çoğaltılması, sağlık turistlerinin taleplerinin araştırılması rekabet avantajını beraberinde getirecektir. Ulusal ve uluslararası tanıtım faaliyetleri planlanmalıdır. Rakip ülkelerin pazarlama ve tanıtım faaliyetleri analiz edilerek çıkarımlarda bulunulmalıdır. Pazarlama ve tanıtım faaliyetlerinde Türkiye'yi sağlık turizminde ön plana çıkarabilecek unsurlar kullanılmalıdır.

Anahtar Kelimeler: Sağlık Turizmi, Medikal Turizm, Sağlık Turistinin Talebi.

Introduction

In recent years, people's perspective on tourism has changed to a great extent. The idea that tourism is a necessity rather than a luxury consumption has been put forward, this idea has been discussed a lot and has not reached a conclusion, but unlike tourism, health tourism is considered as a vital need. The desire to be healthy, which is included in the Maslow's hierarchy of needs at the first stage, explains why people regard health tourism as a vital need. In health tourism, where the aim is to stay healthy or to be healthy, the services provided are vital and involve risk for the consumer. As far as the vital functions of the consumer are concerned, the demand flexibility of the services offered in medical tourism is very low. Moreover, the fact that time is a major factor in the services offered in the health sector eliminates the seasonability of medical tourism. Medical tourism makes itself different from other types of tourism, with its own features. Health tourism is an important and large market in this regard.

In spite of the fact that Turkey has achieved important breakthroughs in health tourism, it still can not establish supremacy over its rivals and falls behind. According to these results, it is thought that the demands of the medical tourist have been determined improperly. From this point of view, the purpose of the study is to determine the current situation of Turkey in terms of medical tourism and to reveal its position in the market. This study will enable the demands of health tourists to be evaluated from a general perspective with the second data and statistical indicators by identifying the factors that will bring Turkey to the forefront of its rivals.

The Concept and Classification of Health Tourism

Health tourism, which is one of the sub-branches of tourism and is increasingly popular today, has been tried to be defined by many researchers especially in recent years and has had multiple definitions. While Pafford (2009) defines health trip that

people make to protect and improve their health as health tourism, the researcher argues that health tourism is not a new formation, contrary to popular belief, but a cultural transfer of thousands of years. Aydın (2012), on the other hand, defines health tourism as the movement of individuals who travel to a different region from their place of residence and stay in the region where they receive health care to protect their health or to be healthier. Kantar and Işık (2014), who make a similar definition with Aydın (2012), mention that there must be accommodation process of at least 24 hours for the health services received by an individual to be evaluated within health tourism. Contrary to other studies, in the studies of Tengilimoğlu and Işık (2010), it is emphasized that all trips that give people pleasure and comfort are called health tourism and the individuals taking part in health tourism are in search of a healthier body. The researchers has not mentioned that there should be any time restrictions to evaluate health services within health tourism. It is considered by the researchers that the reason for emergence of health tourism results from the quest of people who want to age peacefully. Based on the definitions of the researchers, health tourism can be interpreted as the search of individuals who use their scarce resources to protect health or to get healthy again and travel to a different region from their place of residence in line with this purpose.

Health tourism has a wide range of consumers, from individuals who want to protect their health to individuals who are looking for health. Although the general purpose of individuals who take part in health tourism is to tend to be healthy, lots of different classifications of health tourism have been stated to group and identify the individuals taking part in health tourism for different purposes and quests, but no common decision has been reached on classification. Reviewing the studies conducted in the literature (Tengilimoğlu, 2013; Tamer, 2020), it has been seen that health tourism is classified into four headings. The sub-headings in this classification are; thermal tourism, SPA-Wellness tourism, Third-age tourism and medical tourism. As for some studies (Aydın, et al, 2011; Yardan et al, 2014); the classification is grouped under three headings such as medical tourism, thermal tourism, senior and accessible tourism. In contrast to these studies, Mirza (2015) grouped health tourism under two headings, such as medical tourism and wellness tourism, while Özsanı and Karatana (2013) took an approach to the classification as five headings such as Spa tourism, spa-wellness, senior tourism, accessible tourism and medical tourism. Although classification systems titled two, three, four and five are included in the studies, triple and quadruple classification is used more when the current literature is considered. When health tourism is classified according to the masses it appeals to and the common goals of the masses, it can be grouped under three headings such as medical tourism, thermal tourism, senior and accessible tourism.

