

# Health Tourism in Türkiye: Strategies, Practices, and Future Perspectives

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## Abstract

Health tourism has become not only an economic opportunity for countries but also a strategic area in terms of international prestige and service export. Türkiye, has the potential to become a global player in this field due to its advanced health infrastructure, cost-effective services and geographical advantages. However, in order to fully realize this potential, it is necessary to strengthen the promotional activities in the sector, combat illegal and unregulated practices, expand international accreditations and eliminate the lack of qualified human resources. In addition, the quality and reliability of the diagnosis, treatment and post-rehabilitation services offered to health tourists play a decisive role in the choice of destination. In this context, regulations such as complication insurance stand out as important steps to increase trust in the sector. Türkiye's sustainable and competitive position in health tourism will be possible with comprehensive public policies, transparent pricing, coordinated organizational structures and digitally focused promotional strategies. In this study, Türkiye's current situation in health tourism, strategic approaches, structural challenges and future opportunities are examined from a multidimensional perspective. As a result of the current situation analysis, strategic suggestions for the future of health tourism have been developed.

**Keywords:** Health Tourism, Medical Tourism, Health Tourist, Strategy, Sustainability.

**JEL Codes:** L83, I11

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## **1. Introduction**

Health tourism appears as a multidimensional phenomenon that involves individuals traveling from their home countries to another country to access treatment, rehabilitation, and care services (Carrera & Bridges, 2006). In this context, the cross-border mobility of healthcare services has become one of the fundamental dynamics increasingly enhancing the importance of health tourism in a globalized world. Consequently, the economic and cultural dynamics of countries can also be positively affected. Health tourism, which also provides significant foreign currency income, has become a sector evaluated with innovative approaches in terms of countries' service exports. The act of individuals crossing borders to access high-quality healthcare services has turned health tourism into a globally important industry. Accordingly, the global health tourism sector continues to grow and evolve in parallel with rapidly changing economic, cultural, and technological dynamics. As in other countries that stand out in health tourism, Türkiye is also progressing toward becoming a significant player in this field with its high-quality healthcare services, modern medical infrastructure, and cost advantages. However, to fully realize the potential of health tourism in the country, it is necessary to overcome various structural and operational problems. This study aims to examine Türkiye's strategies, public policies, development plans, and sectoral goals in the field of health tourism from a global competition perspective. Additionally, strategic approaches that may shed light on Türkiye's future success in the health tourism sector are discussed in general terms.

### **General Framework of Health Tourism**

Just as the need for access to health services in emergencies has become fundamental, so too has the expectation for healthy living and longevity. This situation leads individuals to choose the most suitable health institutions even in other countries to combat diseases. Today, people are not limited to the healthcare professionals or service costs of their own countries; instead, they compare alternatives both nationally and internationally to find the most effective treatment methods at the most affordable cost (National Academies of Sciences, 2023; Yorulmaz & Erdem, 2021).

Health tourism is a multifaceted service area involving international travel to meet various health-related needs. This field is generally examined under four main subcategories shaped by different needs and expectations: medical tourism, thermal tourism, spa-wellness tourism, and elderly and disabled care tourism. Each subcategory offers alternative access to health services and aims to enhance individuals' quality of life through both preventive and curative health applications (Ordabayeva & Yessimzhanova, 2016; Şengül & Çora, 2020).

### ***Medical Tourism***

Medical tourism includes professional medical services such as surgical procedures, dental treatments, organ transplants, and cosmetic operations. Patients prefer healthcare institutions abroad to access these services more economically, quickly, or with higher quality (Demirer, 2010). Türkiye holds a significant position in medical tourism thanks to its high-tech infrastructure, qualified healthcare personnel, and globally recognized medical practices. High-standard services are especially offered in fields such as oncology, cardiovascular surgery, orthopedics, neurosurgery, and aesthetic surgery. Türkiye welcomes patients particularly from countries like Azerbaijan, Libya, and Iraq. Russia, Germany, and the United Kingdom are also among the prominent countries sending health tourists to Türkiye (Akbolat & Deniz, 2017).

