

HEALTH PROFESSIONALS' STRATEGIC EVALUATION
OF HEALTH TOURISM: THE CASE OF TÜRKİYE



MEHMET BURAK SEZER

BOĞAZİÇİ UNIVERSITY

2025

HEALTH PROFESSIONALS' STRATEGIC EVALUATION
OF HEALTH TOURISM: THE CASE OF TÜRKİYE

Thesis submitted to the
Institute for Graduate Studies in Social Sciences
In partial fulfillment of the requirements for the degree of
Master of Arts
in
International Trade Management

by
Mehmet Burak Sezer

Boğaziçi University

2025

Health Professionals' Strategic Evaluation of Health Tourism:

The Case of Türkiye

The thesis of Mehmet Burak Sezer

has been approved by:

Assoc. Prof. Aslı Deniz Helvacıoğlu
(Thesis Advisor)

Prof. Arzu Tektaş

Assoc. Prof. Murat Levent Demircan
(External Member)

May 2025

DECLARATION OF ORIGINALITY

I, Mehmet Burak Sezer, certify that

- I am the sole author of this thesis and that I have fully acknowledged and documented in my thesis all sources of ideas and words, including digital resources, which have been produced or published by another person or institution;
- this thesis contains no material that has been submitted or accepted for a degree or diploma in any other educational institution;
- this is a true copy of the thesis approved by my advisor and thesis committee at Boğaziçi University, including final revisions required by them.

Signature.....

Date.....

ABSTRACT

Health Professionals' Strategic Evaluation of Health Tourism:

The Case of Türkiye

This study aims at examining the dynamics of health tourism in the Türkiye's health sector. It captures the actual state of Türkiye's position in health tourism that accelerates in line with the expansion of global health tourism market, advances in technology, and with increasing international patient demands. The study employs data gathered from questionnaires filled out by 52 health professionals from 46 different hospitals in Türkiye. The findings of the study highlight the areas of concern for such issues as the impact of health tourism certifications on foreign patient admissions, strategic development recommendations that impact hospital choices, and technology spending. The study presents the competitive strengths, Türkiye's challenges, and development opportunities for health tourism market. It also emphasizes how Türkiye should pursue strategic steps towards boosting its foreign patient reception for the health tourism sector by outlining policy recommendations.

ÖZET

Sağlık Profesyonellerinin Stratejik Sağlık Turizmi Değerlendirmeleri:

Türkiye Çalışması

Bu çalışma, Türk sağlık sektöründeki sağlık turizminin dinamiklerini incelemeyi amaçlamaktadır. Küresel sağlık turizmi pazarının genişlemesi, teknolojideki ilerlemeler ve artan uluslararası hasta talepleriyle uyumlu bir şekilde Türkiye'nin sağlık turizmindeki mevcut durumunu yakalamaktadır. Çalışma, Türkiye'deki 46 farklı hastaneden 52 sağlık profesyoneli tarafından doldurulan anketlerden elde edilen verileri kullanmaktadır. Çalışmanın bulguları, sağlık turizmi sertifikalarının yabancı hasta kabulü üzerindeki etkisi, hastane seçimlerini etkileyen stratejik gelişim önerileri ve teknoloji harcamaları gibi konulardaki önemli alanları vurgulamaktadır. Çalışma, Türkiye'nin rekabetçi güçlü yönlerini, karşılaştığı zorlukları ve sağlık turizmi pazarındaki gelişim fırsatlarını inceleyip ortaya koymaktadır. Ayrıca, bu çalışma Türkiye'nin sağlık turizmi sektöründe yabancı hasta kabulünü artırmak için atılması gereken stratejik adımları belirterek hem hastaneler hem de devlet için stratejik öneriler ortaya koymaktadır.

TABLE OF CONTENTS

CHAPTER 1: INTRODUCTION	1
CHAPTER 2: LITERATURE REVIEW	4
2.1 Overview of health tourism concept.....	4
2.2 History and evolution of health tourism	6
2.3 Overview of health tourism types.....	8
2.4 Future potential of health tourism.....	15
CHAPTER 3: METHODOLOGY	17
3.1 Research design	17
3.2 Sample selection	17
3.3 Data collection	18
3.4 Data analysis.....	19
3.5 Ethical considerations.....	19
3.6 Limitations.....	20
CHAPTER 4: HYPOTHESIS	21
4.1 H1 The health tourism-certified hospitals have higher rates of international patient admissions compared to non-certified hospitals.....	21
4.2 H2 Hospital choice for foreign patients is positively influenced by strategic development by enhancing the quality and scope of the hospital services.....	21
4.3 H3 Hospitals that emphasize health tourism tend to admit a greater number of patients.....	22
4.4 H4 Quality of healthcare service, affordability of prices, and accessibility are important to international patients when selecting a hospital.....	23

4.5 H5 International patients primarily seek healthcare services such as surgical procedures, aesthetic treatments, and dental care	24
4.6 H6 Effective communication improves patient satisfaction when receiving healthcare services	25
4.7 H7 Mostly neighboring countries and regional markets are drawn to Türkiye's accessible, affordable, and high-quality healthcare services.....	26
4.8 H8 The effective utilization of health tourism incentives positively impacts the growth and competitiveness of hospitals in the health tourism sector	26
4.9 H9 Hospitals' investments in technology enhance their potential for health tourism and positively influence the preferences of international patients	27
4.10 H10 Hospitals that collaborate with foreign agencies and insurance companies have higher rates of international patient admissions compared to those that do not.....	27
4.11 H11 Foreign patients prefer hospitals that offer high-quality healthcare services and have advanced technological infrastructure; these factors positively influence their decisions regarding health tourism	28
4.12 H12 Increased financial incentives, effective marketing strategies, and a strong focus on high-quality service delivery positively affect the development of health tourism in Türkiye	29
CHAPTER 5: FINDINGS.....	32
5.1 Evaluation of health tourism certification on international patient admissions	32
5.2 The importance of strategic development recommendations to influence patient hospital preferences	34

5.3 How hospitals perceive and prioritize health tourism	38
5.4 Evaluation of international patients' choices in hospital selection	41
5.5 The services that international patients most frequently seek	46
5.6 Evaluation of communication with International Patients	49
5.7 Evaluation of international patient inquiries by country	52
5.8 Evaluation of incentives utilization by hospitals	55
5.9 Technological investments of hospitals	57
5.10 Collaborating with external resources in order to reach more international patients.....	63
5.11 Factors positively effects international patients to prefer hospitals.....	66
5.12 Evaluation the development of health tourism in Türkiye	69
CHAPTER 6: POLICY RECOMMENDATIONS	77
CHAPTER 7: CONCLUSION.....	80
CHAPTER 8: LIMITATIONS OF THE RESEARCH.....	81
APPENDIX A: SURVEY FOR HEALTH PROFESSIONALS.....	82
APPENDIX B: ETHICS COMMITTEE APPROVAL	87
REFERENCES.....	88

LIST OF TABLES

Table 1. Types of health tourism, key features (Kantar & Işık, 2014)	9
Table 2. Health tourism categories (Cohen, 2008).....	14
Table 3. Patient ratio and certification	33
Table 4. International patient ratio and incentives	55
Table 5. Incentives and quality standards	56
Table 6. Technological investment types	58
Table 7. Document upload system	61
Table 8. Factors mostly effect international patients.....	67
Table 9. Likert scale question answers.....	71

LIST OF FIGURES

Figure 1. Categories of hypothesis.....	31
Figure 2. International patient ratio among hospitals.....	37
Figure 3. Priority ratio among hospitals.....	39
Figure 4. Reasons for international patients.....	44
Figure 5. Popular specialties for international patients	48
Figure 6. Communication channels	50
Figure 7. Popular countries choose Türkiye	52
Figure 8. Sources to bring international patient	64
Figure 9. Suggestions	73

CHAPTER 1

INTRODUCTION

In the past several years, health-care tourism sector has gained an international outlook, and become a major industry (Aydin & Karamehmet, 2017). Health-care tourism industry's growth relies upon a set of factors that include the comparatively high prices of medical interventions in developed countries, availability of foreign travel with reasonably priced options, improved availability of higher-quality goods and services in developing nations, higher demands for cosmetics and dental treatments, higher complexity of health-care tourism services, support and incentives from governments, and advancements in information and communication technology (Connell, 2006; Pafford, 2009; Cohen, 2011). In this context, health tourism has emerged as a rapidly developing industry with diverse economic, social, and cultural impacts worldwide. Health tourism involves the travel of individuals to other countries to receive healthcare services that are either unavailable or costly in their homelands (Aydın & Altuntaş, 2015). Offering wide ranges of medical procedures, such as cosmetic surgery and dental procedures, cardiovascular, orthopedic, oncology, and neurological procedures, health tourism not only improves countries' healthcare systems but also generates foreign exchange revenue as service import (Collins et al., 2022).

Türkiye has achieved remarkable growth in health tourism in recent years, making it an important destination not for the regional but also for the international health tourism market (Sakarya, 2023). The appeal of Türkiye derives from its geopolitical location, quality healthcare system, experienced healthcare personnel, internationally certified hospitals, and affordable prices, which also render it suitable

for foreign patients (Omay & Cengiz, 2013). Interestingly, Türkiye's income from health tourism was approximately \$2 billion in 2019 due to its popularity for several procedures such as ophthalmology, oncology, and orthopedic surgeries (Shabankareh et al., 2023). Additionally, in Türkiye the revenue gathered from health tourism increased to a bit more than \$3 billion in 2024 (Tiryaki, 2025). This growth, supported by the Ministry of Health. There is responsible news that affirms the growth (Sabah, 2024). These benefits enable Türkiye to attract more patients in health tourism, thereby strengthening the country's economy (Shabankareh et al., 2023).

The government's role, coupled with the private sector's input, has been at the center of Türkiye's achievements in health tourism. Türkiye's healthcare sector has undergone huge restructuring with vast investment in medical tourism infrastructure, transport, and partnerships with international players like Johns Hopkins and Harvard Medical School (Collins et al., 2019). These collaborations contribute to the reputation and global recognition of Türkiye's healthcare services, encouraging greater patient satisfaction and trust in the industry.

This study focuses on the development of health tourism in Türkiye from a professional perspective by assessing the perceptions of different managers of hospitals. Notably, the study presents the views of 52 hospital managers coming from different public and private Türkiye's hospitals. This study presents the role of health tourism within hospital management covering both the strategic evaluation of the industry by managers, and the most problematic issues faced by the industry. The primary aim of this study is to understand the dynamics of health tourism industry and assess the possible development paths in Türkiye through the lens of health

professionals, to achieve managerial solutions and to offer strategic recommendations to boost the effectiveness of health tourism.

The study is composed of three parts. The first part provides a description of health tourism with a global outlook, the second part develops hypotheses and employs a survey on the perceptions of the health professionals, the last part presents policy recommendations based on the findings of the survey. This study contributes to the literature by capturing the contemporary dynamics of the Türkiye's health tourism market and provides an in-depth analysis of the critical factors that the health service providers put emphasis on Türkiye. These factors include hospital administrators' role, decision-making, strategic practices. The results of the study aim to propose solutions for the challenges in health tourism market in Türkiye and to provide recommendations for policymakers and managers in the health tourism sector.

CHAPTER 2

LITERATURE REVIEW

2.1 Overview of health tourism concept

The World Health Organization defines health as "a state of complete physical, mental, and social well-being, and not simply the absence of disease or disability" (World Health Organization [WHO], 2025). The World Tourism Organization (WTO) defines health tourism as visits to spas or health centers aimed at improving physical health. Health tourism requires traveling outside one's native country to receive medical care for the aim of healing different diseases. The concept has developed from broader tourism descriptions to describe individuals' desires to improve physical and mental well-being. In Türkiye, it is defined as travel for treatment alone, even though medical and health tourism terms used as same concepts, medical tourism is a sub-category of health tourism according to the Ministry of Health (Genc et al., 2012).

Health tourism entails taking advantage of diverse holiday parallel opportunities together with tourism travel to tourist areas, as well as to receive a specific health service. International health tourism is identified as being among the oldest forms of tourism, dating back to antiquity (Drăghici et al., 2016). Over the last few years, health tourism has extended beyond traditional thermal and spa tourism to include international travel for hospital treatment. This has massively boosted the economic potential of health tourism, and it has gone noticed by many nations. The International Medical Travel Journal reports that the global health tourism business will experience considerable development, referring to the increasing tendency to seek medical solutions abroad (PAPP et al., 2016). As awareness increases about

possibilities, individuals are more interested to look for better alternatives and rates in international markets than to settle for local healthcare.

Medical tourism involves patients traveling across international borders to receive treatment, surgery, and a range of healthcare services. This phenomenon provides an alternative option for individuals seeking affordable or specialized medical care (Nabi et al., 2023). Several factors drive the growth of health tourism. The increase in the population of the world and the resulting demand for various health services are significant considerations. Literature indicates that with an increase in life expectancy, there is also an increase in the demand for a variety of healthcare services (Aydın et al., 2024). The rising healthcare costs in most developed countries have also resulted in individuals seeking other countries that offer low-cost, but quality medical care (Merdivenci & Karakaş, 2020). Snyder et al. (2010) notes that the escalating costs of healthcare in industrialized nations have led patients to find alternatives that are cost-saving and provide less waiting time. The advancements in communication and transportation technology have also been influential in promoting health tourism. The use of information technologies enables potential patients to easily seek out and compare foreign services. It is expected that medical tourism will be expanding with the ease of obtaining information (Çoban, Öztürk, & Ekinçi 2020).

Besides, high healthcare expenditure in industrialized countries, challenges facing social security systems, and populations that are aging at a high rate further increase the popularity of health tourism. Research indicates that high volumes of patients from countries with stressed healthcare systems seek foreign trips in search of timely and less costly treatment options (Snyder et al., 2010). The presence of

advanced medical technologies and specialists in some countries increases their attractiveness as health tourism destinations.

In summary, health tourism addresses individual health needs while also representing a substantial and expanding economic sector. As this market continues to grow, healthcare providers and tourism industries must remain alerted about emerging trends and developments in health tourism, planning effective strategies to meet the changing demands of patients.

2.2 History and evolution of health tourism

Health tourism can be traced as far as ancient civilizations. It began when individuals traveled from the Mediterranean Sea to Epidaurus in the Peloponnese. The Persians also utilized steam and mud baths and were aware of the healing properties of the Dead Sea (Cioban et al., 2018). This custom dates back at least two thousand years, and most accounts indicate that the ancient Greeks and Romans spent lengthy journeys searching for cures and to bathe in therapeutic thermal springs (Omay & Cengiz, 2013). It embraces all types of ancient practices, from the Egyptian bathing and cosmetic use to the construction of Greek and Roman thermal and therapeutic baths with associated exercise routines, Arabian and Ottoman hammams construction, Japanese onsen indulgence, and European spa traditions with sea bathing and oxygen therapy in colonial spas (Smith & Puczko, 2008).

The term "spa" is believed to have originated from the Walloon word "espa," or "fountain." This reference stems from the Belgian village of Spa, renowned since the 14th century for its therapeutic thermal springs. Additionally, it can also be understood from the Latin term "sanus per aquam," it means that "health through water." In the UK, "spa" is used very widely, while in most other European countries

"thermal waters" is used (Kazandzhieva 2014). In the 16th century, rich aristocrats rediscovered Roman bathing culture of the past and gathered in masses to health cities like Baden in Austria. Bath became popular with nobles who grouped to recover and refresh themselves (Smith & Puczko, 2008).

The Renaissance time (14th-17th century) marks a shift in the history of health. Experiments were conducted on the bodies of executed individuals, texts were produced regarding infections, and numerous doctors were educated. Throughout history, health-related research conducted by clergy or other organizations eventually fell into the hands of medical professionals after the Renaissance, leading to the establishment of health professions and specialty areas (Aslan & Erdem, 2017).

In the 1960s, Yoga and Ayurveda were also becoming popular health practices, further increasing health tourism. Ayurveda was being practiced in India back as far as 5000 BC (Tosun et al., 2020). In the ancient Greek Empire, individuals would travel to the thermal springs for treatment purposes. Water of Niles and Jordan were used by both Egyptians and Israelites as well as Ganges River was used by Hindus in order to heal their body and soul. During the 18th century, rich Europeans would travel to the Nile for spa therapy (Gianfaldoni et al., 2017).

Health care expenditures in the United States skyrocketed more than threefold from 1972 to 1982, rising from \$94 billion to \$322 billion. This enormous increase has motivated them to look for alternatives abroad (Freeland & Schendler, 1984). In the 21st century, individuals whose locations provide cheaper prices and shorter waiting times have gained a lot of popularity (PAPP et al., 2016).

Joint Commission International (JCI), established in 1999 as the JC's international affiliate, accredits overseas hospitals. Some institutions pursue

international accreditation, and one such institution is the US-based Joint Commission (JC), the inventor of the business. The JC has accredited over 20,000 United States organizations (Aydin & Karamahmet, 2017). The company plays a vital role in building trust among the healthcare institutions and patients. During the Asian financial crisis in 1997, governments from most nations engaged in huge advertising campaigns to kick-start health tourism, and Thailand emerged as a leading nation for plastic surgery due to its cost-effectiveness (Cioban et al., 2018). Now, nations such as Saudi Arabia, UAE, Thailand, Singapore, Korea, Brazil and Türkiye are expanding their market share in health tourism because of JCI accreditations (Aydin & Karamahmet, 2017). Türkiye possesses 40 JCI-accredited hospitals. JCI (2025) The following sections of this report will deeply examine the case of Türkiye in health tourism and offer some recommendations.

Briefly, health tourism is a dynamic sector influenced by numerous cultural, economic, and technological factors throughout history. Today, it is a large global industry offering various healthcare services in numerous nations. This evolution continues to change to suit the changing demands of patients and the healthcare system.

2.3 Overview of health tourism types

Health tourism types are examined under two main categories, first one is the type of the tourism, and second one is the type of tourists. According to Ministry of Health in Türkiye, health tourism can be categorized into three primary segments: thermal and spa-wellness tourism, medical tourism, and senior care tourism. Some sources also define disabled tourism; however, it is included within the senior care tourism. This

classification reflects the diverse nature of services offered and the specific needs addressed within each segment (Genc et al., 2012).

