

# **Health Tourism and Anatolian Blessings Medicine: A Strategic Business Model Proposal for Turkey's Branding<sup>1</sup>**

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## **ABSTRACT**

The phenomenon of health tourism has begun to play a major role in societies' social life, economic development, and integration with the world. Health tourism involves a wide range of products and destinations and is becoming an area that many public and private stakeholders participate in at the international, national, regional, and local levels. Countries and other interested actors compete with each other to attract potential health tourists. To have a considerable share and to become a sustainable actor in this competitive environment, countries must create a competitive identity and continuously develop and sustain this identity. This identity can be accomplished via branding.

The paper has two major objectives. The first objective is to propose a "Health Tourism Branding Model" that can be used by countries. The second objective is to exemplify the Turkish case designed based on the proposed model.

In conclusion, we strongly believe that countries should shape the organization and strategy of their health tourism in the framework of the proposed business model with a strategic approach and viewpoint.

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**Key words:** Health Tourism, Anatolian Blessings Medicine, Health Tourism Branding Model, Strategic Business Model, Turkey

## **INTRODUCTION**

The phenomenon of health tourism has begun to play a major role in societies' social life, economic development and integration with the world. Health tourism involves a wide range of products and destinations and is becoming an area that many public and private stakeholders participate in at the international, national, regional, and local levels (adapted from Commission of the European Communities, 2001). The field of health tourism, which dates back to ancient times, has developed very rapidly in the last 20 years. It is characterized by a flow of international consumption and production of healthcare services from developed countries to developing countries.

The production and consumption of health services at the international level and within this context, the international mobilization of consumers are phenomena that have been witnessed throughout history. However, this mobilization has further increased especially in recent years due to the globalization process (Kaya et al., 2013). Such mobilization is predominantly due to information and communication technology, the problems faced in health systems (such as long waiting lists, rising costs and problems with service quality), and increased consumer awareness and dynamics (Yıldırım and Altunkaya, 2006) such as those of the European Union (EU). Thus, a serious health tourism-focused industry has been created (Kaya et al., 2013).

Although there are no complete, accurate, and reliable data regarding the size of this industry. It is reported to be a nearly \$100 billion market and to have an average annual growth rate of 25% (Deloitte, 2008). At present, approximately 70 countries have launched themselves as medical tourism destinations (Geva, 2015), and Turkey, India, Malaysia, Thailand, Germany, France, Cuba, Hungary, United Arab Emirates and Singapore are defined among the first ten

destination countries (Deloitte, 2008; Stephano, 2013). According to the Ministry of Health (MoH) data, in 2014, nearly 550 thousand foreigners (including health tourists and non-health tourists) were provided healthcare services (including medical, thermal and thalassotherapy) in Turkey (The Ministry of Health, 2015a; 2015b). As stated in the Tenth Development Plan, the 2023 target is to reach 2 million health tourists and \$20 billion revenue (The Ministry of Development, 2014).

Through the Health Transformation Program (HTP) implemented from 2003 onwards, Turkey has made relative improvements in the components of its health services. Furthermore, the country is progressing towards achieving the institutional capacity (Kaya et al., 2013) that will allow it to provide high-quality and cost-effective services for not only national but also international health consumers. Turkey represents an important potential destination in the field of health tourism. This is mainly thanks to the country's competitive price advantages, high-quality tourism management and world-renowned Turkish hospitality (Yıldırım and Altunkaya, 2006), as well as unique natural and historical richness, suitable climate conditions due to its geographical location.

Given the aim to mobilize and improve this potential, the Health Tourism Development Programme has recognized health tourism as a field of State policy within the scope of the 10th Development Plan (2014-2018). The Action Plan contains 34 actions under 11 policy headings, which are grouped into four main components. Policy headings 4.1 and 4.2 under the Component-4 (Making Effective Promotion and Marketing in Health Tourism), which is closely relevant to the scope and purpose of our study, are as follows: 'Increasing promotion and marketing activities in target countries and regions' and 'increasing cooperation between public and private sectors in promotion and marketing', respectively. In addition, Action 1 states the following: 'Branding and iconization will be completed through a unique promotion strategy'' (The Ministry of Development, 2014).

We believe that this and similar action plans should be enacted within the framework of a strategic business model incorporating specific, innovative, integrated, holistic, multi-layer and hierarchical branding rather than through short-term and fragmented plans and projects. Based on this belief, we propose a Business Model Framework for Turkey's Branding in Health Tourism, which we call 'Anatolian Blessings Medicine'. This framework will constitute the basis for 'identifying and establishing brand positioning and values', which is the initial stage of the strategic brand management processes consisting of the following four steps: 1) identifying and establishing brand positioning and values, 2) planning and implementing brand marketing, 3) measuring and interpreting brand performance, and 4) growing and sustaining brand equity (Keller, 2013).

Currently, the paper proceeds as follows. First, a review of the literature on health tourism and branding is undertaken. In this context, a hierarchical branding and brand architecture model for health tourism is put forth. Second, the Turkish case under the brand of Anatolian Blessings Medicine, which is a strategic business model proposal for Turkey's branding, is presented. Then, conclusions are drawn.

## **HEALTH TOURISM AND BRANDING**

### **Health Tourism**

The international trading of health and health services, i.e. health tourism, is not a new phenomenon. Elite health tourism has existed throughout the centuries (Connel, 2011). Yet, health tourism has changed direction over the last 15-20 years. In the past, the prevailing trend for wealthy segments in developed countries was to travel to developing countries in order to receive health services. Recently, however, mainly middle-class citizens from developed countries benefit from health services in developing countries.

Although health tourism has been practiced since the creation of humankind, many different factors have played roles in its prominence in recent years. These factors can be listed

as the globalization process, rapid developments in information and communication technology, problems faced in health systems, increased consumer awareness, searches for new diversified products and dynamics such as those of the EU. Health tourism, which has become a rapidly developing and growing industry as a result of these factors. It also encompasses treatment, healthy life, and vacation elements in a very general sense(Yıldırım and Altunkaya, 2006).