### ***Thermal Tourism***

Thermal tourism supports the treatment of chronic diseases through therapeutic applications utilizing natural resources, such as hot water baths and mud therapy (Şengül & Bulut, 2019). Türkiye's geothermal resources play a significant role in the development of thermal tourism. Natural healing waters and thermal spa facilities in this area attract both domestic and international tourists. These resources are valued not only for therapeutic purposes but also for relaxation and rejuvenation (Cihangir, 2016). Thermal tourism, by using natural mineral waters, muds, and gases, offers health-focused treatments that aid in conditions such as rheumatic, orthopedic, and skin diseases. It is also considered a part of preventive health services aimed at relaxation, renewal, and enhancing life quality. Generally, thermal tourism is categorized into three types: therapeutic, recreational, and care-oriented for chronic illnesses (Kaçar, 2014).

Türkiye ranks first in Europe and among the top seven countries globally in terms of geothermal resource richness. The advanced infrastructure of thermal and spa facilities in regions like Afyonkarahisar, Denizli, Kütahya, Yalova, and Balıkesir supports the growth of both therapeutic and recreational thermal tourism practices (Cihangir, 2016). Türkiye's potential in this field necessitates integrating thermal tourism with not only health objectives but also economic and regional development strategies.

### ***SPA-Wellness Tourism***

It is preferred mainly for the protection of health and the maintenance of mental well-being, with aims such as stress reduction, gaining vitality, and improving quality of life. This field focuses more on prevention and sustaining a holistic state of well-being rather than treating diseases (Yiğit Tekinçay and Çuhadar, 2019). Complementary applications such as aromatherapy, massage, hydrotherapy, meditation, yoga, nutrition counseling, and detox programs support the balance of body-mind-spirit (Erdoğan and Çalışkan, 2022). In the face of stress factors increasing due to intense work life and digitalization, this type of tourism offers individuals not only temporary relief but also long-term benefits by helping them acquire healthy lifestyle habits. At the same time, it holds strategic importance in terms of supporting local development and increasing the diversity of health tourism (Deveci, 2017).

Türkiye has significant potential in this area with its richness in geothermal resources, traditional bath culture, and modern spa-wellness centers. Spa-wellness centers are becoming widespread in provinces such as Afyonkarahisar, Yalova, Denizli, Balıkesir, and Kütahya;

offering numerous cures, therapies, and healthy living programs for both domestic and foreign tourists (BEBKA, 2012). In this context, it can be said that Türkiye is strongly progressing towards becoming a regional health tourism hub.

### ***Elderly and Disabled Tourism***

Elderly and disabled tourism is a holistic sub-branch of health tourism that facilitates access to health, care, and rehabilitation services for elderly individuals and persons with special needs, while also supporting their participation in social life. This type of tourism includes not only treatment but also support and comfort-oriented services aimed at improving quality of life (Saygılı et al., 2021).

Türkiye is one of the notable countries in this field with specially equipped clinics, geriatric care centers, rehabilitation facilities, and barrier-free hotel concepts for elderly and disabled individuals. With travel and accommodation options based on physical accessibility, this group is offered both health and social integration opportunities. Within this framework, elderly and disabled tourism is not only about meeting individual health needs but also a strategic sector that contributes to countries' social inclusion policies and supports health-based economic development (Erdoğan and Çalışkan, 2022).

These subheadings demonstrate that health tourism is not only a treatment-focused area but also includes a holistic approach aimed at preventive health services, rehabilitation, and enhancing quality of life. Thus, health tourism becomes a strategic sector offering economic and social development opportunities for countries beyond meeting individual needs.

### **Methodology / Approach**

This study was designed as a conceptual and analytical review that examines Türkiye's health tourism strategies, structural challenges, and future opportunities through a multidimensional perspective. Since the subject requires an integrated evaluation involving legislation, organizational structures, economic indicators, accreditation processes, and international media perception, the study adopts a qualitative research approach supported by document analysis.

The data used in the study were obtained through purposeful sampling, focusing on documents that directly influence Türkiye's health tourism policies and international position. The following data groups were included:

- National policy documents: development plans, strategic action plans, tourism strategies, official regulations, and legislative texts.
- Institutional publications: reports and datasets of the Ministry of Health, USHAŞ, TÜSKA, TÜRSAB, and national accreditation bodies.
- International sources: OECD, WHO, IMARC Group, Grand View Research, and global media analyses.

- Academic literature: peer-reviewed articles, theses, and empirical studies published between 2010–2025, with a particular emphasis on 2020–2025 to reflect the most recent sectoral dynamics.
- Media data: international press reports (especially UK-based) and global digital communication studies addressing health tourism disinformation.

