



Current Problems and Solution Suggestions of Private Hospitals and Clinics Operating in the Field of Medical Tourism

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Abstract

Since the health tourism sector is a growing sector from the past to the present day, it has become an important item in terms of countries. Increasing the participation of hospitals in this area is about developing issues taking into account the appropriate arrangements and factors influencing health tourism. This study aims to provide an overview of medical tourism in the field of health tourism services in private class A - B hospitals and class C clinics, assess the current reproduction of the health tourism sector, study the maintenance such as process services and study the visitors coming with medical tourism to class A and B private hospitals and class C clinics. It was made

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to reveal the views that are effective in people's preferences. The research was conducted using the interview technique based on the qualitative research method. A total of 29 health tourism related health information within the scope of the research were reviewed and MAXQDA Analytics Pro program was used in data analysis. This study established that hospitals and clinics struggle with problems resulting from legal obstacles and competition, and proposed solutions in the form of state support and legal regulations. Hospital human resources studies identified staffing problems and recommended staff training. Hospital problems were identified in hospital infrastructure, and it was proposed to open new departments for investment purposes. State organizations identified problems with financial incentives for hospitals and suggested improvements at the state level. It has been determined that health tourists have problems arising from hospitals, patients and Türkiye, and hospital- and state-based solutions have been suggested. It has been determined that health managers interested in health tourism encounter problems arising from patients and personnel, and hospital-based solutions have been suggested. The identified problems and solution suggestions are valid only in the hospitals and clinics within the sample. Although the findings can be partially transferred to similar situations, new studies should be conducted with larger samples and different hospitals and clinics.

Keywords: Medical tourism, hospitals, the problems of medical tourism

INTRODUCTION

The importance of the tourism sector is increasing worldwide. Today, people travel not only to see new places but also to receive medical treatment, which has led to the emergence of health tourism. Health tourism allows people to seek medical solutions beyond the prices and services of their home country; they can travel to countries that offer the highest quality options for treatment, accommodation, and healthcare services (Boz, 2004). According to these definitions, the act of changing cities or countries for medical treatment, sometimes combining both treatment and vacation, is called "health tourism" (Aydın, 2012). Health tourism encompasses not only curative services but also preventive, developmental, rehabilitative, and aesthetic treatments. Türkiye ranks highly globally among countries with its accredited institutions, newly constructed and advanced hospitals, and therapeutic thermal locations. Türkiye's strategic location near the countries of the Middle East and Asia as well as Europe, its ease of access, and its quality due to its educated and young population make it a preferred destination (Doğan & Aslan, 2019).

The services offered by health tourism are divided into health services, treatment services, and rehabilitation services. In the health services area, services such as SPA, lifestyle/health vacations, nature tourism, ecotourism, community tourism, herbal remedies, and complementary

treatments are considered. Optional surgeries, cosmetic surgeries, joint treatments, cardiac services, eye surgeries, diagnostic services, and cancer services are considered treatment services. Rehabilitation services also include dialysis, addiction treatment programs, and elderly care programs (Gonzales et al., 2001).

In the field of health, tourism is divided into different types according to people's needs.

These types are:

- Medical Tourism
- Thermal and SPA-Wellness Tourism
- Advanced Age and Disability Tourism

While medical tourism includes surgical interventions and medical practices, Thermal tourism and Spa-Wellness tourism includes people seeking healing and wellness with thermal waters. Advanced Age and Barrier-free tourism covers individuals with physical or mental limitations who want to spend the rest of their lives in other places and receive quality care services (Yaba, 2022).

Türkiye's Healthcare Services and Medical Tourism Capacity

Türkiye has made significant progress in medical tourism thanks to successful strategies and infrastructure investments prior to the COVID-19 pandemic. The realization of Türkiye's medical tourism goals is closely linked to the development of the medical device and pharmaceutical markets (Özkan, 2019).



Figure 1: Medical tourism market size (Ministry of Health, 2023)

To stand out as a brand, it is necessary to increase recognition in both price and quality. This can be achieved by emphasizing the quality of service offered to customers and combining it with reasonable pricing policies. Additionally, a special promotion and brokerage model can be created for public hospitals, especially city hospitals, to collaborate with the public sector and

reach a wide range of patients. In conclusion, increasing brand awareness, strengthening competitive advantage, and effectively implementing sectoral strategies are important for success in the healthcare sector. By bringing these elements together, the institution's leadership in the healthcare sector is ensured (Amcham Turkey, 2021). A comparison of the market sizes of medical tourism is made in Figure 1.

