

CURRENT SITUATION OF MEDICAL TOURISM UNDER HEALTH TOURISM, POTENTIAL AND FUTURE: EVALUATION OF MEDICAL TOURISM IN TURKEY

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Abstract

In a world of globalization and fierce competition in the market conditions in which we live now, the tourism sector is not possible to stay within national borders. Otherwise, the tourism sector for sustained, rapid innovational and flexible development of its system must constantly update their strategies and potential future trends. Because the main purpose of the tourist's trips to sea, explore new places, creating reasons such as visiting the natural beauty is increasing demand of tourists in different areas. For example, one of them is the medical tourism as a health tourism. The purpose of this study is to examine the situation and the importance of medical tourism in the framework of developing health tourism in Turkey. Medical tourism although is widespread abroad for their fifteen or twenty years, but anyway cannot be said that it is quite common in many countries. For this, there were carried out in private clinics analysis of methods and were studied applying forms and contribution to medical tourism. As a result of the study, despite the presence in many of the studied hospitals accredited documents of international organizations and a large number of foreign tourists arriving in the area of medical tourism, revealed the lack of functioning medical tourism elements. In addition, this study examined the medical tourism situation in

Turkey about Turkey and its development and future of the world of medical tourism and poses one of the few studies on the contribution to the national economy in this area. And is so great importance in terms of supply.

Keywords: Health tourism, medical tourism, medical tourist, health institutions

INTRODUCTION

The importance of the tourism sector is increasing day by day in an environment where globalization is rapidly spreading with the vertiginous speed of information, technology and capital on the world. Competition is at so high level that the tourism sector has brought changes to the way how it works and structure in order to keep up with the competition and to achieve its success in the sector and feel the need for constant renewal. One of them is health tourism. Once the purpose of the visit of the tourists was to have a holiday at the sea, find new and natural places, and see historical places. Nowadays, the demands of tourists are increasing rapidly in different areas. On the one hand, the rapid development of globalization and technology, on the other hand, the increase in the number of tourists coming to the country and the rapid change in the consumption culture have naturally led to the diversification of services and demands.

Especially in recent years, a sub-title of health tourism which is the main subject of our study - medical tourism has become more attractive and important. Because of the increase in health costs of medical tourists in their own countries and the long waiting periods of treatment services in their countries, it caused the medical tourists to have preferred the countries where costs of treatment is cheaper. For example, medical tourists can choose different countries and take advantage of the cheaper prices in medical and surgical procedures and treat them in full confidentiality and do not spend much money compared to their own countries. One of the opportunities offered for medical tourists is facial lifting, hair transplantation, breast enlargement or shrinkage, in vitro fertilization, abdominal stretching, eyelid and lip inflation, rhinoplasty, hysterectomy, hemorrhoid, joint, spinal disc, slimming, varicose or cardiac bypass and so on treatments are included. In short, medical tourism in generally means medical tourists traveling abroad for affordable prices

As we mentioned above, the purpose of the health tourism is the journey of people from different places of residence for their health. In this part of our study, what are the places and services that are being traveled, or the types of health tourism and the services that it offers. Health tourism is widely known in the following three categories (Sağlık Turizmi Kurumu, 2016):

- Thermal tourism and SPA –Wellness
- Elderly and disabled tourism
- Medical tourism

Table 1 Health Tourism Types and Applications

Thermal tourism and SPA –Wellness	Elderly and disabled tourism	Medical tourism
Spa treatments	Excursions tours	Plastic and elective surgery
Climatotherapy	Busy therapy	Cardiovascular surgery
speleotherapy	Dialysis	Plastic surgery
Herbal therapies	Additional programs	Diagnostic services
Complementary treatment, etc.	Addiction treatments	Cancer treatment
	Disabled treatments, etc.	Transplantation
		Infertility treatment

Source: Mologlu, Vedat, 2015, Medical Tourism as a Emerging Value; Contribution to Turkey's Economy, Session 5D: Microeconomics I., p. 673.

In addition to medical services, medical tourism brings together entertainment, relaxation, health and treatment (Gülen & Demirci, 2012, p. 73).