Table 1. Types of health tourism, key features (Kantar & Işık, 2014)

Thermal and spa-wellness	Involves visits to natural hot springs and wellness facilities for health and relaxation therapies.	Rooted in ancient practices, emphasizes healing and relaxation, significant economic impact.	Historical locations like Epidaurus in Greece and contemporary spa resorts globally.
Medical tourism	Involves individuals traveling to other countries for medical procedures and treatments.	High-quality healthcare services, advanced medical facilities, often more affordable than home.	Cardiovascular surgeries, IVF, and cosmetic procedures in countries like Thailand, Türkiye and India.
Senior care tourism	Focuses on healthcare services for individuals aged 65 and older.	Growing elderly demographic, flexible travel options, tailored health services.	Rehabilitation, wellness retreats, and healthcare facilities catering to seniors.

2.3.1 Thermal and spa-wellness tourism

Thermal and spa-wellness tourism has been recognized as one of the oldest forms of health tourism. The healing properties of water, which were referenced by Hippocrates as early as about 1700 B.C., have been stamped throughout history to create bathing cultures and massage in cultures such as Greece and Rome (Zhong et al., 2021). They constructed baths and pools for beauty and health, with Epidauros in Greece being a famous healing center where individuals visited for medical as well as spiritual cures for many years in the past. Numerous European countries have a lengthy history of employing thermal and mineral waters for medicinal and therapeutic purposes (Pereira et al., 2023).

In modern settings, thermal tourism has diversified in addressing various health conditions, including stress management and nutrition guidance (Korkmaz & Arıkan, 2017). Thermal tourism is often regarded as a complementary therapy strategy, contributing significantly to local economies. For example, Sarajevo is known for its thermal springs, with the most renowned located in the Ilidza municipality. These thermal springs consist of sulphuric waters that are rich in calcium, sodium, potassium, and hydrocarbons. As a result, they are utilized for both the prevention and treatment for people (Hrnjić et al., 2016).

Wellness tourism is defined as travel in order to gain or improve an individual's well-being by the Global Wellness Institute (GWI). Korkmaz and Arıkan (2017) has defined thermal tourism as many different types of health treatments like thermal water, physical therapy, rehabilitation, thermos-mineral water bath, and mud activities conducted under the guiding care of expert staff. A region must have natural thermal resources, a good climate, and suitable facilities like hotels and trained health staff in order to be able to support thermal tourism.

Estimated spending on wellness tourism is a bit higher than \$700 billion in 2019. Even though, it dramatically declined to \$400 billion since the pandemic hits the world in 2020 (Yeung et al., 2021). According to report published by Global Market Insight market value of wellness tourism was \$995 billion in 2024 (Singh & Singh, 2025).

2.3.2 Medical tourism

Medical tourism refers to patients deliberately traveling from their home country to another nation to obtain non-emergency healthcare services usually in well-equipped clinics or hospitals. Medical tourism, in contrast with any other health tourism industry, does not rely on nature but on educated doctors and superior healthcare infrastructure (Johnston et al., 2010).

The history of medical tourism is conventional and modern. Conventional medical tourism was an expensive venture, with wealthy patients from developing nations traveling to developed nations for superior health care at a premium (Sarwar et al., 2012). Modern medical tourism has made cross-border health care affordable, with both developing and developed nations making travel across the border (PAPP et al., 2016).

This sector includes a wide range of medical procedures such as cardiovascular surgery, organ transplantation, fertility procedures such as IVF, cosmetic procedures, and specialized care for dental and ophthalmic needs. While some procedures such as cosmetic dentistry, and cosmetic surgeries may seem non-essential, they also require expert attention and are included within the medical tourism process (Noaman & Montargot, 2022).

Medical tourism is on the expansion for a number of reasons, among which is the higher cost of treatments in developed countries especially U.S. and U.K. The majority of people are looking for cheaper and yet quality alternatives elsewhere. Another reason of this expansion is that the patients who decided to go abroad for treatment, look for shorter waiting times (Aydin & Karamehmet 2017; Isikli et al. 2020).

Medical tourism has a wide range of populations that are attracted, from the retirees who come in for elective procedures to young people who need special treatments. Global cooperation exists among the providers of healthcare as hospitals and clinics form partnerships to receive medical tourists and provide high-quality interventions (Smith et al., 2011). The global medical tourism market was valued at USD 35.78 billion in 2024 and is projected to grow to approximately USD 252.94 billion by 2034, with a compound annual growth rate (CAGR) of 21.60% anticipated from 2025 to 2034 (Pandey, 2025).

2.3.3 Senior care tourism

The aging population in many countries has led to the creation of an attractive tourism segment known as senior tourists. This group is increasingly becoming an integral part of the global tourism and travel industry today (Hrnjić et al., 2016). Also known as senior tourism, this sector deals with healthcare services for individuals aged 65 years and older. Advances in medicine have enhanced life expectancy, and low fertility rates have resulted in a higher proportion of older persons compared to the youth population. This demographic trend positions senior tourism as a new market (WHO, 2024).

According to estimates by the United Nations, by 2050 the world's population aged 60 and more will be around 2 billion, which is more than the number of children between 0-14 years (United Nations, 2019). Otoo and Kim (2018) have stated that the elderly population is expected to be the most significant segments for tourism in the next 30 years, since the rising number of aging people in the society.

A recent publication has termed the older tourists as "silver tourist" and mentioned that such tourists have active lifestyle, with plenty of them continuing to work, having a significant amount of savings, and being willing to spend those funds on tourism (Buzulukova & Lobova, 2023). Eurostat data show that in 2021, European tourists aged in the "silver" group who traveled for personal purposes accounted for 33% of all European tourists (Eurostat, 2021).

The expected increase in senior tourism will create pressure for all types of services like travel tours, curative activities, and rehabilitation services. Seniors visit destinations with mild climates and natural beauty, and these also increase off-season tourism (Denzon, 2025). As a rapidly developing subsector of health tourism, senior tourism must cope with changing needs and expectations. Future directions indicate increased specialization and foreign competition in the senior tourism sector, driving innovation in the care services being delivered and concentrating on the quality of care available for this market segment (Sharma et al., 2025).

Second approach to categorize health tourism is according to the health tourists. They are segmented into different groups based on their motivations. Eric Cohen's typology identifies five broad categories of health tourism tourists (Cohen, 2008).

Among these categories, those primarily seeking health services represent an important market segment. Each group has unique needs, necessitating tailored

services and marketing strategies (Cohen, 2008). Healthcare service providers targeting health tourists need to adopt a multi-faceted strategy that includes personalized care in addressing the unique needs of different tourist segments, i.e., Medical Tourists Proper and Vacationing Patients. There must be an integrated marketing strategy with local travel and healthcare, and transparency of prices so that cost-effective clients can be attracted to the practice. Through these strategies, health service providers are better equipped to address the multifaceted needs of health tourists and maximize patient satisfaction in medical tourism (Dabbagh, 2017). Medical tourism development is increasing to encompass different activities from across various industries like medical care, travel, hospitality, safety, health system, government policies, destination management and marketing, education, research, and sustainability (Ile & Tigu, 2017).

Table 2. Health tourism categories (Cohen, 2008)

Visitor Type	Description
Mere tourist	Tourists who do not utilize any medical services during their visit.
Medicated tourist	Visitors who receive medical treatment due to an urgent illness or accident during their travels.
Medical tourist proper	Tourists who primarily travel for leisure but also seek medical treatment available in the region.
Vacationing patient	Individuals who travel for medical treatment and also engage in leisure activities afterward.
Mere patient	Tourists who travel solely for medical procedures without a leisure component.

2.4 Future potential of health tourism

The healthcare tourism sector will expand tremendously with competition in healthcare and price differentials remaining a main driver (Figueiredo et al., 2024). Experts predict that demand for cosmetic surgery, dentistry, and eye treatment will continue to increase and thereby fuel the pursuit of cross-border healthcare (Isikli et al., 2020). More countries intend to develop their health tourism sectors. Singapore, for example, even at higher costs, received about 646.000 patients in 2024, whose care can earn them \$270 million in income. The arrivals provide support for almost 15,000 additional jobs for the country (Media, 2025).

The international health tourism industry will most likely achieve phenomenal growth, with market size increasing from USD 248.9 billion in 2024 to USD 822.7 billion in 2034 at a (CAGR) of 12.7%. Improvements in medical technology, great demand for affordable healthcare centers, and supportive government policies are mainly responsible for the growth (Future Market Insights, 2024).

There is also increased demand for master's degree double programs in health tourism and special nursing training programs affecting to this sector (Çalışkan et al., 2024). Electronic technology innovations and R&D will most likely have a robust effect on health tourism growth. The insurance industry will thrive with such innovations, particularly in view of the requests for innovative insurance products for geopolitics risks together with emergency exit services (Dharmadhikari 2022).

The Türkiye's health tourism industry, supported by its strong medical infrastructure, experienced physicians, and competitive cost bases, can take a notable percentage of this international market. Türkiye's Ministry of Health is doing its best in the way of advertising Türkiye's medical centers and improving health tourism.

Health tourism generated \$2.3 billion (TL74 billion) in revenues in 2023, an increase from \$1.9 billion in 2022, based on the recent data from the trade ministry. Further, Türkiye also witnessed a whopping rise in the overall number of health tourists visiting the country, at 1.4 million in 2023 (Cetinguc, 2024).

Health tourism is emerging as a popular and comparatively new type of travel. It is a high-value added sector that offers employment in various sectors and is supported by most governments in terms of investments and incentives (Kilavuz, 2018; Saleh et al., 2015). As health technology advances further with digital means, Türkiye's role in telemedicine and remote health monitoring will also be set to drive future health tourism success for a more mobile global patient (Collins et al., 2019).

Kilavuz (2018) identified the most significant reasons why Türkiye is among the top choice destination places for travelers: its accessibility, quality of medical care, and competitiveness. Medical care in Türkiye is relatively inexpensive as compared to developed economies of the USA and Europe. Apart from the low price, the country has started to become one of the top-rated places for medical travel as it has experienced doctors and advanced technology.

CHAPTER 3

METHODOLOGY

This study employs qualitative research to capture the factors that affect health tourism and gain insights into the conceptions of the health professionals. Qualitative research realized through a survey provide an in-depth exploration especially for the complex aspects of healthcare (Knafl, 1991; Corbin & Strauss, 2008; Pinho et al., 2014). The survey also covers open ended questions to facilitate interviewees' expression of their ideas and perceptions in line with the qualitative approaches that enable much more nuanced analysis of data (Alshenqeeti, 2014). The survey focuses on the attitudes and practices of health professionals towards health tourism within the scope of medical tourism. The study utilizes a survey covering 52 hospital administrators in 46 various healthcare organizations, all operating in Türkiye.

3.1 Research design

The research utilizes a descriptive research design whose objective is to describe and summarize the information collected from hospital administrators. The design allows one to know the status of practice of health tourism among sampled hospitals.

3.2 Sample selection

3.2.1 Population

The population of concern are hospital administrators in both private and public hospitals practicing health tourism currently. The sample represents hospitals in different sizes. The institutions have service durations ranging from 5 years to 35 years, and there is even a state hospital that is 110 years old. There are also

institutions with a number of branches ranging from 1 to 30. Additionally, there are institutions with a bed capacity ranging from 10 to 765. Furthermore, there are institutions with a total number of employees ranging from 75 to 3680.

3.2.2 Sample size

52 health professionals from 46 different hospitals were selected for the study. The respondents were selected with the assistance of purposive sampling to ensure that they have sufficient experience and knowledge on health tourism.

3.3 Data collection

3.3.1 Survey Instrument

A structured questionnaire was utilized to quantify and qualify data collection.

The questionnaire included following;

3.3.2 Demographic information

Demographic questions relating to the nature of the hospital, location, and the administrator's role.

3.3.3 Health tourism practices

Questions testing awareness of incentives for health tourism, employment sources used to attract global patients, and challenges faced in implementing health tourism strategies.

3.3.4 Open-ended questions

Opportunity for respondents to provide opinions and experience regarding health tourism. Administration: Providing the questionnaire through an internet-based portal (e.g., Microsoft Forms) in order to encourage convenience and ease of response. Follow-up reminders were sent to encourage participation.

3.4 Data analysis

3.4.1 Quantitative analysis

Closed-ended questions were analyzed using descriptive statistics, that is, mean, median, and frequency distributions. It was utilized to combine the respondents' answers as well as to find important trends.

3.4.2 Qualitative analysis

The open-ended responses were analyzed using thematic analysis. This involved data coding to find patterns and themes, enabling rich understanding of hospital administrators' experience as well as their outlook with regard to health tourism.

3.5 Ethical considerations

3.5.1 Informed consent

All respondents were informed clearly regarding the purpose and procedure of the study before they participated. Informed consent was requested to guarantee that participants are ready to take part in research. With their consent, participation has been on a voluntary basis. Neither prize nor punishment were offered to the participants.

3.5.2 Confidentiality

The confidentiality of the participants was maintained at all times. All the collected data were preserved and utilized only for research. The research is not focused on personal data. Rather, data collected in the research are institutional data.

3.6 Limitations

This research acknowledges certain limitations, such as the relatively small sample size, which can affect the generalizability of the results. Additionally, the use of self-reported data can introduce biases in responses.

The research design described provides an in-depth model to investigate the practice and mindset of health tourism among hospital managers. The study aims to provide in-depth details on the current status of health tourism in the Türkiye's healthcare industry.

CHAPTER 4

HYPOTHESIS

This study formulates the following 12 specific hypotheses for testing.

4.1 H1 The health tourism-certified hospitals have higher rates of international patient admissions compared to non-certified hospitals

Below are some current studies and articles supporting the hypothesis that health tourism-certified hospitals tend to have higher international patient admission rates compared to non-certified ones;

Research shows that certified health tourism facilities offering better quality services, bearing important implications for their capacity to attract foreign patients since the patients are sensitive to such certifications (Cioban et al., 2018). Empirical evidence from previous studies has shown that certified healthcare facilities are more likely to succeed in attracting foreign patients since they maintain international quality standards. The research highlights the manner in which certification enhances the reputation of healthcare organizations, which is positively correlated with increased international patient admission (Aydin & Karam Mehmet, 2017). The results of previous studies indicate that certification enhances the credibility and attractiveness of these centers and results in increased foreign admissions.

4.2 H2 Hospital choice for foreign patients is positively influenced by strategic development by enhancing the quality and scope of the hospital services

Some of the recent articles and studies proving the hypothesis are given below.

Türkiye has witnessed a significant growth in its medical tourism sector, which has been largely attributed to the high quality and diversity of healthcare services provided. The country boasts a range of medical treatments that are of high quality and affordable, allowing patients to access high-quality healthcare without spending a fortune. This affordability, coupled with high technology and a qualified workforce, increases the level of care in the majority of the medical specialties. Moreover, the array of services available is staggering. Patients can enjoy cosmetic surgery, dental care, and complex surgery, which ensure that various health needs are addressed. This extensive array not only attracts a variety of international patients but also points to Türkiye's commitment to patient satisfaction a critical quality factor in medical tourism scholarship (Bostan et al., 2023).

Current studies reveal a number of important factors that affect patients' selection of healthcare facilities in Ghana. They reveal that the quality of care and the presence of skilled medical personnel and modernly equipped facilities are important factors in determining patients' selection. Furthermore, easy access to healthcare facilities and the hospitals' reputations are significant factors in determining patients' choices, indicating that these attributes may be enhanced to enhance patient attraction and retention (Udeme & Orumie, 2021).

4.3 H3 Hospitals that emphasize health tourism tend to admit a greater number of patients

Following are two recent articles which support the hypothesis that hospitals dedicated to health tourism are more likely to report higher patient admissions.

Health tourist-prioritizing hospitals tend to admit a higher number of foreign patients, thereby demonstrating an unmistakable link between health tourism focus

and a high level of admissions (Gül et al., 2022). Another study also indicates that health tourism-oriented hospitals not only increase their services but also experience significantly increased patient admission rates, especially from overseas patients (Taufik & Sulistiadi, 2018).

4.4 H4 Quality of healthcare service, affordability of prices, and accessibility are important to international patients when selecting a hospital

According to the literature, foreign patients select the preferred hospitals after extensive research and some criteria. The quality of the healthcare service is the primary criteria, followed by price and availability of the health facility. Some research has debated this issue and brought out the outcomes.

4.4.1 Quality of healthcare services

Foreign patients tend to evaluate healthcare quality based on the qualifications of the staff and the variety of treatments offered, this means that service quality is a significant factor in determining their choice of hospital (Udeme & Orumie, 2021).

4.4.2 Affordability of prices

Research shows that patients are increasingly focused on the cost of medical procedures. Patients prefer hospitals that provide competitive prices with quality care. This highlights the importance of price consideration in international patients' choice (Omay & Cengiz, 2013).

4.4.3 Accessibility

Current studies emphasize that the ease of accessing healthcare facilities is important while selecting a health-care center. Patients prefer centers that are easily accessible and have flexible scheduling, indicating how accessibility influences their choices (Zhang et al., 2020).

4.5 H5 International patients primarily seek healthcare services such as surgical procedures, aesthetic treatments, and dental care

The following studies constitute the basis of this hypothesis as follows:

4.5.1 Surgical procedures

According to recent study international patients often seek healthcare for various surgical treatments including those in general surgery, orthopedics, and cardiology. This indicates that there is a strong demand for surgical services among this group (Isikli et al., 2020).

4.5.2 Aesthetic treatments

A study highlights that cosmetic surgery and aesthetic procedures have become increasingly sought after by international patients. This reflects a significant preference for aesthetic services within the context of health tourism (PAPP et al., 2016).

4.5.3 Dental care services

In Journal of Hospitality and Tourism, there is an article that reports that many international patients look for dental care services, particularly because the services

are less costly abroad. Additionally, many insurance policies do not cover dental procedures. This means that dental care is another major area of interest for international patients (Uygun & Ekiz, 2018; Atiemo, 2020).

4.6 H6 Effective communication improves patient satisfaction when receiving healthcare services

The importance of effective communication improves patient satisfaction when accessing healthcare services is supported by a number of recent studies. The following are some relevant findings.

A study points out that the quality of communication among health care professionals and foreign patients is significant in enhancing patient satisfaction. The study identified that patients who were provided with open and concerned communication were satisfied with their care (Udeme & Orumie, 2021). Another study also emphasizes the importance of communication in improving patient satisfaction among foreign patients. Based on their results, if healthcare providers recognize and respect cultural differences, they lead to improved communication and therefore higher levels of patient satisfaction (Zhang et al., 2020).