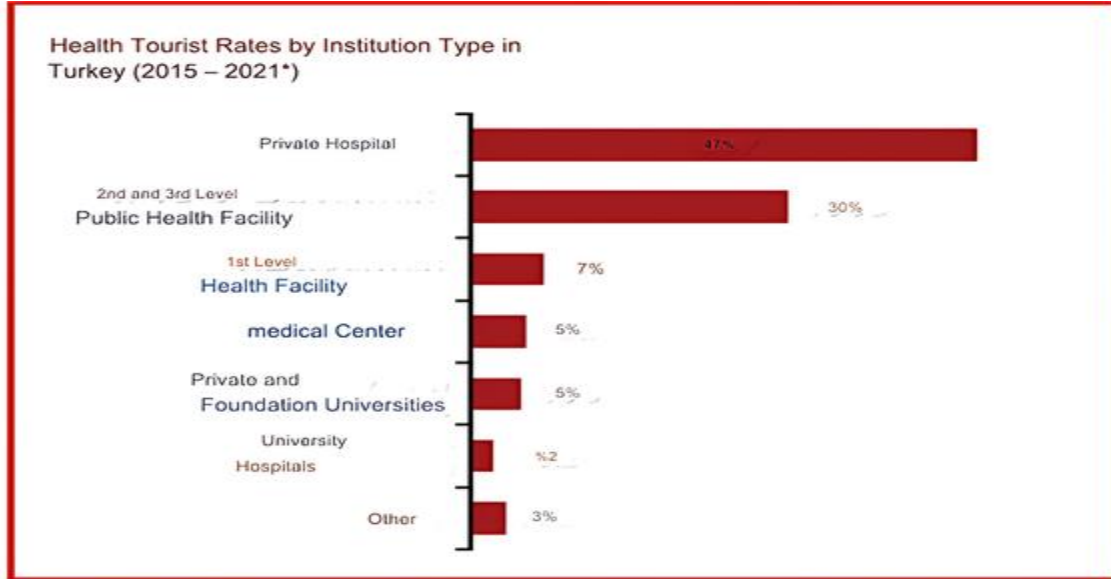


Figure 2: Ratios of health tourists by type of institution in Türkiye (Ministry of Health, 2023)

In Türkiye, it is stated that private hospitals are the most service-providing institutions with a rate of 47%, while 2nd and 3rd level public health facilities also play an important role with a rate of 30% (Amcham Turkey, 2021). Figure 2 shows health tourist rates by institution type in Türkiye

There are a total of 1,205 authorized healthcare facilities and 211 authorized intermediary institutions in our country, the majority of which are in the private sector. This information indicates the existence of 1,205 authorized healthcare facilities participating in health tourism activities within the scope of the "International Health Tourism and Tourist's Health Regulation." An international health tourism facility can directly accommodate international health tourists who apply directly. However, if intermediary activities are necessary, a protocol must be established with an international health tourism organization authorized by the Ministry. This information indicates that the health tourism infrastructure is primarily concentrated in the private sector and that there are many facilities operating in this field (Amcham Türkiye, 2021).

Türkiye Health Tourism Data

It is observed that health tourism is increasingly important for the Turkish economy. Among the main reasons for this increase are long waiting times and high treatment costs in developed countries. Health tourism was preferred by 551,748 people in 2018, while this number increased to 662,087 in 2019. However, in terms of revenue, while it was 1 billion 110 million 843 thousand dollars in 2018, there was a decrease in this revenue in 2019 and it was recorded as 1 billion 65 million 105 thousand dollars. The main reason for this decrease is the Covid-19 pandemic that emerged worldwide. Its impact on health tourism became more pronounced in 2020 and 2021. Due to the pandemic, Türkiye hosted 388,150 patients in 2020, earning 548 million 882 thousand dollars, and in 2021, it provided health services to 642,444 patients, showing a significant increase compared to the previous year, and earned 1,048,549,000 dollars (USHAS, 2020). In 2022, health tourism became a sector where a total of 1,258,382 people preferred to receive health services in the country. The revenue generated during this period was recorded as 2,119,059 thousand US dollars. These figures show that Türkiye is still an attractive destination for health tourism and that growth in the sector continues (USHAS, 2020). In the first two quarters of 2023, a total of 746,290 people came to our country to receive health services, and the revenue generated from this was 1,033,942 thousand US dollars (USHAS, 2020).



