

The Collapse in Tourism during the Pandemic: Expectations and Opportunities for the Health Tourism

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The Collapse in Tourism during the Pandemic: Expectations and Opportunities for the Health Tourism¹

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Abstract

Although it is defined within the tourism sector, health tourism, as an important function of the health sector, showing a rising trend for Turkey, indicates a serious economic development in recent years. Steps on legislative arrangements, infrastructural works and strategy determination have been completed in this area and a serious momentum has been shaped within the framework of sectoral incentives. In this study, the expectations, sectoral risks and opportunities of the health sector for health tourism after the pandemic are analyzed.

There are also evaluations on increasing the share of health tourism income and sustainable health tourism policy of Turkey that has strong health education, qualified infrastructure and experienced healthcare staff. Health tourism, in which the insurance system also interacts within the framework of national and international regulations and international agreements, constitutes an important sectoral share in the economy along with the logistics peripheral service areas. At the same time, the effects of the successful fighting process against to COVID-19 on health tourism are analyzed. In this regard, an evaluation on the contributions and shares of state and private sector is also made.

Keywords

health tourism, COVID-19, the future of tourism in the post-pandemic period

¹ This study is a translation and updated version of the paper previously published in the book titled "Küresel Salgının Anatomisi: İnsan ve Toplumun Geleceği" by TÜBA in June 2020.

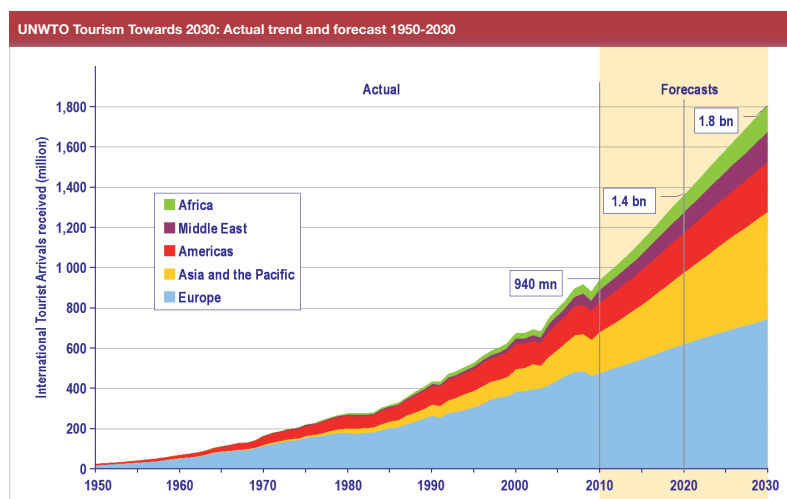
Introduction

Tourism is among the important income sources of Turkey. Having many areas of interaction and fragility due to its nature, the industry is at the top of the industries that have adversely been affected by the COVID-19 pandemic. Following the end of the process of struggling with the pandemic where national and international mobility dropped to a minimum the removal of the restrictions related to travels and the change in the psychological mental perception of the individuals will take time. It is expected that the implementation of the industrial developments and new regulations particularly to meet safe travel and holiday requests of the individuals will form a time-dependent adverse interregnum.

Tourism is a type of an important international interactive trade activity that creates employment in different areas, covers many industries, ensures regional economic potential with a cultural communication language of people by promoting and protecting the environment, nature, and cultural assets and offers a contribution to the minimization of the current deficit. Countries create different tourism destinations with attraction factors capturing the attention of people from different regions of the world, so they can unite their citizens with people from all over the world and they can develop the visions of their citizens.

The tourism, in terms of prioritized countries, can generate an economic potential reaching 9% of the Gross Domestic Product, and in such countries, ensures a share of 10% in employment due to providing flexible employment opportunity. The tourism industry forms 9% of the world's export. Market capacity of \$3.2 trillion is mentioned in the global tourism industry. Furthermore, in general, the development and improvements in the world's economy foresee an increase in the number of people attending tourism activities. While the share of the developing countries in the market is 30% today, this share is expected to be around 57% by 2030. In Graphic 1, the projection regarding the increase in international tourist numbers in the world is given per year and regions.

Graphic 1. International tourist number projection per regions

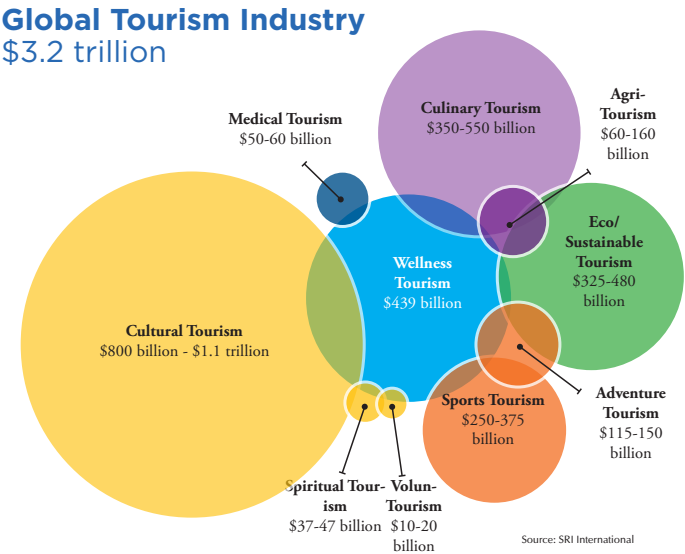


Source: UNWTO, 2015

According to the World Tourism Barometer report published by the United Nations World Tourism Organization (UNWTO) in 2020, the number of international tourists increased by 3.8% in 2019 and was actualized as 1.5 billion. International tourism grew by 7% in 2017 and by 6% in 2018. Particularly following the uncertainty caused by Brexit in terms of economic relations for Europe, the deceleration progress in the world's economy affected all industries due to the disappointment experienced by the European Union countries and the increasing geopolitical and commercial tensions all over the world during the COVID-19-related struggling period. It is reported that world tourism will also be negatively affected by this. These incidents caused a growth speed of 3.8% in 2019, which fell behind in comparison to the previous years. When these developments are taken into consideration, it is foreseen that the devastating impact of COVID-19 pandemic in the tourism industry will be greater. Concerning this, it is thought that health tourism and scientific congress tourism, as well as international student-oriented education activity, can serve to revive the tourism industry.