Purpose of research

The main purpose is to examine the existing applications in hospitals in Turkey in order to give better services to international medical tourists as well as the tourists could be carried out in a rigorous and better conditions, meeting the expectations of patients and ensure Turkey to become a preferred country in this area. As well as, in Turkey with the identification of need, through the data obtained is to reveal the current situation in the medical tourism field, the policies to be developed regarding medical tourism, and will be guided the work to be done in the future and make suggestions.

The latest developments in the field of medical tourism can be considered as the importance of the research. Because of these developments, in order to enlarge Turkey's health tourism and medical tourism opportunities that exist and lay off, the opportunities may arise for the future, is important in terms of alternative tourism facilities tourism and economic dimensions of diversification.

This study also contributes to the medical science in the field of health tourism and medical tourism, to support medical services as an alternative to the diversification of tourism

from a global perspective, to help the national and international developments in the medical sector about medical services is important

RESEARCH APPROACH

The data collection, limitations of the study and findings are included in the methodology section of the study. As a result of the study, the general expectation is to understand the importance of medical tourism and the importance of the risks that can be encountered in terms of reliability. At the end of the study, after the evaluation of the data, some suggestions about the future of medical tourism are presented.

Hypothesis

- V1. The status and level of health institutions in medical tourism in Turkey within the
- V2. If there is the effect of agreements with different countries of the health institutions in Turkey within transnational scope of medical tourism, or is absent.
- V3. Are the health organizations in Turkey within the scope of medical tourism sector preferred by foreign medical tourists or are not preferred.

Literature Research

First of all, a relevant literature review has been made. These include books, theses, scientific articles, project studies, statistics, etc. The majority of the relevant data has been obtained referring to the reports prepared by the Ministry of Health, Ministry of Culture and Tourism, Ministry of Development and Accreditation Institutions. The collected data was tried to be evaluated within the framework of SWOT analysis.

Method of research

In this study, descriptive research method is used. Descriptive analysis is a type of qualitative data analysis that includes general evaluation, summarizing or interpreting of data obtained by various data collection techniques. In this type of analysis, it can be said that the main purpose is to present the findings to the reader or to summarize them. The data obtained at the end of the study on medical tourism in Turkey in the light of the SWOT (strengths, weaknesses, opportunities, threats) analysis was performed.

The scope of research

As the medical tourism is a more recent agenda in Turkey and this area requires the specific studies and the scope of the investigation of well established area-wide health institutions and

agencies in Turkey (government, private, universities, research centers, etc.) the general evaluation has been dealt, review and future suggestions are discussed.

FINDINGS

Medical tourism is a new workspace area of Turkey. However, countries such as India, Malaysia, Singapore, Thailand, Jordan and Germany are among the countries where the medical tourism sector is the most common. Because these countries not only care about the health tourism sector, they have made this field as a policy.

This study examined the case of the medical tourism in Turkey and has tried to show off the current situation and importance. For this purpose, this study examined within the framework of descriptive research method medical tourism practices in Turkey and work was carried out at the end of the SWOT analysis.

As a result of the study, private hospitals, university hospitals and research centers, the majority of which they have the accreditation certificate of international quality, but despite the country's many number of arrival of medical tourists from foreign countries, the medical tourism activities of the hospital under examination were found to be in very inadequate. It is felt that more time and experience are needed to develop this area.

Information about the current status of medical tourism in the country at the moment still is being worked to understand the situation and to predict the future of medical tourism in Turkey if following in this study. The data below reflects the current status of the Medical tourism in Turkey.

SWOT analysis outcome

Turkey's current situation in medical tourism was evaluated with SWOT (strengths, weaknesses, opportunities, threats) analysis referring to the data obtained in this study.