These sources were selected based on their relevance, reliability, and contribution to understanding current sectoral dynamics.

The analysis is grounded in a conceptual framework consisting of four interconnected dimensions:

1. Strategic Policy Framework: Türkiye’s health tourism policies, development plans, and national strategies.
2. Sectoral Capacity and Organizational Structure: human resources, accreditation, inspection mechanisms, and institutional readiness.
3. Economic and Global Positioning: international patient mobility, market size, and comparative global indicators.
4. Perception, Promotion, and Risk Factors: digital promotion activities, disinformation trends, illegal operators, and international media representation.

This framework allows the study to explore the sector both horizontally (across different subfields) and vertically (from policy to practice).

The study employs qualitative content analysis, examining national policies, regulatory documents, academic research, and global data comparatively. The analysis process involved:

- Thematic coding: identifying recurring themes such as accreditation, disinformation, human resources, digital promotion, and legislative gaps.
- Comparative evaluation: benchmarking Türkiye’s performance against global competitors (India, Thailand, Malaysia, Mexico).
- Synthesis of findings: integrating policy-level assessments with sectoral observations.
- Critical commentary: evaluating structural problems such as unauthorized operators, service standardization issues, and post-rehabilitation shortcomings.

This approach provides both descriptive and interpretative insights, allowing the study to present evidence-based assessments and strategic recommendations.

### **Development and Economic Volume of Health Tourism in the World**

Globalization has facilitated cross-location access to health services and made health tourism an important part of the international economy. Crises in health systems, high costs, and long waiting times in developed countries have made this sector an attractive alternative (Şengül and Çora, 2020).

In recent years, health tourism has expanded not only for treatment purposes but also to include a wide range of services such as childbirth, anti-aging applications, psychological support, and alternative therapies. While 14 million people worldwide change countries each year to receive health services, this number has started to increase again in the post-COVID-19 period. India, Thailand, Malaysia, Türkiye, and Mexico are among the leading destinations in this field (Alp and Yılmaz, 2024; Shoukat et al., 2025).

According to IMARC Group (2024) data, the global health tourism market size reached 144.5 billion USD as of 2023. This figure is expected to reach 704.8 billion USD by 2033, with a compound annual growth rate (CAGR) of 17.9%. Grand View Research (2024), on the other hand, reports the 2030 projection for health tourism as 101.98 billion USD, with forecasts varying by market segments. The main reasons for this economic growth include insufficient health insurance coverage in the USA and EU countries, increasing interest in private health services, competitive advantages of technologically advanced and low-cost countries, and ease of access through digital health platforms (Heung et al., 2011).

Health tourism contributes significantly both to health systems and the economies of countries. This sector, which is rapidly growing globally, is expanding further through investment, international cooperation, and digitalization. Countries with strategic advantages like Türkiye benefit greatly from this transformation and are able to position themselves among the key actors in health tourism.

### **Türkiye's Strategies for Health Tourism**

Türkiye has significant potential in the field of health tourism due to its natural resources, developed healthcare infrastructure, and geographical advantages. In order to effectively utilize this potential and achieve a competitive position on a global scale, multidimensional strategies aimed at health tourism have been developed. These strategies have been structured within the framework of Türkiye's development plans, tourism policies, and sectoral action plans, targeting both the improvement of service quality and the enhancement of sectoral diversity. The Eleventh Development Plan (2019–2023) can be considered an important milestone in this regard. The plan includes a series of policy and implementation proposals aimed at diversifying health tourism services and raising quality levels (Batuhan, 2020). Key goals highlighted in this document include increasing the share of international patient mobility, widespread adoption of international accreditation standards in healthcare delivery, updating health tourism legislation, and intensifying promotional activities. Additionally, other important strategic elements in the plan are the training of qualified workforce, support for certification processes of health tourism enterprises, and strengthening technological infrastructure in healthcare delivery. Türkiye's sectoral approach to health tourism is not limited to development plans but is also supported by general tourism policies and strategic action plans. The "Türkiye Tourism Strategy 2023" document defines health tourism as one of the alternative types of tourism and presents a vision aimed at increasing revenue in this field (Polat, 2016). The strategy document adopts as its main objectives the enhancement of institutional capacity in health tourism, the establishment of a national health tourism information system, and the branding of target cities

(such as Istanbul, Ankara, Izmir, Antalya, and Bursa) as international health tourism hubs (Bardakoğlu, 2023).