Health tourism, which mainly comprises medical tourism, thermal tourism, and care tourism, is composed of a very wide range of highly complex products and destinations and it is a field that many public and private stakeholders are involved in at the international, national, regional and local levels (Commission of the European Communities, 2001). Health tourism can be defined as the accumulation of all the relationships and phenomena resulting from a journey that is aimed at protecting, regaining, rehabilitating and/or promoting the physical, social, mental health and wellbeing while typically combining this journey with a vacation or touristic elements in the conventional sense (Voigt et al., 2010). Regarding the general characteristics of health tourism, (1) it is a composite product that is completed by different organizations, (2) it incorporates the features of an interdisciplinary field, (3) it is very difficult to measure its quality because it is a service sector, (4) it is a field involving risk and uncertainty, (5) it is a simultaneous production and consumption process, (6) the revenue elasticity of its demand is high, (7) it is a labour-intensive sector, and (8) it is predominantly a services sector.

For a country to become a sustainable global actor in the health tourism industry in the medium and long terms, it must engage in branding, managing and ensuring its sustainability because the competition is very strong and volatile in this industry. This can only be achieved through the strategic brand management process.

## **Brand and Branding**

The main element that underlies a brand or the concept of branding is a ‘product’. Products are problem-solvers and are viewed by as a bundle of benefits that meet buyers’ or users’ needs or demands. Products include tangible and intangible entities such as ideas, physical objects, services, people and places, or their combinations (Heller, 2015; Kotler and Gertner, 2011). In brief, anything of value that is exchanged by individuals, groups, or institutions is a product. The presence of too many choices of products in the market makes differentiation more challenging. When products are perceived as similar, price becomes the major, and sometimes the only, competitive element. Because the attributes of most products can be easily copied and low prices erode profitability and jeopardize long-term survival in the market, brands are accepted as a seller’s most important tool for creating equity. Although products can be differentiated through their characteristics, consumers lack the motivation or ability to analyse them adequately. Therefore, the combination of brand name and brand meaning becomes the major competitive element in any context and under any condition. (Aaker, 1991; Kotler and Gertner, 2011). Brands allow sellers to define and differentiate their products. A brand creates differences among brands in the minds and hearts of potential consumers. Brands provoke beliefs, evoke feelings, and canalize direct behaviors. They also encourage customers to act (Kotler and Gertner, 2011).

Beyond the utilitarian benefits expected from products, brands have social and emotional value and significance to customers. Brands have personalities and speak to customers. They are capable of increasing or decreasing the perceived value of a product. Consumers tend to pay lower prices for unbranded products or low brand equity products. By contrast, they pay more for products of the high-value brands. Brands have equity for both investors and customers. Brand equity turns into customer choice, loyalty, and financial gains.

It includes many dimensions, including performance, social image, value, trustworthiness and identity (Lassar et al., 1995; Kotler and Gertner, 2011).

There may be numerous brands within a product category. For example, the automobile category includes brands such as X, Y, and Z. People buy brands because they believe brands offer different values. Thus, brands are designed to help consumers perceive differences between brands within the same product category (Lee et al., 2015). Then, what is a ‘brand’ (which is very important and refers to more than merely a product)?

The American Marketing Association (AMA) defines brand as ‘a name, term, design, symbol, or any other feature that identifies one seller's good or service as distinct from those of other sellers’ (AMA, 2015). A successful brand is an identifiable product, service, person, or place that is augmented in such a way that the buyer or user perceives relevant, unique added values that match their needs most closely (Heller, 2015). Brand is a complex bundle of experiences, associations, meanings, and images in people’s minds (Fan, 2010). Aaker defines brand as ‘a multidimensional assortment of functional, emotional, relational, and strategic elements that collectively generate a unique set of associations in the public mind’ (Aaker, 1996).

Thus, brand exemplifies a planned strategic existence with an architectural design. Brand is a concept that incorporates elements such as market and competitive analysis, product or service development, positioning, promotion, distribution, customer relations, customer care, visual wording, story creation and expansion policies. Each brand should be a solution to a ‘real’ need. This need may be rational and/or emotional. This need should be clearly defined. ‘Symbolic value’ is built on this clearly defined need. When value is built, the projected brand comes into existence. After some time, consumers form an integrated brand perception rather than simply a perception of symbolic or functional value. This perception is solid (Batu, 2015).

A company's most valuable intangible asset is its brand. Creating a powerful brand is both a science and art that requires careful planning, deep and long-term commitment, and a process designed and executed in a creative manner (Gertner and Kotler, 2002). The process of creating and managing a brand is called branding (Lee, 2009). Branding refers to developing competitive strategies and intentions and communicating and presenting them (Temporal, 2015). It is a process of differentiating one's product from that of a competitor or competitors (Ahuja, 2014).

There are different fields of branding, including product branding, organization branding, and destination branding. Destination or place branding is an umbrella concept used for 'countries, regions, cities, towns and villages' (Anholt, 2008). Destination branding is defined as the differentiation process that a particular country, city or region undergoes to differentiate itself from others by highlighting its identity and unique characteristics to achieve its economic, political, or social goals (Seçim, 2014).

Country branding, which is a major practice of destination branding, refers to the process of the management of developing a country's brand identity, image, and reputation (Lee, 2009). Country branding refers to a country's ways/methods of distinguishing and symbolizing itself and communicating with its audience. This concerns creating and managing a national brand identity and image. While brand identity refers to how the brand aims to be perceived, brand image is the perception of a brand in people's mind (Lee, 2009). Within the framework of building a brand strategy, an emotionally-based brand vision, brand equity, brand personality, brand positioning (Temporal, 2015), brand image and brand architecture should be developed. Creating an emotionally-based brand vision is a long-term and high-level goal that summarizes where the brand wants to be situated in the minds of consumers. A brand vision is typically emotional by nature and has appeal. The words of the vision statement must be relevant to the subject of the brand and potential consumer profile. Brands, similar to people,



have values that facilitate the development of their personality or character and help consumers differentiate and distinguish them from their competitors. Therefore, the words that are combined to form this set of well-defined values or personality are closely linked to the vision. When they are defined, they give depth and direction to brand communication and, thus, shape the customer experience. In addition, a position that makes the brand distinct from its competitors in the market must be established. This position typically contains one or more positioning statements that define why the brand is different from and better than the competitor brands. While positioning statements for a master brand are often general in nature, the sub-positioning statements derived from them are more goal-oriented and directed at a specific target audience (Temporal, 2015). Brand image is a set of perceptions that consumers have about a brand (Lee, 2009; Hsieh and Lindridge, 2005). These perceptions are symbolic and functional perceptions about the brand (Dobni and Zinkhan, 1990). Brand image is believed to be shaped within the framework of the mind of consumers and the brand's initiatives for the sake of its image (Torlak et al., 2014). Consumers' knowledge about a brand forms the image of the relevant brand (Keller, 1993).