Table 2 SWOT analysis of Turkey's Medical tourism

Strengths	Weaknesses
✓ The health communities providing medical services to be complied with standards.	✓ Because the medical tourism situation is newborn in Turkey, it has not been fully organized yet.
✓ The point of the health system in the health transformation program.	
✓ Health communities in Turkey to become competitive with the western ones.	✓ The number of specialists (doctors, nurses, etc.) trainees in health institutions within the scope of
✓ The price of medical services is more	

<p>affordable in Turkey comparigto other countries health services in.</p> <ul style="list-style-type: none"> ✓ Istabul and Antalya region being wel-known in a geographical area. ✓ The technology quality used in treatment applications and the increasing quality of health services; ✓ The availability of transport and communication technologies; ✓ Attractive sea and natural beauties to relax; ✓ Turkey's climate, geographical location, culture, etc; 	<p>medical tourism is not yet sufficient;</p> <ul style="list-style-type: none"> ✓ Yet correspondent institutions for medical tourism (correspondent tourism enterprises) have not yet entered this area sufficiently; ✓ Inadequacies on the web pages of hospitals. This is also an indication of significant shortcomings in the field of promotion and marketing; ✓ lkal Inadequate cooperation of government, NGO and sector representatives in medical tourism; ✓ There is a small number of Turkish entrepreneurs abroad, which are not enough for medical tourism.
Opportunities	Threats
<ul style="list-style-type: none"> ✓ Medical services in Turkey to be more economical in terms of treatment price comparig to other countries; ✓ Shorter waiting times for medical tourists ✓ Together with treatment for medical tourists as well as a vacation opportunity; ✓ The decrease of travel costs, the effects of health and medical tourism ✓ Providing income for hospital and country; ✓ Employment of new jobs in health and other fields ✓ Contribution to the national economy; ✓ Gaining new experiences, increasing bilateral agreements ✓ Bu sektörde yapılacak yeni yatırımlar sayesinde medikal turizmde marka yaratmak ve değerlendirmek vs. ✓ With the new investments to be made in this sector, creating and evaluating brands in medical tourism. 	<ul style="list-style-type: none"> ✓ Infectious diseases; ✓ People going abroad for medical treatment cause loss of income in medical tourism in the country ✓ Inadequate infrastructure for medical tourism in the country; ✓ The inadequacy of specialist doctors may cause some risks in medical tourism ✓ The need for operations greater than the expected operation and the risk of postoperative care or complications not being made in the same country; ✓ Due to some mistakes in medical tourism, the country has lost its prestige in the health system; ✓ Lack of foreign language proficiency etc.

In this analysis, the existing strengths and weaknesses of the medical tourism sector were determined and opportunities and threats were evaluated against this situation. The main objective of this analysis is; taking in consideration the internal and external fundamental factors of Turkey's medical tourism sector, to determine the present situation, to benefit more from the opportunity to determine, to reduce the negative effects and strategic plans to be less affected from the effects of the weak and threaten direction.

The data given in the SWOT analysis were evaluated based on the data obtained as a result of the study. The majority of these data are obtained based on the reports prepared by the Ministry of Health, Ministry of Culture and Tourism, Ministry of Development and Accreditation Institutions.

Since the study is qualitative and not quantitative, the analysis is considered in the framework of evaluation is not numerical. In addition to the above SWOT analysis not only in particular regions of the country, because the country is a relatively new area for medical tourism in Turkey, we tried to evaluate the situation in general.

SUGGESTIONS

Below are some suggestions for some of the problems seen in the medical tourism industry in Turkey corrected and development are offered:

- Proper the training of specialist doctors and staff to attract medical tourists;
- Improving the education of the individuals working in the medical tourism sector, providing and supporting the necessary opportunities
- Adequate level of technological equipment required to provide quality services to medical tourists
- Adequate medication and materials
- Providing domestic and international relations within the scope of medical tourism;
- Increasing domestic and foreign investments in medical tourism sector
- The inclusion of some hospitals to the network because they carry certain conditions to perform medical procedures (because the contemporary use of technology in health institutions under medical network, standards of hygiene practices and because they make Turkey become easier preferred)
- Accreditation of medical health services by international quality certificates;
- Improvement of Turkey's medical tourism-related advertising and promotional activities
- Raising awareness of the public about medical tourism through publicity;
- Regularization of surveys on medical tourists

- The medical services providing region should provide and introduce the other tourism products of the region.
- Developing the image of the country in medical tourism field in the international market positively
- Increasing participation in congresses, fairs and conferences organized within the scope of domestic and international medical tourism
- Making regular organization of congresses, conferences and fair in the scope of medical tourism in Turkey
- Supporting the modernization, renewal and promotion and innovative activities in the medical tourism sector
- All activities to be carried out within the scope of medical tourism in coordination with Ministry of Health, Ministry of Tourism, hospitals, health and tourism representatives together with investors
- All organizations will be made about medical tourism, scientific studies and research that will increase Turkey's prestige in the health sector is of great importance in terms of both resources.

