

# **An Overview of Health Tourism within the context of Turkey's Tourism Strategy (2023)**

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## **Abstract**

Turkey Tourism Strategy (2023) has set long-term goals for the country in several areas, some of which are: planning, investment, organization, domestic tourism, research and development (R&D), service, strengthening transport and infrastructure, promotion and marketing, education, urban scale branding, the diversification of tourism, rehabilitation of existing tourism fields, and development of points of arrivals. Turkey Tourism Strategy (2023) targets include the use of natural, cultural, historical, and geographical values of our country in the balance of protection-use, and it's going to increase the share of tourism by developing alternatives. With the main targets stipulated by Turkey Tourism Strategy (2023), focus will be placed on creating more attractive and more powerful alternative destination and routes with the integration of health, thermal, upland, winter and mountain sports, culturally important sites and settlements. With the creation of a strong tourism route and the regional destination; culture, hand-crafts, food and beverage facilities and accommodations will provide empowerment to the weak located in these settlements. This study discusses the details of the 2023 vision, which has an important place in Health Tourism, Health and Thermal Tourism Perspective, The Planned Targets, T.C. Government Policies and Legal Regulations, and situations related to Health Tourism.

**Key Words:** Tourism Strategy of Turkey (2023), health/medical tourism, tourism

## **Introduction**

The reasons to visit overseas countries for medical purposes has a long tradition. In prehistoric times, patients used to travel abroad for seeking medical care that was unavailable in their own locality. "The hot springs pool technology for therapeutic purposes spread all over Europe in ancient times by Turks building the Turkish bath complex" (Cetin, 2011, p.901). Medical tourism managed to experience a significant breakthrough until the early 21st Century. After this time period, medical tourism turned into an area with common interest as a well-established industry. A general manifestation of the medical tourism industry is to travel to developed countries from the developing countries.

Medical tourism has flourished in the Asian countries, at least for the last few decades. Countries in Asia appear as the priority selection for medical tourism destinations. Countries like Thailand, India, Taiwan, and Singapore have turned into the global hub for medical tourism. To meet the increasing demands of medical tourism, these countries have invested heavily in their healthcare system in terms of facilities, infrastructures, and

accredited medical service offers (NaRanong & NaRanong, 2011). Medical tourism has also experienced momentum to flourish in countries of Europe, as well as North and South American countries. The Eastern and Central European countries are turning into popular medical tourist destinations owed to lower costs and relevant expenses. Along with many others, medical tourism in Europe is mostly pioneered by the technologically advanced countries. Patients can easily receive better healthcare services and improved treatments when expertise of the medical and healthcare professionals are also relatively higher than the others.

Research shows that Europe, Turkey, Belgium, Spain, Poland, and the Czech Republic are rapidly becoming popular medical tourist destinations (Morgan, 2010). In the same year, popular medical tourist destinations in the world included Thailand, as visited by approximately 1.2 million patients, Mexico, by approximately 1 million patients, mainly originating from Arizona, Texas and California. In addition, the United States of America, visited by over 0.8 million, Brazil, by 0.18 million, Singapore, by 0.61 million, Taiwan, by 0.09 million, and Turkey, visited by 0.11 million foreign medical tourists (Patients Beyond Borders, 2012).

This study focuses on the vision of Turkey's 2023 health tourism perspective, global developments in health tourism, tourist's health, medical tourism in Turkey, and Turkey's tourism diversification strategy. The study seeks to analyze the big market share of health tourism in Turkey.

## **Literature Review Health Tourism**

The access to medical products or services being mostly limited, restricted, or prohibited in a person's home country leads to travel overseas for medical reasons and medical tourism (Howze, 2007). Medical tourists normally tend to avoid unnecessary costs, obligatory surgeries, or life threatening conditions in their home countries (MacReady, 2007). The travel mostly takes from the developing countries, and provides to more developed countries, those which have ample and adequate medical treatment facilities (Milstein & Smith, 2006). The delays and necessary waiting time before, during and after the medical procedure affect medical tourism (Morgan, 2010). Besides, privacy reasons can become a decisive factor (Horowitz & Rosensweig, 2007). On the other side, rising health costs in developed countries caused an increase medical tourism in figures in developing countries. Increasing air travel opportunism with cross-border medical training has also played a role in promoting medical tourism in countries across the world (NaRanong&NaRanong, 2011). Typically, in developing countries, the very basic reason that persuades patients to seek overseas medical treatment facilities is also fueled by financial incompetence coupled with outright cash of insurance benefits (Horowitz & Rosensweig, 2007). Fertility treatments, gender reassignment operations, dental reconstruction, or cosmetic surgery in most cases are not covered by health insurance. Medical tourism is also popularized by the private health care facilities, increasing roles of technology, and the unbalanced access of medical treatment resources. For medical treatment, the quick, reliable, and easy access to information is essential (Morgan, 2010). A considerable number of patients search for relevant information about medical tourism on the Internet. Patients can receive required data and information more effectively and conveniently regarding compared costs, experiences, and the background of the probable destination.