Nation brand encapsulates international stakeholders' perceptions of a country (Fan, 2006). Simon Anholt defines the nation brand as the sum of people's perceptions of a country across six areas of national competence. These areas are tourism, exports, people, governance, culture and heritage, and investment and immigration (Anhold,2015; Simons, 2013).

Then, why do countries have to choose branding? What are the objectives of branding? With increasing globalization, countries are in competition with each other in many fields (economic, political, social, cultural, tourism, investment, military, healthcare, education, technology, manpower, trade, etc.) at the global scale, and they seek to increase their market share and to have a voice in global markets (Lee, 2009; Anholt,2015). A country has to be different from other countries to prevail and to sustain this prevalence in such an intense

competitive environment. Differentiation can be achieved only through branding. To ensure national development and to achieve competitive advantage at both the national and international levels, countries aim to obtain 'nation brand equity', which is based on both national identities and images of symbolic 'soft power'. To attain and sustain these values, nations rely on nation branding (Lee, 2009). A powerful and positive nation brand provides a significant competitive advantage (Anholt,2015).

The primary objective of nation branding is to find and operate strategic areas of competitive advantage that will result in a powerful image and the achievement of a common goal (Anholt,2015; Lee, 2009; Temporal, 2015). To sustain competitive advantage, countries have to keep their identity distinct from others, expand their market share, and become a more attractive and different destination. To find a reputable place on the world map, countries must prove themselves at the international level. This can only be done via branding. National branding has many goals, including (1) to increase exports, (2) to increase the number of tourists, (3) to attract foreign investment and capital, (4) to increase political influence at the international level, and (5) to manage negative biases (Kotler et al., 1999; Yee, 2009). To achieve these goals, countries turn to branding with the aim of differentiating themselves from competitor countries and managing their image. They realize that just as in the business world, image power leads to economic power, wealth, and success (Temporal, 2015).

In this context, 'brand image' is a vital factor. Brand image is a shortcut to conscious purchasing/choice decisions. Few people have sufficient time, patience, or expertise to determine the differences in countries' offerings. Therefore, when making choices, people act based on their basic beliefs and biases about countries (Anholt,2015).

In view of the proliferation of similar products and consumers' need to consume meaning in line with today's economic, technological, and social developments, businesses and countries inevitably use the brand approach as the basic premise. In other words, today's

businesses feel obliged to build distinctive perceptions in the minds of target audience to make their products more preferable than those of their competitors. All initiatives aimed at creating these perceptions fall into the scope of brand management (Babür Tosun, 2014).

In summary, branding ensures competitiveness, customer satisfaction, customer loyalty, and employee satisfaction; increases sales, awareness, efficiency, and productivity; raises awareness; motivates employees; gives identity; and results in brand equity and intellectual property (Hammond, 2008).

### **Branding in Health Tourism: A Strategic Business Model Proposal**

Countries, the health tourism industry, and other interested actors compete with each other to attract potential health tourists. To have a considerable share and to become a sustainable actor in this competitive environment, countries must create a competitive identity (Anholt, 2008) and continuously develop and sustain this identity. Countries have to brand their health tourism sectors and other relevant sectors and businesses.

Because competition in health tourism takes place among brands in today's conditions, branding is considered as a strategic investment. Therefore, branding in health tourism should be approached as a strategic issue rather than a country's short-term tactic. The differences between countries, willing to take a position in the sector have begun to be narrow due to rapid progress in information and communication technology. Countries will have a different image and position thanks to small details that may create major differences. Brand, which is one of the main elements that can lead to such differences beyond the determination of the functionality in the health services provision, appears as a bundle of perceptions that increases the value of the service. It is natural that the services in the services sector, particularly health services, are not easily distinguishable because they, by nature, are consumed as soon as they are produced. Therefore, a country brand is a distinctive feature and provides the customer with information about the services to be offered. Thanks to branding, patients or patients' relatives

are able to distinguish health services offered by different countries. However, regardless of the means of achieving trust, the element of trustworthiness is the path to branding in health tourism. For example, Cleveland Clinic is a distinguishable name in the area of cardiovascular diseases, and there is already a positive bias towards the clinic in terms of its brand value and the services it offers (Karpas, 2000; Öngüt, 2007; SATURK, 2015).

In health tourism, the brand helps to distinguish the service more easily from similar service providers, to promote the service, to make a difference, to place and promote the image of the country or institution in the sector, and finally to prefer the service with confidence. The power of a brand depends on its influence on customers' decisions regarding preference. In the most general sense, by providing an image, assurance, and trust, brand influences health service consumers' decisions. At the same time, brand is a cost, responsibility, the guarantee of sustainability and an asset for health service providers (Öngüt, 2007; SATURK, 2015).

As shown, the 'branding' of countries in the field of health tourism is vital. Then, how should branding be done or achieved in health tourism? What is the most ideal way or method for countries to engage in branding in health tourism? In other words, what should be a country's strategy for health tourism branding? What are the elements of the right strategy for branding in health tourism? What should be the brand architecture or framework of this strategy?

The first step of branding in health tourism is to develop a brand strategy. The brand strategy provides a framework and direction for the brand. Brand strategy is the key to the brand development process and feeds into every component of the brand. It elaborates the objectives and presents the rationale for the brand and provides information about the market where the brand is located, including information about competitors, and the position of the brand in the market. The strategy also entails insights from brand values of the audience. These insights

allow it to develop key and basic messages about the brand. A strategy determines how the brand differentiates itself and feeds into the creative development process (Davis, 2009).

In a branding strategy, especially a successful branding strategy for a destination that includes numerous systems/sectors and sub-sectors, it is very crucial to build an appropriate architecture. The right architecture or framework facilitates clear and smooth branding of destinations consisting of many units and sub-units. A destination's self-branding based on brand architecture is a prerequisite and makes the destination more clear and visible to tourists (Ahuja, 2014).

