AN OPEN TO IMPROVEMENT FACTOR FOR REGIONAL DEVELOPMENT IN TURKEY: MEDICAL TOURISM

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Abstract: Health systems expends for their citizens to prevent fall ill or return to health. Individuals are also spends on to be healthy and durable. Therefore, there is an economic dimension to health protection and improvement. There has also travels on behalf maintain good health, to be heathier or regain health. Health tourism can be a mandatory requirement, unlike other types of tourism. Medical tourism is a component of health tourism. Medical tourism has emerged with begin the trip to countries that higher quality and cheaper treatments. Medical tourism is growing day by day the reasons such as increasing the quality of life expectations, rising cost of care, not to be undertaken by the treatment of some health systems, the lack of adequate health facilities and service quality. Tourists' expectations are also changing over time.

It is discussed in this paper that the development of medical tourism, medical tourism potential, medical tourism market and regional development contribution of medical tourism in Turkey.

Keywords: Medical tourism, health tourism, Turkey, vacation and treatment, patient tourists.

I. INTRODUCTION

Based on the definition of health, the medical tourism can be defined as traveling for the purpose of protecting one's health in terms of physical, spiritual and social aspects, and to be healthier or having medical treatment.We can divide medical tourists into four groups depending on their status of benefiting from the health services during their travel (Saglıkturizmiplatformu.com);

- The tourists who are treated in holiday are;The tourists who receive medical services and medical treatments due to accidentsor falling sick.
- The tourists who travel for the purpose of holiday and treatment: These tourists prefer the countries or regions that they visit because they have treatment possibilities pertaining to some of their sicknesses.We may call these tourists as travelers who travel for the purpose of treatment in the holiday.
- The patients who make holiday: These visitors go to a region for treatment purposes, and they also make holiday after they get well or after treatment.
- Just patients: The tourists included in this group are within the scope of medical tourism.Their aim to go to a region is only having treatment or an operation in that region. They don't have an aim such holiday.

The medical tourism is divided into 3 main components such as SPA and wellness, medical tourism and disabled care (Ministry of Health, 2013).When the world is examined globally, recently, some countries such as Turkey, USA, India, Singapore, Malaysia, South Korea, Thailand, Hungary, Brazil, Argentina, Republic of South Africa, Cuba, Mexico, Germany, Italy, France, Poland, Spain, Greece and United Arab Emirates come into prominence in terms of medical tourism (Kaya et al., 2013).

The medical tourism is the "applications done for treatment purposes in a planned manner by the physicians generally in the secondary and tertiary health care institutions and organizations" (Aydın and Şeker, 2011).In other words, medical tourism is defined as international patients' receiving services from the health institutions for treatment and rehabilitation purposes.Medical tourism emerged by the commencement of the travel to the countries that conduct quality and affordable treatments.These developments resulted in formation of a new sector (Ministry of Health, 2012).Until 90s, when medical tourism was mentioned, it was understood that the high-income citizens of the less developing countries in which sufficient health services cannot be received, travel to the countries that are accepted as developed countries, and they receive health services.Today, the situation is reverse.The main dynamics which cause the emergence and rapid development of the medical tourism can be listed as follows;

- Globalization of the international health standards,
- Increasing standards of the health technologies and service presentation in less developing countries
- Having some treatment and interventions not paid by insurance systems,

- Globalization of the applications which are excluded from the insurance scope such as aesthetics, cosmetic surgery, in vitro fertilization,
- Having the treatment costs cheaper in the country to where the travel is done,
- Receiving more quality health services in the country to where the travel is done,
- Short waiting times for receiving health services in the country to where the travel is done,
- Positive psychological effect of the travel and treatment incorporation on the patient,

Though the tourist aims to receive treatment primarily in the medical tourism, they also want to have entertainment, resting and recreation.The patients benefit also from the touristic richnesses of the country they go in their remission.