Additionally, Gül et al., (2022) examines the adverse effects that communication gaps can have on both patient safety and satisfaction. From their research, effective communication not only remains essential in providing safety to the patients but also plays a vital role in boosting the general satisfaction level of the patients.

4.7 H7 Mostly neighboring countries and regional markets are drawn to Türkiye's accessible, affordable, and high-quality healthcare services

Türkiye is among the most visited health tourism places, primarily due to affordable healthcare services, high-quality medical practices, and hospital facilities reaches to international standards. Some studies validate this hypothesis as detailed below.

It has been noted that Türkiye has shown significant development in health tourism in recent years, a trend attributed to the quality of healthcare services at affordable prices compared to neighboring nations (PAPP et al., 2016). Furthermore, Türkiye's geographical location and the variety of treatment options available make it particularly attractive for patients from neighboring countries (Omay & Cengiz, 2013).

4.8 H8 The effective utilization of health tourism incentives positively impacts the growth and competitiveness of hospitals in the health tourism sector

According to researches, proper utilization of health tourism incentives is crucial for health tourism development and competitiveness for hospitals. Some researchers have already established that through health tourism incentives, hospitals have been able to improve the quality of services and receive greater volumes of foreign patients.

Recent studies have found that countries employing effective health tourism policies, in terms of economic incentives as well as promotional assistance, have experienced tremendous boosts in patient movement and total revenues. Hospitals that leverage these incentives often report improved operational efficiencies and higher patient satisfaction rates, which are critical for maintaining a competitive advantage in the global healthcare market. The strategic application of health tourism

incentives not only promotes hospital growth but also contributes to the broader development of the healthcare sector in the respective countries (Tengilimoğlu, 2021; Sevim & Kurtaran, 2023; Gülşen & Solak, 2024).

4.9 H9 Hospitals' investments in technology enhance their potential for health tourism and positively influence the preferences of international patients

Some researchers concluded that hospitals equipped with high-quality technology can offer better health outcomes and patient experiences, thereby gaining a competitive advantage in the health tourism market.

A study emphasizes that investments in advanced medical technologies enhance the competitive edge of the Türkiye's health sector in the global health tourism market, making it more appealing to foreign patients (Kuşat & Esen, 2022). This, in turn, may lead to an increase in international patient flood and higher revenues from health tourism. Recent research also indicated that the quality of healthcare services, supported by technological advancements, plays a crucial role in attracting international patients, thereby contributing to the growth of health service exports (Baybatlı & Ertürk, 2024).

4.10 H10 Hospitals that collaborate with foreign agencies and insurance companies have higher rates of international patient admissions compared to those that do not

Outcome from literature states that partnerships with foreign agencies and insurance companies directly contribute to the success of international patient admissions in hospitals. Through cooperation with these agencies and companies, hospitals can make the admission process easier, improve communication, and enhance service

delivery, resulting in an increased percentage of international patients successfully admitted for treatment.

For example, hospitals that have partnerships with international insurance firms can simplify payment processes and reduce administrative burdens, resulting in an easier admission process for patients (Kuşat & Esen, 2022). Furthermore, the involvement of foreign agencies allows hospitals to better understand the needs and expectations of international patients, thereby enhancing service delivery and overall patient satisfaction (Batbaylı & Ertürk, 2024). Additionally, those hospitals that have contracts with foreign agencies have higher successful admission rates because these contracts typically include particular marketing efforts targeting potential international patients (Tontuş, 2019). This indicates a strong relationship between the success of the international patient admission process with the support of foreign agencies and insurance companies.

4.11 H11 Foreign patients prefer hospitals that offer high-quality healthcare services and have advanced technological infrastructure; these factors positively influence their decisions regarding health tourism

Foreign patients are most likely to prefer hospitals that offer high standards of medical care and highly advanced technological assistance. This has a big influence on their health tourism choice as well. Researches about this issue included below;

High-quality medical services ensure that patients receive proper and effective treatment, while advanced technological capabilities enhance the efficiency of treatment processes (Aydin & Karamahmet, 2017). This situation highlights the importance for hospitals to emphasize these factors in their marketing strategies. Additionally, Cortez (2008) explains the importance of advanced technology in terms

of foreign patients' choice of destination. Even, mentioned that developing countries have improved the medical technology they offer since to attract more international patients. Emerging countries' technology and facilities compete with developed nations like U.S. and U.K.' standards.

4.12 H12 Increased financial incentives, effective marketing strategies, and a strong focus on high-quality service delivery positively affect the development of health tourism in Türkiye

Most of the articles about health tourism emphasize financial incentives. Some of those studies are given below.

4.12.1 Incentives

In recent years, there has been extensive study of incentives that have influenced the health tourism sector and revealing that such measures have led to amazing statistics of foreign patients. The Türkiye's government has introduced different financial incentives to promote health tourism, such as tax exemptions for healthcare centers treating foreign patients. These financial incentives are required to make health tourism more competitive internationally (Gülşen & Solak 2024). India, Malaysia, Thailand, and Singapore, along with Türkiye, utilize government incentives and support health tourism. The incentives encompass tax relief, medical tourist visas, promotion expenses, certification support, and consultancy services (Tengilimoğlu, 2021).

4.12.2 Marketing strategies

Focused marketing campaigns is extremely important. These campaigns are crucial in the attraction of foreign patients as they help promote the quality and affordability of Türkiye's health services. Effective advertisement strategies tailored to foreign people have been shown capable of significantly attract those patients to contribute to growth in health tourism industry (Patci & Aldoğan, 2021).

4.12.3 High-quality service delivery

Quality of healthcare is directly linked to the training of medical staff, and the lack of trained personnel for health service providers is one of the major issues (Raoofi et al., 2024). Most of the hospitals put high-quality service provision first, and that is essential in attracting foreign patients. The commitment to high-quality care as well as hospital accreditation increases Türkiye's image in terms of being a hub for medical tourism (Saleh et al., 2015).

As discussed in the literature, incentives play a vital role in attracting international patients (Gülşen & Solak 2024), while targeted marketing efforts significantly enhance visibility in the global market (Patci & Aldoğan, 2021). Additionally, ensuring high-quality care through improved training for healthcare professionals is crucial for maintaining high quality of service (Collins et al., 2022). Therefore, implementing these measures is crucial to Türkiye's long-term health tourism development.

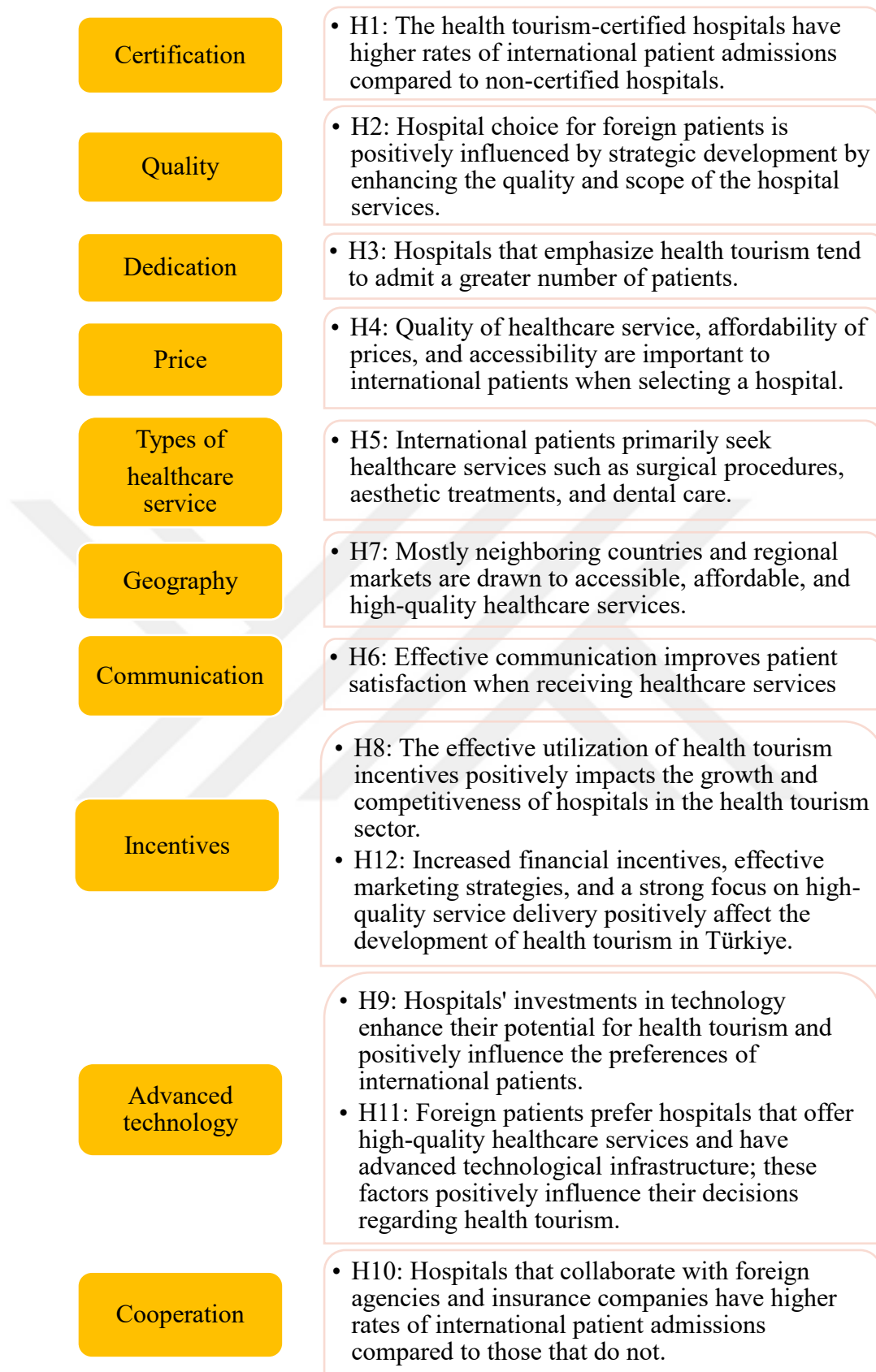


Figure 1. Categories of hypothesis

CHAPTER 5

FINDINGS

This survey seeks to evaluate the strategy, and experience of hospitals operating in the health tourism industry in Türkiye. The questionnaire, divided into two parts, gathers demographic information from hospital managers, as well as data on the hospital's international health tourism capacity, bed availability, staff profile, translator facilities, and organizational structures related to health tourism procedures. The second section explores considerations for international patients' choices, issues faced, overall quality, utilization of incentives, and health tourism strategies.

Additionally, the survey also asks for the evaluation of incentives, legal regulations, and promotion activities as the main factors improving health tourism in Türkiye. The data collected through this survey will be a valuable source to find out the current status of health tourism in Türkiye, and what issues the sector is currently facing.

5.1 Evaluation of health tourism certification on international patient admissions

The analysis reveals that hospitals with a health tourism certification tend to have a larger share of international patients than those without it

Table 3. Patient ratio and certification

INTERNATIONAL PATIENT RATIO	HOSPITALS WITH CERTIFICATION	HOSPITALS WITHOUT CERTIFICATION
0-20%	21	7
20-40%	6	0
40-60%	4	0
60-80%	5	0
80-100%	3	0

The table imply that holding a health tourism certification plays a significant role in helping hospitals to attract and serve more international patients. The analysis reveals that hospitals with a health tourism certification generally serve a higher proportion of international patients compared to uncertified hospitals.

The analysis shows a clear trend. Certified hospitals have significantly higher rates of international patients across various admission rate categories. Specifically, 21 certified hospitals fall within the 0-20% international patient ratio, while only 7 uncertified hospitals do. Furthermore, certified hospitals are the only ones represented in the 20-40% range, and they dominate the higher admission brackets (40-60%, 60-80%, and 80-100%), with no uncertified hospitals reaching these levels.

The hypothesis H1: The health tourism-certified hospitals have higher rates of international patient admissions compared to non-certified hospitals, is strongly supported by the survey result. Even the results clearly indicates that health tourism certification is associated with higher international patient admission rates, thereby supporting the H1. Since there are 21 hospitals having certification and yet fall in to

0-20 % international patient ratio group, it can be also said that certification is not only factor which effects the international patient's admission rate.

5.2 The importance of strategic development recommendations to influence patient hospital preferences

According to literature there are some main recommendations for strategies that influence international patients positively. Those recommendations are below;

5.2.1 Enhancing service quality

In order to enhance the service quality, training and development programs are effective. Implement ongoing training for doctors and healthcare staff to ensure they stay updated their information regarding in their fields. Additionally, creating patient feedback mechanisms which establish processes for collecting patient feedback and using it to improve service quality (Saleh et al. 2015; Collins et al. 2022; Raoofi et al. ,2024).

5.2.2 Pricing strategy

Pricing strategies is another important factor in order to become attractive place for international guests. First of all, having competitive pricing strategy is crucial. Conduct market analysis to compare prices with similar service providers and develop competitive pricing strategies. Secondly, offering service bundles. Offer bundled pricing for specific healthcare services to provide budget-friendly options for patients (Omay & Cengiz, 2013; PAPP et al. ,2016).

5.2.3 Infrastructure and technological investments

Infrastructure and technological investments have critical value when compared with other destinations. Having modern medical equipment is necessary. Upgrade the hospital's infrastructure with current medical devices and technologies to build patient trust. Since reaching patients detailed information easily makes more attractive for foreign patients. Creating digital health applications will be an important factor. Create mobile apps and online appointment systems that allow patients easy access to their health information (Aydin & Karam Mehmet, 2017; Çoban et al., 2020).

5.2.4 Diversity of services and specializations

Diversity of services and specializations differentiate the facility from others. Offering new specialization areas which is not offered from majority. Identify market needs and establish new specialization areas to expand service offerings. In order to specialized while serving foreign patients, cultural support services play vital role. Provide cultural support services for international patients to enhance their hospital experience (Cioban et al., 2018; Zhang et al., 2020).

5.2.5 Patient satisfaction

Focusing on patient satisfaction is mentioned almost in every source in the literature. Improving patient experience directly contribute to their satisfaction. Offer supportive services such as guidance and social activities to positively impact patient experiences. Since the targeted patient are foreign strengthening communication

channels are highly significant. Establish effective communication channels, including translation services and support hotlines (Udeme & Orumie, 2021; Abdelaziz & Mahmoud, 2023).

5.2.6 Easy of access

Accessibility is one of the main questions for international patients, because most of them visit the destination country as a first time. Offering transportation is reason for preference. Facilitate easy access to the hospital by offering transfer services and collaborating with transportation networks (Kilavuz, 2018; Zhang et al., 2020).

5.2.7 Accreditation and credibility

Accreditation and credibility are the major issue to build trust with foreign patients. International accreditation plays vital role to build that trust. Ensure the hospital obtains international healthcare accreditation to enhance its credibility. Not only accreditation but also brand reputation is effective. Develop marketing and communication strategies to strengthen the hospital's brand reputation (Aydin & Karamahmet, 2017).

5.2.8 Advertisement

Marketing and promotion strategies should be delicate when the issue is health. Targeted marketing is crucial. Create marketing strategies tailored to different target groups to attract specific patient demographics. Since it is the information age, online promotion and social media utilization is critical. Digital marketing and social media campaigns to promote hospital services and increase visibility (Patci & Aldoğan, 2021).

These strategic recommendations are designed to influence patients' hospital preferences. By considering these suggestions, hospitals can enhance their service quality and attract more patients.

Among the hospitals that participated in the survey, there are those that offer cultural, social, or recreational services to international patients in addition to healthcare services. These hospitals are actively engaged in quality initiatives aimed at improving health tourism. This combination of services and strategic efforts enhances their ability to attract and serve more international patients effectively. The table below illustrates the proportion of foreign patients accepted by these hospitals.

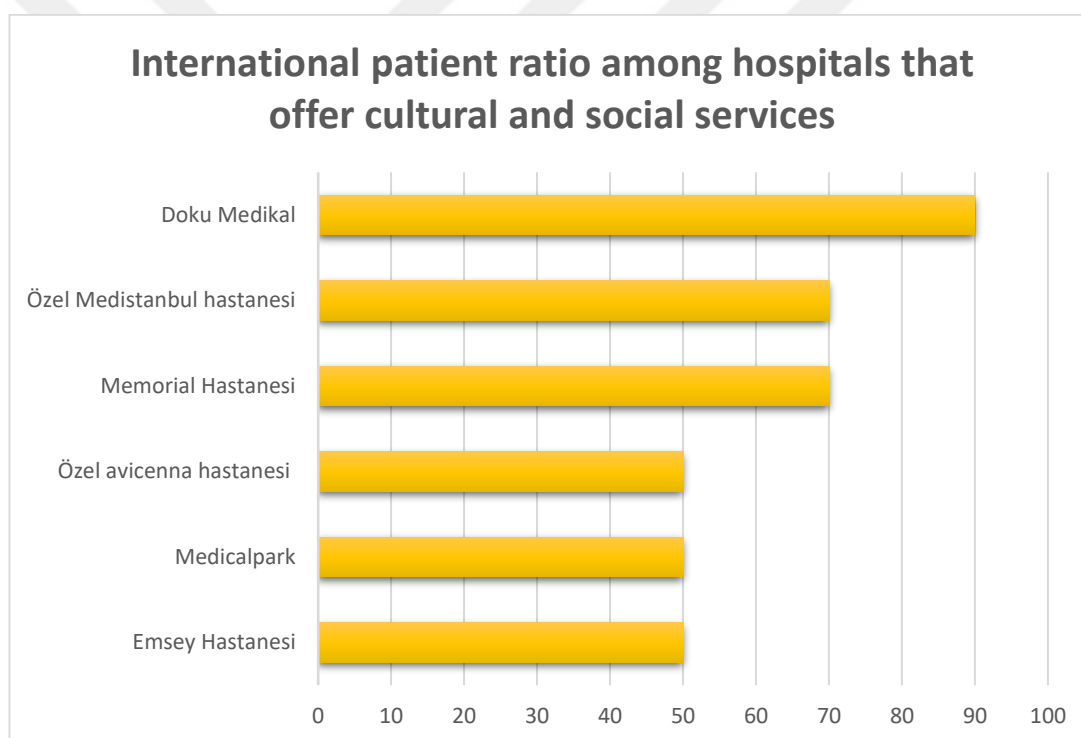


Figure 2. International patient ratio among hospitals

The hypothesis H2 states that “Hospital choice for foreign patients is positively influenced by strategic development by enhancing the quality and scope of the hospital services” is strongly supported by the survey results. The findings indicate that offering cultural, social, and recreational services significantly enhances patient satisfaction and attracts more health tourism patients. This aligns with the

hypothesis by demonstrating that improving service quality through a complete approach positively influences patient preferences. Additionally, the investment in technology aimed at improving health tourism services is crucial for delivering higher quality care, which builds trust with foreign patients. This further supports the hypothesis by emphasizing that enhanced quality directly affects patient choices. Overall, the survey results confirm that strategic development recommendations effectively enhance both the quality and accessibility of services, positively influencing foreign patients' preferences for hospitals.