When the distribution of global tourism to sub-industries is considered, cultural tourism takes the first place and health tourism takes second place. As can be seen in Figure 1, health tourism has an important share in the global tourism industry. The size of the healthcare market and the high income it has generated have led to the formation and rapid development of health tourism.

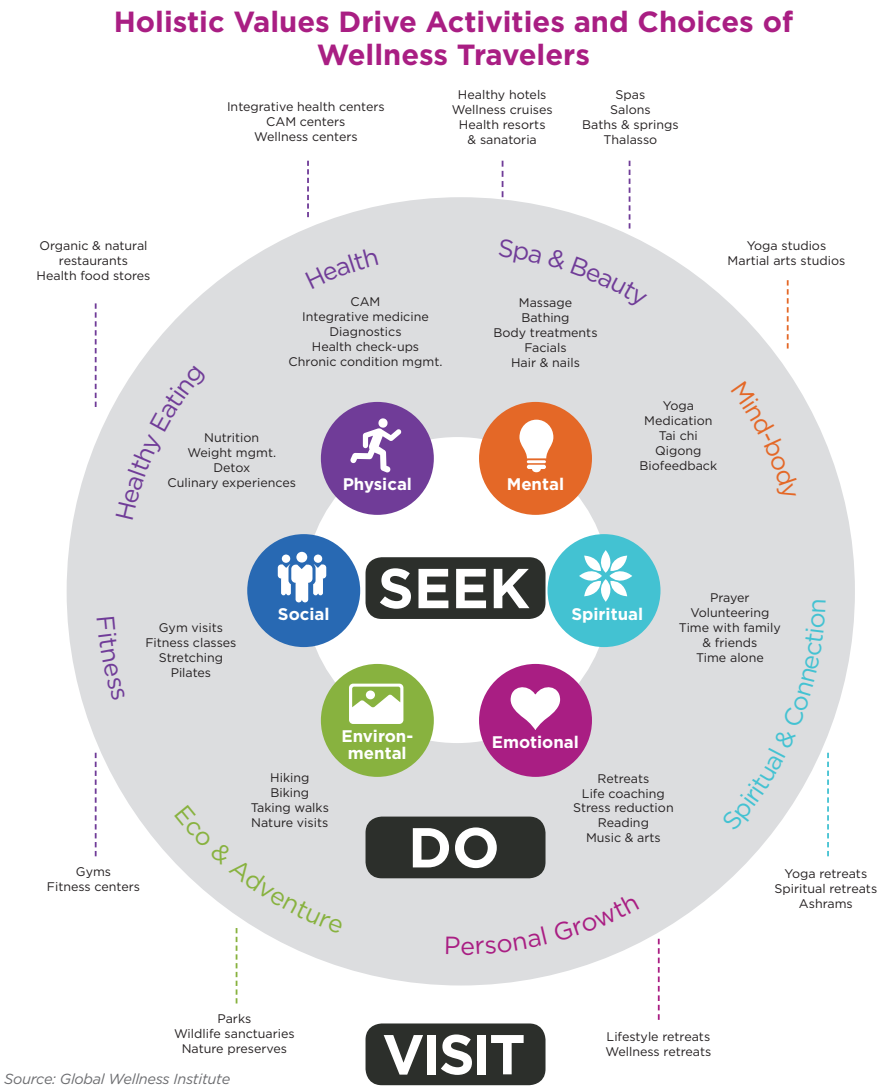
Figure 1. Distribution of Global Tourism per Areas



Source: Global Wellness Institute (2015)

Within the health definition of the World Health Organization, it is emphasized that the evaluation of all tourism alternatives that will contribute to the physical, mental, spiritual, social, emotional, the environmental health of the individual within the scope of health tourism is of importance (Global Wellness Institute, 2018). As can be seen in Figure 2, health tourism draws a multidirectional and multidimensional scope.

Figure 2. Scope of health tourism per topics



Source: Global Welln ess Institute (2018)

Health Tourism and Potential of Turkey

Throughout history, people tried various methods to be healed. People who couldn't find the change to heal in their own region travelled. For example, Istanbul, Bursa, and Baghdad, etc. cities that were the centres of hospitals and thermal springs captured the attraction of people who come for treatment from far geographies. Today, with the developed technological opportunities, the comfort and speed of travel increased and facilitated the mobility of the people for health purposes. Although all these developments, the health service purposed trips have been the trips to be performed by the non-poor people for long years (Tontuş, 2017a).

Since the studies to be performed in the field of health tourism cannot be achieved individually, independently and alone by the health or tourism industry, it is finally understood that the formation of synergy by both two industries through sharing their knowledge on the human labour via co-planning, strategy determination and infrastructure will be for the benefit of the industry. Accordingly, health tourism policies and legislation have been developed as the common practice area by the health industry and tourism industry.