The Concept of Medical Tourism

Medical tourism is a field of health tourism that covers the whole range of surgical practices. (Tengilimoğlu and Işık, 2010). When the literature is reviewed, it is seen that there is no single and common definition for medical tourism, like health tourism. Harahsheh (2002) defines medical tourism as the activity of travelling of individuals, from their own country to another country for the purpose of any medical practice that

covers surgery and dentistry, which is the subject of the medical field. Connell (2006) and Cohen (2013), supporting a similar view, defined medical tourism as a type of tourism in which patients leave their residence for medical operations and travel to a different country. Carrera and Bridges (2006) focused on the concept of service. According to the researchers, medical tourism can be defined as the planned travel to an another country to improve individuals' mental and physical health, to enable people to feel better than usual and to receive treatment services. Jose and Sachdeva (2010) emphasized the economic aspect of medical tourism in terms of consumers. According to this definition, the main purpose of medical tourism is to benefit from advanced health services in another country at a low cost. When the definitions are compiled, it is possible to define medical tourism as the attempts of people who need surgical intervention to travel from their region to another region with the desire to be healthy and to receive the best service at the most affordable price in this process.

The Factors that Affect The Choice of Medical Tourists and Country

There are many different reasons for the increasing demand for the services and why the medical tourism market is growing day by day. One of the most important reasons is that with the development of medicine and science, the expected human lifespan has been extended more than double in the period from the 20th century to the 21st century (Roser et al, 2013). With the extension of human life span, the proportion of 60-year-old and the older group in the population rose and the demands for health care increased (Kozak et al., 2019). Citizens of countries that have difficulty in meeting this demand usually have a demand to travel for medical tourism to countries where they can get the fastest and highest quality services (Akbolat and Deniz, 2017). Some researchers have made definitions that medical tourists have different priorities in terms of choosing the country. According to the definitions of researchers, the factors that affect the choice of patients can be briefly listed as follows; the cost of health care, medical technology, the quality of health care services, specialty doctors in the field, transportation conditions, foreign language skills of the staff, proximity to the residence and whether the health institution, where the patient will receive service, is accredited (Barca et al, 2013; Crooks et al., 2017; Tontus, 2018; Bayar, 2019; Özkan, 2019).

The service expectation of patients that take part in medical tourism can be very different from each other. A clear 'needs analysis scheme' of a medical tourist can not be implemented since patients will have different sources of motivation and priorities in this process. There are different health tourism destinations where medical tourists can evaluate their advantages and disadvantages and choose the right one for themselves in the process. The most preferred cost-effective medical tourism countries have been listed in the American medical journal VeryWellHealt (Whitlock, 2021). The list includes Turkey, Mexico, Colombia, Costa Rica, India, Dominican Republic, Malaysia, South Korea and Thailand. In the tourism market, where there is global competition, various studies and researches were carried out in order to understand the needs of consumer in a better way and to respond to these demands in Turkish tourism industry. Reviewing the studies conducted in the literature, the needs and demands of medical tourists have been identified and listed accordingly. In the studies carried out by Özkan (2019) and

Bayar (2019) it was emphasized that the most important factors that affect the demands of medical tourists are the cost, effective treatment, a staff of specialist and accreditation of medical institutions.

