MEDICAL TOURISM DESTINATION
TURKEY
“We keep the world healthy”

Presentation by
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President
Turkish Healthcare Tourism Development Council

HEALTH TOURISM

MEDICAL TOURISM
THERMAL TOURISM
SPA & WELLNESS

Medical Tourist Considerations
Cost Saving
Availability
Accessibility
Quality
Additional Services

TURKEY?

Medical services?
Quality and the accreditations of the providers?
Cost comparison against other medical tourism destinations?
Travel services and local services?

Pre-procedures and post-services?
Extra advantages of Turkey as a travel destination?
Additional services?
Turkey Medical Services

Turkey provides excellent treatment opportunities by providing services in the medical & healthcare sector with high quality, success, efficiency and satisfies economical expectations as well.

Turkey has abundance of private health institutions with state-of-the-art technology and qualified medical and service personnel.

Today, Turkey is the country with the largest number of JCI accredited institutions.

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**SWOT Analysis TURKEY**

**STRENGTHS**
- Quality service at affordable cost
- Well-qualified doctors and hospitals
- International reputation of accredited institutions in many countries
- Close to US
- Diversity of tourist destinations, many attractions to visit
- English is commonly spoken
- Traditional Turkish hospitality is known worldwide

**OPPORTUNITY**
- Increased demand for healthcare services from countries with aging population
- Shortage of supply in National Health Systems in some countries
- Being a EU Candidate (Patient immobility in EU)
- Demand for olderly care homes from countries which have excess of budget for olderly care

**WEAKNESS**
- Strong competition from countries like Singapore, Thailand, India and etc.
- Some of the developing countries in the region want to attract medical tourists too (Bulgaria, Jordan, Egypt ..)

**THREATS**
- Low coordination between the various players in the industry trying to create the health cluster.
- Governmental support is not as strong as the competitor's.
- Low coordination between the various players in the industry trying to create the health cluster.

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**A+ Hospitals**

- Anadolu Medical Center affiliated with Johns Hopkins Medicine
- Acibadem Health Group associated with Harvard Medical International
- American Hospital
- Dunya Göz / World Eye Hospitals Group
- Echomar Hospital
- Florence Nightingale Hospitals Group
- German Hospitals Group
- Kent Hospital
- Memorial Healthcare Group
- Yeditepe University Hospitals Group

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Modern, hygienic hospitals with 5-star facilities, ISO 9001 certification and JCI (Joint Commission International) standard

Internationally qualified, English-speaking surgeons and specialists

The latest advanced medical equipment and techniques

Medical System based on US model
ANADOLU MEDICAL CENTER

- is a private, not-for-profit institution located in Istanbul
- has an exclusive affiliation with Johns Hopkins Medicine of Baltimore
- its Centers of Excellence are in the fields of Oncology, Cardiac Care and Women’s Health
- Anadolu Medical Center’s Institute of Oncology consists of Oncologic Surgery, Medical Oncology, Hematological Oncology, Radiation Oncology with a CyberKnife Center (Robotic Radiosurgery) and Psychotherapy Units
- Extensive surgery, Obesity surgery, Minimal – Invalive surgery, cancer surgery

Anadolu Medical Center Institute of Oncology

- is planned in accordance with the “Hospital within Hospital” concept
- has adapted the multidisciplinary cancer approach
- has 25 chemotherapy units that consist of individual rooms with utmost comfort
- all physical and psychological care for cancer patients including a medical cosmetic shop
- chemotherapy and anti-cancer therapies prepared by experienced staff through PYXIS system

ACIBADEM HOSPITAL

- 9 hospitals, 15 outpatient services
- operates with over 6,500 employees in 21 different location through a network of 6 general hospitals, medical centers, outpatient clinics, 1 ophthalmology center and laboratories
- They have Gamma Knife which is known as golden standard for the brain tumour surgeries.
- a cooperation with Massachusetts General Hospital who is developing special software programs for advanced MR technology.

ACIBADEM HOSPITAL

- Fortune 500 Turkey: 161st largest company, largest in service sector and 34th largest employer
- First healthcare provider in Turkey to open a satellite clinic
- First Call-Center in healthcare
- The only publicly traded healthcare provider
- Acibadem University starting classes in Fall ’09
- The only healthcare provider to own an health insurance company
- GNK standard Stem Cell Laboratories

AMERICAN HOSPITAL

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The VKF American Hospital is located in Nişantaşı, Istanbul's most central residential and business district. The VKF American Hospital offers diagnostic, inpatient and outpatient care in 38 medical specialties. Its 24 hour service at international standards is given by 500 physician specialists and a health care and support service staff of 1,150 persons.