In this study, the factors effecting the development of medical tourism in Turkey, Turkey's medical tourism market, medical tourism potential and contributions of medical tourism on the regional development were emphasized.

II. DEVELOPMENT OF MEDICAL TOURISM IN TURKEY

The health services had been provided by the state to a large extent until 90s in Turkey.Between 1995-2000s, a drastic spurt has been shown in health.First of all, numerous private health organizations were established starting from these years.These private health organizations attract attention with their ability to provide secondary and tertiary health care services, having high infrastructural possibilities, state-of-art technology and high productivity.This change in the health sector caused changes in the private health insurance companies and the expectations of the citizens.Many medicine faculties were established alongside the private health organizations.The success in diagnosis and treatment has increased in Turkey due to well educated physicians, applicable state-of-art technologies and also by increasing the medical standards.State-of-art medical technologies have a 40% share in the development of the global medical tourism.Turkish medical sector uses state-of-art medical technologies.By the developments after 2000; the use of advanced technologies such as MR, CT, Radiotherapy approximated Turkey to the averages of EU and OECD countries in terms of technology intense and even took Turkey beyond the average of some West European countries. (TUSIAD, 2009).Quality assurance is one of the factors that affect patients' preference for health care institutions.For this reason, it is important for health institutions to be accredited by Joint Commission International and to obtain ISO 9001: 2008 certificates.In our country, 43 health institutions have received JCI accreditation certificate.In addition, the Ministry of Health has extensive studies to determine the quality standards of its own hospitals (Binler, 2015).

In Turkey, a number of arrangements have been made to improve medical tourism.The Ministry of Health has a Health Tourism Coordinator's Office within the General Directorate of Treatment Services.The Coordinator's Office is comprised of Thermal Tourism Spa Wellness, Medical Tourism, Senior and Disables Tourism as well as Foreign Coordination Branch Directorates.The prices of the health services to be provided have been determined.The Patients are accepted without any protocol in the case of cash or credit card payments for the health care they receive.In the event of the treatment costs of the patients are covered by the health insurances of their own countries, a protocol is made between the foreign insurance companies, domestic insurance agencies, travel agencies and private hospitals.

As of 2011, a bilateral co-operation agreement has been signed with 53 countries in health sector.In 2011, there were foreign patients unit total in 40 hospitals in 18 provinces (Aydın and Şeker, 2011)..By 2014, 43 health organizations of which 1 is outpatient treatment, 1 is transfer services and 3 are clinical laboratories have been approved by JCI and ISO in Adana, İstanbul, Kocaeli, Ankara, İzmir, Antalya, Bursa provinces.While the number of international patients was 110 thousand in 2010, it reached 300 thousand in 2013 (Aydın, 2014).As it is in the whole world, also in Turkey the medical tourism is new and takes a rapid progress.Infrastructure and legal regulations have also been influential in this development.

Health institutions and tour operators work in coordination in medical tourism.Tour operators provide all kinds of arrangements for the patient to reach the country and reach the treatment centers in the country.

III. MEDICAL TOURISM POTENTIAL OF TURKEY

Turkey is an attractive holiday country.It has the climate characteristics which are preferred with its hot sunny and arid days in summers.Cheap and high quality health services are provided with natural and cultural geographical advantages.Cardiac surgery, radiotherapy, organ transplantation, infertility and in vitro fertilization treatments, aesthetic surgery, eye surgery, dental treatment and dialysis services are provided dominantly in medical tourism of Turkey.We can divide the tourist who are treated in Turkey into four groups.These are;

- *Medical tourists* are the tourists who come to get medical treatment.