One of the most effective factors in the choice of medical tourists' destination is the cost. Until the beginning of the twenty-first century, wealthy people who did not live in a developed country traveled to developed countries to be able to receive health-care services that they could not receive in their own countries or to get better health-care quality, but after the twenty-first century, medical tourist markets have begun to change. Trips to the developing countries have started to be organized in order to receive less costly and higher-quality healthcare service (Kantar and Işık, 2014). With the notable increase in neurological disorders, especially in countries with a high average age and in the Northern European countries, patients started to look for new economic solutions due to the fact that the care process was difficult and costly (Aktepe, 2013). The factor of low cost, which is the most significant feature of this search process, makes medical tourism attractive for patients. In parallel with this result, Yıldırım and Altunkaya (2006) also emphasized that cheap and high-quality service is one of the important factors in the growth and historical development of health tourism. When Table 1 is analyzed, it is seen that Turkey provides services at 50% to 60% more affordable costs, compared to the USA market. In addition, Turkey maintains a pricing policy at a level that can compete with Costa Rica and Thailand while it provides more affordable medical services than countries such as Mexico, Singapore, South Korea and Taiwan. As a result, Turkey, which offers treatment opportunities at a low cost in the medical tourism market, is in an accessible position for consumers.

Table 1. Medical Service Treatment Costs (\$) (2015)

Medical Products	USA	Costa Rica	India	Malaysia	Mexico	Singapore	South Korea	Taiwan	Thailand	Turkey
Average Savings	-	% 45-65	% 65-90	% 60-80	% 40-60	% 25-40	% 30-45	% 40-65	% 50-75	% 50-60
Coronary Artery Bypass Graft	88.000	31.500	14.400	20.800	37.800	54.500	29.000	21.000	23.000	16.500
Bypass Heart Valve Replacement	85.000	29.000	11.900	18.500	34.000	49.000	33.000	18.000	22.000	17.500
Hip Replacement	33.000	14.500	8.000	12.500	11.500	21.400	15.500	12.000	11.500	11.000
Knee Replacement	34.000	9.500	7.500	12.500	12.800	19.200	15.000	12.000	11.500	11.000
Spinal Fusion Surgery	41.000	17.000	9.500	17.900	22.500	27.800	18.000	18.000	16.000	13.500

IVF Treatment	15.000	-	3.300	7.200	7.800	9.450	7.500	4.800	6.500	3.600
Gastric Bypass Surgery	18.000	11.200	6.800	8.200	13.800	13.500	12.500	13.000	12.000	9.500
Dental Implants Dental Bridge	23.000	9.500	7.200	7.800	8.500	12.000	10.500	9.500	10.500	790
Face Lift	12.500	4.500	3.500	5.500	5.250	8.750	5.900	5.600	5.300	5.400
Rhinoplasty	6.200	3.400	2.800	3.600	2.800	4.750	4.700	3.500	4.300	3.000

Source: Arı, 2017.

Another factor that affects the choice of medical tourists' destination is the waiting period. In the USA, Britain and developed countries, medical tourists who want to receive medical services face long waiting times even if they take a risk paying high fees (Youngman, 2008). Among the reasons for the extension of patient waiting time, there may be a shortage of physicians and an insufficient number of beds. Accordingly, the bed capacity is of great importance. In a study carried out by Deniz (2016), the number of medical tourists that countries can serve on a year-by-year basis was included. India took the lead with an annual capacity of 8 million, Singapore was 7.7 million, Turkey, Malaysia and Thailand followed Singapore with an annual patient capacity of 7.5 million in this research. In addition to this, Asia, which is one of the most important regions in medical tourism, hosts many medical tourists every year. Thailand, Singapore, India, South Korea and Malaysia are among the Asian countries that play an active role in medical tourism (Connel, 2006). From this point of view, the fact that the number of medical patients that Turkey can serve annually is close to the leading Asian countries shows that Turkey is a country with high potential in medical tourism.

Having an accreditation certificate of international health care institutions is of critical importance for medical tourists. The lack of an accreditation certificate in health institutions causes some negative image of institutions such as the fact that the institution does not have standards of service and there is a high probability of bad examples (Barca et al., 2013). The research conducted by Bostan and Yalçın (2016) also supports this data; It is claimed that institutions with accreditation certificates have a great influence on the choice of country and hospital of health-care workers working in Turkey and medical tourists that come to Turkey. In the field of medical tourism, The Joint Commission International (JCI) is the most well-known commission that issues accreditation certificates and supervises medical institutions. The mission of JCI is to improve the safety and quality of patient care continuously and to monitor it in the process through accreditation and certification services in health institutions that serves in 80 countries.