Türkiye's health tourism strategies are based on a planned and sustainable development approach that is compatible with public policies. Within this framework, the developed strategies support sectoral growth while also laying the groundwork for structural transformations aimed at increasing Türkiye's competitive power in the global health tourism market.

### **Development and Economic Contributions of Health Tourism in Türkiye**

The health tourism sector is not limited to the provision of health services alone but also provides a significant economic contribution to countries. Türkiye has earned a substantial amount of foreign exchange income in recent years through its health service exports in this field. In this context, according to 2023 data, revenue from health tourists exceeded 3 billion USD (Kaya, 2025). Additionally, the number of international patients coming to Türkiye to access health tourism services has been increasing every year. The number of health tourists was 729,592 in 2021, 1,381,807 in 2022, and 1,538,643 in 2023 (USHAŞ, 2024).

Türkiye has a rapidly growing potential in health tourism and aims to increase its international competitiveness. The country possesses great potential in this field with its geostrategic location, developed healthcare infrastructure, and thermal resources. Türkiye's health tourism strategies and targets are critically important for ensuring sustainable success in the sector. This sector also contributes to economic growth and, through international patient mobility, transforms Türkiye into a global hub. Türkiye needs to further strengthen its competitiveness in health tourism by increasing its investments in this area.

### ***Current Challenges Affecting Türkiye's Health Tourism Potential***

Despite its great potential in health tourism, Türkiye faces difficulties in fully utilizing this potential. A study revealed that while the average medical tourism efficiency rate of leading countries in this sector is 69.7%, Türkiye's efficiency score remained at 28.97% (Yiğit et al., 2019). Accordingly, it can be stated that Türkiye is unable to effectively harness its health tourism potential, and structural inefficiencies adversely affect sustainable competitiveness.

At the same time, international advertising and promotions are known to be effective for the health tourism sector, which is essentially an export of services. As important as the availability of qualified services ready for presentation is their recognition and demand by potential buyers. Türkiye, noted for its geographical location, advanced healthcare infrastructure, expert health professionals, and cost-effective services, has the potential to be a significant global player in this sector. However, the incomplete realization of this potential is influenced by structural problems such as insufficient international promotion and marketing activities, legislative and bureaucratic obstacles, lack of coordination among healthcare institutions, discrepancies in quality standardization, and data management issues (Yiğit et al., 2019). Furthermore, inadequate strategic planning and sustainability awareness in health tourism may negatively impact Türkiye's efficiency in this sector.

### ***Organizational Management Issues in Employment, Education, and Language Proficiency***

One of the main challenges in Türkiye's health tourism sector is the inability to sustainably employ qualified human resources. Particularly, low foreign language proficiency among healthcare personnel directly interacting with patients negatively affects service quality and patient satisfaction (Demirer, 2010; Eren and Türkay, 2023; Köroğlu and Tengilimoğlu, 2021). Therefore, continuous training programs on language, intercultural communication, and international patient relations for professionals working in health tourism are crucial (Kurtulmuş and Güler, 2021). Although some universities in Türkiye offer associate and postgraduate programs in health tourism, the absence of undergraduate programs remains a notable deficiency (Göktaş, 2018; Özcan et al., 2017). Additionally, the inadequate training of employed personnel according to sectoral needs hinders service standardization and blocks the effective use of health tourism potential. Focusing solely on infrastructure investments while neglecting qualified workforce planning is criticized as a structural barrier to sustainable growth in health tourism (TÜRSAB, 2022). Consequently, all health facilities providing health tourism services should expand education and certification programs based on national qualifications to enhance workforce quality and support international competitiveness. In this regard, it is of great importance that standards and qualifications related to health tourism professions are determined under the authority of the Vocational Qualifications Authority (MYK).

### ***Promotion Activities and Disinformation in Health Tourism***

In 2023, global digital advertising expenditures reached approximately 667.6 billion USD. The United States ranked first with 263.89 billion USD, followed by China with 136.1 billion USD and the United Kingdom with 32.66 billion USD (Oberleo, 2025). In 2024, digital advertising is expected to constitute 59.6% of all global advertising investments, driven by a 7.4% growth rate that exceeded earlier projections (Dentsu, 2024).