- *The health of tourists* is the urgent and unplanned reception of health services by the tourists who come for touristic purposes.From this point of view, every tourist coming to Turkey may potentially need to get a health care service.
- Also the tourists who come to Turkey for treatment purposes *within the scope of international bilateral agreements in the field of health* are in question.Protocols have been signed with Sudan, Afghanistan, Yemen, Albania, TRNC, Kosovo and Azerbaijan.The patients in the number as set within the scope of the protocol can come to Turkey and receive treatment from public and university hospitals.
- *By the agreements done among the social security institutions*, our expatriate citizens living abroad and citizens of these countries are treated in Turkey.Turkey has made such agreements with Germany, Austria, the Netherlands, Belgium, France, the TRNC, Macedonia, Romania, Albania, Bosnia and Herzegovina, the Czech Republic, Azerbaijan, Luxembourg and Croatia as of 2012 (Kaya et al., 2013).

The travels for the purpose of eye diseases are at the forefront throughout the world.When the distribution of medical tourists is examined in Turkey according to the clinics, the clinic of eye diseases ranks first.(Table 1).On the other hand, it must be noticed that oncology, cardiovascular and aesthetic surgery which provide treatment under clinics such as internal diseases, general surgery, come into prominence (Kaya et al., 2013).

Table 1.Distribution of the medical tourists who come to Turkey by clinics (2012)

Clinics	Number
Eye diseases	20822
Orthopedics and traumatology	17489
Internal diseases	16979
Ear, nose, throat diseases	14300
Gynecology and obstetrics	14291
General surgery	10266
Oral, dental and jaw diseases and surgery	9908
Brain and neurosurgery	6713
Skin and venereal diseases	6545
Child health and diseases	6003
Other	46137

Source; Kaya, et al., 2013

The medical tourism industry is developing rapidly, especially with private hospitals' initiatives on medical tourism and travel operators' following developments in this sector, offering new collaborations and services.The number of hospital beds per 10,000 people in Turkey is very low compared to OECD and EU countries.Despite the high diagnostic and treatment success rates, due to the high occupancy rates, it is difficult for public and university hospitals to be directed to the medical tourism.For this reason, at most the private hospitals provide service on medical tourism.In terms of health personnel ratio, Turkey is behind the average of EU, OECD and WHO countries.Only 8% of the hospitals have a unit to deal with foreign patients, and 14% of the hospitals have staff in charge.This ratio is higher among private hospitals.The majority of the personnel who deal with foreigner patients can speak English and German.At the southeast regions of Turkey, the employment ratio of the personnel who can speak Arabic increases (Bilen, 2015).With the improvement of the structural problems such as bed capacity, number of personnel and foreign patient unit of health institutions, the potential of medical tourism in Turkey will increase.In this case, it is likely that public and university hospitals will develop medical tourism infrastructure and become involved in promotion, marketing and global cooperation.

IV. MEDICAL TOURISM MARKET OF TURKEY

In the present situation, the most frequent medical tourists in Turkey are from Western Europe countries and neighbors of Turkey.Table 2 shows the distribution of the number of international tourists and medical tourists according to the top ten countries sending the most tourists to Turkey for the purpose of treatment in 2012.The number of international tourists also include the tourists who come for treatment on the basis of tourist health, social security institution coverage and international coverages.

Table 2.Number of international patients and medical tourists coming to Turkey (for first 10 countries, 2012)

International patient		Medical tourist	
Nationality	Number	Nationality	Number
Germany	43259	Libya	36534
Libya	38898	Germany	21084
Rusia	27604	Iraq	15738
Iraq	16926	Azerbaijan	10888
Holland	14959	Rusia	8281
Azerbaijan	13023	England	6183
England	12456	Holland	5525
Romania	5685	Romania	5089
Norway	5554	Bulgaria	4799
Bulgaria	5511	Norway	4388

Source:Kaya, et al., 2013

When Table 2 is examined, it is seen that those coming from Libya take the first place among the medical tourists.During the civil war in Libya, many Libyans were brought to Turkey and treated free of charge.This situation has led to a convergence between the two countries.Many Libyans came to Turkey for the purpose of treatment upon Libya

government promised, after civil war, to afford the costs of Libyan patients.The presence of a large number of Turkish immigrants in Germany is effective in promoting Turkey.The arrival of a large number of travelers is also influential in recognition.The private sector also strives for promotion (Kaya et al., 2013).Of course, it should not be overlooked that the treatments in Turkey are very high quality and much cheaper than Germany.