Figure 3: Health Tourism Revenues (Thousand USD) (TurkStat, 2022)

The clinic branches most preferred by international patients are respectively; Gynecology, internal medicine, ophthalmology, medical biochemistry, general surgery, dentistry, orthopedics and traumatology, infectious diseases, and ear-nose-throat. Although not clearly reflected in

official data, the prevalence of Hair Transplantation, Plastic and Aesthetic surgical procedures is also known and followed by the sector (Öcel & Karaca).

The study conducted by Sevim and Sevim (2019) reveals that the majority of patients coming to Türkiye are from countries such as Libya, Iraq, and Azerbaijan. Factors influencing the choice of these patients include the relatively weak health services in their countries compared to Türkiye, religious and cultural similarities, and easy access to Türkiye. Particularly, it is stated that these patients prefer Türkiye due to quality and access issues in healthcare services. Additionally, religious and cultural similarities play an important role in patients' preference for Türkiye. Türkiye's proximity to countries such as Libya, Iraq, and Azerbaijan is another factor that makes it attractive for patients from these countries. The study also indicates that 54.6% of patients have visited Türkiye for medical tourism purposes at least twice. This indicates that Türkiye is a reliable and preferred destination for health tourism.

Hospitals and healthcare institutions in Türkiye have improved their infrastructure by emphasizing international quality and standard certifications, updating medical equipment and techniques using the latest technology, and granting citizens the right to choose their doctors. These improvements and innovations in the healthcare sector have led to greater satisfaction among citizens with healthcare services and their preference for these services. The satisfaction rate with healthcare services, which was 55.3% in 2005, increased to 72.3% in 2015 with the improvements made. This increase highlights Türkiye's success in the healthcare sector and citizens' access to higher quality healthcare services domestically. Developments in Türkiye's healthcare infrastructure have contributed to a decrease in the number of citizens going abroad for health tourism (Kılınç, 2017).

There are several reasons why Türkiye has become a pioneer in medical tourism. These include the presence of quality and technologically advanced hospitals in the country with ISO-9001 certification, ease of transportation and proximity, the ability to purchase quality medical services at affordable prices due to exchange rate differences, the employment of highly experienced, qualified, and proficient in foreign languages doctors and healthcare personnel, and the similarity of Türkiye's medical system model to that of the United States, which significantly influences the country's success in the medical tourism market (Çınar & Özkaya, 2020).

Türkiye's prominence in healthcare services is supported by several reasons such as having reliable and good doctors, a solid infrastructure, and up-to-date healthcare technologies (Sülkü,

2017). Health tourism in Türkiye has hospitals with certifications in different categories to provide quality services. Foreign patients coming to our country for tourism place importance on quality standards and hospitals' JCI accreditation documents. As of 2019, there were 44 JCI-certified institutions in Türkiye. By 2022, the number of accredited institutions had increased to 112. Türkiye ranks highly in the world rankings in terms of accredited institutions (SAYA Akademi, 2019).

Medical Tourism in Türkiye

Türkiye has experienced healthcare personnel that contribute to its prominence in medical tourism. Experts and qualified healthcare personnel in the healthcare sector provide a service that complies with international standards to ensure patients are treated safely and effectively. Additionally, healthcare institutions with modern medical infrastructure such as city hospitals offer healthcare services distinguished by the use of advanced technology. Türkiye's collaboration between the government and the private sector to support medical tourism also enhances its success in this field. Türkiye has implemented various policies and practices to promote and develop medical tourism. In this context, it offers a price advantage of 50-60% compared to European countries. Türkiye attracts medical tourists by providing a more economical option while offering the same quality healthcare services. Factors such as short waiting times, the ability to quickly schedule appointments, and effective treatment planning also contribute to its attractiveness (Sevim, 2019).