In the Medical Tourism Evaluation Report of Turkey conducted by Republic of Turkey Ministry of Health (2013), it was explained that one out of every four medical tourists prefers hospitals that have a JCI accreditation certificate. Turkey is one of the countries that closely follows accreditation process in health. Until 2012, 10% of the hospitals with JCI accreditation certificate worldwide were located in Turkey (Zengingönül et al., 2012). The most recent data for today are shown in table 2. In 2021, It is seen that Turkey has more accredited health institutions than most of the countries in which it competes in terms of price and number of annual patient

hospitalizations. In medical tourism, where international competition is intense, Turkey is in a position to gain a competitive advantage over its rivals.

Table 2. The Number of Healthcare Institutions with JCI Accreditation in Countries

Thailand	India	Turkey	Malaysia	South Korea	Taiwan	Mexico	Singapore	Costa Rica
62	37	32	17	9	8	7	5	2

Source: Joint Commission International (2021). The Number of Healthcare Institutions with JCI Accreditation in Countries.

The principle of accessibility, which is one of the basic elements of the tourism product, is of great importance in the marketing of the product that will be offered to the consumer. Problems arise in terms of the marketing of tourism products in institutions that are far away from the consumer's location or do not have adequate transportation infrastructures, including products with high attractiveness. Accessibility refers to the proximity of tourist centers with high attractiveness to the target audience in the market and the ability to reach them at a low cost. In spite of the fact that accessibility also creates an attractiveness for the consumers with middle and upper income group, there is no obvious relation between low cost and attractiveness. For the middle and upper income group, time-cost is a more important criterion of attractiveness. Time is more important criterion than money for an American tourist, who goes to India to play golf, to be able to return his country as soon as possible-(Kozak et al., 2019). The same example will be applied to a medical tourist who has left his country for health care and wants to come to Turkey. Nowadays, many people have to cope with extended working hours at work, regardless of the continent. Potential health tourists who will leave their country for health care during these limited times will want to be able to return to their country within the shortest time. People who are short of time as they work, as well as elderly and sick people, will not want to travel for a long period of time. Under equal cost and terms of service, these groups will move to countries that close to their address of residence.

According to the health tourism reports of Association of Turkish Travel Agencies (2014), it is seen that the first three countries that choose Turkey in health tourism are Germany, Libya and Russia. It is also pointed out that the countries included in the report are not located geographically far from Turkey. It has been seen that people have access to transport from the mentioned countries in a short time by air transportation. It is indicated by airlines that Germany to Istanbul has an average flight time of 2 hours 30 minutes, from Libya to Turkey, it takes 2 hours 45 minutes and as for Russia to Istanbul, it takes 2 hours and 50 minutes. In the healthcare industry, where every second is important, the possibility of fast transportation to the service is literally vital for medical tourists.

Costa Rica, a small country located in Central America with a population of 5 million people, is ranked 7th in the Medical Tourism Index (The Medical Tourism Index, 2021). In a study of Costa Rica's medical tourism data were compiled, it was stated that 95% of the medical tourists that come to Costa Rica was coming from the North America and the tourists preferred Costa Rica most for the dental treatment. (Bawazeer, Rahman, Barkhuu, Ilic and Alag, 2016). Another study shows that 40% of health tourists that come to Costa Rica come only for the dental treatment (Borgen Project, 2019). Dental treatments are mostly medical operations that do not require hospitalisation and in which the patient is discharged during the day. As a result, it can be inferred from the data we have that a large part of the medical tourists who prefer Costa Rica may have chosen the country because it is close to their address of residence and they do not prefer to make long trips for services with a short treatment period.

