



Health Tourism in Mediterranean Region: North Cyprus, Turkey and Israel

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Abstract

Health tourism is one of the fastest growing sectors in both health and tourism. Mediterranean region could be named as the heart of health tourism as it is the center of three continents and the cradle of cultural heritage, with an additional advantage of mild weather. Turkey, Israel and North Cyprus are three countries in the region with a potential to significantly improve their success in health tourism sector. The aim of this study is to investigate the current situation, strengths and weaknesses of these three countries; and, to provide possible strategies for North Cyprus to enter the global market.

Keywords: Health Tourism, North Cyprus, Israel, Turkey, Tourism.

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INTRODUCTION

The Mediterranean Region

Mediterranean region involves countries around the Mediterranean Sea, the largest inland sea in the world; characterised with a warm climate. It is the merging point of three continents: Europe, Africa and Asia. For centuries, region has served as the major trade route for the empires (Mediterranean, 2018). Topography of the region alters from hills and mountains to sandy beaches. Sunny summers, mild climate and sandy beaches; together with the great historical artefacts, make the Mediterranean region a perfect spot for tourism.

There are 24 countries over 3 continents in the region. Spain, Italy, France, Monaco, Malta, Slovenia, Croatia, Bosnia-Herzegovina, Montenegro, Albania and Greece are in Europe. Gibraltar is also a European region controlled by the United Kingdom. Turkey is in the Eurasian region, at the location where Europe meets Asia. Cyprus is in the north-eastern part of the Mediterranean Sea, with two divisions where southern region is Republic of Cyprus, a European Union member country and the northern region is Turkish Republic of Northern Cyprus, an independent state protected with the guarantorship of Turkey. Syria, Lebanon, Israel and Palestine are in Asia. Egypt, Libya, Tunisia, Algeria and Morocco are in Africa (Mediterranean, 2009).

Western and eastern parts of the Mediterranean Sea have slightly different cultural structures. Western Mediterranean region possesses a more western cultural harmony, including breezes from Italian, Spanish, Andalusia culture and history. Eastern Mediterranean region has an older historical and religious presence. Historically, the crescent-shaped region including Turkey, Middle Eastern countries and North Africa shores is known as the Fertile Crescent and is believed to be the starting point of humanity (Haviland, Prins, Walrath, & McBride, 2013). The region has become home to countless civilizations as well as different religions, for decades, centuries and millennia (Bingöl, 2004). This resulted in presence of unique historical and cultural monuments and artefacts. Culture of the region acts as one of the most important factors for tourist attraction. Turkey, Israel and North Cyprus are three major tourist attractions located at the Eastern Mediterranean Region.

Turkey, the merging point of Europe and Asia, is estimated to have a population of 84 680 273 people (TÜİK, 2021). The capital city is Ankara but İstanbul is the largest and most well-known city. The official language of the country is Turkish. Turkey is governed by a unitary

presidential system-based republic. President of the country is Recep Tayyip Erdoğan. Presidential and parliamentary elections are repeated every 5 years. Area of the country is measured as 769 630 km² (NTV, 2021). Gross domestic product of the country in 2022 was estimated to be 853 billion USD, adding to 9 961 USD per person (IMF, World Economic Outlook Database, 2021). GINI coefficient of the country was 41,9 in 2019, ranking as middle (Bank, 2019). Human development index is 0.838, ranking as very high (Nations, 2022).