Digital marketing has become an essential tool for attracting international patients and ensuring competitive advantage in the health tourism sector. Through social media, search engine optimization (SEO), content marketing, and online patient review platforms, healthcare providers can increase visibility, promote service quality, and strengthen brand awareness (Cristobal-Fransi et al., 2023). When strategically implemented, these tools contribute to building a strong national image in health tourism and positively affect patients' decision-making processes (Ordabayeva & Yessimzhanova, 2016).

However, promotional activities in Türkiye remain insufficient, and limited awareness among foreign nationals continues to be a barrier to choosing Türkiye for treatment. At the same time, the rise of disinformation—especially after the pandemic—has further complicated trust-building efforts. Recent studies highlight misleading content about treatment quality, service costs, and travel safety, which negatively influence patient decisions and damage the reputation of healthcare providers (Johnson, 2024; Chen, 2024; Williams et al., 2022).

Türkiye has been one of the countries most affected by such disinformation. Particularly in the British media, numerous reports emphasize alleged poor-quality aesthetic surgeries and patient grievances. Secret recordings at Turkish health tourism fairs in London and other negative news

stories have shaped a critical discourse focusing on postoperative complications, lack of transparency, and insufficient patient safety (Mirror, 2025a; 2025b; 2025c; 2025d; Surrey Live, 2025; The Sun, 2025).

This disinformation has reached a level where it is even reflected in academic publications abroad. Doughty et al. (2024) identify Türkiye as the most frequently referenced country in British media reporting on dental tourism. While Türkiye is promoted as a destination offering affordable and rapid services, these advantages are often accompanied by narratives emphasizing risks such as medical complications, inadequate follow-up care, and perceived low service quality. British media also frequently highlight cases requiring corrective treatment in the UK, suggesting an additional burden on the NHS.

Although some of these media narratives are based on individual real-world cases, many portray generalized and stigmatizing judgments. A lack of sufficient counter-narratives showcasing the overwhelmingly successful outcomes in Türkiye contributes to the formation of a one-sided, negative public image.

### ***Illegal Operators in the Sector: Unlicensed Health Tourism***

Besides disinformation, the presence of unauthorized and unregulated illegal entities, commonly referred to as “merdiven altı” (basement) operations, is a serious problem in Türkiye’s health tourism. Recently, unlicensed promotional activities on social media and the increase of unlicensed intermediary agencies have led to serious complications threatening patient safety and creating negative perceptions internationally. Reports highlight unlicensed clinics operating with procedures violating medical ethics and patient rights, directing patients to risky operations without informed consent. A dramatic example widely publicized was the 2024 “suicide allegation after beard transplant” in Istanbul. According to NTV, the patient suffered severe complications after the beard transplant and later died; investigations revealed the procedure was performed by a real estate agent, not a physician (NTV, 2024). The clinic was reportedly active in health tourism but operated in violation of legal regulations and professional competency standards. This case shows that unauthorized individuals can perform aesthetic or surgical procedures in Türkiye, raising serious patient safety concerns. Such incidents not only cause individual harm but also open doors to negative international media portrayals against Türkiye.

Factors contributing to the spread of unauthorized practices include insufficient oversight, weak sanctions, easy promotion of unlicensed clinics on digital platforms, and low public awareness (Downing and Perakslis, 2022; Jalali et al., 2025; Wahed, 2015). Such conditions damage Türkiye’s trust-based brand image in health tourism and negatively affect international patient preferences. The attitude of unauthorized actors engaged in off-the-books activities to increase health tourism revenues undermines quality control processes, facilitates the spread of unregistered services, and compromises patient safety. This poses a serious long-term threat to the sector’s overall reputation and revenue potential.

Furthermore, weak existing inspection mechanisms in health tourism cause adverse effects not only on patient safety but also on economic transparency. The prevalence of unregistered clinics

and consultancy services prevents accurate measurement of revenues from health tourism, reducing public budget contributions (Johnston et al., 2010; Turner, 2007). The presence of healthcare providers that do not comply with national quality standards set by the Ministry of Health or internationally recognized accreditation disrupts quality standardization and renders monitoring mechanisms ineffective.

### ***Standards, Accreditations, and Sustainability***

For Türkiye to establish a sustainable and reliable health tourism structure, ensuring the international quality assurance of services in this field is essential. Accreditation of health tourism service providers is not only a quality indicator but also one of the fundamental bases of trust-building in the global patient market. One of the main factors shaping international patients' preferences is whether healthcare providers hold recognized accreditation certificates (Aydın and Karamahmet, 2017).