5.3 How hospitals perceive and prioritize health tourism

Survey specifically focused on how hospitals perceive and prioritize health tourism in relation to their overall strategic goals. Respondents were asked to categorize health tourism as one of the following: their top priority, among their top three priorities, a topic that has gained attention due to recent demand increases, or not a priority at all.

The responses gathered provide valuable insights into the varying degrees of emphasis that different hospitals place on health tourism. Analyzing these responses reveals important trends and implications for the healthcare sector, particularly in how hospitals can adapt to changing market dynamics and patient needs.

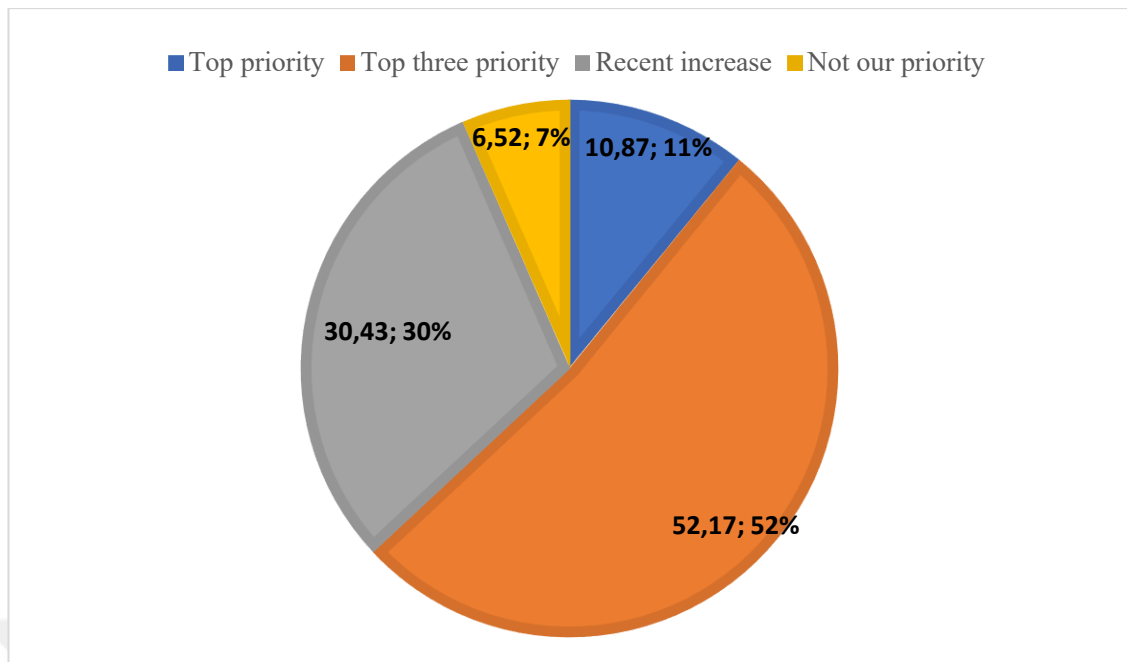


Figure 3. Priority ratio among hospitals

This proportional analysis shows how the strategic priorities regarding health tourism are distributed among hospitals. The majority of hospitals see health tourism as an important priority, while some still do not prioritize this area.

5.3.1 Determination of Priorities

A little bit more than half of the hospitals has stated that health tourism "is among our top three priorities." This indicates that health tourism is an important strategic goal for these institutions. Almost 11 % of hospitals stating "is our top priority" view health tourism as one of their most critical areas. These hospitals may focus more on investments in health tourism.

Increase in Demand:

Almost 31 % of hospitals that have come to the agenda due to recent demand increases which demonstrate that they are closely monitoring market dynamics and developing strategies accordingly. These hospitals may adopt a more flexible and adaptive approach to capitalize on market opportunities.

5.3.2 Strategic positioning

While most of the hospitals express that health tourism is a at their agenda, a small portion like 6,5 % indicate that it is not a focus for them. This suggests variability in the strategic approaches of hospitals regarding health tourism, with some still exploring the potential in this area.

Strategic positioning considers something beyond a specific product; strategic positioning places your company or firm in the marketplace to best meet your needs. This process will ensure a solid groundwork for decision making (Saleh et al., 2015). The way hospitals are positioned within the health tourism sector reveals a range of strategic objectives and responses to market demands. Türkiye is defined as one of the leading countries in health tourism. Creating added value is likely to depend on evaluating both sectoral and organizational performances. This variability highlights considerable opportunities for enhancing service offerings and strengthening the competitive edge of healthcare institutions (Merdivenci & Karakaş, 2020). Furthermore, comprehensive analyses of the survey findings can assist hospitals in identifying and implementing effective approaches to capitalize on emerging trends in health tourism. By leveraging these insights, hospitals can navigate the complexities of the health tourism landscape more effectively.

In the survey, 5 institutions indicated that it is their most important priority, while 24 institutions stated that it falls within their top three priorities. Among the 5 institutions that identified health tourism as their most important priority, 3 of them stated that foreign patient admission rate is between 60-80 %, while only 2 of them stated between 40-60 % foreign patients at their facilities. Meanwhile, 13 of the 24 institutions that included health tourism in their top three priorities, claims that foreign patient admission ratio among their patients is between 20-40 %.

The hypothesis H3 states that “Hospitals that emphasize health tourism tend to admit a greater number of patients”. The survey results provide strong link between emphasizing health tourism and accepting more foreign patients. Specifically, 66% of the six hospitals that identified health tourism as their top priority reported an international patient admission rate of over 40%. Additionally, only 25% of the 27 hospitals that placed health tourism within their top three priorities achieved the same admission rate. This data suggests a clear correlation between the prioritization of health tourism and higher rates of international patient admissions, thereby reinforcing the hypothesis H3.

5.4 Evaluation of international patients' choices in hospital selection

In the context of health tourism, understanding the reasons why international patients choose specific hospitals is crucial for enhancing service delivery and improving patient satisfaction. The survey includes an open-ended question asking hospitals to identify the key reasons why international patients prefer their services. Analyzing these responses provides valuable insights into the competitive advantages hospitals have and the factors that attract patients from abroad. By examining the diverse reasons provided by various hospitals, a comprehensive understanding of the current landscape in health tourism can be achieved.

The responses to the question regarding the reasons international patients choose specific hospitals reveal several key themes:

5.4.1 Quality of service and expertise

Many hospitals emphasized the quality of their medical staff and the expertise of their healthcare providers. Phrases like "successful doctor team" and "experienced

physicians" were frequently mentioned, highlighting that the reputation and skill of the medical staff are significant factors in attracting international patients. The emphasis on the quality of medical staff and their expertise aligns with findings from recent studies, which indicate that patients prioritize hospitals with highly qualified healthcare professionals. Research suggests that the perceived competence of healthcare providers plays a significant role in influencing patient decisions in health tourism (Weis et al., 2017).

5.4.2 Ease of access

The convenience of reaching the hospital was another prominent theme. Statements such as "ease of transportation" and "closeness to the airport" indicate that transportation plays a vital role in patients' decision-making processes. Hospitals located in tourist-friendly areas or those with good transport links are likely to be favored by international patients. The importance of logistical considerations, such as transportation and proximity to airports, is supported by literature that highlights how accessibility can enhance patient experience and satisfaction. A study by Atiemo (2020) found that ease of access is a major determinant in the selection of healthcare facilities by international patients.

5.4.3 Patient satisfaction and service delivery

Several responses emphasize the importance of patient satisfaction and efficient service delivery. Terms like "patient-centered approach" and "quick and reliable service" reflect hospitals' commitment to providing a positive experience for their patients, which is crucial in a competitive markets like health tourism. The focus on patient-centered care and efficient service delivery reflects current trends in

healthcare, where patient satisfaction is increasingly recognized as a key performance indicator. It is stated in a work of Udeme and Orumie (2021) that both public and private hospitals should improve the satisfaction of patients by working on their internal processes.

5.4.4 Pricing policy

Affordability also emerged as a notable factor. Hospitals mentioned their "competitive pricing" and "value for money," suggesting that cost-effective solutions are appealing to international patients seeking quality care without excessive financial burden. The mention of competitive pricing is crucial, as cost-effectiveness is often a significant factor for patients seeking treatment abroad. Research indicates that transparent pricing and value for money are essential for attracting international patients, particularly in markets where healthcare costs vary widely (Kilavuz, 2018).

5.4.5 Infrastructure and facilities

Lastly, some responses highlighted the modern and comprehensive infrastructure available at the hospitals. Phrases like "fully equipped and high-end hospital" indicate that the usage of advanced medical technology is a priority in order to attract foreign patients. The emphasis on modern infrastructure and advanced medical technology is consistent with findings that suggest patients are more likely to choose hospitals that offer advanced technology at their facilities. A study by Latief and Ulfa (2024) highlights that the availability of advanced medical equipment significantly impacts patient choices.

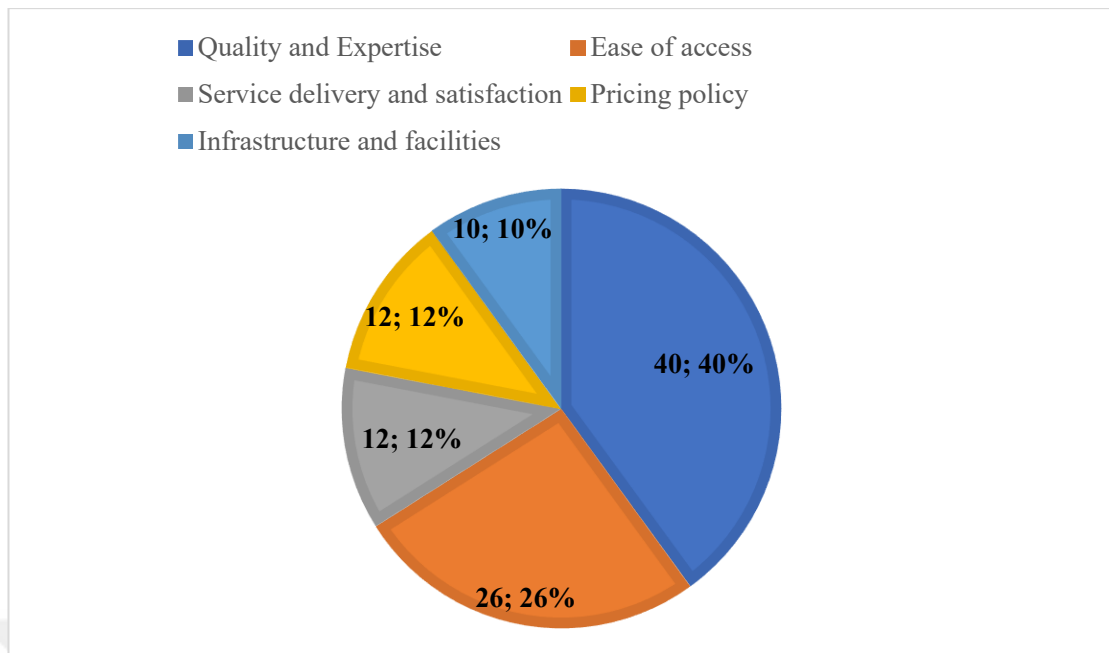


Figure 4. Reasons for international patients

This proportional analysis shows which factors are most significant for international patients in choosing hospitals. The highest percentage is attributed to the quality of service and expertise, followed by ease of access. Pricing policy and service delivery and satisfaction have same importance according to health-care professionals. Infrastructure and facilities are less emphasized among those themes. These insights can help hospitals determine where to focus their strategic planning efforts. In summary, the analysis of the responses regarding why international patients choose specific hospitals reveals several critical factors, including the quality of service, ease of access, patient satisfaction, pricing policies, and hospital infrastructure.

The hypothesis H4 that quality of healthcare service, affordability of prices, and accessibility are important to international patients when selecting a hospital is partially supported by the survey results. In the distribution of responses, the most significant factor identified by participants was Quality of Service and Expertise, with 20 out of 50 respondents (40%) emphasizing its importance. This aligns well

with the hypothesis, reinforcing the idea that quality is a top priority for international patients. Ease of Access was ranked second, with 13 out of 50 respondents (26%) highlighting its significance. This also supports the hypothesis, indicating that accessibility is a critical factor in hospital selection. However, the results show a notable discrepancy regarding affordability of pricing. Only 6 respondents (12%) cited pricing as a priority. This suggests that, while affordability matters, it is not as highly prioritized as the quality of care and accessibility, which diverges from the initial hypothesis.

When the hospitals categorized by their sizes in terms of their bed capacities. They are grouped into three different categories; Small size where relevant hospitals have up to 50 bed capacity. Medium size where hospitals have between 50 to 200 beds. Lastly, large sized hospitals which have more than 200 beds in their facilities. It is also one of the requirements of being a University Hospital which having more than 200 beds. I examine the results of those categorized hospitals and found that 31% of the small sized hospitals assumed both quality of the service and ease of access. Lowest rank was 15% which belongs to service delivery and satisfaction.

Medium sized hospitals answers were look like small sized ones, the most and least answers belonged to same topic with different ratios. 45% of those hospitals' managers assume that quality of the service is game changer for international patients. 27% belongs to ease of access, and 9% for both pricing and service delivery and satisfaction.

When the large sized hospitals' answers examined it can be said that the most given answers were same with both small and medium size, which is 45% for quality of the services. However, surprisingly a new group of answer is given from the large

sized hospitals which is second most given answer with 27% for infrastructure and facility. Additionally, none of the managers from large sized hospitals mentioned about the pricing policies.

Overall, the survey results indicate that while quality and accessibility are paramount for international patients, the importance of pricing may not be as significant as previously assumed. Additionally, large sized hospitals' managers believe importance of infrastructure and facility as a hospital selection criterion for international patients.

5.5 The services that international patients most frequently seek

In the survey conducted this thesis, one of the questions asked was about which medical specialties international patients most frequently seek. The responses gathered from various hospitals provide valuable insights into the preferences and trends in health tourism.

5.5.1 Most common specialties

5.5.1.1 General surgery

This specialty appeared frequently across multiple hospitals, indicating a strong demand for general surgical procedures among international patients.

5.5.1.2 Plastic surgery

Many hospitals noted plastic surgery as a preferred choice, reflecting the increasing interest in aesthetic procedures among international patients.

5.5.1.3 Orthopedics

The orthopedic specialty also received numerous mentions, suggesting that international patients are seeking treatment for musculoskeletal issues.

5.5.2 Diverse range of services

The responses revealed a wide variety of specialties being sought, including cardiology, oncology, hair transplantation and even niche areas like child neurology. This diversity suggests that international patients are not limited to a single type of service but are looking for comprehensive care options.

5.5.3 Emerging trends

Some hospitals highlighted newer or less traditional services, such as obesity surgery and psychiatric treatment. This indicates a shift in patient preferences and the evolving landscape of health tourism, where patients are increasingly seeking specialized care tailored to their unique needs.

To conduct a proportional analysis of the responses regarding the most sought-after specialties by international patients, it is needed to categorize the specialties based on the provided data. Here's the analysis based on the responses:

Categorization of Specialties: General Surgery, Plastic Surgery, Orthopedics, Cardiology, Oncology, Hair Transplantation, Neurology, Urology, Dermatology, Obesity Surgery, Psychiatry, Hematology, Pediatrics, and Ear, Nose and Throat (ENT)

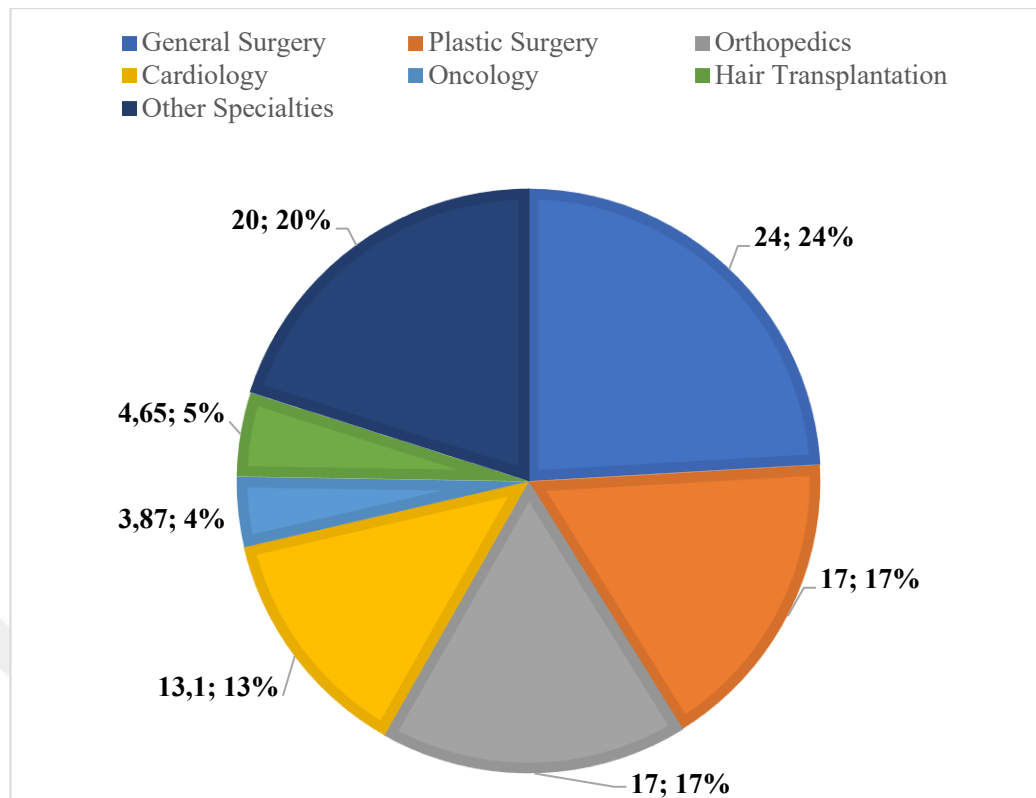


Figure 5. Popular specialties for international patients

The proportional analysis reveals that General Surgery is the most sought-after specialty among international patients, followed by Plastic Surgery and Orthopedics. This observation is consistent with findings from PAPP et al. (2016) who note that general surgical procedures rank among the top requests in health tourism due to their essential nature and effectiveness. Additionally, significant interest in Cardiology and Oncology reflects a trend where patients increasingly seek specialized treatment for serious health issues (Aydin & Karamehmet, 2017).