Israel, is estimated to have a population of 9 459 260 in 2022. 74,2% of the population was recorded as Jewish whereas %20,9 of the population was Palestinians-Arabs. 4,8% of the population was registered as the non-Arabic Christians or was with no registered religion (IRIN, 2016). Israel is the only country in the world that is Jewish. Hebrew and Arabic languages are spoken in the country. The capital of the country is controversial. The largest city is Tel Aviv and the currency used in the country is New Israeli Shekel. Jerusalem is globally one of the top religious attractions for Muslims, Christians and Jews. The country is ruled as a unitary parliamentary republic. The president of the country is Yitzhag Herzog and the prime minister is Binyamin Netanyahu. Knesset acts as the parliament council. 120 members of the parliament are elected every 4 years. The president is elected from the parliament with 5 years duration. The area of the country is measured as 20 770 km². Israel economy relies on 3 sectors: tourism, agriculture and industry (Coğrafya Dünyası, 2021). Gross domestic product of the country in 2021 was estimated to be 446,71 billion USD, adding to 47 602 USD per person (IMF, World Economic Outlook Database, 2020). GINI coefficient of the country is 34.8, ranking as middle (GINI, 2018). Human development index is 0.919, ranking as very high (Nations, 2022).

Turkish Republic of Northern Cyprus is located on the northern part of the Cyprus Island. The country is under global embargoes towards numerous sectors such as sports, transportation and economy. The country has a rich cultural and historical background, including traces from Venetians, Ottomans and United Kingdom. Capital of the country is Nicosia. Currency used is Turkish Lira and the official language is Turkish. The country is governed by a semi-presidential system based republic. Elections for 50 parliament members are held every 5 years. President of the country is Ersin Tatar and the prime minister is Ünal Üstel. Area of the country is measured as 3 555 km². The population is estimated to be 382 836 (Anadolu Ajansı, 2022). Gross domestic product of the country in 2020 was estimated to be 21 400 billion Turkish Lira, adding to 10 555 USD per person (Devlet Planlama, 2020).

In terms of competition capacity, North Cyprus projects a more closed economy but Israel and Turkey are two important forces in the region. Both countries follow an open economic policy and meets raw material needs in advantageous ways. Turkey holds the advantage of having a very large area and productive conditions in terms of agriculture. Also, for human workforce, the current state of currency puts Turkey in an advantageous condition. For tourism, three countries could have a strong competition. Culturally, all countries provide opportunities. Summer holidays are also provided by Antalya Region of Turkey, Dead Sea and Herzliya regions of Israel and Kyrenia, Famagusta, İskele regions of North Cyprus.

Health Tourism

As travel, transport and cooperation eases at an international level, higher quality or lower costs of healthcare in different countries attracts the interest of patients and potential patients. This has significantly increased the importance of health tourism concept. Concept of cheaper and high quality healthcare combined with a beach or cultural holiday seems very attractive for patients either with or without budget-based difficulties. Therefore, health tourism could be defined as the visit of individuals to a country to receive curative, preventative, rehabilitative or health-promoting services. Health tourism sector involves 4 concepts; medical, thermal health, elderly and disabled tourism.

Health tourism sector enables the growth of both health institutions and national economy (Tontuş, 2022). There are numerous factors that shape health tourism. First of all, as the time people can spend on leisure activities increase by time, people become inclined to the leisure activities that support motivations for a healthy lifestyle. Also, with ageing populations, healthcare becomes a significantly more important necessity and this results in an over-burdened healthcare system. People who have the opportunity would want to escape this system. Moreover, development of technology resulted in invention of cutting-edge diagnostic and therapeutic devices which all countries or all hospitals cannot afford. This causes specialization amongst hospitals and even amongst countries. As health tourism sector has countless possibilities and various branches, estimating the size of the market possesses great difficulties. According to the Medical Tourism Association, 2018 market size reached 100 billion USD (World Tourism Association, 2022).

Health tourism is interlinked to many other sectors including transportation, tourism, communication, information technology, travel, finance, construction, health institutions and brokerage firms (Tontuş, 2022).