Accreditations from independent and internationally accepted organizations such as Joint Commission International (JCI), American Accreditation Commission International (AACI), Trust Effective Medicine Optimized Services (TEMOS), German Accreditation Council for Healthcare (DACH), and Global Healthcare Accreditation (GHA) demonstrate that a health facility has reached a certain level in patient safety, service quality, clinical process accuracy, and compliance with ethical standards (Bozkurt and Kılıç, 2025; Çora and Mikail, 2024). Additionally, the Türkiye Health Services Quality and Accreditation Institute (TÜSKA) aims to increase reliability and service quality in health tourism by inspecting compliance with national quality standards for healthcare in Türkiye (Can et al., 2018). As the national accreditation authority, TÜSKA plays a vital role in supporting the international competitiveness of healthcare providers while enhancing patient safety and satisfaction. Through the Health Accreditation Standards (SAS) developed by TÜSKA to define quality and safety standards for healthcare institutions, standardized, higher-quality, and sustainable outcomes are targeted across different service areas such as hospitals, oral and dental health centers, hemodialysis centers, laboratories, and outpatient health services (Kavak, 2018). SAS is prepared in accordance with the principles of the International Society for Quality in Health Care (ISQua) and facilitates compliance with nationally and internationally recognized quality standards in healthcare services. However, only a limited number of healthcare institutions in Türkiye currently hold such international accreditations. Most institutions operate solely with certificates issued at the national level (Cengiz, 2018). This causes regional and institutional disparities in service quality and raises the issue of lack of uniformity in the health tourism sector (Turner, 2007).

Currently, significant quality differences exist among health tourism service providers in Türkiye. While some large private hospitals provide world-class services, smaller-scale or unauthorized clinics may conduct practices that jeopardize patient safety. The continued acceptance of international patients by institutions without health tourism authorization,

exploiting legal loopholes, clearly reveals deficiencies in monitoring mechanisms and challenges in the enforceability of regulations. The inability to conduct equal and effective inspections locally deepens this fragmented quality structure and raises concerns about sector-wide coherence. In this context, the amendment to the Private Hospitals Regulation published on January 30, 2025, introduced new regulations aimed at increasing quality and patient safety in private hospitals (Official Gazette, 2025a). In the health tourism field, the “Regulation on International Health Tourism and Tourist Health,” which came into effect on April 26, 2025, mandates that health facilities must possess internationally valid accreditations and certificates issued by TÜSKA (Official Gazette, 2025b). This requirement includes a comprehensive evaluation process covering patient safety, service quality, and clinical management to ensure that both private hospitals and all facilities with health tourism authorization comply with quality standards. Thus, TÜSKA’s SAS accreditation aims to improve the quality of healthcare services nationally and internationally in Türkiye.

For Türkiye to create a strong brand value in health tourism, the mere possession of accreditation certificates is insufficient. Achieving standardization in service delivery is also a critical necessity. However, in the current structure, significant institutional variations exist in fundamental service steps such as patient information, admission, treatment planning, discharge processes, and follow-up. For example, identical medical procedures like aesthetic surgery or orthopedic intervention can be conducted under completely different protocols in different institutions. This variability not only affects the patient’s treatment process but also complicates the measurement, comparison, and improvement of service quality. As a result, trust can sometimes be undermined among international patients, negatively impacting Türkiye’s preference as a health tourism destination (Crooks et al., 2011). Also, the aforementioned regulation requiring integration of all health tourism facilities into the national health tourism portal “HealthTürkiye,” which took effect on April 26, 2025, ensures that services offered by healthcare providers are collected in a central database for transparency and traceability. This integration will facilitate patient choice processes and enable continuous monitoring of service quality.

### ***Diagnosis, Treatment, and Post-Rehabilitation Processes***

For health tourists, not only the diagnosis and treatment phases but also the quality and reliability of post-treatment services play a decisive role in destination choice. In this regard, the aforementioned regulation has made “complication insurance” mandatory for surgical procedures performed in health tourism practices to ensure patient safety and minimize financial risks of possible complications (Official Gazette, 2025b). This practice aims to prevent patient grievances resulting from medical failures after treatment while enhancing healthcare providers’ sense of responsibility, contributing to the raising of quality standards in the sector. These regulations can be regarded as critical steps taken to increase Türkiye’s competitiveness in health tourism and to improve international patient satisfaction.