ISO 9001:2000

JCI Accreditation

is a member of American Hospital Association

Its affiliations are: New York Presbyterian Hospital, The Methodist Hospital System Houston, Texas Children's Hospital, The University of Texas, MD Anderson Cancer Center, European Institute of Oncology

DUNYA GÖZ / WORLD EYE HOSPITAL

The biggest private eye hospital group of the world
4 International clinics in Germany, Holland and Belgium
200 million $ investment in 13 years
Experienced medical team speaking 19 different languages
Performing 30,000 examinations, 3,000 laser and 3,000 eye surgeries monthly
120 ophthalmologists, 1,000 smiling staff
Has treated 20,000 foreign patients from 97 different countries in 2008, of which %80 are from Europe

CHICAGO Medical Tourism Package: 3285 $
- Both ways flight ticket with Turkish Airlines
- Accommodation for 5 nights at a 4 star hotel (including breakfast)
- All transfers between Airport-Hotel-Hospital
- Check - ups and diagnosis
- One eye Cataract surgery
- Guiding services within the hospital in Turkish, German, Dutch or English
- Half day Istanbul city tour

Both eyes package price 4270 $

ECHOMAR HOSPITAL & IMAGING CENTER

Established in 1992
ISO 9001:2000 Quality Certificate
56 beds
Includes 17 medical specialties
Close to complete the JCI process
ECHOMAR HOSPITAL & IMAGING CENTER

- Echomar Group creates the imaging centers in the governmental hospitals and they manage it.
- They manage their hospitals in a boutique style and they have a high sensitivity for the quality.
- They have partnerships for the treatments that they do not provide. They give package services for int. Patients.

KENT HOSPITAL, İZMİR

KENT HOSPITAL

- Kent Hospital is a JCI accredited fully-equipped medical complex, one of the largest and most modern hospitals in southeastern Europe.
- Kent Hospital is a full service medical complex offering tertiary services like open heart surgery, coronary artery bypass, hip and knee replacement surgeries, aortic surgery, IVF, kidney and pancreas transplantation and oncology services.
- 121 In-patient beds, 21 ICU beds: 82 Private Rooms, 11 Suites

KENT HOSPITAL

- Kent Hospital’s construction standarts adaptaded to international standarts, as it was built according to the American Institute of Architects (AIA) construction standarts.
- The world famous Mayo Clinic provided consultancy on facility design, medical guidelines and administrative protocols to the set up of Kent Hospital from scratch as a modern purpose-built hospital.
- Built on 35,000 square meters according to American Institute of Architects guidelines

MEMORIAL HEALTHCARE GROUP

- 210 bed capacity, 170 doctors, 300 nurses, 1200 personnel
- Accomplished the following “firsts” in Turkey:
  - The first JCI accredited hospital in Turkey
  - The first microinjection technique (ICSI) as part of IVF procedure
  - The first blood-type incompatible pediatric liver transplantation
  - The first private hospital that obtained a licence from the Ministry of Health (MoH) for organ transplant
  - The first hospital to carry out differentiation of the myocardial cell from the embryonic stem cell
MEMORIAL HEALTHCARE GROUP

Specialized in:
- Transplantation (Liver, kidney, pancreas, small intestine)
- Heart surgery (900 bypass operations per year)
- In Vitro Fertilization and Genetics
- Interventional cardiology and radiology
- Orthopedics and Sports Medicine

YEDITEPE UNIVERSITY HOSPITAL

Academic Staff: 156
Residents: 39
Nurses: 163
Others: 358

Yeditepe University Hospital and its affiliated institutions were accredited as a whole system by the JCI at first survey for all standards
- First university hospital with JCI
- Accredited with one of the best scores in the world
- ISO 9001-2000

The first permanent artificial heart pump operation in Turkey, October 2006
- The first implantable miniature left ventricle assisted coronary artery bypass, “Impella Assisted Beating Heart CABG”, May 2008
- The first autologous chondrocyte transplantation operation in Turkey, September 2008
- Operative Mortality 0% (65% of the patients with high risk)

Hospital Mortality 1.5% (first 30 days)
Organ Transplantation Center (Liver, kidney, pancreas, Heart)
Stem Cell Transplantation Center
Some affiliates and partners:
PRICE COMPARISONS

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<th>Service</th>
<th>Turkey</th>
<th>USA</th>
<th>India</th>
<th>Thailand</th>
<th>Costa Rica</th>
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HOW TO GO THERE?