The variety of preferences identified points to a substantial demand for different medical services, indicating that hospitals should enhance their offerings in these specialties to better attract international patients. Research conducted by Merdivenci and Karakaş (2020) highlights the flexibility of healthcare services to align with the specific needs of international clientele, as this approach can lead to greater patient satisfaction and retention. Furthermore, expanding services in high-

demand areas like general surgery can strengthen hospitals' competitive edge within the global healthcare landscape (Sharma et al., 2025).

Among the total of 129 specialties, a significant portion indicated a preference for various surgical procedures. General Surgery accounted for 24% of the responses, orthopedic treatments where most of them is surgical, 17 % these statistics align well with the hypothesis by highlighting the demand for surgical services. Additionally, Plastic Surgery was noted by 17 % of respondents, reinforcing the notion that aesthetic treatments are a key area of interest for international patients. Furthermore, the ratio was 13,1 % for cardiology where most of them is cardiovascular operations which is also illustrating that international patients are indeed seeking specialized surgical care. While hair transplantation 4,65 % and oncology 3,7 % were included as well, they further emphasize the range of surgical services in demand.

However, it is important to note that dental care, which is also part of the initial hypothesis, was not specified in the survey categories. This absence suggests that while the hypothesis holds strong position regarding surgical and aesthetic services, it may not fully encompass the preferences of international patients concerning dental care. Overall, the survey results largely align with the hypothesis H5: emphasizing the high demand for surgical and aesthetic services among international patients.

5.6 Evaluation of communication with International Patients

As health tourism continues to grow globally, hospitals must adapt to the needs of international patients. This section evaluates responses to three key survey questions directed to hospital administrators regarding their facilities for managing

international patients' communication processes. The questions focus on the establishment of dedicated departments, the availability of contracted translators, and awareness of government-provided translation services. Analyzing these responses offers insights into how effectively hospitals are meeting the communication and support needs of diverse patient populations. This evaluation aims to underscore the importance of tailored support systems in enhancing patient satisfaction and the overall experience of international patients, contributing to the advancement of health tourism.

Questions analyzed

- i. Were you aware that the Ministry of Health provides a free 24/7 translation support center? If yes, do you use this service?
- ii. Does your hospital have translators contracted to communicate with foreign patients who speak different languages?
- iii. Has a separate department been established to track the processes of international patients?

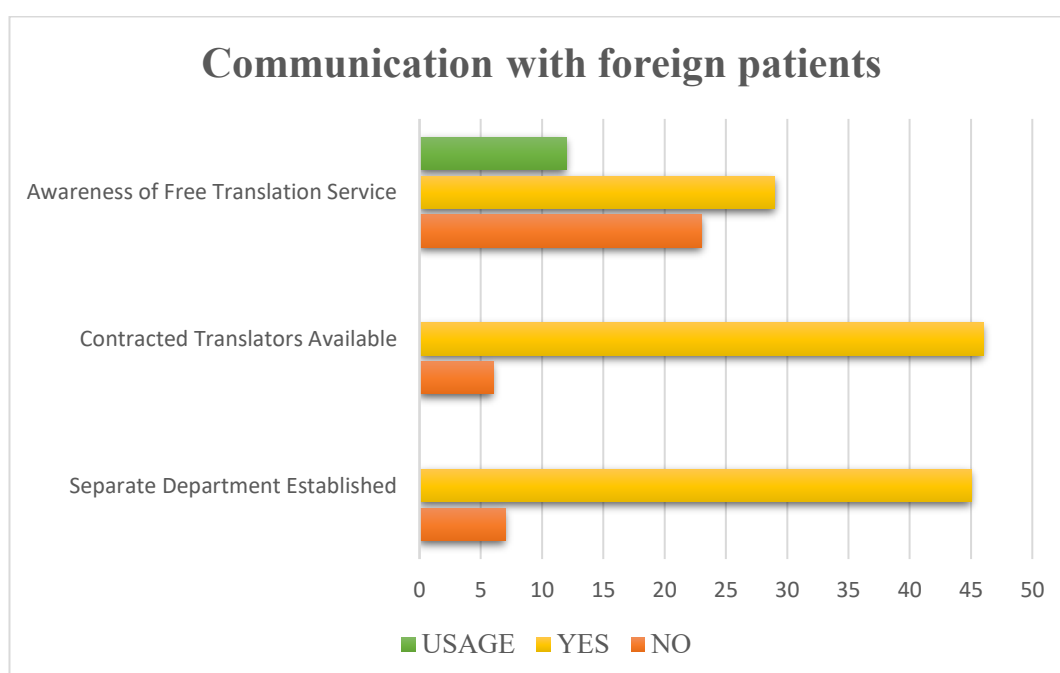


Figure 6. Communication channels

The analysis indicates a strong inclination among hospitals to establish dedicated departments for managing international patient processes, with over 86 % of hospitals confirm such an operation. This suggests a growing recognition of the importance of supporting international patients, which may enhance patient satisfaction and streamline services. The availability of contracted translators is also notable, with nearly 90 % of hospitals affirming that they have translators to assist foreign patients. The outcome highlights an effort to overcome language barriers, which is crucial for ensuring that international patients can communicate their needs and understand their treatment plans. This is crucial for effective communication, as language barriers can significantly impact patient care and overall experience. However, the awareness and utilization of the Ministry of Health's free translation support service reveal areas for improvement. While over half of the hospitals are aware of this resource, only a quarter actively utilize this service. This difference suggests that hospitals can gain from increased publicity of available resources to make the patients and employees aware of the assistance that is present.

The analysis reveals a significant trend among hospitals in establishing dedicated departments for managing international patients, with approximately 87 % confirming such initiatives. This suggests that many healthcare facilities recognize the importance of effective communication in enhancing patient experiences. This reflects a growing recognition of the unique needs of these patients (PAPP et al., 2016).

Moreover, nearly 90 % of hospitals reported having contracted translators, which is crucial for effective communication. Research shows that overcoming language barriers is essential for quality healthcare, especially in diverse settings (Aydin & Karamahmet, 2017; Raoofi et al., 2024).

However, while 55 % of hospitals are aware of the Ministry of Health's free translation support service, only 23 % utilize it. This gap suggests that promoting available resources can significantly enhance communication strategies. Hospitals that actively encourage the use of support services are better positioned to meet the needs of international patients (Abdelaziz & Mahmoud, 2023; Sharma et al., 2025).

The hypothesis H6 which states that effective communication improves patient satisfaction when receiving healthcare services is supported by the findings from the survey results.

5.7 Evaluation of international patient inquiries by country

Based on the data collected from hospitals regarding the countries from which they receive the most inquiries, responses are categorized to identify the most frequently mentioned countries and regions.

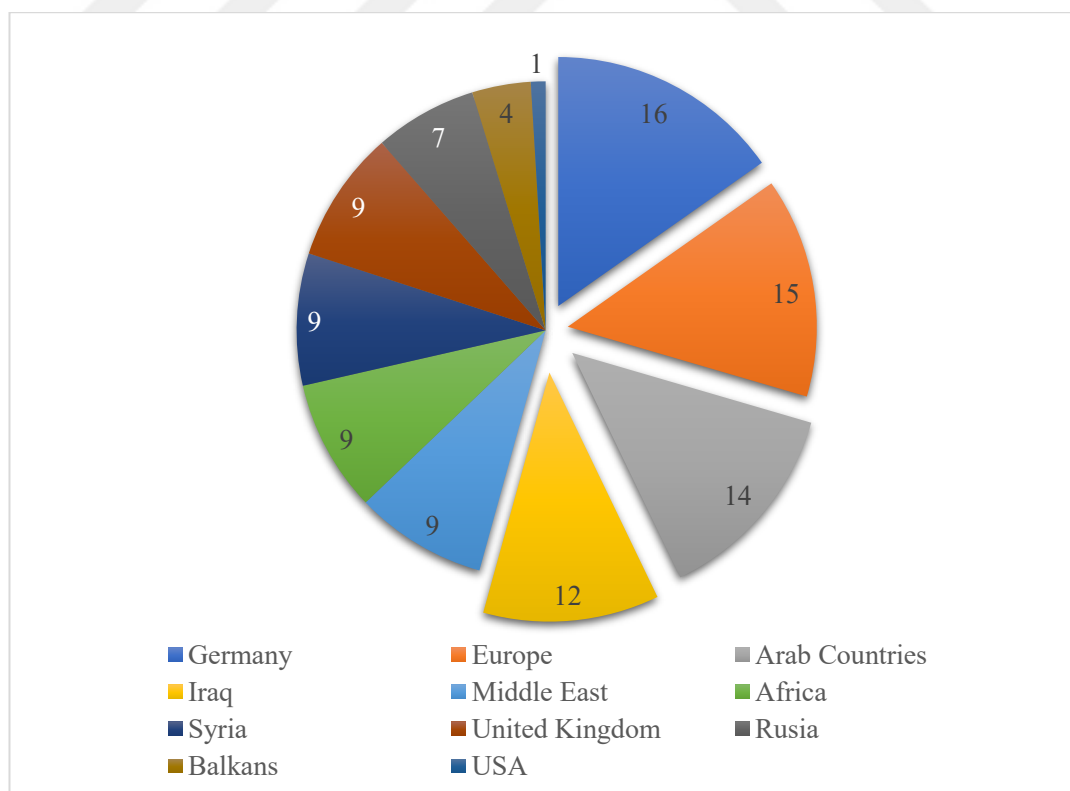


Figure 7. Popular countries choose Türkiye

The analysis reveals a strong demand from specific countries and regions, particularly from Germany and Europe. 105 different countries or regions were mentioned, 31 of them belongs to Germany and Europe which is almost 30 %. 14 of the answers belong to Arab Countries which is the second biggest region where citizens of them choose to come Türkiye.

In summary, the data indicates that hospitals are primarily receiving inquiries from Germany, Iraq, Europe, and Arab countries. Enhancing offerings and focusing on high-demand countries can strengthen hospitals' positions in the competitive landscape of international health tourism. As highlighted by PAPP et al. (2016) it is essential for healthcare providers to comprehend the demographic characteristics of their patients in order to formulate effective strategies that address the needs of international clientele.

This concentration of patient inquiries suggests that hospitals may benefit from targeted marketing and tailored services to meet the specific needs of these patient populations. Aydin and Karamehmet (2017) mentioned the necessity for hospitals to evolve in response to the changing dynamics of health tourism by acknowledging the preferences of their global patients. Moreover, the work of Raoofi et al. (2024) underscores the significance of establishing strong communication pathways to ensure that patients feel supported and well-informed throughout their healthcare experience. By integrating these insights, hospitals can enhance their service delivery and broaden their appeal to a diverse range of international patients.

The hypothesis H7 states that mostly neighboring countries and regional markets are drawn to Türkiye's accessible, affordable, and high-quality healthcare services. The survey results, based on responses from 52 hospital administrators, provide compelling evidence that aligns with this hypothesis. Majority of those

foreign patients come from neighboring regions like Europe, Balkans, Arab countries. Specifically, Iraq was mentioned 12, and Syria 9 times. Hospitals, which underscores the appeal of Türkiye's healthcare services to its immediate neighbors. This aligns well with the hypothesis, suggesting that geographical proximity plays a crucial role in attracting patients to Türkiye.

Additionally, the mention of Germany and the United Kingdom reflects a broader regional interest. The presence of these countries in the responses indicates that Türkiye's reputation for accessible and affordable healthcare also resonates with patients from more distant, yet still neighboring, markets. Üstün and Uslu (2022) mentioned about countries that mostly prefer Türkiye as health tourism destination include Azerbaijan, Germany, and Iraq, among others. It is important to note that most of those arriving from Germany are expatriate Türkiye's people.

The presence of inquiries from U.S.A., U.K., and Africa highlights the global nature of health tourism, where patients seek quality healthcare solutions far beyond their home countries. This diversity in responses indicates that Türkiye's healthcare services are recognized and sought after across a wider geographical spectrum, not limited to just its immediate neighbors.

The data gathered from the survey respondents strongly supports the hypothesis H7: by demonstrating that Türkiye's accessible, affordable, and high-quality healthcare services are indeed attracting patients primarily from neighboring countries and regional markets. This connection underscores Türkiye's strategic position as a hub for health tourism in the region.

5.8 Evaluation of incentives utilization by hospitals

The survey conducted among hospital administrators provided valuable insights into the relationship between the utilization of health tourism incentives and the proportion of international patients in various hospitals across Türkiye. The responses revealed that 30 hospitals (approximately 57,7 %) reported benefiting from health tourism incentives, while 22 hospitals (approximately 42,3 %) stated that they do not utilize these resources. This near-even distribution suggests a significant opportunity for hospitals that are currently not engaging with these incentives to enhance their international patient inflow and overall competitiveness in the health tourism sector.

Table 4. International patient ratio and incentives

International patient ratio	Total hospitals	Utilizing incentives	Not utilizing incentives
0-20%	28	10	18
20-40%	12	11	1
40-60%	7	4	3
60-80%	2	2	0
80-100%	3	3	0
Total	52	30	22

The findings show the importance of health tourism incentives in promoting hospital growth and attracting international patients. Among the 12 hospitals having more than 40 % of their patients from health tourism, only 3 of them do not utilize the government incentives. This clearly shows that usage of incentives helps to

facilities to boost their foreign patient inflow. Research also supports the idea that hospitals leveraging these incentives can significantly enhance their market reach (Gülşen & Solak 2024).

In contrast to that, there are 40 hospitals having between 0 - 40 % international patients, and 19 of those hospital do not utilize the incentives. It can be said that some organizations missed opportunities in attracting international patients through effective strategy. For example, a study by Ateş and Sunar (2024) highlights that structured health tourism strategies, including government incentives and marketing initiatives, lead to increased patient inflow and improved hospital revenues. Additionally, as highlighted by Taş and Karyağdı (2024) effective use of such incentives can significantly boost patient inflow, thereby fostering the growth of health tourism in the region.

Table 5. Incentives and quality standards

Incentives	Number of hospitals	With quality standards	With out quality standards
Utilize government incentives	30	29	1
Do not utilize government incentives	22	15	7

The hypothesis H8 states that the effective utilization of health tourism incentives positively impacts the growth and competitiveness of hospitals in the health tourism sector. The survey results provide significant evidence to support this hypothesis.

From the responses gathered, it was found that 30 hospitals reported utilizing health tourism incentives. Among those 30 hospitals only 1 of them do not carry out

quality standards at their hospitals. On the other hand, 22 hospitals stated that they do not benefit from these incentives and 7 of them do not conduct quality studies at their hospitals. As noted by Batbaylı and Ertürk (2024), leveraging both internal and external resources is essential for enhancing hospital competitiveness in the global health tourism market. Hospitals that utilize both internal resources like quality standards and external resources like government incentives, clearly reach higher competitiveness in the health tourism. The correlation between the utilization of health tourism incentives and the proportion of international patients is evident in the analysis. Hospitals that leverage these incentives are likely to experience an increase in their international patient inflow, which contributes to their overall growth and competitiveness in the health tourism market. This is particularly important as the data suggests that those hospitals not utilizing these incentives may be missing out on valuable opportunities to enhance their appeal and market presence.

The survey results affirm the hypothesis H8 by demonstrating a clear relationship between the effective utilization of health tourism incentives and the success of hospitals in attracting international patients.

5.9 Technological investments of hospitals

In today's healthcare industry, the significance of investing in technology is on the rise. For the sake of enhancing the quality of care, sustaining patient satisfaction, and gaining a competitive edge, hospitals are making investments in various technological infrastructures and systems. According to the survey results, the technological investments made by participating hospitals exhibit diversity across

different categories. Below is a list of the categories identified for these investments with the number of hospitals both having and not having technological investment at all, based on the survey findings.

Table 6. Technological investment types

Technological Investment Types	Number of hospitals
With technological investment	28
Hospital medical equipment	10
Hospital automation system	5
Imaging system	3
Robotic surgery	3
Artificial intelligence	1
Other investments	6
With no technological investment	24

In today's rapidly evolving healthcare landscape, technological investments play a crucial role in enhancing the quality of care and improving operational efficiency. The following sections highlight the significance of various technological investment categories identified in the recent survey results.

5.9.1 Hospital medical equipment investments

Advanced medical equipment is vital for diagnostic and treatment processes. Such equipment facilitates more accurate patient assessments and enhances the overall quality of healthcare (Hurry, 2024).

5.9.2 Hospital automation system investments

Hospital automation systems streamline processes such as patient record management and data analysis, thereby increasing efficiency. These systems enable faster and more effective delivery of healthcare services (Deloitte Center for Health Solutions, 2020).

5.9.3 Imaging system investments

Medical imaging is the visualization of structure and function of various tissues and organs of the human body, primarily for clinical diagnosis and medical research (Hussain et al., 2022). Medical imaging improved the understanding of diseases for doctors in terms of diagnosis, treatment and even for prevention (Laal, 2013).

5.9.4 Robotic surgery investments

Robotic surgery applications utilize minimally invasive techniques, which lead to shorter recovery times for patients. These methods help reduce pain and promote faster healing (Picozzi et al., 2024).

5.9.5 Artificial intelligence investments

Artificial intelligence technologies are employed in the analysis of patient data and diagnostic processes, facilitating the provision of personalized healthcare (Kuwaiti et al., 2023).