However, failure to manage processes with standard procedures in health tourism services poses high risks to patient safety. Particularly, the lack of systematic post-discharge follow-up protocols in many clinics complicates the timely detection and intervention of complications.

Many international patients treated in Türkiye seek re-treatment in their home countries if complications arise, creating a negative image for Türkiye's healthcare system and service providers (Snyder et al., 2011). It should be remembered that health tourism services encompass not only the treatment period but also pre- and post-care monitoring within a holistic service understanding.

Another issue is regional differences in practices. Healthcare institutions operating in different provinces of Türkiye exhibit significant inequalities both in human resource capacity and administrative structure. These inequalities cause regional inconsistencies in the planning, delivery, and supervision of health tourism services, leading patients to experience very different procedures for similar treatments in different provinces (Toprak et al., 2014). In a sector requiring sensitivity such as health tourism, these inconsistencies not only reduce service quality but also erode international trust in the sector (Hodges et al., 2012).

Considering these issues, it is crucial for Türkiye to strengthen quality assurance and accreditation processes not only at the document level but also in practical application to enhance its international competitiveness in health tourism. Achieving implementation uniformity, reinforcing inspection mechanisms, disseminating process management fully compliant with international standards, and establishing a service philosophy centered on patient safety will enable Türkiye to achieve sustainable success in this sector.

### **Ministry of Health Perspective: Global Opportunities in Health Tourism and the 2032 Vision**

When evaluated on a global scale, Türkiye faces certain disadvantages in health tourism. Particularly, East Asian countries have strengthened their infrastructure and developed comprehensive strategies, making significant progress in this field (Bulut & Şengül, 2019). Türkiye's dependence on foreign health technologies and medical consumables, combined with fluctuations in exchange rates, increases health tourism costs and reduces the country's attractiveness. Nevertheless, Türkiye has set important goals in the health tourism sector. According to statements by the Minister of Health Prof. Dr. Kemal Memişoğlu, Türkiye aims to generate annual revenue of 20 billion USD from health tourism within four years (Ministry of Health, 2025). A significant part of this strategy is the "HealthTürkiye" brand, regarded as an important step that will contribute to Türkiye becoming a global player in this area. Currently, Türkiye attracts many foreign patients from Europe, the Middle East, and Asia, which enhances the country's capacity and prestige in providing international health services.

According to the Ministry of Health, in a world where approximately 280 million migrants live and about 14 million people annually change countries to receive health services, the health tourism market is expected to reach 350 billion USD by 2032. This figure includes not only traditional health tourism but also the rapidly growing remote health services sector. Consequently, digital health services are projected to reach a market size of 550 billion USD by 2030. The integration of these two fields is considered a strategic opportunity for Türkiye (Ministry of Health, 2023).

### **Conclusion**

Although Türkiye's health tourism sector holds great potential, certain structural and operational challenges prevent this potential from being fully realized. The lack of alignment in national-level health tourism organization and strategies among stakeholders threatens sectoral unity. On one hand, some private sector entrepreneurs pursue aggressive marketing strategies and sometimes rule-breaking approaches, while on the other, some public hospitals are inadequate in providing health tourism services. These asymmetrical approaches cause health tourism offerings to become fragmented and uneven in terms of efficiency.

There are serious deficiencies in international accreditation among Türkiye's health institutions for providing international health services. The number of institutions accredited according to international standards is quite limited. This not only undermines foreign patients' trust but also negatively affects Türkiye's global competitiveness in health tourism. Moreover, the shortage of foreign language proficient staff and the frequent inability to deliver services in an adequately comprehensible manner lead to communication barriers between health tourists and services they receive compared to those in their own countries. Additionally, some countries' negative perceptions and prejudices towards Türkiye adversely impact health tourism. Such perceptions reduce the preference for Türkiye not only in commercial and diplomatic relations but also in this strategically important sector. Political instability in some neighboring countries results in both market shrinkage and difficulties in bilateral relations for health tourism.

Another significant issue in the sector is pricing and organizational uncertainties. Health tourists are concerned not only about service quality but also about the transparency and fairness of prices. Such uncertainties hinder Türkiye from establishing sustainable competitive power in the health tourism market.

To achieve the determined goals in health tourism, strengthening national-level health tourism organization, ensuring health facilities possess international accreditation certificates, organizing undergraduate educational opportunities in health tourism, conducting postgraduate academic studies, training academicians in this field, and increasing the number of foreign language proficient health tourism employees are of great importance.