The majority of tourists coming to Turkey for health tourism are SPA and thermal facilities' visitors. In medical tourism, usually the patients come to Turkey for hair transplantation and aesthetic surgery, eye treatment, IVF applications, physical rehabilitation, and hematolysis. In recent years, the quality of health services in Turkey is increasing steadily with the potential to provide health services in a competitive level (Ilker, 2012). This increase led the tourists from around the world are coming to Turkey for

treatment.

Medical tourism is creating new opportunities for Turkey, in addition to the significant success of mass tourism in Turkey. It is an alternative that can contribute to the diversification of the tourism products. We can examine health tourism under these three headings:

1. Wellness Tourism, which consists of nature tourism and village tourism,
  2. Healthcare tourism as SPA and rehabilitations,
- Medical Tourism, which consists of such surgeries and treatments as shown in Figure 1.

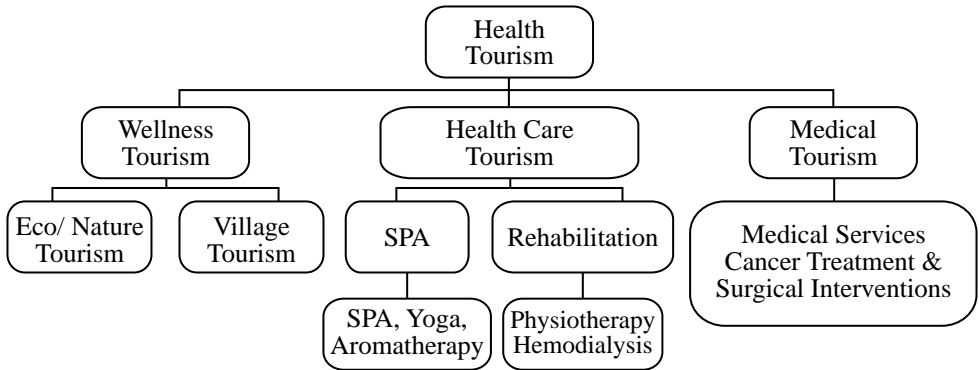


Figure 1: Health Tourism

(Source: Iordoche, Ciochina, & Roxana, 2013, p.37)

Medical tourism and health tourism are very often meant as synonymous. However, a clear distinction persists between these two terms outlining their basic features. This is essential to understanding the key meaning of both of these tourism types. In general, the definition of medical tourism relates to a situation when a consumer decides to travel across international borders, having the intention of receiving some form of medical treatment. Such treatment can include a full range of medical services, but very often consists of elective surgery, dental care, fertility treatment, and cosmetic surgery. There are hardly any traits that can create differences between medical and healthcare tourism. The boundary setting for these two types tourism is difficult and not straightforward, but in general, health tourism stays within medical tourism, aiming at the same purposes of treatment trade. However, not all the aspects of health tourism can be considered as medical tourism. For instance, cosmetic surgeries are performed more for aesthetic reasons which moves beyond the boundaries of healthcare (OECD, 2010). Medical tourism is attached to the wider perspective of health tourism. In many countries, this is involved with longer historic antecedents of coastal localities, spa towns, and many other therapeutic landscapes.

### ***Global Developments in Health Tourism***

In 2008, the report produced by the McKinsey and Company estimated that the medical tourism market would expand from US\$ 40 billion up to US\$ 100 billion by 2012. In 2013, Patients Beyond Borders Portal (PBB) forecasted that the medical market size would reach US\$ 24-40 billion on the basis of at least 8 million cross-border patients moving across countries spending around US\$ 3000-5000 per visit. These costs include treatment related costs, local and cross-border transport, patients' staying and accommodations. These figures indicate that the size of the medical tourism market has been expanding gradually, worldwide, involving at least 50 countries from various continents. This industry creates both micro and macro level opportunities, establishing it as one of the leading revenue generating niches of the tourism industry. The most important centers of Medical tourism in Asia are India, Malaysia, Singapore, and Thailand.