Globally, numerous countries compete for health tourism. Each have their advantages and target groups. For example, for African market, Republic of South Africa and Tunisia are preferred choices. For Gulf countries and the Middle East, United Arab Emirates, Iran and Jordan are popular destinations. Israel which is located in the Middle East, attracts patients from Europe, Russia and Cyprus. For America continent, United States of America attracts patients with high-income for the latest technology treatment but the citizens of the country are fond of receiving possible treatments abroad due to lower costs. Brazil, Canada, Cuba, Mexico and Costa Rica also offer health tourism options. In Asia, China is well-renowned for providing alternative and complementary therapies. South Korea, Malaysia, India, Singapore, Thailand, Taiwan and New Zealand are popular medical tourism destinations for patients living in the Asia and Pacific region. In Europe; United Kingdom, France, Hungary and Germany are well-liked medical tourism destinations. Turkey, has the potential to attract patients from Europe, Asia, Middle East, Gulf Countries and North Africa. Location and price are the two important factors for attracting such a wide patient population range. Also, culture and possibility of joining thermal, beach, winter, action and countless more holiday types make Turkey an attractive destination. North Cyprus, has a similar opportunity on a smaller scale. Also, due to the British history of the country, the island is well-known in the United Kingdom and the country becomes preference of such patients.

Turkey provides a good quality medical care, proven with accreditations, in numerous specialties including plastic surgery, ophthalmology, gynaecology, internal medicine, biochemistry, dentistry, general surgery, orthopaedics, ear nose throat surgery and infectious diseases. Turkey treated 701 046 patients, receiving an income of 1 492 438 000 USD in 2019, within the scope of health tourism. Even in 2020, although the presence of a global pandemic, 407 423 patients preferred Turkey for health issues, creating an income of 1 164 779 000 USD. In 2022, with lifting of travel restrictions, 1 258 382 health tourism patients were recorded in the country that generated an income of 1 926 094 000 USD (USHAŞ, 2022). These official numbers are debated to be incomplete as most of the hair transplant patients remain unrecorded and hair transplant stands as the top preference of patients for visiting Turkey for health tourism. Each hair transplant patient is estimated to spend an amount starting from 2 000 USD. Initially, the majority

of the health tourism patients was from Gulf countries but this situation has changed in the last years. Nowadays, 70% of the patients are estimated to be from Europe, especially Italy, Spain, Holland, Austria, France, Sweden, Norway and Finland (Elmacioğlu, 2022). Turkey's success in health tourism has the leader advantage: Turkey was one of the first countries to offer health tourism. This also resulted in the country gaining a vast experience in the sector. The new strategy Turkey follows is creating a package for the tourist patients. The package involves hotel, transportation, sightseeing tours and hospital expenses. Therefore, patient is guaranteed that no additional costs will appear. Physical location closeness, easy visa procedures, low costs and accessibility are listed as the reasons for patients preferring Turkey for health issues (Gündüz, Gündüz, & Yavuz, 2019). Technological advancements, patient experience, legal guarantees, religious similarities, touristic attractions, low waiting time also were amongst the causes of preferring Turkey (Sağ & Zengül, 2018). In terms of thermal tourism, Turkey possesses tens of thermal complexes, with availability of complementary and rehabilitative therapies. There are few limitations of the country in the health tourism sector. First of all, marketing is relatively neglected when compared to the improvement in health services. Also, the integrated approach of health tourism bears glitches. Data and information sharing with the Ministry of Health could be inaccurate at times. These all could be reasoned to the country missing a clear national strategy for management of health tourism.

Israel follows a different strategy for health tourism compared to many other countries. The country has created a niche market with the latest technology and cutting-edge researchers to provide the top-quality treatment. In 2006, 15 000 patients went to Israel for health purposes and this generated a revenue of 40 million dollars (Haaretz, 2008). In 2010, this number was raised to 30 000 patients. In 2012, income of the country from health tourism was calculated as 140 million USD (Shuttleworth, 2013). Israel is well-renowned for in-vitro fertilization, surgery and cancer treatment. For bone-marrow transplantations, Israel could be listed as one of the best treatment locations globally. This procedure is not available in Cyprus and Cyprus government has made an agreement with Israel government to send all Cypriot patients with bone transplantation requirement to Israel. Apart from medical treatments, Dead Sea provides a great opportunity for thermal tourism. The mineral content of the water has become a great research interest internationally. The mild weather, iconic cultural artefacts and religious importance of the country attracts patients who also have secondary aims such as having a holiday or visiting Jerusalem. The