When considered in this context, we believe that due to its peculiar characteristics, branding in health tourism should be done and managed from a hierarchically multilayer, multi-component and holistic brand architecture viewpoint. Based on this belief, we call our branding architecture in health tourism the 'hierarchical branding model in health tourism'. According to this architecture model, the 'country health tourism brand' is positioned at the top of the hierarchy or pyramid, 'sectoral health tourism brands' and city brands are in the middle, and 'corporate health tourism brands' and 'individual health tourism brands' are placed at the very bottom of the pyramid. In other words, under this branding model, countries build up a brand in five levels/layers. A country's health tourism brand should be positioned in the first level. A Country brand is the master or core brand and is located in the top layer. It represents, as a whole, 'country health tourism brand' because the country destination is the destination that health tourism stakeholders and buyers will naturally look at first or develop an interest in. Therefore, countries must first design/develop and manage 'country health tourism brand' as an umbrella brand. A Country brand is a collective and federated brand (Kapferer, 2008). The master brand provides strategic direction and vision, typically via government policies (Temporal, 2015). However, because health tourism consists of many sectors, countries must create sectoral brands in the second level. These sectoral brands include the types and sectors

of health tourism. Although these types vary across countries, they can be listed as medical tourism, thermal tourism, care tourism, spiritual treatment tourism, phytotherapy tourism and other sectors. Sub-brands, such as public services and industries, implement master brand policies and priorities, and they work intensely to influence their specific target audiences (Temporal, 2015). In the third level, city brands should be established, in other words, cities must be branded. In the fourth level, corporates in each sector design their individual brands. In the fifth level, personal brands should be set up, that is individuals must be branded. Personal branding is a description of the process whereby people and their careers are marked as brands and the idea that the success comes from personal packaging (Brown, 2014). All these brands often offer customer experiences (Temporal, 2015). Under this model, hierarchically and in parallel, value added is created on the basis of the brand at each level, and the levels and brands at each level are associated with each other vertically and horizontally as well as mechanistically and organically. Every stage of this value creation chain should be managed in a conscious, comprehensive, planned, strategic, and sustainable manner. In order to minimise the possibility of conflicts and overlaps between the levels and elements, branding activities should be carried by a single autonomous institution in a coordinated and integrated manner. Under this model, the state/public is predominantly responsible for country, sector, and city branding, while corporate and personal branding is carried out by individual enterprises and persons respectively. Each country endeavors to fill this model based on its realities, capacities, and differences.



**Figure 1:** Multilayer Branding and Branding Architecture Model in Health Tourism (Source: The Author)

The following section is intended to present the brand architecture that we developed for Turkey to illustrate a country example of this model to the attention of the readers and other stakeholders.

## **A STRATEGIC BUSINESS MODEL PROPOSAL FOR TURKEY’S BRANDING IN HEALTH TOURISM**

### **Turkey’s Health Tourism Brand, Brand Architecture and a Business Model Framework: Anatolian Blessings Medicine<sup>3</sup>**

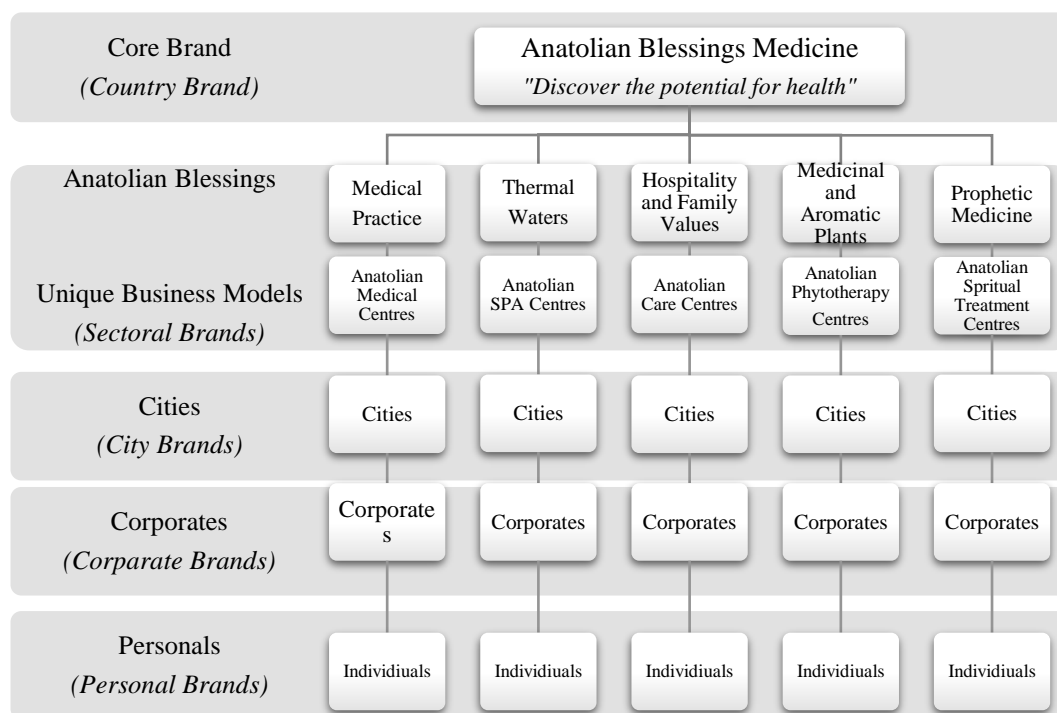
‘Anatolian Blessings Medicine’, which we propose for Turkey, designed based on the Hierarchical Branding Model in Health Tourism<sup>above</sup>, is illustrated in Figure 2. We propose ‘Anatolian Blessings Medicine’ as Turkey’s master brand for health tourism. Taking Turkey’s brand ‘Turkey: Discover the Potential’ as a starting point, we propose the following mantra<sup>4</sup> for this master brand: ‘Turkey: Discover the Potential for Health’.

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<sup>3</sup> It is helpful to underline that not only foreign patients but also Turkish citizens should benefit from the opportunities offered within the framework of Anatolian Blessings Medicine in an equitable and cost-effective manner.

<sup>4</sup> A brand mantra is typically a 3-5 word brief encapsulation of brand position.





**Figure 2:** Turkey's Health Tourism Brand<sup>1</sup> (Source: The Author)

### Turkey's Country Brand for Health Tourism: Anatolian Blessings Medicine

We believe that 'Anatolian Blessings Medicine' and specific business models shaped in the context of these blessings, are the key elements that can lead Turkey to a unique and special position in the global health tourism market. Given its geographical location (on the crossroads of Europe, the Middle East and Asia), Turkey is a natural hub for health tourism because it is within a maximum 3-4-hour flight distance from nearly one billion potential customers. The Anatolian geography has a distinguished structure because of its sea, sand and sun (due its location on Earth, Turkey is blessed with an abundance of seas, sand, sun, mountains, plateaus, plains and natural water resources); its identity as an Islamic country (the vast majority of Turkey's population is Muslim, which can be an advantage for health tourists coming from and looking for similar services and experiences; its medicinal and aromatic plants (there are approximately 12,000 plant species in Turkey. Among the existing species, approximately 9,000 are natural plant species and 3,000 are endemic species); and its legendary hospitality

and family values. Therefore, the health tourism activities carried out in this geographical location should be based on these privileges and should be authentic. Thus, we believe that Turkey's master brand for health tourism must be 'Anatolian Blessings Medicine'<sup>5</sup> because elements and blessings needed to fill the content of the concept and brand of Anatolian Medicine and to make it unique and distinctive are available in this country, and we call them 'Blessings of Anatolia'. In terms of health in general and health tourism in particular, Anatolian Blessings can be discussed under five main categories: 1) Traditional Medicine, 2) Thermal Waters, 3) Hospitality and Family Values, 4) Medicinal and Aromatic Plants, and 5) Prophetic Medicine. Turkey's sectoral health tourism brands based on these blessings are presented below.