Applying low prices in health care, using English language in most of the country, and with the professional service concept are the advantages for India's medical tourism. Medical tourism is leading also in Malaysia, Singapore, and Thailand. In the Middle East, especially Dubai, Bahrain and Lebanon are creating their own medical tourism industries with the hope to keep patients in their country (Ilker, 2012). Apollo, which is the largest private international health service group in India, has 37 hospitals and also has partnerships with the hospitals in Kuwait, Sri Lanka, and Nigeria and plans collaborations with growing private institutions and other organizations with international connections in Dubai, Bangladesh, Pakistan, Tanzania, Ghana, Philippines, London, and Chicago (Connel, 2006). In the same lane, Japanese hospitals promote a new and niche section of health tourism - 'Tourism for Mental Health' ([http://www.saglikturizmi.org.tr/BULTEN/bulten\\_5.pdf](http://www.saglikturizmi.org.tr/BULTEN/bulten_5.pdf)). According to Turkish Ministry of Health, following 35 countries lead the medical tourism in the world; Argentina, Australia, Belgium, Brazil, the Caribbean, China, Costa Rica, Cuba, France, Germany, Hungary, India, Israel, Japan, Jordan, Malaysia, Mexico, Morocco, New Zealand, Panama, Philippines, Poland, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Switzerland, Taiwan, Thailand, Tunisia, Turkey, United Arab Emirates, United Kingdom, and the United States ([http://www.saglikturizmi.org.tr/BULTEN/bulten\\_5.pdf](http://www.saglikturizmi.org.tr/BULTEN/bulten_5.pdf)). Eastern European countries have begun to take an important share of the health tourism market by using the advantage of EU membership and low labor costs. Hungary is beginning to take place in the 'shining star countries', and this level can be seen as a \$ 2 million per year entry obtained from only dental treatment. Another country is Belgium, which had a very serious sector share by the surgery and obesity treatment issues (Yildirim, 2004). In Turkey, thermal tourism in most of the region is being carried out together in medical tourism. Patients visit these thermals for reasons ranging from relaxation to therapeutic to curing illnesses. Turkey is among the top 7 countries in the world in terms of resource wealth and potential for geo-thermal (Manavgat Health Tourism Opportunities Report, 2013). The patients admitted to health facilities in Table 1 have shown that tourist's health **top 10 countries**. Kaya, Yildirim, Karsavuran and Ozer (2013) highlighted that some of these countries specialize in different areas, for instance: Russia in emergency medicine and child health and diseases, United Kingdom in family healthcare, Germany in infectious diseases and Azerbaijan in radiology and medical laboratory.

**Table 1: Tourist's health - Top 10 countries and clinics, 2012**

Clinics	Country										Total
	Afghanistan	Germany	Azerbaijan	Georgia	Holland	England	Libya	Russia	Syria	Ukraine	
Emergency medicine	1433	7551	1643	1461	2518	4993	1611	16829	1293	1249	40581
Child Health and Diseases	15	2107	115	20	366	309	109	2329	8	131	5509
Family physician	19	123	67	29	113	884	529	79	4	21	1868
Infectious diseases	17	131	83	48	29	80	98	72	11	24	593
Radiology and Medical Laboratory	12	19	35	10	3	7	17	13	6	9	131

**Table 2:** Medical tourism – Patient numbers by country and type of hospitals 2012

Country	Type of Hospital				Total
	Public Hospitals	Training and Research Hospitals	Private Hospitals	University Hospitals	
Libya	11	50	36467	6	36534
Germany	516	81	20366	121	21084
Iraq	367	357	14771	243	15738
Azerbaijan	529	905	9176	278	10888
Russia	287	219	7742	33	8281
England	419	49	5662	53	6183
Holland	118	11	5362	34	5525
Romania	69	23	4989	8	5089
Bulgaria	315	150	4256	78	4799
Norway	40	8	4304	36	4388

The Table 2 shows the distribution of patients admitted to hospitals in Turkey within the scope of medical tourism. Patients from all countries in the top 10 show that they prefer especially private hospitals over the other hospital types.

***Turkey's Tourism Strategy (2023)***

In every region of Turkey, alternative tourism will be developing in this frame. The accommodation capacity will be developed in the new development planned points of arrival, and studies shall be carried out improving the quality of transport among the destination travel facilities.