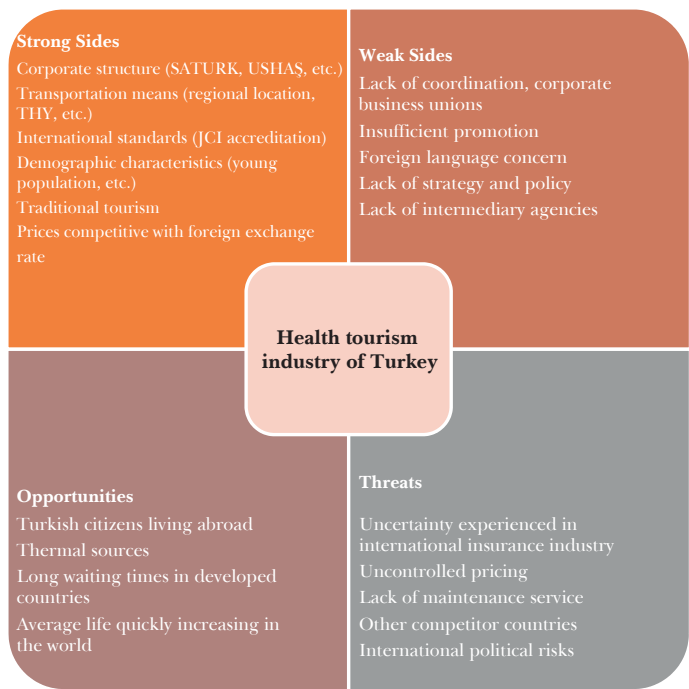
Following the saturation of the domestic tourism of the countries that have a high level of welfare with tourism potential; the international travelling got cheaper and easier, and as a result of the research opportunities offered by the information technologies, alternatives have been found in the international tourism industry and so the good quality and affordable tourism alternatives started to be preferred by the individuals. In terms of health tourism, the patient and patient's relatives had the chance to access information at a level to enable them to make a conscious preference on reaching reliable health service providers and the centres offering good quality and affordable, faster, and qualified health service. The health insurance companies have taken the economic health tourism alternatives into their portfolios to meet the above demands of the patient and patient's relatives, through purchasing services from different countries.

Turkey captures the attraction of the citizens of many countries with its relatively affordable and good quality health services. The closeness of our country to the regions with overpopulation and also high per capita income has contributed in the development of the Thermal Health Tourism by the opening of many five-star thermal hotels, and Medical Tourism through the city hospitals that are fully equipped with advanced technologies of the world, training hospitals, university hospitals, accredited private hospitals and the good quality health services provided by these hospitals.

In the presentation of the health services, Turkey is a candidate to get high shares from the health and thermal health tourism markets with its facilities having very well physical opportunities, full equipment, and advanced technology, as well as healthcare personnel offering good quality health service.

The corporate structure and young labour force, as well as the transportation opportunities, reveal the power of Turkey related to health services (Tontuş, 2017b; 2017d). In Figure 3, the SWOT analysis of Turkey in terms of health tourism is provided. At this point, the price advantages, thermal potential, short pending times, history and cultural heritage richness, customized health service offered over the world standards bring Turkey to the fore in health tourism.

Figure 3. SWOT analysis of health tourism in Turkey



Source: Tontuş, (2017d)

Tourism season can continue for 12 months in Turkey, and this allows the patients arriving for health tourism to also participate in other tourism activities. In this respect, health tourism is a type of tourism that should be discussed multidimensionally and for which a strategy should be generated for Turkey.

The framework of Health Tourism

While revealing the general framework of health tourism, it is useful to explain the relevant sub-topic terms. These are; health tourists, health tourism, the health of tourists, and tourism health.

- 1. **Health Tourist:** A *Health tourist* defines a person who travels to obtain health protection, improvement, and treatment of diseases or to receive health services due to any other reason;

2. **Health Tourism:** *Health tourism* means a scheduled travel or travelling for minimum 24 hours that is performed from the place of residence to another region or country by the health tourist or by the person to assist such person who will receive health service.
3. **Health of Tourist:** *Health of tourist* means the necessity to get urgent or unplanned health service during the travelling of the tourists who go from their place of residence to another country for travelling purposes.
4. **Tourism Health:** The health of the places where the tourists accommodate and visit, maintaining the health of such places, the measures taken for the health-related effect of the tourist on the environment and environment on the tourist are defined as *tourism health*.

The overall benefits of health tourism, which has positive effects on the economy, can be listed as follows. First of all, the income obtained from foreign tourists has an economic contribution to the countries. Furthermore, developing countries can provide some kind of resource transfer from developed countries. Tourism is one of the factors ensuring information sharing and cooperation between countries. Health tourism may create opportunities in other medical trade areas (Özer & Songur, 2012: 73-74). In this sense, health tourism has a wide interaction with the economy.

Increasing the number of old aged people, cost differences, developments in technology and transportation, quality network, increasing health expenditures, legal regulations, accredited health organizations, quality human resources, globalization of health and natural thermal resources are listed as the contributing factors of health tourism (Tontuş, 2017b). These contributing factors brings the advantages of Turkey's health tourism to the forefront. Because the increasing number of old aged persons and the cost advantage resulting from variables such as foreign exchange rate indicate that Turkey has an important potential.

In Turkey, the Ministry of Health established an upper organization for the health tourism and with the relevant attempts, realized legal and economic supporting and standardization studies, and today, organizations have been established with TÜSEB and the companies founded under TÜSEB. Furthermore, the relevant associations and associations, particularly SATURK, Uluslararası Sağlık Hizmetleri A.Ş. (US-HAŞ) work on the development of health tourism with various publications.

In health tourism India, Thailand, Singapore, USA, Malaysia, Germany, Mexico, South Africa, Brazil and Costa Rica, in medical tourism; Panama, Brazil, Malaysia, Costa Rica, India, in thermal tourism; India, Turkey, Malaysia and in SPA tourism; Hungary, Czech Republic, Austria, Bali and Maldives are the pioneer countries in wellness tourism. In particular, India is considered as the centre of medical tourism (Özer and Songur, 2012: 74-75). In this sense, Turkey has the potential to develop in medical tourism, thermal tourism and wellness tourism.