### **Turkey's Sectoral Health Tourism Brands: Unique Business Models**

Turkey should develop its specific health tourism business models, i.e., its sectoral brands, based on blessings of Anatolia under five groups of master brand models. These groups are 1) Anatolian Medical Centres (AMC), 2) Anatolian SPA Centres (ASPAC), 3) Anatolian Care Centres (ACC), 4) Anatolian PhytotherapyCentres (APC), and 5) Anatolian Spiritual Treatment Centres (ASTC) (Figure 2). These sectoral brands are presented below.

#### **Anatolian Medical Centres**

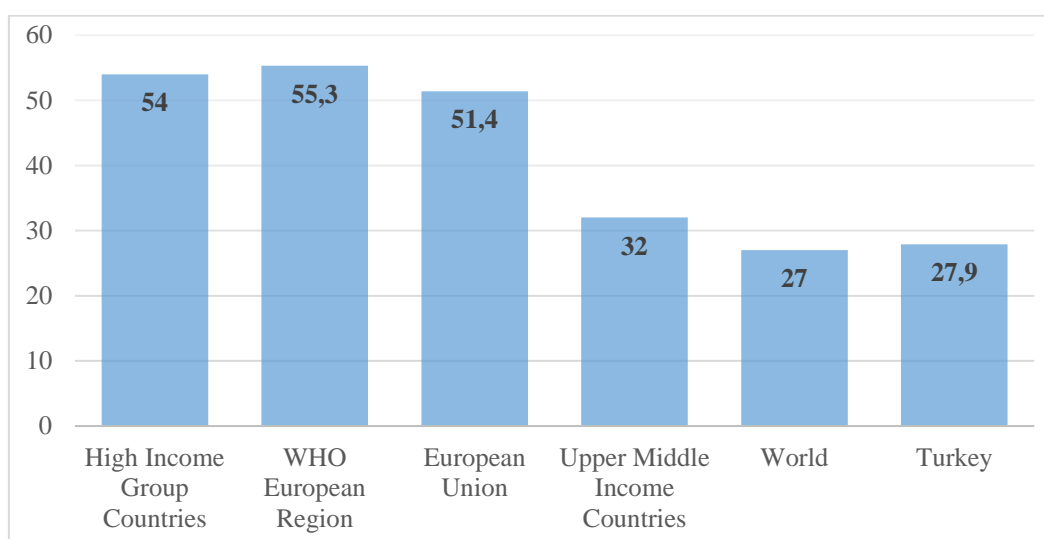
Our concept of Anatolian Medical Centres (AMC) refers to a framework and scope encompassing modern medical practices and processes. We claim that Turkey is in a good position in terms of modern medical practices and accumulation. The major factors in Turkey's medical tourism-oriented competitive advantage can be listed as hospitals' high-quality infrastructure, equipment and the high level of education and experience of health professionals,

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<sup>5</sup> The concept of 'Anatolian Blessings Medicine' has been designated as Turkey's brand in the field of health tourism at the global scale. 'Anatolian Medicine' should be considered in the same way that 'Chinese Medicine', 'Indian medicine', or 'Greek Medicine' are considered. This can only be achieved through branding.

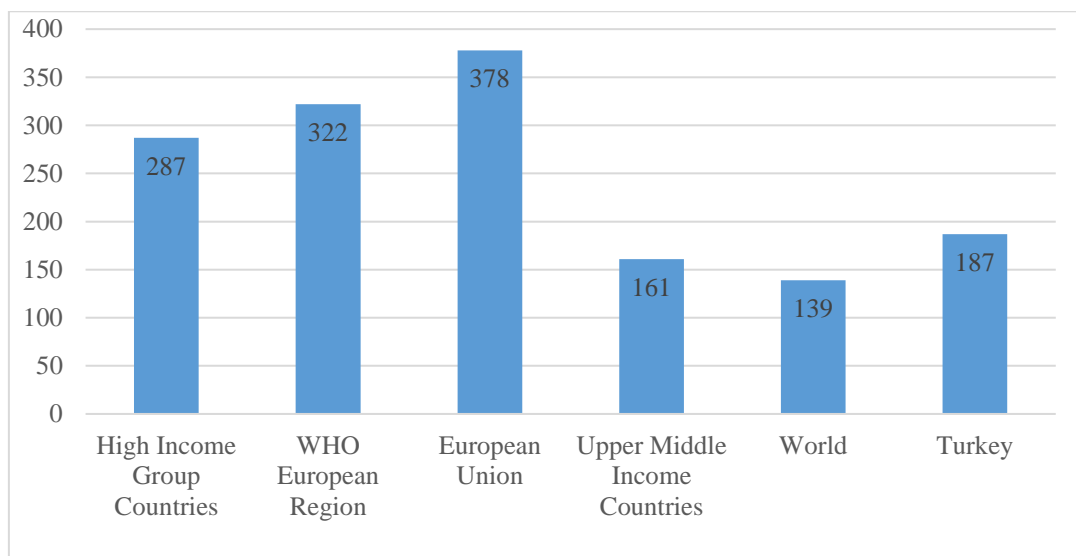
primarily physicians. However, it is difficult to say that they are adequate in quantity (Yıldırım and Altunkaya, 2006).

Thus, the international comparison of the number of hospital beds per 10,000 population indicates that Turkey, with 27,9 beds, remains below the world (27.0), EU (51.4) and WHO European Region (53.0) averages (Figure3). Nevertheless, an increase in both bed quality and quantity is expected with the full operation of city hospitals (PPPs hospitals) in the near future.