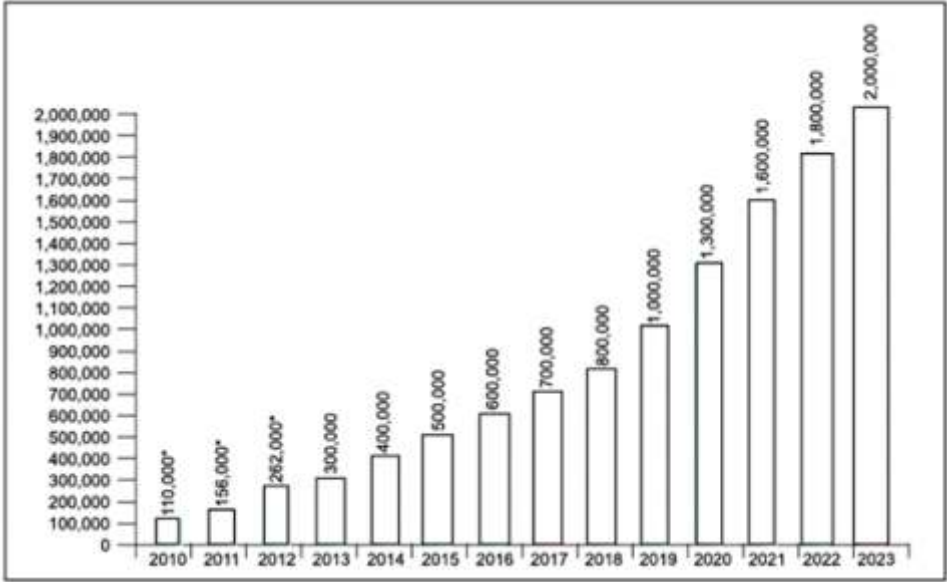
***Tourism Diversification Strategy***

The main targets of Turkey's Tourism Strategy (2023) include the development of health tourism and thermal tourism, winter tourism, golf tourism, marine tourism, eco tourism and plateau tourism, convention and exhibition tourism. Propagation of an entire year's tourism season will depend on the diversity of the tourism product, and will be provided through the specified kinds of tourism to gain momentum (The Ministry of Culture and Tourism, 2007).

***Turkey's Health Tourism 2023 Objectives***

According to the vision of 2023, integration with alternative tourism types nearby will be correlated with other cultural and natural resources. This will provide capacity for growth of thermal and cultural tourism. The Ministry of Culture and Tourism is fostering the development of thermal tourism centers by encouraging pilot studies and providing subsidiaries and tax reductions to the entrepreneurs.

After completion of these new health tourism facilities, it is forecasted there will be a rapid increase in tourist numbers (The Ministry of Culture and Tourism, 2007).



**Figure 2:** Vision of Health Tourism 2023- Number of Patients

(Source: <http://saglik.gov.tr/SaglikTurizmi/belge/1-24202/turkce-uluslararası-saglik-turizmi-sunumu.html>)

**Table 3:** Vision of Health Tourism 2023- Performance Indicator

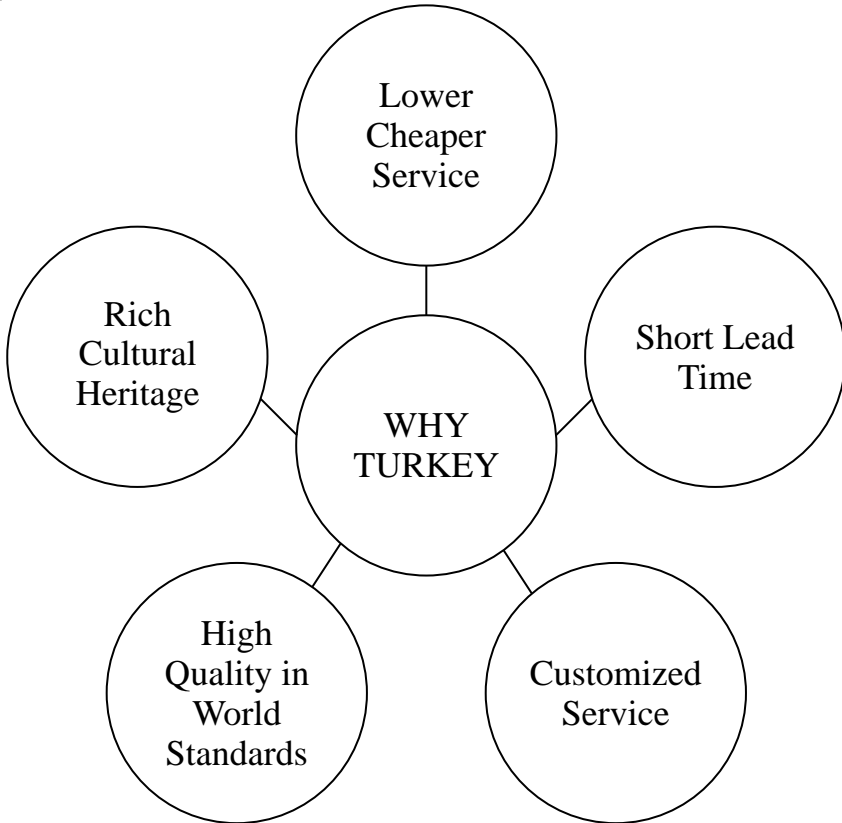
Performance Indicator	Current State	Targets to be Achieved	Targets to be Achieved
	2011	2017 T	2023T
Incoming tourism Number of Patients in the Scope of Health Tourism (in thousands)	156	700	2.000
Health Tourism Revenue (Year) (SGP ABD\$)	1 billion	8 billion	20 billion
International Accreditation of Health Organizations Rate	2,5	4,5	10
Free Health Region Number	—	4	10