Methods

The purpose of this study is to contribute to the position of Turkey to gain competitive advantage in the medical tourism market by understanding the demands and needs of medical tourist in a correct way. Qualitative research methods were applied in support of each other. Firstly, secondary sources were scanned and the concepts of health tourism, medical tourism and medical tourist were introduced in the national and international literature. The position of countries in the medical tourism market and the expenditures of medical tourists were compiled from statistics. In line with the purpose of this study, the current literature review was used to reveal the potential of medical tourism in Turkey. The data published by institutions and organizations such as the World Health Organization, the Ministry of Health, the Ministry of Culture and Tourism and the Turkish Statistical Institute have been collected. In addition, analysis has been carried out by using SWOT analysis in order to reveal the position of Turkey in the medical tourism market and to get a competitive advantage against other countries.

Findings

The Position of Turkey in the Health Tourism Market

It is possible to evaluate the position of Turkey in health tourism with data. The expenditure statistics of tourists that come to Turkey are listed in Table 3. When the data were analyzed, the expenditures made within health tourism increased by 62% in 2019. Expenditures on food&beverage, accommodation and expenditures made within package tours have fallen behind health tourism expenditures. In 2020, which is considered to be the pandemic period, tourism activities in general have come to a standstill. Tourism activities have been adversely affected by the pandemic worldwide. According to the data of 2020, it has been seen that health tourism expenditures belong to the area that depreciate the least compared to the previous year. In the first quarter of 2021, when the pandemic period continues, there was growth compared to the first quarter of the previous year. Compared to other fields, health tourism is the only tourism activity that has not experienced a downsizing.

Table 3. The Change in the Expenditure Rates of Tourists that Come to Turkey Compared to the Previous Year-Period (%)

Expenditures	2019	2020	2021 (First Quarter)
Package Tour	%13	%-77,5	-71
Accommodation	%21,4	-65,3	-44,8
Food&Beverage	%27,4	-58,3	-34
Health	%62	-48,5	4,7
Other	%12,4	-61,2	-32,5

Source: Turkish Statistical Institut (2021). The Change in the Expenditure Rates of Tourists that Come to Turkey Compared to the Previous Year-Period.

In Table 4, the number of health-care workers in Turkey is evaluated on the basis of years. Considering these data, the number of health workers has increased over the years. According to the general evaluation, the highest number in the distribution among health care workers consists of nurses with 190,499 people. The number of specialists is the largest number of employees when evaluated in terms of physicians. As of 2018, the number of specialist physicians is 82,984. The number of general practitioners is 44,053, the number of dentists is 30,615, and the number of assistant physicians is 26,181. 1 million 16 thousand 401 healthcare workers are working in total.

Table 4. The Number of Healthcare Workers in Turkey Over the Years

The Distribution of Health Workers	2002	2014	2015	2016	2017	2018
Specialist Physician	42.457	75.251	77.622	75.620	80.951	82.984
General Practitioner	30.900	39.045	41.794	43.058	44.649	44.053
Assistant Physician	15.592	21.320	21.843	23.149	24.397	26.181
Dentist	16.371	22.996	24.834	26.674	27.889	30.615
Pharmacist	22.289	27.199	27.530	27.864	28.512	32.032
Nurse	72.393	142.432	152.803	152.952	166.142	190.499
Midwife	41.479	52.838	53.086	52.456	53.741	56.351
Other Medical Personnel	50.106	138.878	145.943	144.609	155.417	177.409
Recruitment of Other Personnel and Services	83.964	303.110	311.337	321.952	339.241	376.367
Total Personnel	378.551	823.069	856.792	871.334	920.939	1.016.401

Source: Ministry of Health (2019). Health Statistics Yearbook.

Figure 1 shows the number of health tourists and medical tourists over the years. When the table is analyzed, it is seen that the number of tourists that come for health tourism and medical tourism increased between 2015 and 2019. Although there was a decrease in these numbers during the pandemic process, 338,150 people visited Turkey in 2020. 2019 was the year that had the visitors most with the number of 662,087 tourists. According to a general conclusion, the period in which tourists who come to Turkey for the purpose of health tourism receive the least services is 3rd quarter of the year, July-September. Based on this data, it is possible to say that health tourism, in addition to not having seasonal features, can be an alternative to mass tourism, which is an important source of income in Turkey.