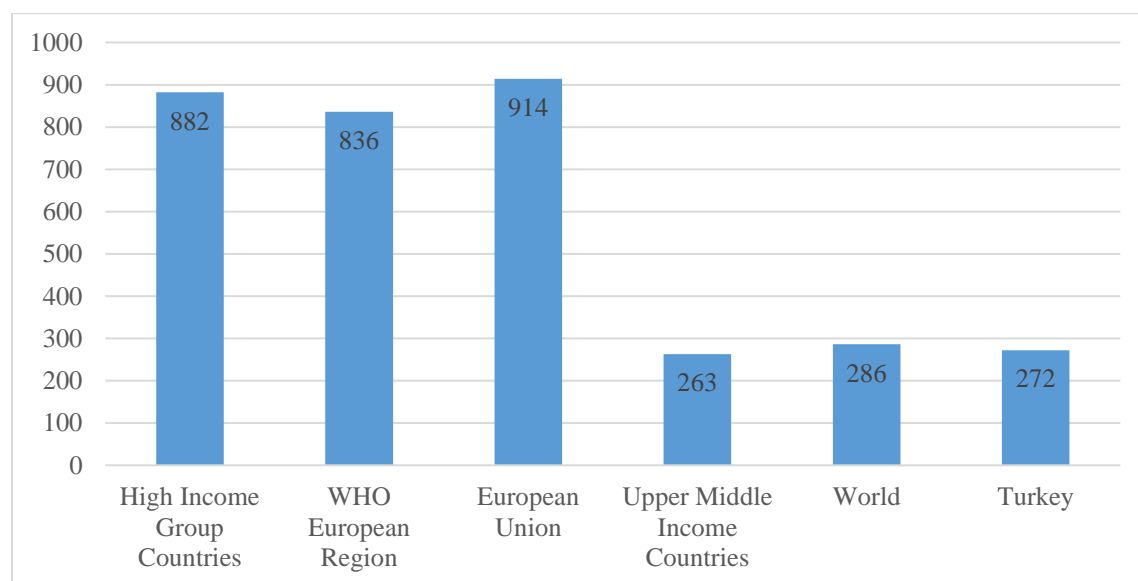
**Figure 3:** International Comparison of the Number of Hospital Beds per 10.000 Population (Source: The Ministry of Health (2018) and WHO Europe (2019)) (Note: Turkey's data belongs to the year 2017. Countries' data belong to the year of 2016 or nearest.)

An international comparison of the number of physicians per 100,000 population based on the 2016 or nearest data reveals that with 187 physicians, Turkey is above the world average (139) but below the EU (378) and WHO European Region averages (322) (Figure 4).



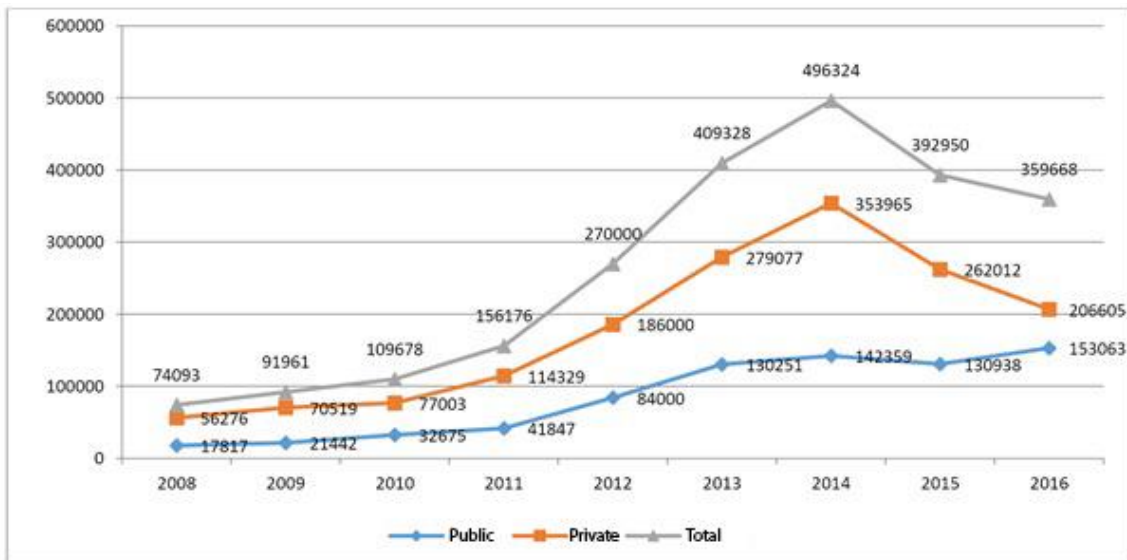
**Figure 4:** International Comparison of the Number of Physicians per 100.000 Population (Source: The Ministry of Health (2018) and WHO Europe (2019) Note: Turkey's data belongs to the year 2017. Countries' data belong to the year of 2016 or nearest.)

According to an international comparison of the total number of nurses and midwives per 100,000 population based on the 2016 or nearest data, Turkey, with 272 nurses and midwives, is well below the world average (286), EU (914) and WHO European Region averages (836) (Figure 5).



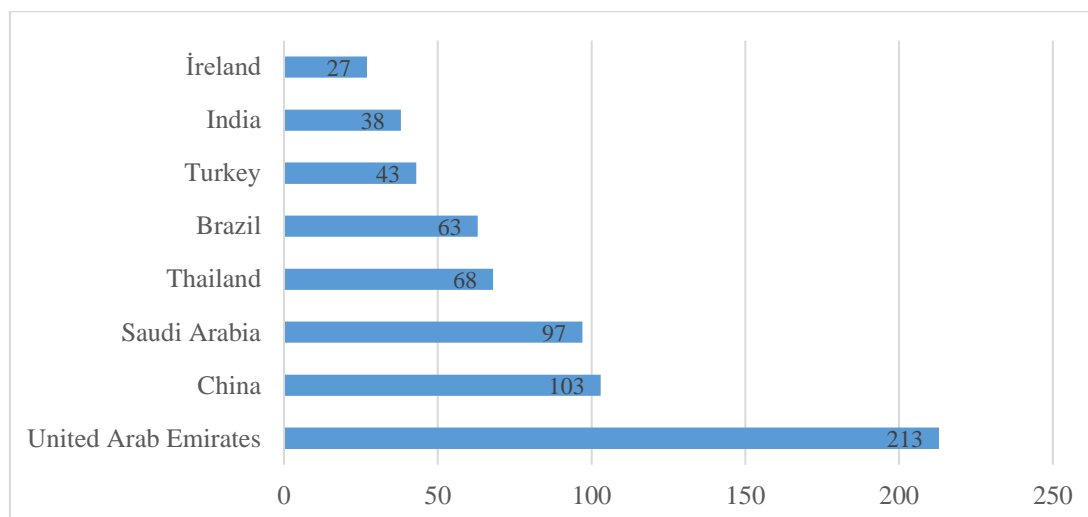
**Figure 5:** International Comparison of the Number of Nurses and Midwives per 100.000 Population by Year (Source: The Ministry of Health (2018) and WHO Europe (2019) Note: Turkey's data belongs to the year 2017. Countries' data belong to the year of 2016 or nearest)