The increase in the world population, the improvement in the quality of life, the proportional increase of the old-age population and the increase in healthcare costs in various countries have directed the individuals to the countries where they can get better quality and relatively cheaper services (BAKA, 2011). In this context, Turkey, in the presentation of health services, has become a real health base in its region with the quality of its human resources, economic value and the use of advanced technology, as well the application of international standards. In recent years, thousands of patients, particularly from neighbouring countries, Central Asia, Middle East, African countries and many European countries, even from the USA, come to our country for the purpose of treatment. With its health tourism, Turkey has a robust country position towards becoming a centre of health.

Reasons of Health Tourism

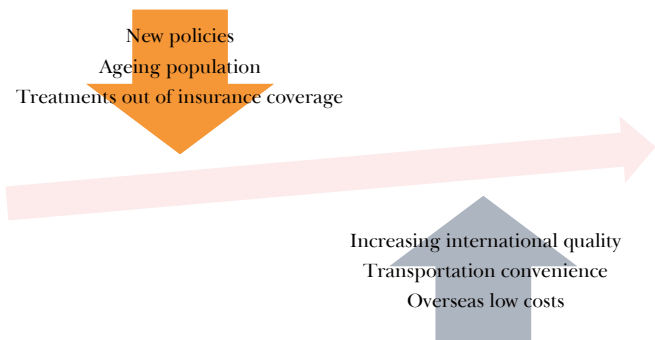
There are many factors that trigger health tourism and determine the need. These are listed by Tontuş (2015) with the following main topics:

- Avoiding long patient waiting lists
- Receiving cheaper health service with better quality in a shorter time
- Accessing to high health technology
- Desire of chronic patients, old-aged or disabled people to go to other places and to get treatment
- The desire of people with drug and different addictions to be in different or more appropriate places
- The desire of being treated, as well as travelling and doing cultural visits
- The desire of the person to attach to life and to live
- Increase in the rate of old-age population and chronic diseases in developed countries
- The patient's difficulty to access service in his own country than the other countries
- Opportunity to receive quality healthcare service for rare diseases with more appropriately in the other country
- The sick individual's need for healthcare during holiday or business trip
- The well-development of communication and transportation, since there are not enough health institutions in their country where they can benefit from health opportunities.

The above listed reasons should be analysed well to enable Turkey develop in health tourism. Following the recent pandemic, the successful health and crisis management of Turkey can be added to this list. The positive image owned by Turkey during this process should be used for being a centre in the health tourism.

When the preference reasons of the persons willing to get service under the scope of health tourism, it is seen that some factors play important role in the selection of country and place in health tourism. These factors can be summarized as new technology, quality of care, payment capacity, accessibility, convenience, safety, tourism element, privacy and surplus opportunities. In terms of preference, Turkey has all these features.

Figure 4. Growth of health tourism with effecting factors



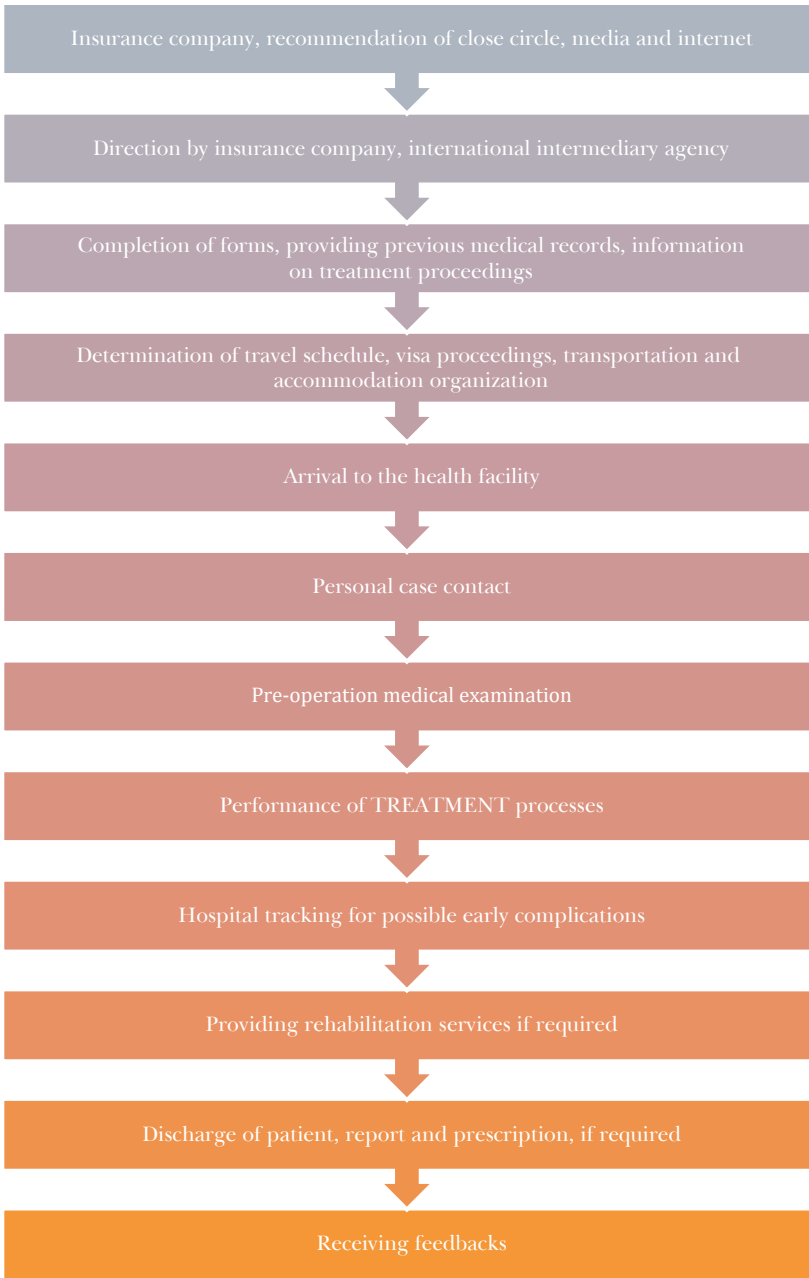
Source: Tontuş (2017c)

