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JOHNS HOPKINS

Turkey as a Medical Destination *Physician's Perspective*

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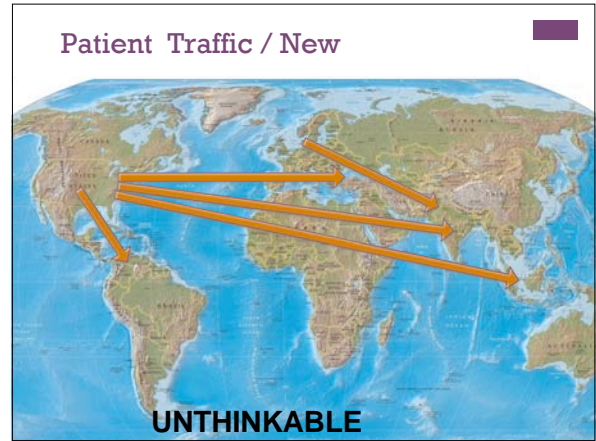
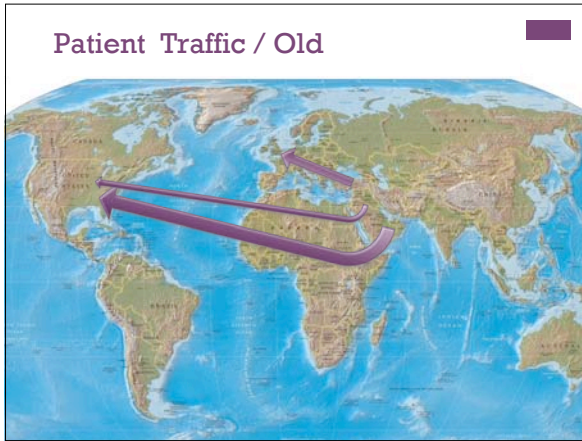
1995 Fellow, Cardiovascular Surgery & Cardiopulmonary Transplantation

MAYO CLINIC

CHLA USC

Texas Heart Institute
Houston, Texas

1994 Fellow, Cardiac Surgery & Tx



+ Patient Expectations

AFFORDABLE

HIGH QUALITY SAFE CARE

IOM Expectations:

- Safe
- Efficient
- Effective
- Timely
- Patient-centered
- Equitable

Patients are neither willing to sacrifice perceived quality nor pay more for care

+ Drivers / Global

OLD	NEW
<ul style="list-style-type: none"> ■ No local technology ■ No local expertise 	<ul style="list-style-type: none"> ■ Rising healthcare costs in developed countries ■ Late/difficult access to local healthcare ■ No local advanced technology/expertise ■ Access to treatments that have yet to achieve regulatory approval within the patient's own country ■ Global trend for wellness/cosmetics also in the middle class

+ Drivers / Turkey



From West

- Rising healthcare costs in developed countries
- Advanced technology/expertise in speciality areas
- Better quality/price ratio
- Impressing hospitality

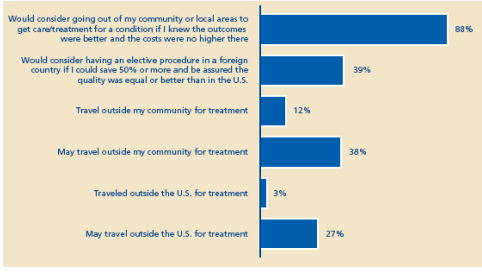
From East

- Advanced Technology
- Expertise
- Speciality focused healthcare
- Rising healthcare costs in developed western countries
- State of the art facilities

+ Major drivers in general

- Cost savings
- Access to advanced treatment
- Shorter waiting periods
- Comparable or better quality care

+ Consumer interest (US) in outbound medical tourism



Source: Deloitte/Medical Tourism, 2008

+ Turkey

Physicians

- Standardized education in medical schools (6 years)
- Structured residency programs accredited by MoH
- Strong regulatory mechanism
- US fellowships and residencies

Nurses & Paramedical

- Deficient Language skills
- Shortages
- High Attrition

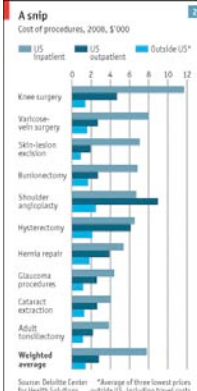
Hospitals

- State of the art facilities
- Highest number of JC Accredited hospitals outside US
- Health Information technology

+ Why Turkey

Value = $\frac{\text{Clinical Quality} + \text{Patient Satisfaction}}{\text{Cost}}$