Benefits of Health Tourism

Health tourism is one of the rapidly growing and significant potential subsegments of the tourism industry. One of the factors triggering this growth is the more cost-effective healthcare services in some countries (Henama, 2014). In this regard, health tourism contributes significantly to countries. The benefits of health tourism can be categorized into two main groups: tangible and intangible benefits. Among the tangible benefits, the contribution of foreign tourist revenues to the economic prosperity of countries plays a significant role. Additionally, health tourism increases technology and knowledge exchange between countries, develops strategic partnerships, and provides the opportunity to offer better services to domestic patients in the international competitive environment. Among the intangible benefits, health tourism contributes to technology and knowledge transfer between countries and provides opportunities for foreign patients. This demonstrates that health tourism is not only an economic phenomenon but also contributes to international cooperation and development in the field of healthcare services at the international

level (Özsarı & Karanata, 2013). Among the intangible benefits, sharing social and cultural experiences, contributing to the development of international relations, developing global medical marketing and trade, gaining competitive advantage, strengthening public-private partnerships in the health field, increasing patient satisfaction in many aspects, and gaining international acceptance of medical treatments stand out. Health tourism strengthens the image of countries as global healthcare providers, reinforcing the perception of providing world-class healthcare services, and enabling better coordination among hospital support services. This demonstrates the wide range of health tourism as a phenomenon that not only contributes economically but also enriches culturally and socially (Yalçın, 2006).

The Negative Aspects of Health Tourism

In addition to the benefits, there are also disadvantages of health tourism. Some governments and insurance companies do not pay for health services obtained from abroad, so patients have to pay for the services themselves. Since patients usually return to their countries a few days after the surgery, they have to meet any side effects, complications, or post-operative care needs in their own countries. In many countries, there is a lack of sufficient laws regarding medical errors known as medical malpractice, so local courts may not provide adequate assistance in medical malpractice cases (Özsarı & Karanata, 2013).

Factors Affecting the Provision of Health Tourism Services in Hospitals

To ensure the sustainability of hospital operations and to maximize the benefits for both the hospital and the patient, it is necessary to carry out the necessary work and improvements in institutions that provide health services.

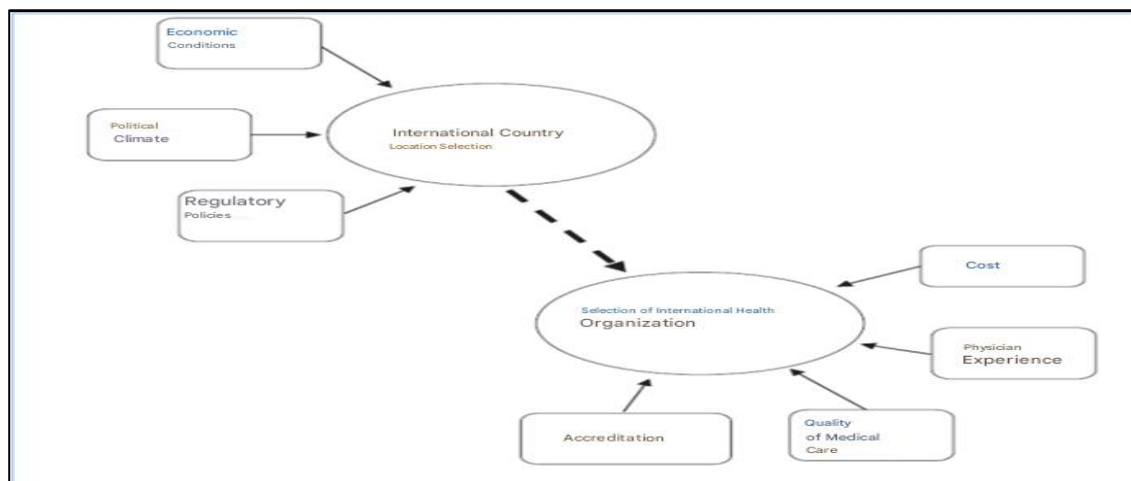


Figure 4: Factors Influencing Medical Institution and Destination Selection

This figure shows the main factors that individuals looking for international healthcare consider when choosing a country and healthcare institution. The figure covers two main selection stages:

1. International Country Location Selection

Three main factors stand out in individuals and health tourists' choice of a country:

Economic Conditions: The general economic situation of the country, exchange rates and the cost of accessing healthcare services are among the important factors affecting the selection process.

Political Climate: The political stability and security situation in the country can be decisive in the decisions of health tourists.

Regulatory Policies: The incentives offered by the government in the field of health tourism, legal regulations and policies regarding patient rights play a role in the choice of destination.