Although there is an important development potential, we encounter the problem on the cross-border transfer of health insurance rights, the accreditation problem of the professional individuals offering health service, the problem on the management of the postoperative care and complications, the asymmetry and confusions in the malpractice laws, failure to keep or transfer the patient records digitally in the same standard in everywhere, cross-border travel problems, communication language problems, the problems arising from the cultural differences as the factors that avoid the development of the health tourism (Tontuş, 2017c). However, these problems can be eliminated with correct strategy and policies.

Types of Health Tourism

While some sources related to the health tourism handles the health tourism in two groups as medical tourism and thermal health and SPA & wellness tourism (Pollock & Williams, 2000; Polat, 2008), some other sources review the health tourism under three topics as medical tourism, elderly and disabled tourism, thermal health and SPA & wellness tourism (Tontuş, 2017b). The general operation process of the health tourism accommodating various forms is summarized in Figure 5. Sometimes the tourism purposed accommodation of the patients can be included in this process.

Figure 5. Process experienced in health tourism



Source: Tontuş (2017c)

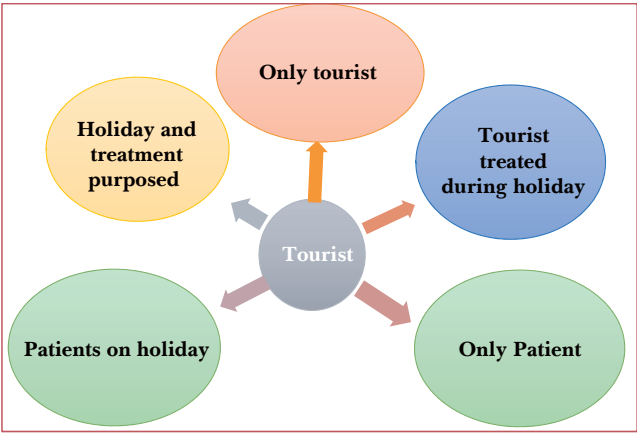
The Ministry of Health defines the health tourism as an alternative tourism type that accommodates medical tourism, elderly and disabled tourism and thermal tourism. In the analysis performed in this study, this classification of the Ministry of Health has been taken as basis. The reason of gathering the health tourism under 3 groups is that the elderly and disabled tourism became a type of tourism that provides important economic income for the countries and that is progressively developing. These tourism types has important economic share within the international tourism industry. Recently the importance paid by the countries to these tourism types increased and they found place within the state policies (Yıldız, 2017).

Medical Tourism

Medical tourism is one of the 3 important types of health tourism and it is defined in various ways. This tourism is a type of health tourism where international patients go to other countries from their own countries for the purpose of treatment, rehabilitation and care, and get service from the health institutions in that countries. It is a type of health tourism that accommodated more advanced treatments (cardiovascular surgery, radiotherapy, etc.), transplantation, infertility, aesthetic surgery, eye, teeth, dialysis treatments, etc. According to another definition, the medical tourism is the type of tourism where the people living in a country travel to another country for medical diagnosis, treatment and care, to get a higher quality service from the health services compared their own country or to benefit from cheaper health services compared their own country (Özsarı & Karatana, 2013). Cohen evaluated the concept of medical tourism over the purpose of tourists. According to Cohen, there are 5 different tourist groups as below per the purpose of the performance of health tourism. These are:

- The *tourist* went on holiday abroad without seeking any medical treatment
- The tourist requiring medical treatment while on holiday abroad
- The tourist who intend to benefit from the medical treatment and touristic activities at the same time abroad
- The tourist who want to benefit from touristic activities during the medical treatment abroad
- The tourist who are abroad only to get medical treatment

Figure 6. Tourism Groups in Health Tourism Activities



In medical tourism, there are significant differences in the treatment fees per the countries. The factors that are affecting the preference in medical tourism are affordable prices, quality health services and specialization. In the countries providing price advantage, India, in the countries providing quality health services, Singapore and Germany, in specialized healthcare services; in aesthetic surgery area Lebanon, and in the treatment of eyes, Turkey comes to the forefront. In order to get a significant share from the health tourism in the coming period by evaluating these data, a good competition environment should be created in favour of our country by determining the current policies in medical practices, diagnosis and treatment, and pricing. In particular, during a period where the pandemic process gives a lesson on the diversification of income sources to the countries, the return of the investments to be made by Turkey on the areas where there is a chance of global competition will be more in the following periods.

Along with the developing health services, Turkey has increased the number of tourist, and also the number of tourists coming for medical tourism. The individuals who receive service from our public and private hospitals within the scope of the health of tourists are the tourists who come to visit our country and receive planned health service or unplanned service whenever they need. This group has an important share in health tourism. Therefore, the health tourism cannot be considered separately from the general tourism and it is within the general tourism. This should be carefully evaluated by the representatives of the industry.

In order to continue the health tourism successfully and efficiently, the international patient registration unit established within the Ministry of Health should be arranged to include all public and private hospitals within the scope of the health tourism. Because, in order to determine the strategies for the next period, it is necessary to collect healthy data and analyse these data. After the pandemic, the evaluation of the data collected at the point of steps to be

taken for the health tourism, making use of them while creating the strategy and policy will increase the efficiency.