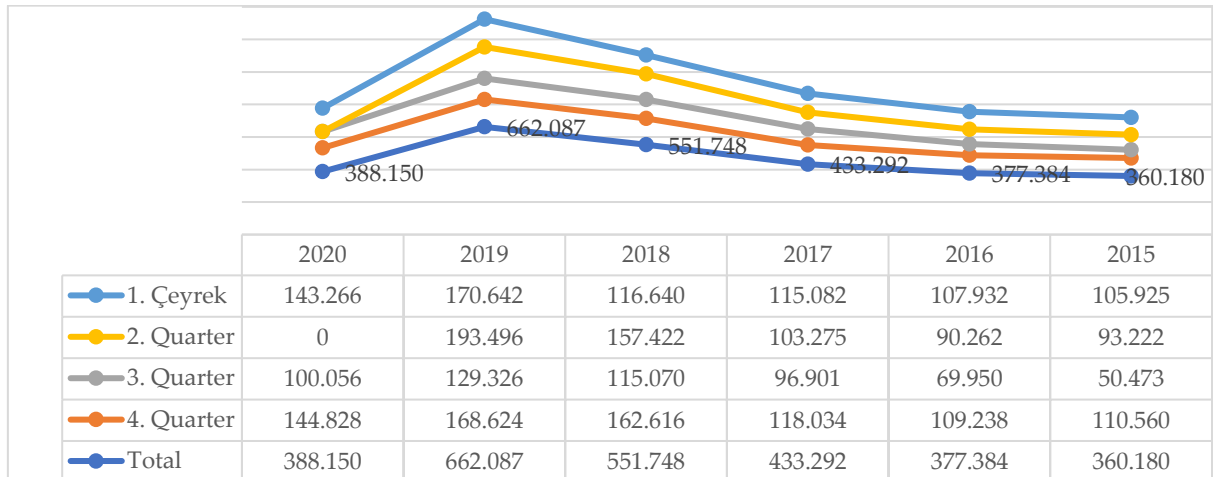


Figure 1. The Number of Tourists that Come for Health Tourism and Medical Tourism Over the Years

Source: Turkish Statistical Institute (2021). The Number of Tourists that Come for Health Tourism and Medical Tourism Over the Years.

Another of the health tourism data is the distribution of health tourism income over the years. Considering health tourism income of Turkey, there was a 12% increase in between 2015 and 2016, a 15% increase in 2016-2017, a 4% increase in 2017-2018, a 23% increase in 2018-2019 and a 48% decrease in between 2019 and 2020 in total income in terms of a year. The reason for this decrease in health tourism is the effects of the pandemic period on tourism sector. 2019 is the year when health tourism incomes are the highest. In total, \$ 1 million 65 thousand 105 was spent. It is possible to say that health tourism incomes increased in terms of year before the pandemic period. In addition, it is expected that an income of \$ 20 billion will be earned through health tourism in 2023, according to the data of the Ministry of Health.