5.9.6 Other investments

- i. Server and storage system investment
- ii. Oncology center establishment
- iii. Medical device for minimally invasive surgeries
- iv. Investment in an overseas eye clinic
- v. Renovation of patient service rooms
- vi. Digital marketing systems
- vii. Others

One of the other investments is information security which is of great importance to healthcare systems in that it helps guard against identity theft, data breaches, and other forms of cyber-attack (Abdelaziz & Mahmoud, 2023). Another investment is customer relationship automation system which effects patient satisfaction overall (Atiemo, 2020). In addition to those digital marketing systems are crucial for strengthening hospitals' strategies to attract international patients. They enable healthcare services to reach a broader audience (Collins et al., 2022).

Each of these categories is essential for improving healthcare quality and enhancing the patient experience. Besides those technological investment there is one specific system is required as a quality standard of having international patient certificate for hospitals. It is not an obligation but crucial for the process of accepting foreign patient. It is called document upload system. Since the potential patients are from abroad their needs must be understood clearly before they arrive. This system makes it easy for both the facility and the patient itself.

Secure electronic messaging tools within web-based patient portals are being adopted quickly in healthcare, and both providers and patients are increasingly enthusiastic about utilizing this method of communication (Jahn et al., 2018).

Document upload systems play a crucial role in modern healthcare by improving operational efficiency and enhancing communication between patients and healthcare providers. These systems allow for a more streamlined intake process, enabling patients to submit their documents easily and quickly (Haun et al., 2015). As a result, this technological advancement contributes to improved patient outcomes and overall satisfaction. This technological advancement not only improves operational efficiency but also contributes to higher patient satisfaction and better overall health outcomes.

As healthcare continues to evolve, the significance of such systems in bridging the gap between patients and providers cannot be overstated. The usage of that specific system is forwarded as a question to the managers of hospitals attend our survey. Below is an analysis between document upload system and foreign patient admission rates of hospitals based on the survey findings.

Table 7. Document upload system

Document upload system	International patient admission rates					Total hospital numbers
	0 – 20 %	20 – 40 %	40 – 60 %	60 – 80 %	80 – 100 %	
YES	16	8	5	2	3	34
NO	12	4	2	0	0	18

Key features of having document upload system;

- Diversity: Infrastructure hospitals have a wide range from university hospitals to private hospitals. This is evidence of the commitment of various healthcare providers to technology.

- **Competitive advantage:** Technological infrastructure allows hospitals to communicate and provide services to international patients better. This may give hospitals a competitive edge in the global health tourism market.
- **Quality of service:** Information systems and remote document upload can enhance the quality of patient satisfaction. International patients can save time by easily uploading their documents, thus speeding up their processes.

34 hospitals from 52, claim that they have document upload system online. In addition to that specific system, 23 of those hospitals also stated technological investments from different categories explained above. Above all else, at the 18th question where those professionals are asked to evaluate the importance of different sub-categories, there was a sub-category about the importance of technological investments. 18 hospitals which state to have both technological investments and document upload system, claims that their technological investments are very influential on international patients. 10 out of the 18 hospitals also stated they welcome between 40 – 100 % international patients.

Key handicaps of not having document upload system

- **Limited technology use:** Hospitals without infrastructure may lag behind in technological advancements. This can negatively impact patient satisfaction and service quality.
- **Competitive challenges:** These hospitals may face difficulties attracting international patients. The lack of technological infrastructure can weaken their competitiveness in the international health tourism market.
- **Limited quality service Experience:** Lack of infrastructure can be regarded as a limited-service experience for foreign patients. Investment in technology

can improve their quality of service as well as their ability to provide better information for international patients' needs.

18 facilities from 52, claim that they have not document upload system online. Furthermore, 13 of those 18 centers also stated that they have no other technological investments at all. Above all else, to the 18th question's sub-category which evaluate the importance of technological investments in terms of foreign patients, 8 of those 13 hospitals either claims somewhat influential or not influential at all. 7 of those 8 hospitals' international patient admission rates are between 0 – 20 %, only one of them achieved to accept between 20 – 40% patients.

The hypothesis H9: states, "Hospitals' investments in technology enhance their potential for health tourism and positively influence the preferences of international patients." The survey results strongly support this hypothesis. It is evident that hospitals with technological investments have higher foreign patient admission rates, thus validating the accuracy of the hypothesis.

5.10 Collaborating with external resources in order to reach more international patients

This section presents the evaluation of intermediaries during accepting foreign patients from abroad. A question about international patient admission process in the survey conducted. This inquiry aimed to uncover the strategies hospitals employ to facilitate the admission of foreign patients. The responses reveal a variety of sources used by hospitals in order to bring international patients.

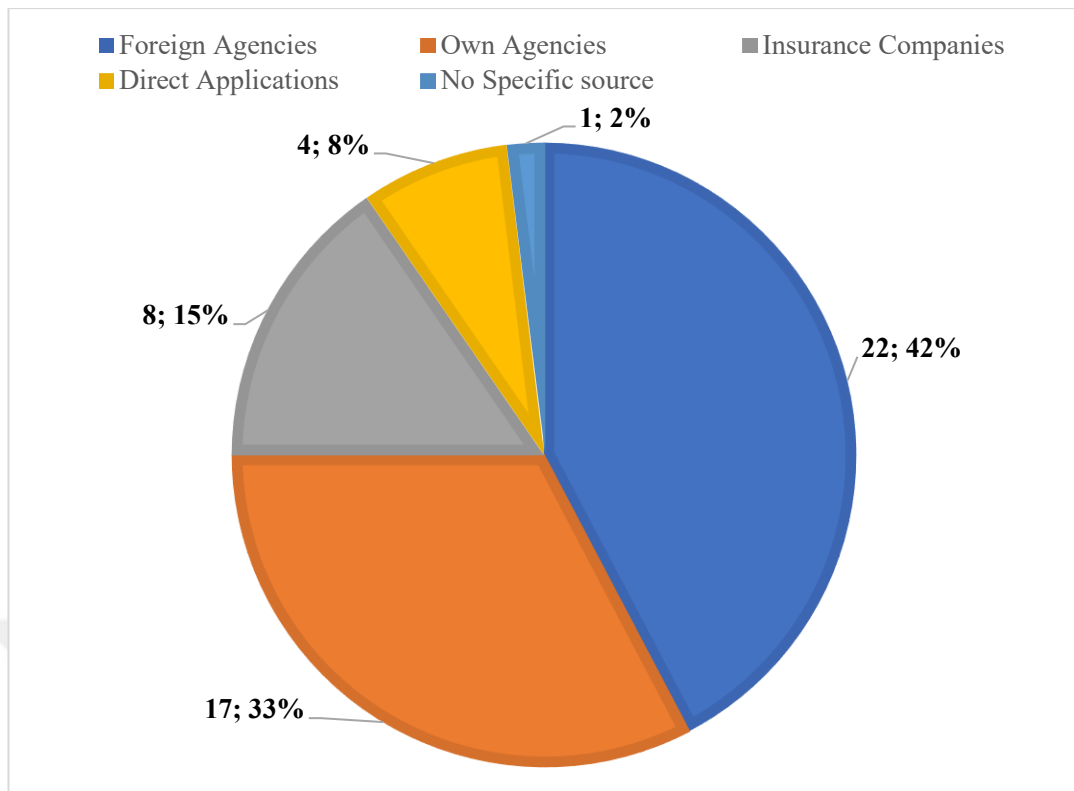


Figure 8. Sources to bring international patient

The findings reveal that foreign agencies are the most commonly employed source for helping international patient admissions, 42% of hospitals rely on these partnerships. This suggests that many hospitals recognize the importance of collaboration with external entities to effectively attract and manage foreign patients. Research indicates that such collaborations can enhance service delivery by providing hospitals with insights into international patient needs (Kuşat & Esen, 2022).

In contrast, own agencies are utilized by 32% of the hospitals, indicating a significant reliance on internal resources. While this approach can offer greater control over the admission process, it may also limit the hospitals' ability to reach a broader international audience. The dual reliance on both foreign and own agencies highlights a strategic approach that combines internal capabilities with external partnerships.

The involvement of insurance companies, reported by 15% of hospitals, reflects another important source for attracting international patients. Paul et al. (2017) stated that many developed countries' insurance companies are aware of that the health expenses are cheaper outside of their homelands. Therefore, they started to create health tourism plans for their customers which eventually reduce companies' costs. Even the insurance companies like Anthem Blue Cross and Blue Shield and United Group Programs attended global healthcare congress where thousands of health service providers gather, in order to advertise their new plans for health tourism (Paul et al., 2017).

According to IMARC Group (2022) healthcare marketing is a dynamic field in order to improve hospitals' capacity to connect with patients and build enduring relationships they should utilize effective strategies. The findings from our survey shows that a small percentage like 7 % of hospitals rely on direct applications. 2 % of the hospitals report having no specific source. This suggests that while some hospitals may have established pathways for international admissions, there are still opportunities for improvement in outreach and engagement strategies.

The survey results of correlation between patient admission rates and collaborating external organizations explained as follows. First of all, hospitals claim to either not work with any agency, or accept only direct applications from foreign patients stated their patient admission rates were between 0 – 20 %. On the contrary, most of the other hospitals work with foreign agencies, insurance companies, or their own agencies stated their patient admission rates above 40 %.

The data indicates that 42% of hospitals utilize foreign agencies, which supports the 10th hypothesis's first part of foreign agencies' positive impact on patient admission process. This finding aligns with the understanding that external

partnerships can enhance operational efficiency and patient outreach (Kusat & Esen, 2022). In addition to that, 15% of hospitals reported working with insurance companies, further reinforcing the hypothesis's second part which claims the positive impact of insurance companies on patient admissions. Paul et al. (2017) stated that collaborations with insurance providers can streamline the admission process and mitigate financial concerns for international patients, making hospitals more attractive as treatment destinations.

However, a notable proportion of hospitals like 32% rely on their own agencies. While these internal resources can provide control over admissions, they may limit the hospitals' reach to international patients. This reliance on internal channels indicates a potential gap in maximizing the benefits that could be derived from external collaborations.

Taking all into consideration, the survey results partially support the hypothesis H10 and yet the hypothesis missed the importance of hospitals' own agencies. The collaboration with foreign agencies and insurance companies leads to higher rates of successful international patient admissions. The strong reliance on foreign agencies and insurance companies indicates that these partnerships are essential for optimizing the admission process.

5.11 Factors positively effects international patients to prefer hospitals

In recent years, the healthcare sector in Türkiye has witnessed significant growth, particularly in the dominion of medical tourism. To understand the factors influencing this expansion, a survey was conducted among various hospitals to assess the impact of specific attributes on their services. The results of this survey provide valuable insights into the perceptions of healthcare providers regarding the

quality of services, technological infrastructure, accessibility, pricing, waiting times, support of agencies, accreditation, experienced doctors, touristic advantage of Türkiye and government incentives. the following table shows the findings of that question.

Table 8. Factors mostly effect international patients

Criteria	Numbers of hospital		
	Not influential at all	Somewhat influential	Very influential
Quality of services	0	5	47
Technological infrastructure	0	6	46
Accessibility	0	7	45
Pricing	0	8	44
Waiting times	1	10	41
Support of agencies	0	20	32
Accreditation	10	14	28
Experienced doctors	1	31	20
Türkiye's touristic advantage	9	31	12
Government's incentives	15	28	9

18th question of the survey, presents a three-option question regarding certain topics; quality of services, technological infrastructure, accessibility, pricing, waiting times, support of agencies, accreditation, experienced doctors, touristic advantage of Türkiye and government incentives. It requested an evaluation of these topics from

the perspective of foreign patients whether they have impact or not. The options were: 'Not influential at all', 'Somewhat influential', and 'Very influential'. In this section, the evaluation of the responses is given.

There are four topics that are mentioned as “Very Influential” over almost 85 % of all hospitals. Those topics are high quality healthcare services, technological infrastructure, accessibility, and pricing. 47 hospitals indicated a strong positive impact for high quality healthcare services. This suggests that maintaining high standards is crucial for attracting foreign patients. Technological infrastructure was followed by 46 hospitals, frequently marked as “Very Influential”. This suggests that the effectiveness of technological investments is highly considered by international patients. Third most rated criteria was accessibility with 45 hospitals. Since the targeted patients come from abroad, easy-access matters for them. Last but not least, pricing has voted by 44 hospitals. This reflects that international patients are price sensitive for their treatments.

There are three topics have found “Not Influential at All” which are government incentives, accreditation, and touristic advantage of Türkiye. First of all, even though government incentives are crucial for hospitals, it has not the same significance for international patients, because it does not have any direct effect on them. In this mind of setting, it makes sense to be not influential at all. Secondly, Türkiye’s being touristic place is considered as “Not Influential at All” by the managers. This will only make sense when it is considered that almost all of the patients are coming for medical tourism purposes to those hospitals, not for thermal or spa tourism. Last one is remarkable, 10 out of 52 hospitals managers which is almost 20 % of all, have found accreditation is not influential at all. 7 of those 10

hospitals do not have accreditation certificate, since they do not have this certificate, they might think it is not important factor for foreign patient. Yet, 28 out of 52 hospitals assumed accreditation is very influential.

All of above take into consideration, the survey results provide support for the hypothesis H11 which states that “Foreign patients prefer hospitals that offer high-quality healthcare services and have advanced technological infrastructure; these factors positively influence their decisions regarding health tourism.” The survey results highlight that high-quality care, technological infrastructure, accessibility, and pricing are the most voted answers regarding the influencing international patients. Thereby validating the hypothesis that high-quality services and technological capabilities are crucial to attract international health tourists. Kusat and Esen (2022) also mentioned that upgrading technological infrastructure will raise the competitiveness of the Türkiye’s health sector at the global market, since it attracts more international patients. In addition to that Omay and Cengiz (2013) remarked quality healthcare system as a matter which makes Türkiye’s healthcare attractive for foreign patients.

Even though two factors align with the hypothesis, there are two more factors that are critical in shaping the preferences of foreign patients seeking medical treatment abroad, which are accessibility and pricing. Overall, the survey findings and the hypothesis are closely interconnected, this analysis can serve as a foundation for further research or strategic planning within the healthcare sector.

5.12 Evaluation the development of health tourism in Türkiye

Health tourism has emerged as a significant sector in terms of high economic return as service export for many countries, including Türkiye. The potential for growth in

this area is vast, driven by various factors such as Aiming for the Highest Quality, Advertising and Promotional Activities, Enhancing Türkiye's International Reputation, and etc. The survey was conducted by utilizing a Likert scale, to better understand the key components that contribute the development of health tourism in Türkiye. In addition to that 20th and the final question, which seeks for suggestions from health professionals according to development of Türkiye's health tourism. Suggestion question has importance in terms of not limiting the participants with the certain topics from the Likert-scale question. 28 of those 52 participants provided suggestions. Therefore, 54% of hospital administrators contributed to the suggestion section. This survey aims to gather insights on the importance of various factors that can influence the enhancement of health tourism in Türkiye.

At the 19th question of the survey, Likert-scale question regarding certain topics were asked. Evaluation of these topics were requested from the angle of the development of health tourism in Türkiye. In that question, 1 represent for “Not important at all” and 5 is for “Very important”. Evaluated the responses are given in this section.

Table 9. Likert scale question answers

Topics	Numbers of Hospital				
	1	2	3	4	5
Increasing incentives	0	0	6	8	38
Advertising and promotional activities	0	0	9	12	31
Training qualified personnel	0	5	5	12	30
Aiming for the highest quality	0	0	0	12	40
Enhancing Türkiye's international reputation	0	0	17	6	29
Strengthening technology in healthcare	0	0	16	9	27
Convenience for visa and flight tickets for health tourists	1	6	12	5	29
Legal regulations to support health tourism	3	8	11	15	18

The results of the survey indicate that hospital administrators in Türkiye have provided their perspectives on various aspects of health tourism through a Likert scale assessment. This evaluation reflects their opinions about the importance of several factors that contribute to the development of health tourism in Türkiye. Key findings matter more than others are revealed below.

First of all, the highest voted criteria are Aiming for the Highest Quality health services. Most hospitals aimed for the highest quality in service delivery, reflecting a commitment to excellence. However, variability in scores indicates that some hospitals may still need to improve their service quality. 12 hospitals' managers voted this particular issue as important, and 40 of them voted as very important. It is

remarkable that there was no other scoring to that part of the question. As Raoofi et al. (2024) stated quality of healthcare is one of the major issues, and it is directly linked to trained medical staff. That is why, 42 out of 52 professionals have also said either important or very important to Training Qualified Personnel.

Second highest scored sub section was Increasing Incentives. 8 hospitals administrative stated as important, and 38 of them as very important. Gülşen and Solak (2024) stated before financial incentives are necessary to become competitive in health tourism internationally. Türkiye's health-care managers seem to think same way.

Third one on the rank was increasing Advertising and Promotional Activities in order to develop health tourism. 12 of the hospitals said it is important, while 31 of them clarify as very important. It is better to take notice that there was no scoring to that question neither not important at all, nor not important.

The topic Enhancing Türkiye's International Reputation has got 29 votes from 52 hospital managers. It is little more than the half of the participants. Same results appeal for the section of Convenience for Visa and Flight Tickets for Health Tourists as well. However, reputation increasing efforts did not get any 1 or 2 score which means no professional seem this issue as not important, on the other hand, convenience for visa and flight ticket for health tourist got both 1 and 2 scores. Even though low scored hospital numbers were short, still there are some professionals consider this issue is not a hot topic in order to develop health tourism.

There is another topic which is not given 1 or 2 scores as well, that is Strengthening Technology in Healthcare. It can be said that Most of the professionals consider this issue as a significant factor in terms of developing the Türkiye's health tourism sector internationally. Recent research also highlighted that healthcare

services amplified with advanced technology have positive contribution to the growth of health tourism (Baybatlı & Ertürk, 2024).

Last sub-topic in that Likert-scale question was about Legal Regulations to Support Health Tourism. This issue was the only one which gets evenly distributed answers. It can be concluded that since the legal regulations are mostly related with internal issues of health sector, it may not be seemed as important as other sub-sections for the health professionals, in terms of contribution for the development of health tourism.

Specific suggestions are also asked for the development of health tourism in Türkiye, at the 20th and final question of the survey. There were 52 participants; only 28 of them provided suggestions. Therefore, 54% of hospital administrators contributed in that part. They are grouped as follow; Medical Staff, Marketing, Pricing, Incentives, Audit, and Quality related contents.