Turkish Airlines fly directly to NY everyday

After 18th May, everyday direct flights will start to Chicago

Turkish Airlines is a Star Alliance member and this makes the connection flights easier from other states of US

Distance Comparisons

From New York to:
- Singapore: 18 hrs non-stop
- New Delhi: 16 hrs non-stop
- Bangkok: 17 hrs non-stop
- Mexico City: 6 hrs non-stop
- Osaka: 7 hrs non-stop
- Istanbul: 13 hrs non-stop

Medical Tourism Cities of Turkey

Best developed medical tourism cities are:

- İstanbul: "where the continents meet"
  - An open air museum for all ages
  - Cultural experience for congress, meetings and incentives
  - A cozy destination for families and couples
  - A great metropolitan city with internationally rewarded modern shopping centers and traditional Grand Covered Bazaar
  - The city kept more than 8 million foreign visitors annually
  - 300 accommodation facilities with 5,000 beds

- 5* hotel: avr. price pp in DBL room from 85 $
- 4* hotel: .............................................................. from 50 $
- 3* hotel: .............................................................. from 30 $
- Airport – Hotel transfers ................................ from 50 – 60 $
- Guided transfers ................................................... from 120$
- English is commonly spoken around the city
- Medical services and travel services will all be given in english
Nearly 10 million foreign tourists yearly
Many historical and touristic attractions
Wonderful weather year long
JCI accredited hospitals

ANTALYA
"Turkish Riviera"

• 3rd biggest city of Turkey.
• 3.5 million population
Ephesus Ancient City, House of Virgin Mary, Artemis Temple, Basilica of St John are around.

IZMIR
"Aegean Queen"

• 1800 thermal springs throughout Anatolia, we only use 600 of them.
• 190 thermal resorts in 46 cities Bed capacity is almost 15,000.
There is a considerable demand every year in this field so it is very convenient for domestic and international investors
• With the new investments it may be increased up to 100,000 bed capacity
• 7th richest country in the world when it comes to thermal resources

Medical Tourism Industry
Estimated at $60 Billion (2008)
Expected to grow to $100 billion by 2010
Over 35 countries serve a million+ medical tourists annually
(Source: Deloitte Center for Health Solutions, 2008)

Global Industry
Estimated at $250 Billion (2007)
$194 billion in spa, thermal-related industries
Hospitality, tourism, and real estate
(Source: Global Health Summit Report, 2008)

Pre and Post Procedure Decision Making Process

Answers of the question
WHY TURKEY?
• Medical Services
• Cost Advantage
• Quality and Accreditations
• Travel Services
• Local Services
• Language Barrier
• Pre and Back Up Services

Thermal Spas in TURKEY
Thermal Treatments

- Physiotherapy
- Rehabilitation Treatment
- Rheumatic Diseases
- Bone Metabolism Diseases
- Dermatology
- Geriatrics
- Loose weight
- Wellness

# of medical & thermal tourists Turkey

- 2003  126,000 Thermal tourists
- 2004  152,000 Thermal tourists
- 2005  204,000 Medical & Thermal tourists
- 2006  269,000 Medical & Thermal tourists
- 2008  356,000 Medical & Thermal tourists
- 2012 (forecasted) 1,000,000 medical and thermal tourists

BALÇOVA THERMAL RESORT

- Each year over 1000 Norwegian patients receive therapy here for rheumatism, in accordance with an Agreement signed with the Norwegian Ministry of Health.
- Thermal Spring water 36°C
- 90-95% treatment success rate

FAMOUS DR. KANGAL FISH - SIVAS

- Located in middle-east Anatolia in Sivas, Turkey.
- Thermal spring water 37°C
- 21 day package programme for Psoriasis treatment
- Best results in reoccurring period in the world

FAMOUS DR. KANGAL FISH - SIVAS

- Psoriasis patients come from all around the world.
- The main natural effects for recovering the psoriasis:
  1. The physical contact of doctor fish, 4 to 8 hours decapitages of squams by fish.
  2. The effect of selenium that spa has
  3. The direct effect of natural ultraviolet radiation thanks to the high altitude (1650 mt.)
  4. Jacuzzi effect of the pools since the source of spa is spreaded at the base of the each pool.
AFYON THERMAL REGION
• Thermal Spring water 49°C

KÜTAHYA THERMAL REGION
• Thermal Spring water 43°C

"We keep the world healthy"
TURKEY

THANKS FOR LISTENING