It seems possible for Turkey to get a bigger share from the global medical tourism market.The world's largest market for medical tourism is the United States.In terms of cultural distance (due to its historical and political implications), Turkey is closer to the United States than Far East countries, which are in a position to be an important competitor.Western European countries are also important markets.Distance and cultural proximity is an advantage with the Western European countries which have many Turkish citizens and which send many tourists in terms of tourism mobility.On the other hand, the Balkan countries, Middle East, Russia and Central Asian countries, where common historical advantages are present, constitute another great potential market.

CONTRIBUTIONS OF MEDICAL TOURISM ON TURKEY'S REGIONAL DEVELOPMENT

The medical tourism is a type of tourism which is spread throughout the year.Its being not seasonal provides a stability in the tourism incomes.The possibility of the patient companions to accompany the travel may increase the economic contribution.The average per person spending of the tourists who come to Turkey is 756 USD as of 2015 (TURSAB, 2016).However, the average cost of a tourist arriving for medical intervention ranges from 3500 USD to 35.000 USD.A medical tourist arriving in Turkey spends averagely 2885 USD.It is possible for each foreign patient to create 3.8 times more added-value than a traditional tourist only with a surgical operation (TÜSİAD, 2009).5,155,058 TL was collected from the foreign nationality patients who were treated in 2010 (Aydın and Şeker, 2011).It is estimated that this figure reached at 1.856.352.000 USD in 2012 (Kaya et al., 2013).

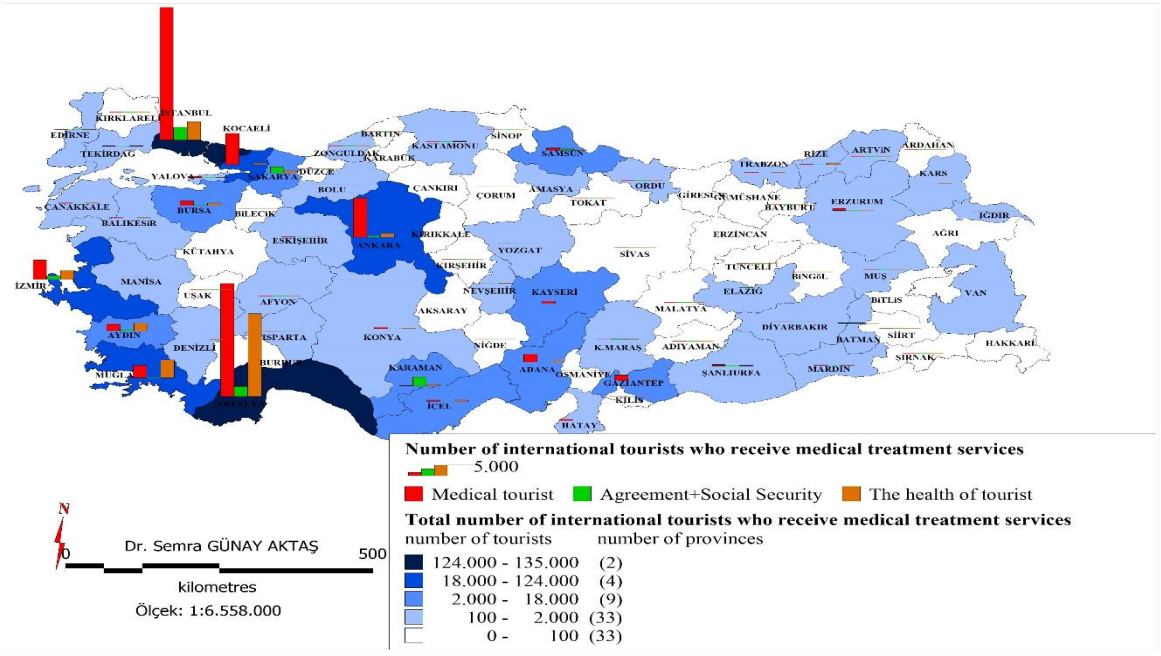


Figure 1.Distribution by provinces of international tourists who receive medical treatment services in Turkey (2012)
Source: Günay Aktaş, 2016