Furthermore, for sustainable and coordinated progress in health tourism, it is necessary to strengthen a culture of common sense and cooperation among stakeholders from the public sector, private sector, academia, and civil society organizations. In this context, the establishment of a council to guide national health tourism policies, monitor sectoral developments, and conduct regular strategic evaluations would be beneficial. This council, representing all components of the health tourism ecosystem, should address sectoral problems and opportunities through regular meetings and carry out periodic situation analyses and performance evaluations. Such a structure could eliminate fragmentation in the sector, make policies more consistent, and enhance international competitiveness.

## **Recommendations**

To ensure sustainable, coordinated, and internationally competitive development in Türkiye's health tourism sector, the recommendations presented below have been structured under a systematic and model-based framework. In this context, a National Health Tourism Council

(NHTC) model is proposed as an institutional mechanism to ensure coordination, standardization, and strategic alignment among all stakeholders.

### ***Establishment of a National Health Tourism Council (NHTC)***

A national-level council is essential to address fragmentation in the sector and ensure policy coordination. The proposed NHTC will:

#### ***Structure and Composition***

- Public Sector: Ministry of Health, Ministry of Culture and Tourism, Ministry of Trade, USHAŞ, TÜSKA
- Private Sector: Authorized private hospitals, health tourism agencies, sectoral unions (TÜRSAB, TÜSEB partners)
- Academia: Universities with health tourism, health management, and public policy departments
- Civil Society: Patient associations, accreditation bodies, professional chambers

#### ***Core Functions***

- Develop, update, and monitor national health tourism strategies every three years.
- Coordinate promotion, branding, and international market management.
- Oversee standardization, accreditation, and quality compliance through a unified monitoring structure.
- Prepare annual sector performance reports including data analytics, accreditation performance, pricing transparency indicators, and international patient satisfaction metrics.
- Identify illegal operators, propose sanctions, and coordinate with regulatory units.
- Ensure alignment between education policies and sectoral workforce needs, including language training and certification standards.

#### ***Decision-Making Mechanism***

- Quarterly council meetings
- Annual National Health Tourism Assembly (expanded stakeholder format)
- Working committees: Accreditation & Quality, Promotion & Digital Strategy, Education & Workforce, Service Standardization, Legal Oversight & Ethics
- Decisions adopted by qualified majority and submitted to the Ministry of Health for implementation

#### ***Workforce Development & Standardization***

- Establish undergraduate programs in Health Tourism Management.
- Expand MYK-based competency standards for all health tourism roles.
- Make foreign-language proficiency and intercultural communication training mandatory in authorized facilities.

### ***Strengthening Accreditation Obligations***

- Require all health tourism institutions to obtain accreditation from TÜSKA and/or internationally recognized bodies.
- Introduce a three-tier accreditation model (Basic, Advanced, Excellence) to encourage gradual quality improvement.

### ***Comprehensive Promotion & Disinformation Management Strategy***

- Create a centralized digital promotion office under NHTC.
- Develop real-time disinformation monitoring and evidence-based counter-communication mechanisms.
- Produce annual country brand perception reports to assess reputation risks in target markets.

### ***Combating Illegal Practices***

- Implement a national digital verification system to authenticate licensed clinics and agencies.
- Establish a unified complaint and whistleblower portal linked to HealthTürkiye.
- Increase sanctions for unauthorized operators and strengthen digital platform oversight.

### ***Patient Pathway Standardization***

- Develop national patient pathways covering pre-arrival, admission, diagnosis, treatment, discharge, and post-rehabilitation.
- Mandate clear follow-up protocols and integration with the HealthTürkiye portal.
- Make “complication insurance” monitoring mandatory with transparent reporting.

### ***Data Integration and Monitoring***

- Create a National Health Tourism Data Center under the Council.
- Integrate all facilities into a unified database with dashboards on:
  1. Patient volume
  2. Treatment outcomes
  3. Complication rates
  4. Accreditation status
  5. Pricing transparency indexes

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**Declaration of Research and Publication Ethics**

This article is single-authored. 100% of the contribution belongs to this single author.

**Researcher’s Contribution Rate Statement**

The authors declare that they have contributed equally to the article.

**Declaration of Researcher’s Conflict of Interest**

There is no potential conflicts of interest in this study.