quality of healthcare in Israel was justified as the medical Tourism Index ranked Israel as one of the most popular medical tourism destinations and the best experiences of patients; Israel was ranked as third as the best location for Non-Israeli patients to receive care (Second Opinion Group, 2015). But, this quality was achieved at one important cost. These beds were otherwise going to be provided for Israel citizens. The essential problem preventing expansion of health tourism in this country is the shortage of beds. In Israel, it was reported that 1,91 hospital beds exist per 1000 citizens which is much lower than 3,4 beds value of countries of Organisation for Economic Co-operation and Development (OECD) (Shuttleworth, 2013).

North Cyprus is relatively new to the health tourism sector. As the country and the population are smaller compared to countries like Turkey and Israel, the targets for health tourism are smaller scaled. The recent target set by the country is to reach 10 000 patient tourists and 100 million USD income (Kıbrıs Gazetesi, 2022). There is no accurate data available for health tourism in the country. The essential reasons for this situation possibly are government not placing an adequate emphasis on regulating the process and gathering information. Doctors or small medical centres are working individually with brokerage agents to promote their health tourism facilities. The leading speciality for health tourism in the country is in-vitro fertilization as availability of oocyte donors places the country in a beneficial situation compared to the rest of the world. And, the second largest speciality is plastic surgery, due to operations being available for lower prices in accredited institutions. The market for plastic surgery especially targets the United Kingdom. The greatest limitation of the country is unavailability of direct flights. Patients reach the country via Larnaca Airport in Republic of Cyprus or via Turkey airports.

Opportunities for Health Tourism in North Cyprus

Turkey and Israel both hold a reputable place within the health tourism sector. North Cyprus is located in between these countries, with a great unliberated potential. In terms of cultural heritage and weather, North Cyprus could provide conditions similar to Turkey and Israel. Success in health tourism could even provide North Cyprus with an additional advantage: promotion of the country to the world. Health tourism could be a legitimate way to ease the bureaucratic and diplomatic obstacles.

An effectively working national data collection and regulation system is necessary for the country in order to measure both progress and quality of health tourism services. National and international grants could be instrumentalized to improve the technology and infrastructure.

Afterwards, a progressive marketing strategy is required to compete with the neighbouring countries. Also, grants could be provided on basis of the number of threatened patients, in order to encourage registration of the numbers of treated patients. There is an actively working Cyprus Health Tourism Council, trying to improve the health tourism sector in the country. This council places a great emphasis on the Map2heal project which is an international software featuring 151 network offices from 90 countries. The council is aiming to develop a health tourist admission system special for North Cyprus (Sözeri, 2020).

As in-vitro fertilization is the top health tourism service in the country, this service could be promoted using social media and international medical conferences. North Cyprus has an obvious price advantage when compared to other countries, especially Israel which is also very successful in in-vitro fertilization treatment. North Cyprus is increasingly preferred as a retirement home by especially British and German citizens. Health and retirement complexes could be built to target long term stay of this patient group.

Apart from social media and mass media advertisements, technological novelties such as Metaverse could be instrumented to create an innovative project and promote the health tourism facilities. A valid pathway to promote the quality of medical care in the country is to encourage presentations at international fairs and medical conferences. In the literature, studies about health tourism in North Cyprus are extremely limited. It would be unfair to expect a medical professional to promote the medical treatment in a country that he or she does not know anything about. Aside medical specialities, even the health tourism sector currently lack information about the health tourism facilities in the country. For patients to trust the services in the country, it is important to first impress their local doctors. As visibility of the country in medical literature increases, the number of tourists preferring the health services of the country would also be expected to increase.

CONCLUSION

North Cyprus, at the heart of the Mediterranean region, possesses a great undisclosed potential for health tourism. However, let alone international marketing, the national mechanisms in the country are still open to progress. A national strategy and control mechanism is a necessity. Marketing and promotion of the health tourism facilities could then employ numerous strategies such as use of social media, technology and medical conferences.

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