By the way, an important matter should be resolved in a shorter time. And it is related to the intermediary institutions, companies and tour operators that will bring health tourists to the universities and other public hospitals. Still no payment can be made since there is no legal regulation concerning the tour companies and tour operators, briefly intermediary companies that organize the bringing of the patients within the scope of international health tourism. This causes disruptions in the transfer of the patients coming from other countries within the scope of health tourism. The elimination of this problem, the issuance of a legal regulation for the payment of a certain service fee to the tour companies, tour operators and intermediary companies to continue the transfer of the patients within a system will have significant contribution to the number of tourists to come.

A New Dimension to Health Services: USHAŞ A.Ş.

Pursuant to the 663 numbered Decree Law paragraph 2 of the Annex 2. article put into enforcement by being published in the Official Gazette dated 03 August 2018 and numbered 30498, Uluslararası Sağlık Hizmetleri A.Ş. (USHAŞ) has been established for the purpose of directing the health tourism in our country, contributing the international relations in this area, granting authorization to the companies acting as intermediary, offering consultancy service, acting as intermediary, performing the promotion of the health system, carrying out and implementing projects, dealing with strategic activities within the scope of nationalization project for drug, medical device and materials, and providing effect to minimize the current deficit (USHAŞ, 2020).

The duties of USHAŞ are explained in five articles. These are:

1. To give license and authority certificate to institutions that act as intermediaries in the field of international health services.
2. To make international advertising and promotion of our country's health services, to coordinate, direct and support the promotion and information activities in this field.
3. To act as an intermediary agency for international health services, to conclude contracts for international health services on behalf of public and private sector organizations within the framework of the authority granted, to support the execution of contracts
4. To respond the applications for information on international health services, to take actions with the relevant authorities to resolve complaints and disputes, to determine the problems that may be faced by the parties and to take preventive measures.
5. To promote the health system of our country, to provide consultancy service to the international people and organizations with regard

to health systems, health financing and public-private cooperation models, to meet international demands, to make and implement projects for the establishment and development of systems in these areas.

Undertaken very important duties in the health tourism, USHAŞ’s vision is defined as following:

- To assume a leading position in exportation of health services and public/private sector coordination within the country
- To strengthen the image of the Turkey by ensuring the effective promotion of Turkey’s health capacities, opportunities and potential abroad
- To contribute and to develop strategies for increasing the quality and standard of health services provided abroad
- To assume a leading role in the exportation of health system and education

The number of health institutions and the intermediary agencies to which the authorization certificate has been granted by USHAŞ on behalf of the Ministry of Health since its establishment is as following according to 2019 data of the Ministry of Health, General Directorate for Health Services, Department of Health Tourism.

Table 1. Number of health facilities and intermediary agencies authorized by USHAŞ

Organization	Number
Number of Intermediary Agencies	57
Public Health Facility	100
Public University Hospital	22
Private Health Facility	533
Foundation University Hospital	20
Total Number of Organizations	731

The policies for enabling the certified companies, which will offer service in the health tourism of Turkey, to increase their activities after the pandemic for the purpose of having minimizing effect on the current deficit of the health tourism industry having high added value should be developed. The incomes given per patient vary both in terms of medical tourism and tourist health, as well as in terms of public and private sectors.

Among the reasons of Turkey’s recent progress in the medical tourism, offering good quality medical diagnosis and treatment, surgical operation, as well as medical care services to the health tourists at world standards, even beyond the

world standards can be mentioned. In Turkey, of good quality health service is offered to the health tourists at the highest level and affordable price by the well-trained teams specialized in their own fields at the public and private health institutions having very good physical structure and equipment, as well advanced technology used medical devices and tools. Turkey is the leading country in the field of health in the region with this capacity.

Elderly and Disabled Tourism

Elderly and disabled tourism is a kind of health tourism where the care, rehabilitation and medical treatments of the elderly and disabled persons are together. This tourism shows itself as elderly tourism, elderly care services, treatment services in the clinical hotel, special care for disabled people and sightseeing tours. With the improvement of the health conditions and so the extension of the human life along with the developing technology, the rates of the diseases decreased, the rates of the people at an age of 65 and above increased within the community, therefore elderly tourism's customer portfolio expanded. Thus, an active and dynamic elderly population has formed in the world. The individuals in this age group are generally retired, therefore they have much leisure time and this reveals a potential tourism mass. Furthermore, the flexibility concerning the time has created an opportunity to be benefited by the elderly people in affordable tourism alternatives outside the season (Gülen & Demirci, 2011: 80; Soysal, 2017: 171). This opportunity ensures that tourism continues throughout the year. Also, a consistent and continuous tourism income circulation occurs throughout the year. With the increase in the rate of the elderly population, an elderly and disabled tourism requirement has occurred as a result of the demands for the health and care services and also the lack of regulations regarding many activities of disabled individuals, whose share within the total population in many countries is 10%, such as tourism, entertainment, trip, etc.

In the world, it is a known fact that the average age of the population in the developed and developing countries has increased rapidly in the recent years. The average living time has extended and the age average of the population has increased due to the decrease in the birth rates, the treatments found for many diseases along with the advanced technology and the improvement in the life quality standards in Japan and the developed countries located in North Europe (Tontuş, 2017b). Increasing average age creates a great potential for the elderly tourism. High exchange rate and the quality of the health services provides an advantageous position to Turkey in elderly tourism in the world. While the population increase slows down in the world, life expectancy increases, the ageing trend continues, and the elderly population rate, which was 8% in 2015, is expected to be 16% in 2050 (SBB, 2019).