CONCLUSION

In this study, the situation today with a sub-branch of medical tourism and being developed health tourism in Turkey were examined. Health care countries patients come from, provinces, private and state hospitals, clinics examining, analyzing the current situation, contribution and application forms it has been investigated to medical tourism.

As a result of the study, it is seen that the majority of private and public hospitals within the scope of the research have an accreditation certificate of international nature but they are insufficient in some subjects. There are some standards for hospitals in the world. These standards are determined by JCI (Joint Commission International) and ISO (International Standardization Association). Offering medical tourism services referring to JCI accredited hospitals in Turkey is around 43. These hospitals are the health organizations that use the modern technology, hygiene standards, the presence of experienced specialists and the conditions that are required. The fulfillment of certain conditions for these health institutions and the importance of accreditation are being open in front of the medical market in the world and being recognized and providing opportunity to attract medical tourists.

Table 3 The Total Healthcare Organizations in Turkey which Has Received JCI Accreditation

Toplam Akredite Sağlık Kuruluşu Sayısı	43
Akredite Hastane Sayısı	38
Akredite Klinik Lab. Sayısı	3
Akredite Ayakta Tedavi Sayısı	1
Akredite Tıbbi Nakil Sayısı	1

Source: Association of Hospitals, Accredited, <http://www.ahd.org.tr/akreditasyon.aspx>.

Below are the countries that are affected by the accreditation practices starting with JCAHO and which form the national accreditation programs by JCAHO and JCI accreditation organizations for 1951 to 2001 (Özdil, 2010, p. 51) (Carikci, 2011, p. 9).

Table 4 Countries Accreditation Programs Activities in the Health Sector; Source: Carikci, Ilker (2011)

İlk yıl denetimi	Programlar	Program Adeti
1951	ABD (JCAHO)	1
1958	Kanada	1
1974	Avustralya (ACHS)	1
1979	ABD (AAAHC)	1
1986	Tayvan (TJCHA)	1
1987	Avustralya (QIC)	1
1989	Yeni Zelanda	1
1990	Birleşik Krallık (HAP)	1
1991	Birleşik Krallık (HQS), US (NCQA)	2
1994	Güney Afrika	1
1995	Finlandiya, Kore, Endonezya	3
1996	Arjantin, İspanya (FAD)	2
1997	Çek Cumhuriyeti, Japonya	2
1998	Avustralya (AGPAL), Brezilya (CBA), Joint Commission International, Polonya, İsviçre	5
1999*	Fransa, Malezya, Hollanda, Tayland, Zambiya	5
2000	Portekiz, İngiltere (CSBS), Filipinler	3
2001	Bulgaristan, Almanya, İtalya, İrlanda	4
Henüz İşlevsel Değil	Kolombiya, Slovakya, Moğolistan, Bosna	4
Toplam		38

However, as seen in the research data, the majority of the hospitals providing health and medical services in the country, whether state or private, have international accreditation certificates despite medical tourists coming from many foreign countries there is a fact that medical tourism activities are not satisfactory in the country compared to other countries.

As an example, medical tourism activities of hospitals that do not comply with certain standards may raise some risks. Considering that health is so important that no risk should be taken, these risks can cause significant damage to medical tourism movements. Therefore, the accreditation documents providing international standardization and the fulfillment of certain necessary conditions have great importance for reliability.

Another problem in the field of medical tourism, which is a sub-branch of medical tourism in, is the lack of publicity about the medical tourism sector, the financial distress and the negative impact of the accidents in the country affect the image of the country negatively. Because medical tourists, not only look for the cheap medical treatment and hospital, but also search a safe to go. In addition, the medical tourist will research the country or region of the country / region of the destination, the infrastructure of the region, the technological status of the existing facilities and the demand for international tourism in the country. The point to emphasize here is not only the development of certain areas in the country, but also the fact that all areas need to be developed equally and the different areas even affect each other or become a whole, as seen in the studies of the tourists in the country preference. In other words, the country's health, nature, climate, culture, politics, economy, city, villages and life forms constitute a whole.