According to Figure 6, the number of international patients receiving health servicestends to have continuously increased over the years. A significant rise is observed especially from 2010 onwards. This tendency points to Turkey’s potential for medical tourism. However, while the number of tourists receiving health care services increased steadily until 2015, it is noteworthy that there was a sudden decline in 2015. In 2015, the number of tourists in Turkey in the field of health services has decreased by 20% compared to 2014. The main reason, among the others, of the serious decline in the number of health tourists in Turkeywasperiodical political and regional events. However, this situation is thought to be temporary.



**Figure 6:** Foreigners Provided with Health Services by Year, 2008-2016 (Source: Yıldırım (2016, 2018))

The number of JCI-accredited health institutions and organizations in selected countries is provided in Figure 6. Accordingly, the country with the highest number of JCI-accredited health institutions and organizations is United Arab Emirates, with 213 institutions/organizations. Turkey, with 43 institutions/organizations, ranks in sixth place.



**Figure 7:** The Number of JCI-Accredited Health Institutions and Organizations by Country, September 2019 (Source: JCI (2019))

### **Anatolian SPA Centres**

Anatolian SPA<sup>6</sup> Centres (ASC) are centres that use thermal waters as the main input. Located on a major geothermal belt, Turkey is ranked seventh in the world and first in Europe in terms of richness and potential of geothermal resources. Turkey has over 1000 thermal springs, and thermal centres have been built on 200 of them (Ministry of Culture and Tourism, 2007).

Turkey's thermal waters are superior to those in Europe in terms of volumetric flow rate, temperature and various physical and chemical properties (The Ministry of Health, 2012). Today, thermal tourism significantly contributes to the economy of many countries. Japan is ranked first among these countries. The leading countries participating in thermal tourism activities are Germany, Hungary, Russia, and the Nordic countries. In Turkey, Afyon, Kızılcahamam, İzmir and Pamukkale are major destinations of thermal tourism. In the upcoming years, the potential of thermal tourism is expected to increase thanks to various initiatives and promotions (The Ministry of Health, 2015b).

The share of thermal tourism in Turkey's overall tourism is approximately 1%, and its daily bed capacity is estimated at 500,000. A Thermal Tourism Master Plan was developed,

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<sup>6</sup> SPA, which is an acronym, is the Latin phrase "Salus Per Aquam", which means 'health through water'. Traditional Turkish baths should be considered in the scope of these centres.

and thermal destinations have been grouped into the following four priority regions: Southern Marmara (Balıkesir, Canakkale, Yalova), Southern Aegean (Aydın, Denizli, Manisa, İzmir), Phrygia (Afyonkarahisar, Ankara, Uşak, Eskişehir, Kutahya) and Central Anatolia (Aksaray, Kırşehir, Niğde, Nevşehir, Yozgat) (The Ministry of Health, 2015b).

### **Anatolian Care Centres**

Anatolian Care Centres (ACC) refer to centres that provide elderly care, terminal care, and disabled care services by using Anatolia's hospitality and family values and similar blessings as input. It is clear that the capacity of the ACCs, which are expected to benefit primarily from the infrastructure of the Ministry of Family and Social Policies (MFSP) and other relevant facilities, should be enhanced substantially. Available data show that at present, approximately 32.664 people (Yıldırım, 2013) work in the care sector. However, the shortage of multilingual staff, particularly staff with English language skills, is one of the major problem areas of this sector.

### **Anatolian Phytotherapy Centres**

Medicinal and aromatic plants are used to prevent and treat diseases as well as to maintain and improve health in traditional and modern medicine (BAKA, 2012). The use of plants in the treatment of diseases is as ancient as mankind itself. Inscriptions on some stone tablets obtained from archaeological excavations contain information about the use of plants in treatment, including information about their usage and prescription. Approximately 25% of medicines used today are of plant origin (Yücel, 2010).

Anatolian Phytotherapy Centres (APC) are therapy centres that use medicinal and aromatic plants as the main input<sup>7</sup>(ResmiGazete, 2014). Thanks to its geographical location,

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<sup>7</sup>Legislation on traditional and complementary medical practices for human health in Turkey entered into force in 2014.

climate and vegetation diversity, agricultural potential, and large land area, Turkey is one of the leading countries in terms of medicinal and aromatic plants (Bayram et al., 2010; Faydaoğlu and Sürücüoğlu, 2011). The ecological and biological diversity of Turkey, which incorporates the features of three ancient continents (Europe, Africa, and Asia), is superior to that of other countries that lie on longitude 40° N. As an indicator of its wide range of climate and topography, Turkey has three vegetation regions: Mediterranean, Europe-Siberia, and Irano-Turanian. Each of these regions has its own specific endemic plant species and natural ecosystems (Tan, 2010). Turkey incorporates numerous herbal products that constitute the input for herbal medicine, chemical plants, food and additives, cosmetics and perfume industries of developed countries (Bayram et al., 2010; Tan, 2010; Faydaoğlu and Sürücüoğlu, 2011).

Turkey hosts 75% of all plant species in Europe, and nearly one-third of these species are endemic (BAKA, 2012). Research has found that 2,282 of the endemic plants are specific to one of Turkey's geographical regions and spread only throughout that region (Ekim et al., 2000; BAKA, 2012). Turkey has a rich flora, with 174 families, 1,251 genera, and more than 12,000 taxa and subtaxa (subspecies and varieties). Among these taxa, 234 are alien and cultivated. The remaining species are plants that spread naturally. Considering that the whole continent of Europe hosts approximately 12,000 plant taxa, Turkey's richness in terms of flora is evident (Ekim et al., 2000). Turkey is a rich country in terms of endemism (prevalent in or limited to particular regions of the world) as well. While in Europe as a whole, the total number of endemic taxa is approximately 2,750, the number of endemic species is 2891. When the 497 endemic subspecies and 390 varieties are included in this figure, the total number reaches over 3,750. Although the exact number of medicinally used plants in Turkey is unknown, the estimated number is approximately 500. Furthermore, nearly 200 medicinal and aromatic plants can be exported (Faydaoğlu and Sürücüoğlu, 2011).