In elderly and disabled tourism; clinical hotels, recreation areas, resorts and nursing homes have an important place. In elderly tourism activities and elderly care services; the rehabilitation services and occupational therapies

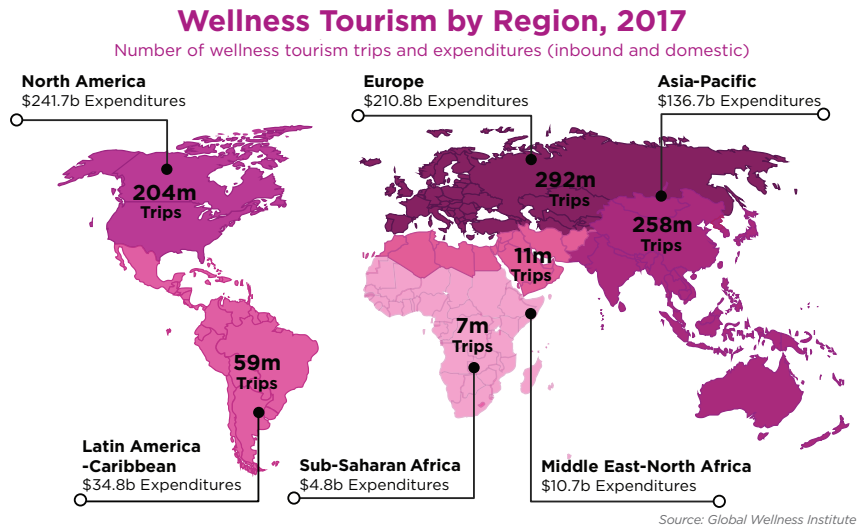
for disabled people and special care and sightseeing tours are held at clinical hotels. The elderly tourism has taken its place among the tourism types as an alternative tourism type that has an importance and potential in terms of diversification of tourism. According to the studies conducted, it is stated that the population above 65 in the EU countries will be more than the population under the age of 20 by 2025. While there are four working population per each old-aged person in the world today, this ratio is expected to fall below two by 2050. In addition to this, the elderly tourism is directly related to the disabled tourism, because disability is generally directly related to the elderly (Tontuş, 2017b).

Thermal Health Tourism and SPA & Wellness

Thermal health tourism and SPA & wellness is defined as a type of health tourism where some complementary medical applications such as medical massage, peloid, etc. are carried out together with thermal springs and/or hotel services. Thermal health tourism, in addition to various methods such as thermo-mineral hot water bath, mud bath, etc., covers the cure treatment applications made by combining climate cure, physical therapy and rehabilitation, exercise, psychotherapy and diet, etc. supportive treatments, as well as the entertainment and recreation purposed use of thermal waters. In general, centres providing health service with water are defined as SPA. According to the World Health Organization, wellness is a method that relieves and heals people physically, mentally and socially as well as treating the disease or weakness. Thermal health tourism and SPA & wellness are performed for the purpose of relaxation physically, mentally and socially, as well as treating some of the diseases. Wellness tourism is the performance of physical and psychological activities in order to promote health and well-being. In this regard, the travels to places that will motivate them in order to improve or protect their health is defined as wellness tourism (Mueller & Kaufmann, 2001; Soysal, 2017: 171).

The total share of the wellness tourism in the world is reported as \$639.4 billion under the light of the forecasts of 2017. Europe, including Turkey, is the most visited region/Continent and ranked second with an expenditure of \$210.6 billion. Turkey is ranked 8th in Europe for tourism income in this area (Global Wellness Institute, 2018).

Map 1. Wellness tourism per regions



Source: Global Wellness Institute (2018)

The health service categories and the characteristics of the persons benefiting from these have been summarized in Table 2 according to the types of health tourism reviewed in 3 main topics.

Table 2. Health services offered in health tourism and characteristics of benefited tourists

	Health improvement oriented services	Treatment oriented services	Rehabilitation services
Beneficiaries of service	- Medium and upper level income group - Healthy - Low-health risk - All age groups	- Medium and upper level income group - Healthy as to travel - Variable health risk - Medium and Above age group	- Upper level income group - Special requirements - Low to medium-level health risk - Old aged - Drug addicted
Capacity requirements of health services	- A good basic health service - Increasing expectation for hospital services	- Specialized physician - Various requirements from interventions to supportive treatments - High-level technology	- High-level technology - Specialized physician - Basic health services - Therapeutic interventions
Time	- Variable	Foreseeable - Short and traceable	- Long - Variable

Source: Özşarı & Karatana (2013: 138)

Opportunities of Turkey

The roadmap listed above will also be a guide for the determination of the strategies for all areas of health tourism. It is obvious that the service industry is one of the most affected industries in the pandemic process where the economies of the countries are ultimately damaged. Tourism is one of the areas that mostly affected by this situation within the service industry. Turkey is pointed out as one of the leading countries in the field of health with its success in the management of COVID-19 pandemic and left very positive influence throughout the world. During a period where the people would like to socialize by avoiding short-term doubts after the pandemic, Turkey may be a pioneer country of the world in the health tourism by merging its corporate success and natural potential. In the economic road map to be followed in the new period, wider place should be given to the health tourism and a consultation should take place with all stakeholders, including public and private sector, in terms of strategy and policy development.

Turkey has significant opportunities to obtain more income from health tourism. These can be listed as new technology, quality health and care service, affordable payment cost, accessibility, safety, tourism element, privacy and new market opportunities. When the quality level of health tourism in Turkey is taken into consideration, it is among the countries that are in the best position in the world. Particularly with the “Health Transformation Program” actualized in 2003, many regulations have been performed to make the presentation of health services in Turkey more effective, efficient and accessible, be at modern level and more qualified. Same level of health service is managed to be offered through the new hospital facilities constructed in all regions of Turkey.