Therefore, promotion of activities on medical tourism and services is needed, and, these promotions will cause the image of the existing medical tourism and the income from this sector will increase. For this purpose, it would be useful to arrange package tours (treatment price, transportation, accommodation, touristic trips, interpreters, free or discount tours etc.) and other organizations for medical tourists in medical tourism sector.

In addition, in the hospitals serving in a medical scope, importance should be given to the social dimensions as well as the health and economic dimensions. Another deficiency seen in the examination essence is the lack of specialist doctors and foreign language knowledge. The employment of those who speak foreign languages, experience and knowledge level of the specialist doctors are very important in order to close the deficiencies in the medical tourism sector and increase the quality and thus the sustainability of this quality. For foreign medical tourists, the presence of foreign language experts or multilingual translators and the presence of public relations departments are of great importance for increasing customer satisfaction.

All the organization activities to be carried out within the scope of medical tourism should be carried out not only by the hospitals but also by the Ministry of Health, Ministry of Tourism, health and tourism representatives together with all the activities in coordination.

According to medical tourism evaluation report of the Ministry of Health in Turkish Republic, Germany, Libya, Russia, Britain, the Netherlands, Iraq, Azerbaijan, Syria, Georgia, Norway, Afghanistan, France, Ukraine and other countries are at the beginning of the incoming countries and the most intensively visiting Turkey for medical purposes.

According to the obtained result there is the increase in the number of international patients and people who get medical tourism service in Turkey. Private hospitals are among the hospitals most preferred by these patients. Private hospitals have become more prominent than the other hospitals due to their comfort, quality and service provision.

In order to attract foreign medical tourists to Turkey it is required to increase the market share and the determination of the marketing mix for the target market. For this reason, it is preferable for the neighboring countries and Turkish citizens to live densely. In addition to this, determine the success or failure of the medical tourism sector and to be directed to the target market in a strategic manner in Turkey.

According to information obtained as a result of research in this context, Turkey medical tourism industry in aesthetic surgery, heart disease, hair transplantation, IVF therapy, in treating eye and dental diseases had good service, and these areas were found to be more successful.

Despite the problems mentioned at the beginning of the results of our study nevertheless, the situation in the medical tourism sector in Turkey is not so bad. When it comes to medical statistics, positive developments can be seen. For example, the main reason of foreign medical tourists prefer Turkey rather than abroad, are treatment prices, the quality of hospitals and health services. Addition to the quality of health services and cost-effectiveness, there are short wait, specialist doctors, technological equipment, appropriate climate, holiday opportunity and so on can be listed as. Therewithal, because some of the services are not covered by insurance in their own countries and long waiting can cause medical tourists to choose another country.

In this context, there should not be forgotten the effect and contribution of health tourism agencies, tour operators, transportation, hotel and insurance companies that encourage this field to accelerate medical tourism movements and service.

As a result, obtained in this research, the international nature of the majority of private hospitals within the scope of research accreditation document and having the infrastructure to accelerate medical tourism movement, but hence it could be said that Turkey can not get enough share of medical tourism pie of the World. In order to avoid this, it is necessary to

develop a strategic plan in this sector such as promotion, personnel employment, coordination and similar activities

This eliminated need may arise for the future of Turkey's medical tourism opportunities, diversification of the country's tourism and alternative tourism opportunities in terms of economic size is of paramount importance.

FURTHER STUDIES

The following subjects should have been lead in the future studies as a result of research:

- Research the role of Intermediary Institutions and its benefits to the state economy in health tourism. Determination the status and the road map of Intermediary Institutions in Turkey toward to the future.
- Research the price policy applied by private and public hospitals intended for foreign medical tourists and crosscheck the price policy of other countries in sake of to keep them under control in Turkey.
- Research the role and importance in medical tourism of the cities as Istanbul, Ankara, Antalya, and Izmir in Turkey and also compare the performance of those cities with each other. Research the insufficiencies of medical tourism sector in the cities mentioned above and preparing suggestion plan for improving the quality.

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