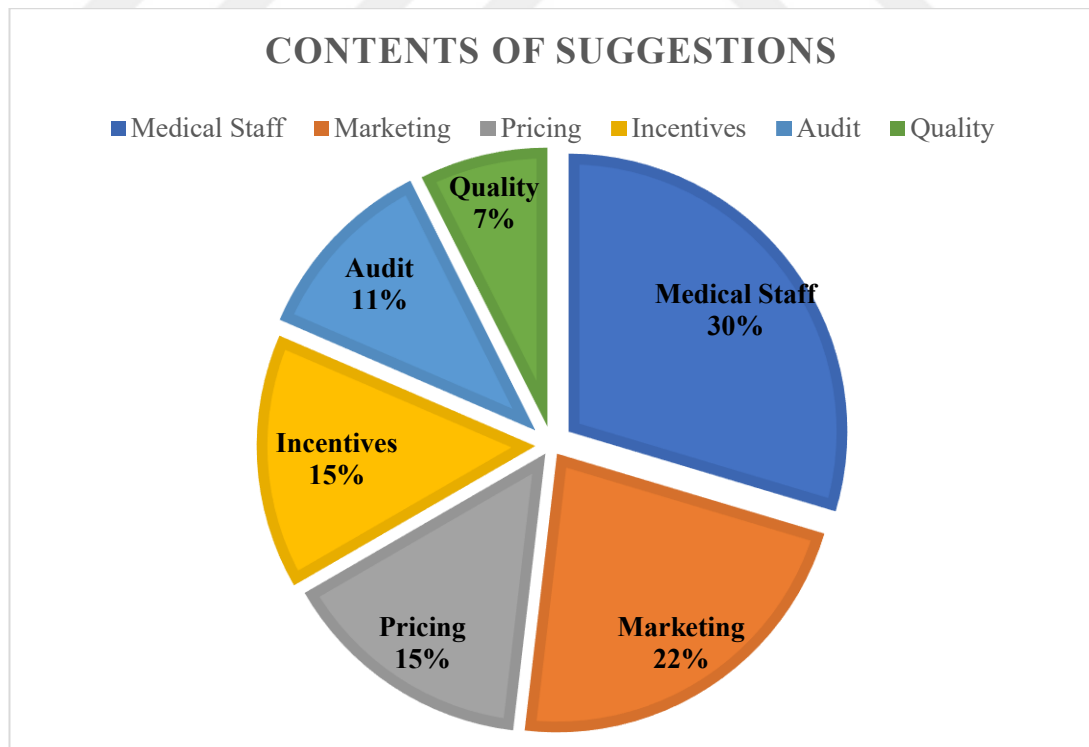


Figure 9. Suggestions

The responses collected from hospital administrators regarding the development of health tourism in Türkiye, provide valuable insights into the industry's current challenges and opportunities. The suggestions reflect a diverse understanding of the factors that can enhance the health tourism and attract international patients.

Several administrators emphasized the need for improving on healthcare staffs in many aspects. While 9 hospitals have recommended under this content, most of them emphasize the importance of training specific to health tourism. Collins et al. (2022) stated that ensuring high-quality care is essential, and this can be achieved through enhanced training for healthcare professionals to maintain a superior level of service. It is stated in the survey results that training programs should also be applied to executive teams rather than just to field personal. They believe that trained employee at any position will also help to promote the establishments as well. Some of them also stated that specific department should be set, in order to raise awareness. According the survey results not only the training, but also personal rights should be improved. Many of those professionals agreed that all health workers' incomes and promotions should be increased. Even there were some suggestions which stated that doctor's revenue should be higher when they serve to international patients, since the organization earn more.

A consistent theme among the suggestions was about the need for enhanced marketing efforts. Patci and Aldoğan (2021) mentioned that successful advertising campaigns in foreign countries have proven to be highly effective in attracting patients, thereby contributing significantly towards the growth of the health tourism industry. 6 hospital professionals gave suggestion regarding advertisement. Majority of them support the idea of increasing promotional activities since they directly affect

the visibility of Türkiye's health tourism efforts internationally. Some of the recommendations includes that there should be more health tourism fairs, and tourist trips both inside and outside Türkiye. While some others underline that regulations towards advertisements should be alleviated by the policy makers. Effective marketing strategies have been demonstrated to have a substantial effect on the success of health tourism initiatives (Koç & Aydın, 2023).

Many hospital administrators stressed the need for increased incentives to foster health tourism. Four different professionals have stated the importance of increased encouragements. In addition to increase they also support the idea of reachability of the incentives. One of them especially highlighted that incentives should be more beneficial to health-care providers rather than intermediary organizations. Financial incentives by government are essential to become competitive, to enhance service quality, and to boost international patient inflow (Tengilimoğlu, 2021; Gülşen & Solak, 2024; Taş & Karyagdi 2024).

All of the professionals who contributed about pricing issue, have stated the same thing which is about reasonable pricing. Most of them agreed that there is no cost-based pricing strategy on health tourism. They believe that same services are offered to native patients at lower costs by hospitals, whereas the price goes up when they charge international patients. They stand up for the idea of standard price tariff for international patients. Even, some of them have concerns, that current pricing strategy will negatively affect the health tourism sector in Türkiye.

Some of the health professionals underline that audition. They believe increase in auditions will improve the overall quality of serving international patients. Firstly, they stated that there were some organizations operate without licenses. Secondly, intermediary firms like agencies, or even healthcare providers

should be monitored and regulated by the policy makers. Some managers believe that Türkiye's health system should not be competing on price, instead they should compete on quality. Priority of the hospitals should on the service quality in order to satisfy foreign patients, rather than other issues like profitability. There were not many suggestions for quality issues, this may be related with the perception that the current Türkiye's health system quality is already above the average.

The suggestions from hospital administrators reveal a comprehensive understanding of the multifaceted nature of health tourism. The results from survey support the hypothesis H12. Aiming for the highest quality, increasing incentives, and advertising and promotional activities are the most voted topics by health-care professionals, which is exactly mentioned in the hypothesis

CHAPTER 6

POLICY RECOMMENDATIONS

Türkiye's health tourism industry has shown great potential for expansion, fueled by several factors that hospitals need to strategically tackle in order to increase their foreign patient admissions. Studies show that hospitals with health tourism certification have greater international patient acceptance rates. The presence of certified hospitals with low admission rates, however, highlights that certification is not enough; numerous factors determine the appeal of foreign patients.

To improve patient satisfaction, hospitals must focus on the delivery of a variety of cultural, social, and leisure activities. These additional amenities have been seen to contribute significantly to the overall experience of the patient, making Türkiye an even more popular destination for health tourism. Combining elements of experience of local culture, well-being programs, and recreational facilities not only enhances the value of the patient experience but also encourages word-of-mouth, generating even more interest from international visitors.

Moreover, prioritizing the activities of health tourism can greatly enhance the rate of accepted foreign patients. The trend indicates that hospitals should prioritize marketing and promotion activities to attract foreign patients. By establishing personalized marketing campaigns that highlight the competitiveness of Türkiye in the areas of quality, price, and accessibility of healthcare, hospitals can position themselves competitively in the world's health tourism market.

While quality of care and availability remain crucial, it has now been found from studies that pricing's role might be less paramount than initially expected. This consideration indicates that there should be greater emphasis on delivering excellent

service and exceptional patient satisfaction rather than comparing on prices.

Enhanced service quality, patient service, and customer satisfaction can work its way through enhanced loyalty and repeated visits and consultations, thus achieving long-term international patient relations.

Furthermore, the fact that dental care services have not been a focus of the survey points to an untapped potential within the health tourism industry. Increased demands for dental care from overseas patients could make Türkiye's outreach much broader. Marketing full dental packages alongside other medical services could attract a wider audience of health tourists to hospitals.

Effective communication strategies are also essential in raising patient satisfaction. Staff communication skill training has the capacity to improve patient encounters, leading to a more satisfying health care experience. Effective and empathetic communication, especially in a diverse setting, has the ability to bridge gaps and establish trust, making patients feel important and heard.

The significant amount of hospitals' usage of their own agencies reveals a potential area for improvement, suggesting that hospitals could benefit from expanding their external collaborations to enhance their international patient admission rates further. This approach could ultimately lead to improved patient admission rates and greater satisfaction among international patients.

Even though, majority of hospitals in Türkiye possess the necessary technological infrastructure for international patients. Considering the number of hospitals without advanced technological infrastructure, there is significant potential for development in this area. By directing investments toward technology, hospitals can increase their international patient intake and enhance overall service quality.

Türkiye's geostrategy also enhances its capacity to attract patients from local markets and neighboring countries. Direct accessibility through direct flights from major cities makes it convenient, therefore an easy choice for medical tourism. Through this advantage, hospitals can invest in specialized marketing to neighboring countries, promoting services and forming partnerships with local agencies.

Sevim and Tufan (2023) emphasize that the effective use of incentives correlates with higher patient satisfaction and operational efficiency, further reinforcing the need for hospitals to engage with these resources. In order to contribute the service quality, research conducted by Tengilimoğlu (2021) indicates that hospitals that take full advantage of government incentives tend to enhance their service quality, which is essential for meeting the evolving demands of international patients. This strategic alignment not only increases patient satisfaction but also contributes to the long-term viability of health tourism initiatives. Hospitals that are not currently leveraging these incentives, they should consider implementing strategies to enhance their competitiveness in the health tourism sector, ultimately leading to increased growth and better patient outcomes.

CHAPTER 7

CONCLUSION

When the open-ended question's results are evaluated, it can be observed that common pricing tariff, audit requirement, and need for more transparent legal regulations indicate areas that must be worked on in order to realize the full potential of health tourism. As there is establishment of common price tariff, audit need, need for more transparent law regulation, and coordination among sectors could add more power to a model for developing health tourism in Türkiye. Türkiye can enhance its health tourism services by implementing these recommendations. Those would be of great help in improving the development and success of health tourism in the country, making it an even more attractive destination for foreign patients.

Lastly, Türkiye's hospitals should invest their resources in further investment in health tourism, diversification of services, appropriate marketing, and collaboration with foreign agencies. If they implement these policies, hospitals will significantly enhance their international patient admissions and competitiveness in the rapidly evolving global health tourism industry. By taking a holistic approach that puts emphasis on quality, accessibility, and patient satisfaction, Türkiye will not only establish itself as a health tourism destination but also achieve sustainable growth in this new area.

CHAPTER 8

LIMITATIONS OF THE RESEARCH

This study is limited to 46 hospitals and 52 administrators, all of which are actively involved in health tourism in Türkiye. This focus on a specific subset of institutions is significant when interpreting the findings, as it may not fully represent the broader landscape of health tourism across the country.

Additionally, another limitation of this research is that it relies on a survey capturing the perceptions and insights of health professionals. Consequently, the results may be influenced by their individual perspectives and potential biases. This reliance on subjective viewpoints could restrict the generalizability of the findings to other stakeholders within the healthcare system, such as patients, policymakers, and administrative staff. Thus, while the insights provided are valuable, they should be contextualized within the framework of the specific participants involved in the study.

After the findings it has been realized that there are some sub-categories that are needed to be tested. For further studies it will be recommended and for this study it could be accepted as a limitation.

APPENDIX A

SURVEY FOR HEALTH PROFESSIONALS

Dear Health Administrator, this survey form is being conducted as part of a master's thesis study at Boğaziçi University under the supervision of Assoc. Prof. Aslı Deniz Helvacıoğlu. The data obtained will be used solely for scientific purposes and will not be shared with any institution or individual. Providing accurate and complete answers to the survey questions is crucial for the success of the study. Thank you for taking the time to participate in the survey.

Mehmet Burak Sezer

SURVEY QUESTIONS

SURVEY QUESTIONS TO BE DIRECTED TO HOSPITAL OFFICIALS

SECTION 1:

1. Name of your hospital:
2. Number of branches of your hospital:
3. Your educational background:
☐Primary-Middle School ☐High School
☐University ☐Master's Degree ☐Doctorate and above
4. How many years has your hospital been in operation?
5. Does your hospital have a health tourism certificate?
☐Yes ☐No
6. What is the approximate percentage of international patients among those visiting your hospital?
☐%0-20 ☐%20-40 ☐%40-60 ☐%60-80 ☐%80-100
7. How is health tourism positioned in relation to the general strategy and goals of your hospital?
☐It is our top priority
☐It is among our top three priorities
☐It has come to our agenda due to recent demand increases
☐It is not among our priorities

SECTION 2

1. Please provide the following general information about your hospital.
 - a. Total Bed Capacity:
Intensive Care Bed Count:
Service Bed Count:
 - b) Total number of staff:
 - c) Number of active service personnel:
2. What do you think are the reasons international patients prefer your hospital?
.
.
.
3. Which three specialties do international patients most frequently seek services from in your hospital?
.
.
.
4. Has a separate department been established to monitor the processes of international patients in your hospital?
☐Yes ☐No
5. Is there staff who speaks foreign languages assigned to communicate with and manage the processes of international patients coming to your hospital?
☐Yes ☐No
6. Do you have interpreters contracted with your hospital to communicate with foreign patients who speak different languages?
☐Yes ☐No
7. Did you know that there is a 24/7 center provided by the Ministry of Health offering free interpreter support? If yes, do you use this service?
☐Yes ☐No ☐ (We use it)
8. Do you offer cultural, social, or sports services outside of healthcare to international patients visiting your hospital?
☐Yes ☐No

9. Do you provide special transportation and/or transfer services for international patients visiting your hospital?
- ☐Yes ☐No
10. From which countries do foreign patients most frequently apply to your hospital?
11. What problems and issues do you most frequently encounter with foreign patients?
12. Are there quality initiatives related to health tourism being conducted in your hospital?
- ☐Yes ☐No
13. Does your hospital have accreditation certification?
- ☐Yes ☐No
14. Does your hospital benefit from Health Tourism Incentives?
- ☐Yes ☐No
15. Does your hospital have technological investments aimed at health tourism?
- If yes, please specify your investments.
- ☐Yes ☐No
- Technology investment (Please specify.....)
16. Do you think your hospital is conducting advertising and promotion aimed at international patients?
- ☐Yes ☐No

17. What intermediary organizations does your hospital work with when accepting patients from abroad?

☐ Foreign agencies

☐ Own agencies

☐ Insurance companies

☐ Other (Please specify)

18. Please evaluate the following propositions from the perspective of international patients who wish to come to your hospital.

	Not influential at all	Somewhat influential	Very influential
Provision of high-quality healthcare services			
Affordability of healthcare services			
Short waiting times for healthcare services			
Türkiye's central location			
Accreditation of your hospital			
Strong medical staff of your hospital			
Support from intermediary organizations and agencies			
Türkiye's richness in terms of tourism			
Technological infrastructure of your hospital			
Utilization of incentives by your hospital			

19. Please evaluate the following statements regarding the development of health tourism in Türkiye. (1: Not important at all - 5: Very important)

	1	2	3	4	5
Increasing incentives					
Diversifying advertising and promotional activities					
Training qualified personnel					
Targeting the highest quality in healthcare service delivery					
Conducting studies to enhance Türkiye's international reputation					
Strengthening technology in healthcare infrastructure					
Providing ease of visa and flight ticket arrangements for international health tourism applicants					
Establishing legal regulations to support health tourism					

20. If you have any suggestions for the development of health tourism in Türkiye, please specify.

(Please specify.....)

APPENDIX B

ETHICS COMMITTEE APPROVAL



T.C.
BOĞAZİÇİ ÜNİVERSİTESİ REKTÖRLÜĞÜ
Sosyal ve Beşeri Bilimler İnsan Araştırmaları Etik Kurulu (Sbinarek)

Sayı : E-84391427-050.04-217506
Konu : 2024-81T Kayıt Numaralı Başvurunuz
Hakkında

23.01.2025

Sayın Doç. Dr. Aslı Deniz HELVACIOĞLU

Tez danışmanlığımı yürüttüğünüz öğrenciniz Mehmet Burak Sezer'in "'Health Professionals' Strategic Evaluation of Health Tourism: The Case of Türkiye." başlıklı projesi ile Boğaziçi Üniversitesi Sosyal ve Beşeri Bilimler İnsan Araştırmaları Etik Kurulu (SBİNAREK)'e yaptığınız 2024-81T kayıt numaralı başvuru 17.01.2025 tarih ve 2025/01 sayılı kurul toplantısında incelenmiş ve projeye etik onay verilmesi uygun bulunmuştur.

Bu karar tüm üyelerin toplantıya on-line olarak katılımıyla ve oybirliği ile alınmıştır. Onay mektubu tüm üyeler adına Komisyon Başkanı tarafından e-imzalanmıştır. Bilgilerinizi rica ederiz.

Saygılarımızla,

Dr. Öğr. Üyesi Işıl ERDUYAN
Kurul Başkanı

Bu belge, güvenli elektronik imza ile imzalanmıştır.