PROCEDURE	ASM	UK	GERMANY
Cyberknife	10,000 €		17,000 €
Angioplasty	5,000 €	12,000 €	8,000 €
CABG	10,000 €	22,000 €	12,000 €
Aort Valve Replacement	9,500 €	23,000 €	15,000 €
Mitral Valve Replacement	12,400 €	23,000 €	16,000 €
IVF	2,600 €	7,000 €	6,500 €
Knee Replacement	6,700 €	11,000 €	8,000 €
Hip Replacement	8,300 €	13,000 €	10,000 €
Liposuction	2,900 €	6,000 €	5,500 €
Rhinoplasty	2,700 €	6,500 €	6,000 €



Source: Deloitte Center for Health Solutions. *Average of three lowest prices outside US, including travel costs

+ Quality competitive with developed market centers of excellence

AHA Metrics

	ASM	COE
Aspirin at arrival	100 %	100 %
Aspirin at discharge	100 %	100 %
B-blocker at arrival	100 %	100 %
B bloker at discharge	100 %	100 %
ACEI for LV Dfx	100 %	100 %
Door to Balloon time	44 min	86 min

Mortality

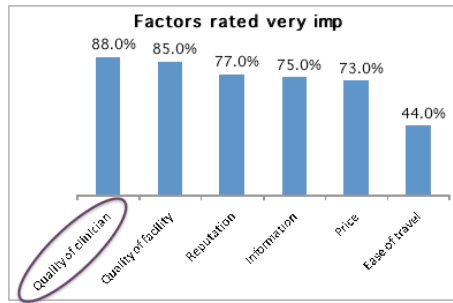
	ASM
CABG	0.2 %
Valve Replacement	0 %
CABG-VR	0.5 %

Infection Rate*

	ASM
CABG	0.7 %
Overall Cardiac Surgery	1.02 %

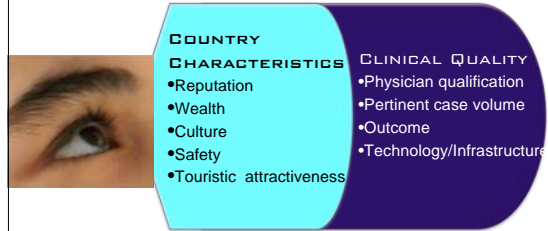
*MRSA-free hospital

+ Influences on choice



Source: © Intuition Communication Ltd 2008
www.treatmentabroad.com

+ Perceived quality is a combination of country characteristics and clinical quality



+ Turkey / SWOT

- State-of-the-art healthcare provision
- Latest technology
- Very good physicians
- Caring nurses
- Affordable prices

- No well defined national strategy about health tourism
- Missing cooperation among service sectors
- Lack of trust to country, overall
- Heterogeneous level of hospitals
- Lack in foreign language knowledge

- Close relationship of nearby countries with Turkey
- Big number of Turkish nationals abroad, especially Europe
- Huge number of not/under-insured people in Europe and US seeking quality healthcare

- Healthcare investments of surrounding countries (Dubai, Israel, Jordan...)
- Political instabilities and terrorism too much in the international press
- Difficulties in after-care and follow-up

+ Challenges to solve

- Universally accepted quality standards and credentialing
- Portable medical records
- Medical information exchange platforms
- Liability
- Pre-certification
- After care
- New insurance products



+ Most important

- Communication
- Quality measures
- Outcomes
- Invoices/Fees
- Improving standards also to enable patients to compare treatment in different countries

TRANSPARENCY

+ Who is responsible if something goes wrong

- Lack of clarity on malpractice jurisdiction
- Physicians' responsibilities
- Xenophobia
- Lack of continuum of care between home and destination

+ Physicians' role

- Learn cultural competence
 - Culturally-sensitive interviewing
 - Simultaneous interpreters
- Promote shared decision-making
- Understand patient expectations
- Be realistic !

PATH FORWARD

REALIZED POTENTIAL

SPIN-OFF

TURKEY
EMERGES
AS MAJOR
MEDICAL
TOURISM
DESTINATION

GDP Growth
Employment in Healthcare Sector
Employment in Tourism Industry
Overall Growth in Commerce
Reversal & Arrest of Brain Drain
Stimulus to Pharmaceuticals Industry
Growth in Insurance Industry
Better medical facilities for larger population
Catalyzes Turkey to the Club of Global Leaders

+ Five C's

- Common goals
- Commitment
- Competence
- Communication
- Coordination

TEAMWORK

+ Future Questions

- What is the **economic impact** of patients traveling for care?
- What are the potential implications for **clinical workforce migration**?
- What will **attract international patients** to Turkey?
How might Turkish providers best position themselves for medical travelers?
- Where are these **patients coming from**?
- How do the U.S. trends relate to global trends in patient mobility? How do they relate to trends in **outbound patients**?
- How do medical travelers **choose** destinations and providers?

+ We are committed



There, time is Istanbul...

"There, God and man, along with nature and art, created something of magnificent beauty worth seeing"