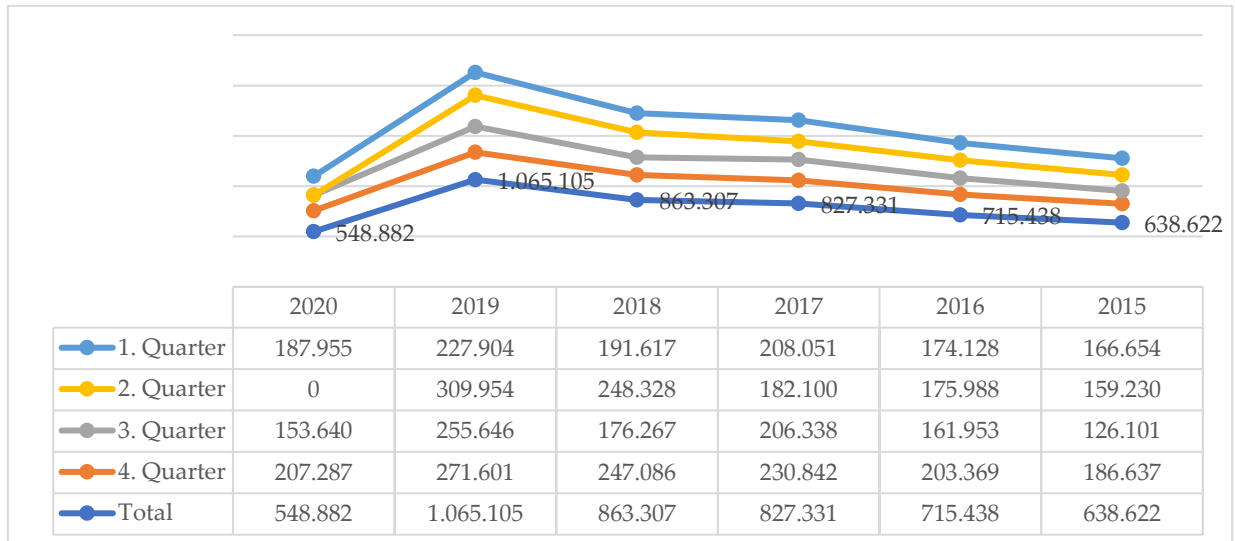


Figure 2. Health Tourism Income 2015-2020 (1.000 \$)

Source: Turkish Statistical Institute (2021). Health Tourism Income 2015-2020.

Table 5 shows that medical tourists, who prefer Turkey, prefer it due to the presence of tourism opportunities. In addition, the fact that it is not covered by insurance attracts medical tourists.

Table 5. The Reasons Why Countries Prefer Turkey in Medical Tourism

	Germany	Russia	England	USA	Libya	Holland	France	Azerbaijan	Central Asian Countries	Middle Eastern Countries
Price Difference	•		•	•		•	•			
Length of Waiting	•		•			•	•			
Technological Incompetence		•			•			•	•	•
Lack of Specialisation in Employees		•			•			•	•	•
Kinship Relationship								•	•	
Diaspora	•		•			•	•			

Non-Coverage Insurance	•	•	•	•		•	•	•	•	
The Need for A Specific Treatment Option		•			•			•	•	•
Cultural Similarity								•	•	•
Tourism Facilities	•	•	•	•	•	•	•	•	•	•

Source: Directorate General of Health Services (2015). Turkey's Medical Tourism Preference Reasons by Country.

Findings Related to SWOT Analysis Strengths

Due to the fact that there are specialist physicians in their field in Turkey, the quality of services provided to health tourists is high.

With the presence of qualified medical professionals, it is able to compete with other medical institutions around the world.

Due to the quality of medical equipment in hospitals, the quality of service provided comes to the fore.

Technological developments are being followed within the scope of health tourism. In hospitals, devices with technological infrastructure are used in accordance with the needs of health tourists.

Healthcare costs are more affordable than in other countries. Thus, it provides health tourists with a cost advantage over other competing countries.

Services are provided at the international level with the high number of accreditations made with international institutions and organizations.

The number of patients it can serve in a year is higher than in other countries.

Turkey is rich in alternative tourism that is complementary to health tourism. Health tourism and medical tourism can be integrated with alternative types of tourism.

Health tourism policies have been established by carrying out coordinated studies with Ministry of Family and Social Services, Ministry of Health, Ministry of Culture and Tourism, Ministry of Economy and Ministry of Development. Thus, co-ordination among the institutions has been ensured.

Intermediary organizations such as accommodation enterprises and travel enterprises commissioned by the ministry in the field of health tourism are high in number.

Weaknesses

Some countries have a negative image of Turkey.

The statistical data shared on health tourism and medical tourism are limited.

Strategic plans are not yet at an adequate level within the scope of health tourism and medical tourism.

In the field of health tourism, there are few education options at bachelor's degree, associate degree and postgraduate degree levels.

Opportunities

Health tourism is included in the tenth and eleventh development plans. Thus, national and international health tourism will come to the forefront.

There are government incentives for health tourism. The legal regulations made on this issue are also an important factor.

Turkey is a country with easy access and high transportation diversity due to its location between the European and Asian continents. For this reason, it is possible for health tourists to prefer Turkey.

It is rich in thermal facilities that are used as a complementary factor in health care.

Turkey is a country that is rich in alternative types of tourism.