**Table 1:** Plant Species, Medicinal Plant Species and the Trade Potential of Some Selected Countries

Countries	Plant Species			Medicinal Plant Species		Trade Potential
	Natural	Endemic	Total	Herbal Drugs	Total	
Turkey	8,250	3,750	12,000	na	500	\$3 billion
China	Na	na	26,000	na	5,000	na
India	Na	na	15,000	na	3,000	na
Europe	9,250	2,750	12,000	2,000	na	na
Worldwide	Na	na	500,000	4,000	50,000	\$100 billion

Source: Compiled from BAKA (2012); Yılmaz et al. (2010); Çakal (2013) and Schippmann et al. (2002)  
 na: not available

The number of plant species used for medicinal purposes worldwide is estimated to be more than 50,000. From these species, 4,000 herbal drugs are commonly used, and approximately 2,000 herbal drugs are traded in Europe. In Turkey, nearly 350 medicinal and aromatic plants, including subspecies are subject to the domestic and international trade, and 150 of these plants are exported. Plant species traded in domestic and foreign markets are typically collected from flora. Yet, in recent years, there has also been an increased interest in the agriculture of these plants (Yılmaz et al., 2010; Çakal, 2013).

Reports state that Turkey's total exports amount of herbal drugs is approximately \$50-60 million. Turkey, with \$16 million exports in total, is the major thyme exporter of the world. Its exports of essential oils (rose oil, bay oil, etc.) is approximately \$19 million in total. However, given that 95% of medicinal plants are mostly exported informally, the economic size of this sector is unknown. Turkey has a very rich resource of flora, and medicinal plants have a major commercial potential. At this point, the cultivation and agriculture of medicinal and aromatic plants become more significant. Medicinal plants are generally collected from natural lands, such as forests, meadows, and wetlands. Although this seems economical, it brings various problems as well. Therefore, the reclamation and cultivation of medicinal plants

are essential for a sustainable production model. Agriculture of medicinal and aromatic plants is important for both the protection of biodiversity and the country's economy (Yücel, 2010).

APCs, where medicinal and aromatic plants are utilized as resources, have the potential to create a considerable health tourism economy for Turkey. This economy will be realized in two main paths. The first path will involve the industry of medicinal and aromatic plants operating in a registered and professional manner and the value-added that this industry creates. The second path will contain value ads to be generated by the institutional delivery of products and services that the industry produced in the first path to national and international health tourists via the APCs.

### **Anatolian Spiritual Treatment Centres**

Anatolian Spiritual Treatment Centres (ASTC) are composed of institutions and organizations that offer Prophetic Medicine-oriented services. In the light of the Holy Qur'an, which is the source of healing for all spiritual, social and physical diseases and disorders, Prophetic Medicine can broadly be categorized into two groups: 1) spiritual means (prayer, worship and dhikr) and 2) physical means (food, plants, drugs, etc.). As previously noted, Turkey is a Muslim country and this constitutes an advantage in terms of attracting more health tourists from countries which are only a 3-3.5-hour flight away from Turkey.

### **Anatolian City Brands**

Anatolian City Brands (ACB) consist of cities (e.g. Istanbul, Ankara, Izmir, Antalya) that have/will come to the forefront in the health tourism field. As health tourism destinations, cities compete with each other at national and international level. Therefore they have to be branded. NGOs, municipalities, local organisations/institutions, and especially central governments are involved in the branding of cities.

### **Anatolian Corporate Brands**

Anatolian corporate brands consist of individual enterprises operating in the field of health tourism. These corporates include public and private health and tourism organizations, intermediary institutions, thermal facilities, spiritual treatment businesses, phytotherapy businesses, and care businesses that directly or indirectly operate in the field of health tourism. The branding process of these corporates is carried out in coordination with the initiatives for sectoral and country brands but individually.

### **Anatolian Personal Brands**

Anatolian personal brands consist of individuals operating/to be operated in the field of health tourism. These individuals include people who have/will come to the forefront in the five main fields of Anatolian Blessings mentioned above. In Turkey, especially in the field of medical medicine, some experts have come to the forefront. However, these people are required to be marketed in the international markets and therefore to be branded. This is required because informed health tourists would like to choose their practitioner who is a valuable component of the health tourism's value chain. The branding process of these people is carried out in coordination with the initiatives for sectoral, city and country brands but individually.

### **CONCLUSIONS**

As it is obvious, this paper has aimed to propose a specific, qualified, and viable branding model in health tourism and present the Turkish case in view of 'identifying and developing brand plans'—one of the four steps of the strategic brand management process. Relevant actors and stakeholders should build the remaining three pillars of the branding process, i.e. designing and implementing brand marketing programs, measuring and interpreting brand performance, and growing and sustaining brand equity, on the specific, qualified, and viable plan presented in the study.

To become a sustainable global actor and brand in the health tourism sector in the long term, Turkey should swiftly and simultaneously accomplish its Blessings of Anatolia-oriented branding in the context of its mechanistic and organic capacity with a holistic perspective within the framework of specific business models. These should continuously be developed as well. We define mechanistic capacities as well as institutional capacities such as buildings, health technology, and legislation, while organic capacity refers to the trained and qualified health tourism labour force, health tourism philosophy and science, modes of production and intellectual capital. The capacity in these two paths should also be built on the framework of a sound, powerful, visionary, and sustainable business model. In this context, it becomes vital to carry ‘Anatolia Blessings Medicine’ into effect which we have proposed and attempted to summarize above.

In summary, we believe that Turkey will succeed when it establishes its mechanistic and organic capacities for the ‘Blessings of Anatolia’-oriented five main business models of health tourism. It is important to ensure a hierarchical branding process. If we embrace these blessings at the high policy level and can transform them into marketable products, Turkey will make an impact on the health tourism market and, thus, will be able to have a sustainable health tourism policy.

We believe that it is impossible for a country to be successful in the field of health tourism unless it follows the framework of a R&D-based innovative, original, and creative business model based on usable knowledge that incorporates an integrated, holistic, scientific, and hierarchical branding, as in other fields. In sum, we strongly believe that countries should shape the organization and strategy of their health tourism within the framework of the proposed business model with a strategic approach and viewpoint.

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