Following the commissioning of Department of Health Tourism established in 2010 and USHAŞ established in 2018, Turkey points out that it has institutionally adapted the health tourism policy. Along with this, under the eleventh development plan, many plans and policies specific to health tourism have been published within the scope of increasing the diversification and qualification of the tourism services within the sustainable development plan. The qualified public hospitals constructed in each city, the physical structure equipped with the advanced technology owned by the private sector, the accredited hospitals having qualified health personnel, five-star hotels in cities convenient for medical tourism offer economic and qualified service to the health tourists. With the employment of trained health personnel speaking foreign language and opportunity to commission foreign physicians, Turkey can be compared with European countries.

When all these investments are taken into consideration, Turkey has new market opportunities in health tourism in the new period. Offering cost advantage, opportunity to travel and qualified technological infrastructure in the world health tourism, Turkey comes at the top of the preferences of international patients. Within 2023 health vision and government program, it is targeted to continue the cooperation with the other countries and international agencies

in the field of health, to make Turkey a centre of attraction in its region and to increase the cross-border health service presentation capacity (Soysal, 2017: 175). Having the advantage of accessibility due to its geographical location, Turkey has direct flights to many regions as a result of the investments made in airways. In particular, there are daily flights to Turkey from neighbouring countries. When this situation is considered, the number of foreign tourists can be increased with the comprehensive packages from health services to flight services. For this, all institutions must be in cooperation and coordination.

Within the scope of health tourism, Turkey has serious superiorities in some areas particularly in the medical tourism. The branches for which Turkey admits frequent international patient are the internal diseases, orthopaedics, eye diseases, gynaecology and obstetrics. In addition to this, it should be emphasized that, compared to the other countries, Turkey is the country that the most eye surgery related foreign patients are admitted. Concerning eye diseases, particularly (*excimer laser surgery, front camera surgery, retina surgery, squint surgery, etc.*) upper specialization branches have been ultimately developed in our country. When it is considered that the tourists who prefer Turkey for eye operation stay in the country averagely for 45 days, how an important economic benefit does the medical tourism provide can be understood. Also, it can be expressed that Turkey has a relatively superior position compared to the other countries in the medical tourism in terms of aesthetic surgery, particularly hair transplantation (Soysal, 2017: 180). Furthermore, with the recent situation of the exchange rate has brought Turkey to a quite advantageous and competitive position in terms of costs in health services.

Conclusion and General Evaluation

We can briefly list below the steps to be taken and the strategy to be followed by Turkey in order to have the deserved share in the world's health tourism market, and within the scope of year 2023 targets, to reach 2 million of health tourists and an income of \$20 million in health tourism, 500 thousand beds, 15 million of tourists and an income of \$750 million in thermal health tourism, to be the world's most important and Europe's number one thermal tourism destination, to be ranked at the upper levels we deserve in the global wellness tourism, and to have 10.000 beds capacity, 150.000 tourists and an income of \$750 million in the elderly tourism. On the other hand, the tourism is the one of the most affected sector with the measures in pandemic such as physical distance, quarantine, and curfew. The tourism, which has a fragile feature, is a sector that interacts with many different sectors and has a wide spectrum in terms of employment. Tourism is a sector that interacts with many different sectors and has a wide spectrum in terms of employment. For this reason, the process of pandemic in Turkey, as in the whole world also faced a serious crisis and challenge (Şeker et al., 2020). However, the serious measures taken in health and tourism policy and the intense efforts in international level have been made for the sustainability of the sector.

- The tourism industry, Ministry of Health and private health institutions should take steps together, ensure complete coordination and actualize the integrated practices.
- The majority of the patients coming for treatment to Turkey arrives in the summer months. Therefore, health services and tourism are carried out together. In this respect, two types of services should be evaluated together.
- Importance must be paid to the training of the service providers and interpreters in order to understand the international patients correctly and to provide the correct service to these patients.
- The medical practice and care costs are 50% to 60% cheaper in Turkey when compared to other countries. The promotion of this cheap service delivery should be made better all over the world.
- While the average income per patient is between \$2-4 thousand within the scope of the health of tourist, this income varies between \$9-12 thousand in the medical tourism. According to one general tourist, the average income per patient within the scope of the health of tourist is 3-6 times, and this is 14-19 times in the medical tourism (TÜRSAB, 2014: 4; Aydın, 2014:9).
- As can be seen here, our country should make good use of this industry by performing a good evaluation of the health tourism with high added value.
- 40% of foreign patients pays importance to advanced technology and 32% to of quality care (Ehrbeck et al., 2008:4). At the cost point, when it is considered that Turkey is already advantageous in this regard, the status of having advanced technological equipment and quality in this regard should always be protected.
- Our country, in addition to the compulsory medical practices, is an important destination among some other services such as hair transplantation and aesthetics. These opportunities should be used at the highest level.
- Making payment to the intermediary agencies that bring patients to the official institutions should be clarified and necessary legal regulations should be made in the health services.
- The international cooperation should be increased through the effective promotion and marketing in the field of health tourism.
- The cooperation with the public and private sector should be increased in the field of promotion and marketing.
- It is useful to establish a tourism insurance system for the continuity of different commercial activities that provide an important input in terms of productivity and employment in the tourism sector.

In addition to the articles listed above, bilateral agreements should be well-evaluated with the economic and political relations, the geographical and cultural proximity, long waiting times in the relevant country and inadequacy in health services, and competitive prices. In addition to these, in order to get the desired share from the target market; a robust health tourism portal, advertisement, participation in fairs, congresses, trade and purchasing committees, B2B meetings, digital marketing and health tourism related information stands should also be used in the most effective manner.

The maritime tourism that generally generates a lower income compared to the alternative tourism types is still dominant. Besides the mass tourism with low added value, the development of health tourism with high added value by developing special programs will attract the tourists bringing high income to come to our country. Turkey should evaluate each opportunity in an efficient and effective manner in order to reach the economic targets.

As a result, it is understood once again that tourism, which is a fragile sector and a part of the entertainment sector and cultural relations at the international level, can only survive in such crises with special policies and supports.

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