Belge Doğrulama Kodu : 0BEK-R660-0H3K

Belge Doğrulama Adresi : <https://www.turkiye.gov.tr/bogazici-universitesi-ebys>

Adres: Boğaziçi Üniversitesi 34342 Bebek/ İstanbul

Telefon No: Faks No:

e-Posta: Internet.Adresi: www.bogazici.edu.tr

Kep Adresi: bogaziciuniversitesi@hs01.kep.tr

Bilgi İçin: Nurşen MUNAR
Mühendis

Telefon No: 0 212 359-6749



REFERENCES

- Abdelaziz, A., & Mahmoud, A. N. (2023). Data security in healthcare systems: Integration of information security and information management. *Journal of Cybersecurity and Information Management*, 11(2), 17–26. <https://doi.org/10.54216/jcim.110202>
- Alpin, G. M., & Solak, I. (2024). Health tourism tax incentives in Turkey in 2024. *Bulletin of the International University of Tourism and Hospitality*, 4(2), 6–17. <https://doi.org/10.62867/3007-0848.2024-4.01>
- Alshenqeeti, H. (2014). *Interviewing as a data collection method: A critical review*. English Linguistics Research, 3(1). <https://doi.org/10.5430/elr.v3n1p39>
- Ateş, A., & Sunar, H. (2024). Comparison of Türkiye’s medical tourism market with existing and potential competitor countries. *Journal of Society, Economics and Management*.
- Atiemo, P. (2020). *Factors influencing customer satisfaction in healthcare in some selected public and private hospitals in the Greater Accra Region*. University of Cape Coast.
- Aydin, G., & Altuntaş, B. K. (2015). Dünyada ve Türkiye’de sağlık turizmi pazarlama uygulamaları ve karşılaştırmalı durum analizi. *Pazarlama ve Pazarlama Araştırmaları Dergisi*, 1–21. <https://www.researchgate.net/publication/328833599>
- Aydin, G., & Karamehmet, B. (2017). Factors affecting health tourism and international health-care facility choice. *International Journal of Pharmaceutical and Healthcare Marketing*, 11(1), 16–36. <https://doi.org/10.1108/ijphm-05-2015-0018>
- Aydın, Y. E., Çalınar, H., Korkmaz, S. G., & Demir, L. (2024). A systematic review of medical tourism supply chain: Current status and future directions. *International Journal of Contemporary Tourism Research*, 8(2), 213–226. <https://doi.org/10.30625/ijctr.1525031>
- Batbaylı, Ş., & Ertürk, E. (2024). Uluslararası hizmet ticareti olarak sağlık hizmeti ihracatı ile döviz kuru ve ekonomik büyüme arasındaki ilişki. *Dicle Üniversitesi İktisadi ve İdari Bilimler Fakültesi Dergisi*, 14(27), 336–364. <https://doi.org/10.53092/duibfd.1399591>
- Bostan, S., Tengilimoglu, D., Karaman, S., Colak, T., Caltulu, N., & İleli, O. C. (2023). Determining healthcare services satisfaction of foreign patients: Field research. *European Journal of Environment and Public Health*, 7(3), em0138. <https://doi.org/10.29333/ejeph/13075>
- Buzulukova, E., & Lobova, E. (2023). Stimulating the growth of ‘silver’ tourism through the development of relationships and the creation of targeted communications with travelers. *Population and Economics*, 7(4), 103–123. <https://doi.org/10.3897/popecon.7.e110202>

- Cetinguc, C. (2024, April 13). *Turkey ranks 7th worldwide in health tourism with \$2.3B revenue in 2023*. P.A. Turkey.
<https://www.paturkey.com/news/2024/turkey-ranks-7th-worldwide-in-health-tourism-with-2-3b-revenue-in-2023-15675/#:~:text=According%20to%20recent%20data%20from,reaching%201.4%20million%20in%202023>
- Cioban, G.L., Cioban, C.I., & Nedelea, A.M. (2018). *Trends in medical tourism in the context of globalization*. Lumen Proceedings.
<https://doi.org/10.18662/lumproc.76>
- Çoban, M., Öztürk, N., & Ekinçi, E. (2020). A bibliometric analysis of the 100 top-cited publications in health tourism. *International Journal of Health Management and Tourism*. <https://doi.org/10.31201/ijhmt.790108>
- Cohen, E. (2008). *Medical tourism in Thailand*.
<https://assumptionjournal.au.edu/index.php/AU-GSB/article/view/381>
- Cohen, E. (2011). Medical Travel and the Quality-of-Life. In *Springer eBooks* (pp. 169–191). https://doi.org/10.1007/978-94-007-2288-0_10
- Collins, A., Medhekar, A., & Şanal, Z. G. (2022). A qualitative analysis of Turkish stakeholders perspective for improving medical tourism. *International Journal of Tourism Research*, 24(3), 487–500. <https://doi.org/10.1002/jtr.2516>
- Connell, J. (2006). Medical tourism: Sea, sun, sand and . . . surgery. *Tourism Management*, 27(6), 1093–1100.
<https://doi.org/10.1016/j.tourman.2005.11.005>
- Corbin, J., & Strauss, A. (2008). *Basics of Qualitative Research (3rd ed.): Techniques and Procedures for Developing Grounded Theory*.
<https://doi.org/10.4135/9781452230153>
- Cortez, N. (2008). Patients without borders: The emerging global market for patients and the evolution of modern health care. *Indiana Law Journal*, 83.
- Çalışkan, S., Sevim, B., & Tuncer, K. (2024). Health tourism training: A study on secondary education. *International Journal of Health Management and Tourism*, 9(3), 267–284. <https://doi.org/10.31201/ijhmt.1530586>
- Dabbagh, M. (2017). *Healthcare tourism*. International Hellenic University.
- Deloitte Center for Health Solutions. (2020). Health tech investment trends: How are investors positioning for the future of health? In *Deloitte Center for Health Solutions*.
https://www2.deloitte.com/content/dam/insights/us/articles/6459_Health-tech-investment-trends/DI_Health-tech-investment-trends.pdf
- Denzon, G. (2024, December 29). *Navigating Senior Tourism Trends: What to expect in the coming years*. TicketingHub.
<https://www.ticketinghub.com/blog/senior-tourism-trends>

- Dharmadhikari, S. (2022). *Emerging trends in health insurance sector. In Emerging trends in health insurance sector.*
- Drăghici, C. C., Diaconu, D., Teodorescu, C., Pintilii, R.-D., & Ciobotaru, A.-M. (2016). Health tourism contribution to the structural dynamics of the territorial systems with tourism functionality. *Procedia Environmental Sciences*, (32), 386–393. <https://doi.org/10.1016/j.proenv.2016.03.044>
- Eurostat. (2011). *Tourism trends and ageing*. https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Tourism_trends_and_ageing#Highlights
- Figueiredo, N., Abrantes, J. L., & Costa, S. (2024). Mapping the Sustainable Development in Health Tourism: A Systematic Literature Review. *Sustainability*, 16(5), 1901. <https://doi.org/10.3390/su16051901>
- Freeland, M. S., & Schendler, C. E. (1984). Health spending in the 1980's: Integration of clinical practice patterns with management. *Health Care Financing Review*, 5(3).
- Genc, A., Şencan, İ., Aydın, D., Constantinides, C., Mike, C., Yılmaz, C., & Lanyi, A. (2012). *Definitions and descriptions regarding health tourism*. In Republic of Turkey Ministry of Health General Directorate of Health Services Department of Health Tourism (Ed.), Health tourism.
- Gianfaldoni, S., Tchernev, G., Wollina, U., Roccia, M. G., Fioranelli, M., Gianfaldoni, R., & Lotti, T. (2017). History of the baths and thermal medicine. *Open Access Macedonian Journal of Medical Sciences*, 5(4), 566–568. <https://doi.org/10.3889/oamjms.2017.126>
- Gül, T., Değirmencioğlu, A., Bulut, B., Dağ, E., Baştürk, Y., & Dağlı, M. (2022). Health service quality and patient communication in medical tourism. *Journal of Tourismology*, 8(1), 115–137. <https://doi.org/10.26650/jot.2022.8.1.1059252>
- Haun, J. N., Patel, N. R., Lind, J. D., & Antinori, N. (2015). Large-Scale survey findings inform patients' experiences in using secure messaging to engage in Patient-Provider communication and Self-Care management: a quantitative assessment. *Journal of Medical Internet Research*, 17(12), e282. <https://doi.org/10.2196/jmir.5152>
- Hrnjić, A., Šuta, N., & Pilav-Velić, A. (2016). *Innovation in senior tourism: Creating energy efficient and health-supported tourist offer*. Review of Innovation and Competitiveness.
- Hurry, B. (2024). Revolutionizing patient care: The role of medical devices in modern medicine. *Preprint*.
- Hussain, S., Mubeen, I., Ullah, N., Shah, S. S. U. D., Khan, B. A., Zahoor, M., Ullah, R., Khan, F. A., & Sultan, M. A. (2022). Modern Diagnostic Imaging Technique Applications and Risk Factors in the Medical field: A review. *BioMed Research International*, 2022, 1–19. <https://doi.org/10.1155/2022/5164970>

- Ile, F. L., & Tıgu, G. (2017). Medical tourism market trends - an exploratory research. *Proceedings of the . . . International Conference on Business Excellence, 11*(1), 1111–1121. <https://doi.org/10.1515/picbe-2017-0114>
- IMARC Group. (2022). Healthcare marketing: Strategies for effective patient engagement. Understanding healthcare marketing: A unique landscape.
- Isikli, E., Serdarasan, S., & Karadayi-Usta, S. (2020). Predicting the medical tourism demand of Turkey. In *Lecture notes in management and industrial engineering* (pp. 119–132). https://doi.org/10.1007/978-3-030-42416-9_12
- Jahn, M., Porter, B., Patel, H., Zillich, A., Simon, S., & Russ, A. (2018). Usability assessment of secure messaging for clinical document sharing between health care providers and patients. *Applied Clinical Informatics, 9*(2), 467–477. <https://doi.org/10.1055/s-0038-1660521>
- JCI-Accredited organizations. (2025). Joint Commission International. <https://www.jointcommissioninternational.org/who-we-are/accredited-organizations/>
- Johnston, R., Crooks, V. A., Snyder, J., & Kingsbury, P. (2010). What is known about the effects of medical tourism in destination and departure countries? A scoping review. *International Journal for Equity in Health, 9*(1), 24. <https://doi.org/10.1186/1475-9276-9-24>
- Kantar, G., & Işık, E. (2014). Health tourism in Turkey. *Sağlık Akademisyenleri Dergisi, 15*–20.
- Kazandzhieva, V. (2014). *Trends in the development of spa and wellness tourism*.
- Kilavuz, E. (2018). Medical tourism competition: The case of Turkey. *International Journal of Health Management and Tourism, 3*(1), 42–58. <https://doi.org/10.31201/ijhmt.372364>
- Knafl, K. A. (1991). Patton, M.Q. (1990). Qualitative Evaluation and Research Methods (2nd Ed.). *Research in Nursing & Health, 14*(1), 73–74. <https://doi.org/10.1002/nur.4770140111>
- Korkmaz, S., & Arıkan, G. (2017). A study of thermal tourism consumers' perspectives towards thermal tourism and evaluations of service quality dimensions. *International Journal of Health Management and Tourism, 49*–61. <http://dergipark.ulakbim.gov.tr/ijhmt>
- Kuşat, N., & Esen, E. (2022). Competitiveness of Turkish health sector from a health tourism perspective. *International Journal of Global Research, 1*–6.
- Kuwaiti, A. A., Nazer, K., Al-Reedy, A., Al-Shehri, S., Al-Muhanna, A., Subbarayalu, A. V., Al Muhanna, D., & Al-Muhanna, F. A. (2023). A review of the role of artificial intelligence in healthcare. *Journal of Personalized Medicine, 13*(6), 951. <https://doi.org/10.3390/jpm13060951>

- Laal, M. (2013). Innovation process in medical imaging. *Procedia - Social and Behavioral Sciences*, 81, 60–64. <https://doi.org/10.1016/j.sbspro.2013.06.388>
- Latief, A., & Ulfa, M. (2024). Healthcare facilities and medical tourism across the world: A bibliometric analysis. *Malaysian Journal of Medical Sciences*, 31(2), 18–29. <https://doi.org/10.21315/mjms2024.31.2.3>
- Medina, A. F. (2025). *Singapore's medical tourism industry*. ASEAN Briefing. <https://www.aseanbriefing.com/news/singapores-medical-tourism-industry-growth-opportunities-and-future-trends/>
- Merdivenci, F., & Karakaş, H. (2020). Analysis of factors affecting health tourism performance using Fuzzy DEMATEL method. *Advances in Hospitality and Tourism Research (AHTR)*, 8(2), 371–392. <https://doi.org/10.30519/ahtr.734339>
- Nabi, M. N. U., Khan, S. M., Misbauddin, S. M., & Fatema, K. (2023). Why is India a popular destination for Bangladeshi medical tourists? A study based on perceived justice by Bangladeshi patients. *International Journal of Pharmaceutical and Healthcare Marketing*, 17(3), 265–287. <https://doi.org/10.1108/ijphm-07-2021-0072>
- Noaman, S., & Montargot, N. (2022). Understanding interactions between providers of cosmetic tourism and tourists: The Lebanon experience. *Tourism Culture & Communication*, 23(1), 45–60. <https://doi.org/10.3727/109830422x16510695152055>
- Omay, E. G. G., & Cengiz, E. (2013). Health tourism in Turkey: Opportunities and threats. *Mediterranean Journal of Social Sciences*, 4(10), 424–424. <https://doi.org/10.5901/mjss.2013.v4n10p424>
- Otoo, F. E., & Kim, S. (2018). Analysis of studies on the travel motivations of senior tourists from 1980 to 2017: progress and future directions. *Current Issues in Tourism*, 23(4), 393–417. <https://doi.org/10.1080/13683500.2018.1540560>
- Pafford, B. (2009). The third wave—Medical tourism in the 21st century. *Southern Medical Journal*, 102(8), 810–813. <https://doi.org/10.1097/smj.0b013e3181aa8ce4>
- Pandey, D. (2025, January 6). *Medical tourism market size to hit USD 252.94 B by 2034*. <https://www.precedenceresearch.com/medical-tourism-market>
- Papp, Z., Lerincz, K., Euromonitor, García-Altés, V., Velkoff, L., et al. (2016). Health tourism trends. *Pannon Management Review*.
- Patci, C., & Aldoğan, E. (2021). Assessment of Health Tourism Marketing in Turkey. *Opus Uluslararası Toplum Araştırmaları Dergisi*. <https://doi.org/10.26466/opus.899400>
- Paul, D. P., Barker, T., Watts, A. L., Messinger, A., & Coustasse, A. (2017). Insurance companies adapting to trends by adopting medical tourism. *The Health Care Manager*, 36(4), 326–333. <https://doi.org/10.1097/hcm.0000000000000179>

- Picozzi, P., Nocco, U., Labate, C., Gambini, I., Puleo, G., Silvi, F., Pezzillo, A., Mantione, R., & Cimolin, V. (2024). Advances in Robotic Surgery: A review of new surgical platforms. *Electronics*, 13(23), 4675. <https://doi.org/10.3390/electronics13234675>
- Pinho, N., Beirão, G., Patrício, L., & Fisk, R. P. (2014). Understanding value co-creation in complex services with many actors. *Journal of Service Management*, 25(4), 470–493. <https://doi.org/10.1108/josm-02-2014-0055>
- Raoofi, S., Khodayari-Zarnaq, R., & Vatankhah, S. (2024). Healthcare provision for medical tourism: A comparative review. *Journal of Education and Health Promotion*, 13(1). https://doi.org/10.4103/jehp.jehp_1740_22
- Sakarya, A. H. (2023). *Unlocking Turkey's healthcare potential: Delving into the 2023 medical tourism landscape with key stats, patient insights, and transformative trends*. Care in Turkey. <https://careinturkey.com/turkey-medical-tourism-stats-2023-infographic>
- Saleh, A. S., Hussain, F., B Saud, M. B., & MD. Isa, M. A. (2015). Strategic marketing & competitive analysis of Malaysian medical tourism industry. In *Proceeding - Kuala Lumpur International Business, Economics and Law Conference (Vol. 6)*.
- Sevim, F., & Kurtaran, T. (2023). Evaluation of Turkey's health tourism performance with the MOORA method. *Gümüşhane Üniversitesi Sosyal Bilimler Dergisi*, 14(1), 99–109. <https://www.researchgate.net/publication/367966669>
- Shabankareh, M., Nazarian, A., Golestaneh, M. H., & Dalouchi, F. (2023). Health tourism and government supports. *International Journal of Emerging Markets*, July. <https://doi.org/10.1108/ijoem-03-2022-0391>
- Sharma, Y., Alam, S., & Shant Priya, M. (2025). Strategic insights into patient satisfaction in medical tourism: A blueprint for global healthcare strategy. *Cuest Fisioter*, 54(3), 5187–5194. <https://doi.org/10.48047/5wenwv29>
- Smith, R., Martínez Álvarez, M., & Chanda, R. (2011). Medical tourism: A review of the literature and analysis of a role for bilateral trade. *Health Policy*, 103(2–3), 276–282. <https://doi.org/10.1016/j.healthpol.2011.06.009>
- Snyder, J., Crooks, V., & Turner, L. (2010). Issues and challenges in research on the ethics of medical tourism: Reflections from a conference. *Journal of Bioethical Inquiry*, 8(1), 3–6. <https://doi.org/10.1007/s11673-010-9272-0>
- Taufik, N. A., & Sulistiadi, W. (2018). The impact of medical tourism industry for the hospital services and marketing activities: A systematic review. *Jurnal Administrasi Rumah Sakit Indonesia*, 5(1). <https://doi.org/10.7454/arsi.v5i1.2873>
- Taş, B., & Karyağdı, N. (2024, January 7). Health tourism and tax incentives in Türkiye. *Turkish Tax News*. <https://turkishtaxnews.com/health-tourism-and-tax-incentives-in-Türkiye>

- Tengilimoğlu, D. (2021). Health tourism and government incentives. *Journal of Life Economics*, 8(1), 1–10. <https://doi.org/10.15637/jlecon.8.1.01>
- Tiryaki, U. (2025). The rise of health tourism in Turkey: Data and future projections. *New Health Media*, February. <https://www.newhealth.media/en/blog/the-rise-of-health-tourism-in-turkey>
- Uygun, M., & Ekiz, E. (2018). An overview of health tourism within the context of Turkey's Tourism Strategy (2023). *Journal of Hospitality and Tourism*, 1–2016, 18–26. <https://www.researchgate.net/publication/327235499>
- Weis, J. L., Sirard, R. B., & Palmieri, P. A. (2017). Medical tourism: the role of the primary care provider. *BJGP Open*, 1(2), bjgpopen17X100617. <https://doi.org/10.3399/bjgpopen17x100617>
- World Health Organization. (2024). *Ageing and health*. <https://www.who.int/news-room/fact-sheets/detail/ageing-and-health>
- Yeung, O., Johnston, K., Callender, T., Ross, K., Takemoto, R., & Ko, S. (2021). The global wellness economy: Looking beyond COVID. *The Global Wellness Economy*. https://globalwellnessinstitute.org/wp-content/uploads/2022/02/GWI-WE-Monitor-2021_Wellness-Tourism.pdf
- Zhang, W., Ung, C. O. L., Lin, G., Liu, J., Li, W., Hu, H., & Xi, X. (2020). Factors contributing to patients' preferences for primary health care institutions in China: A qualitative study. *Frontiers in Public Health*, 8, 414. <https://doi.org/10.3389/fpubh.2020.00414>
- Zhong, L., Deng, B., Morrison, A. M., Coca-Stefaniak, J. A., & Yang, L. (2021). Medical, health and wellness tourism research—A review of the literature (1970–2020) and research agenda. *International Journal of Environmental Research and Public Health*, 18(20), 10875. <https://doi.org/10.3390/ijerph182010875>