Figure 1 shows the distribution by provinces of international tourists who receive medical services in Turkey in 2012.The distribution, by provinces, of international patients receiving medical services is shown by the shading method.White color shows the provinces in which no or minimal treatment services were provided.Dark brown is the provinces where international tourists received the most medical treatment.International patients preferred mostly Antalya and Istanbul provinces.Ankara, İzmir and Muğla followed these two provinces.Figure 1 shows in which scope the international tourists received treatment with bar graphic by provinces.The bar indicated with red shows the medical tourists.The green bar shows the total of the international patients who come both by bilateral agreements and by the coverage of their countries' social institutions.The blue bar symbolizes international tourists who come for a holiday and receive treatment as result of becoming sick and so fall into the scope of the tourist

health.The proportion of medical tourists is higher than other tourists in İstanbul, Antalya, Ankara, Kocaeli, İzmir, Adana, Gaziantep and Bursa provinces.The proportion of the tourists who are considered in the tourist health group is higher in Aydın and Muğla provinces.While Istanbul was the most preferred destination for health and medical tourists, Antalya passed Istanbul in the applications of tourist health , in other words, in terms of the number of tourists who had to take medical services while they were visiting for touristic purposes.The services which are within the scope of the tourist health in terms of international tourists receiving health services in Muğla province is higher than other services (Günay Aktaş, 2016).

Another important consequence of medical tourism is that it accelerates the increase in quality of health care services and leads to provision of better health care services to the country's citizens.This situation shows that the medical tourism contributes to the regional development.By the progress of medical tourism, the infrastructure investments increase, the number of the qualified personnel increases, the capital increases and global cooperations develop.

With the transformation in the health sector, the rapid increase in the number of beds, the inclusion of private health institutions in the system, the capture of advanced technologies and health standards, and the low costs of treatment compared to many other countries have opened the doors of medical tourism for Turkey.Turkey, which is a preferred country in terms of tourism in the international market, has also become one of the preferred countries in terms of medical tourism with the contribution of its citizens working abroad.Turkey quickly made legal regulations on medical tourism and integrated itself into the international system.Short, middle and long terms of policies have been specified for medical tourism.

CONCLUSIONS

It could not drastic spurts in terms of medical tourism due to insufficient number of beds specially in public and university hospitals even to meet the needs of Turkish citizens despite the high efficiency.Mostly, private health organizations made organizations on medical tourism.The private sector treats more medical tourists as promotion and accreditation are important in this sector alongside the quality and prices are affordable.

Despite the fact that health personnel are trained in Turkey, the inadequacy in number and the lack of foreign language knowledge constitute the greatest human capital troubles.Especially with the medical tourism units or personnel of the private health organizations, these problems are reduced.

The success int he diagnosis and the treatments is the biggest promotion of Turkey in terms of medical tourism.On the other hand, the proximity both on distance and cultural aspects to the Western Europe, Balkans and Middle East countries, which are among the important medical tourism markets, play an important role in the preferences of medical tourists.

With the increase in the number of health institutions that can serve in high standards, the potential of our country to become a strong service provider in global medical tourism has also been strengthened.Turkey will receive medical tourists with an even faster increase in the future if the care the people show for their health increases, the health care services become competitive and the cost differences remain as the main factor.

Although the infrastructure of health services is suitable for most parts of Turkey, metropolitan cities and the capital city attract medical tourists in the present case.In terms of regional development, the arrangements should be made for the dissemination of medical tourism all over the country.

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