It is expected that the interest in health tourism will gradually increase with the increasing third-age population.

The increase in average lifespan is reinforced by the desire of individuals to live healthier.

Turkish citizens that live in other countries prefer Turkey for their health services.

Threats

Other competing countries are strong on health tourism. The countries have an advantageous position in terms of the number of health workers and the technologies used.

Political instability in neighbouring countries adversely affects tourists who come or plan to come to our country.

Terrorist incidents in our country negatively affect tourism activities.

Geographical distance to countries that are developed in health tourism such as the United States, is a disadvantage.

Since the medical tourism advertising of each country is legally different, publicity activities are incomplete and inadequate.

Result

Health tourism is an increasing market, due to the increased third-age population, the desire of people to live longer and the desire to be healthy. In this type of tourism, where the main purpose is to be healthy or stay healthy, the length of stay is longer compared to other types of tourism. In addition, it does not have a seasonality feature.

Currently, arrangements are also made to bring health tourism to the forefront. It is obvious that medical tourism activities will develop in Turkey due to the fact that health tourism is included in the eleventh development plan of Turkey. Accordingly, it is possible to make data access easier. In the eleventh development plan, it has been emphasized that qualitative and quantitative developments will be included in order to increase the awareness of Turkey in health tourism. In addition, it was highlighted that publicity activities within the scope of health tourism should be given importance by putting an emphasis on international accreditation too. According to the results of the research, as mentioned in the SWOT analysis, the plans and policies to be put forward in terms of health tourism, it will also enable coordinated work while ensuring competitiveness. Coordination between institutions and organizations will also be able to remove obstacles in terms of the development of health tourism. In spite of the fact that Turkey has the critical items highlighted in the studies in its inventory, it still can not establish supremacy over its rivals and falls behind. According to these results, it is seen that the needs of the medical tourist

have been identified incorrectly or Turkey has made mistakes in marketing. In order to gain more market share on the basis of competing countries, activities should be carried out that can improve health tourism. Especially, publicity and marketing activities should be directed by supporting alternative types of tourism integrated with health tourism and health tourism. Thus, it will be possible to go beyond the seasonality feature of tourism and talk about tourism activities that span the year.

The results of the research are similar to the results of other studies conducted in the field of health tourism and medical tourism. According to Özkan (2019), the reasons why health tourists prefer Turkey are that it has an international accreditation certificate, has a high level of medical technology and has specialized medical personnel. In addition, the results of this research also showed similarities in the light of the data compiled and the results of the SWOT analysis.

In this study, unlike other studies in the literature, the opinion was expressed that geographical location and accessibility play a more important role in the choices of medical tourists than indicated in previous studies. Especially, the limited time of patients with middle and upper income groups and the fact that elderly and sick people are mostly sensitive to long trips support this view.

The geographical location of Turkey, its richness in alternative types of tourism, its advantage in terms of costs compared to competing countries are important factors for the development of health tourism. By using these elements correctly, it is critical to determine the demands of health tourists to increase market share. For this purpose, it is thought that policies and strategies should be created by analyzing the health tourism activities of competing countries. Considering the results of the research as a whole, it is possible to introduce the following recommendations:

- Turkish citizens that live abroad come to Turkey within the scope of health tourism. Incentives can be introduced to enable these citizens to prefer Turkey for health tourism.
- National and international publicity activities should be planned. Inferences should be made by analyzing the marketing and publicity activities of competing countries. In marketing and publicity activities, factors that can put Turkey at the forefront of health tourism should be used.
- In order to develop health tourism, it is essential to share statistical data. The sharing of data plays an important role in determining the demands of health tourists.
- Health tourism on a regional basis should be introduced with complementary types of tourism. Alternatives to health tourism such as thermal tourism, spa and wellness tourism, nature tourism should be created.
- It is possible to carry out activities that encouraging national and international health tourism by creating "health packages" by travel agencies.
- Research should be conducted that deals with the issue of health tourism in various aspects. In this context, it is suggested that individuals who will conduct research in the literature should conduct comparative analyses of medical tourism trends based on countries.

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