(Source:<http://saglik.gov.tr/SaglikTurizmi/belge/1-24202/turkce-uluslararası-saglik-turizmi-sunumu.html>)

As shown in Figure 2 and Table 3, Turkey's annual health tourism revenue aims to increase to 20 billion through 2023. Turkey is planning to accept 2 million international patients(<http://saglik.gov.tr/SaglikTurizmi/belge/1-24202/turkce-uluslararası-saglik-turizmi-sunumu.html>).The construction of giant modern city hospitals and health campuses continues in the cities of Ankara and Mersin. “To be a leader in health tourism” is the main target of Turkey's Health Tourism. Turkey's competitiveness has been seen in the quality of

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health services increasing steadily with the potential to provide health services particularly in the European and OPEC countries which have increasingly aging populations. The hot springs for healthy living, SPA and similar facilities will be developed as the specialist areas, which should be determined in the 2023 vision of period (The Ministry of Culture and Tourism, 2007). More intensive use of health technology, concentrating on the production of medicines and medical supplies, will increase health expenditures in the long term but generate health tourism in the process (Manavg at Chamber of Commerce and Industry, 2013).



**Figure 3:**Turkey'sCompetitiveness Plan Elements of Health Tourism

Source: Ministry of Health (2012), Turkey Medical Tourism Assessment Report  
Turkey has potential to gain a large market share from health tourism, as indicated in Figure 3,taken in response to international patients. Additional reasons to choose Turkey as a health tourism country include cheap services in Turkey, short lead time, Turkey's rich cultural heritage, the customized service, and high-quality standards (Ministry of Health, 2012).

## Conclusions

Turkey envisions appearing as the global leader in health tourism. Health tourism activities in Turkey are performed comprehensively, including thermal tourism, health tourism, and elderly and disabled tourism. Within the scope of medical tourism, Turkey is offering and supervising essential health services to at least 32 million tourists visiting Turkey each year. A web-based program regularly registers foreign patients admitted to university, public, and private hospitals.

Turkey has recently formed a new organizational law aiming 'to carry out Health-Tourism-related works and operations and to ensure coordination with the relevant'. Under this law the Department of Health Tourism was established under the Directorate General of Health Services. The patients and tourists were given interpretation services mainly in four languages; Arabic, English, Russian, and German on a continual basis. They were also given the opportunity for obtaining emergency services by dialing 112 and 184 for lodging complaints and receiving information in their mother-tongue. These call centers receive at least 700 calls per month, on average. Turkey has been passing through a massive restructuring of its medical and healthcare tourism facilities, making them more competitive and attractive. The country is adopting a comprehensive medical and healthcare system allowing more foreign and domestic investments. Continuous quality improvement and scaling up the entire healthcare system are some major steps for the purpose. The country also witnessed massive private sector investments. Turkey is steadily turning into a good choice for health tourists from across the world. The country is also stressing the importance of creating efficient and expert medical and healthcare professional groups. The geographical location and rich cultural background are bonus attractions to the prospective medical tourists.

The Turkish medical and healthcare practitioners and private investors are gradually working to attract and retain international standards in almost each step. Turkey also attracts foreign investors, making its medical and healthcare infrastructures more rewarding and prominent in the global arena. Turkey is surely emerging as a promising medical tourism destination in the world. Turkish Government is aiming to increase the contribution of health tourism to 20 billion US dollars by attracting 2 million international patients to the country by 2023. To do so, Ministries of Health and Tourism are collaborating on construction of several modern and specialized hospitals, development of advanced R&D facilities and within planning to grow of many modern city hospitals, Advanced R & D centers, offering special entry visas for participant of health tourism (Kaya et al., 2013). In align with this plans, Turkey is aiming to be a leader in 'quality and affordable service delivery in health tourism and economic service delivery'. Turkey's 2023 strategic vision brings developed solutions to improve health tourism.

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