2. Selection of International Health Institution

After a country is selected, patients evaluate the following factors when choosing a particular healthcare institution in that country:

Cost: The total cost of treatment and care services plays a major role in patients' decisions.

Physician Experience: The specialization areas, experience and whether or not doctors have international accreditations are important factors in patient selection.

Quality of Medical Care: The technological infrastructure of hospitals, patient satisfaction and service quality are among the elements taken into consideration.

Accreditation: Healthcare institutions with internationally valid accreditations are preferred more by patients.

To develop in the field of health tourism, attention should be paid to certain issues. These issues are listed as follows:

- Staff fluent in foreign languages or staff responsible for translation,
- The health institution's emphasis on patient privacy,
- The cost of health services,
- The quality of health services,
- The accreditations of the health institution,
- Accessible marketing efforts,

- Experienced and reliable physicians,
- Good and reliable staff,
- Accessibility of the health institution,
- The infrastructure of the health institution.

Infrastructure in Hospitals

In hospitals and clinical centers related to health tourism, infrastructure is of great importance. It should be ensured that individuals applying for health tourism receive quality and comfortable treatment services during their stay in the hospital. Treatment facilities and hospitals should have the physical infrastructure or access to the equipment that tourists may need (Altsoy, 2018).

The infrastructure of the hospital includes its capacity to apply advanced technology, ambulance services, intervention rooms, waiting rooms and circulation, clinical services of the laboratory, blood centers, meals, pharmacy, etc. (Derin & Demirel, 2013).

Looking at the factors determining the adequacy of infrastructure in health institutions (Yirik, 2014):

- Offices to assist tourists while providing treatment services to patients,
- Offices where health institutions can get information,
- Offices where tourists can receive translation services,
- Having a section for foreign patients within the institution,
- Cultural differences should be taken into consideration.

Quality and Accreditation in Hospitals

The diversity of healthcare services and the quality of treatment processes are among the main reasons that increase treatment costs. The possibilities of quality in treatment processes vary depending on the complete determination of service standards, the provision of services in accordance with standards, and the pre-determination of incorrect practices (Babacan, 2023).

The criteria recommended by the American Medical Institute for high-quality healthcare services today are as follows (Ekici, 2013):

- Avoiding harmful situations,
- Being beneficial and effective,
- Providing patient-centered care,
- Providing services in a timely manner,

- Being fair and equitable.

Financing in Hospitals

In the growing field of health tourism, one of the reasons why patients travel for treatment is that they can obtain the same services at a cheaper cost than in their home countries (Barca, 2012). Financial management in hospitals involves using their resources most efficiently and increasing the institution's value.

Financial management is of great importance for hospitals participating in health tourism (Babacan, 2023). Hospital financing is concerned with the continuity of the hospital and marketing the services it provides, establishing infrastructure for these services, and hiring personnel for translation if there are no staff proficient in foreign languages. One of the reasons why Türkiye ranks so high in health tourism is its affordable treatment prices. Although these prices vary from hospital to hospital, they are generally cheaper for tourists compared to their own countries. Effectively managing hospital finances is important for both the institution's continuity and health tourism. Offering quality services at affordable prices attracts the attention of health tourists.

Marketing and Sales Activities in Hospitals

In recent years, health tourism has gained increasing popularity, bringing with it intense competition. There are important efforts that health institutions must undertake to ensure the flawless delivery of health tourism services. One of these efforts is sales and marketing activities (Kaptanoğlu, 2011). The impact of advertising, marketing, and sales activities on the development of tourism is significant. Therefore, it is important to clearly define the target market for health tourism. Europe is of great importance as a target market for health tourism. Organizing promotional and advertising activities in countries for promotional purposes is an important issue. Government support can be utilized in these areas (Aktepe, 2013).

The international health tourism market conducts marketing activities to attract tourists to the destinations targeted by medical tourism. Descriptions of services and quality levels in the health sector, as outlined by the goals of medical tourism, should be made, and the characteristics of demand in their target markets should be determined. Advertising, promotion, and distribution activities should be carried out accordingly. Using media to reach target audiences through informative websites, easily accessible and understandable advertising, and promotional activities is important. It is better for businesses advertising for these promotions to collaborate with

government agencies. For this marketing, theories should be developed, and research should be conducted on markets to develop brand-new products and opportunities (Kılınç, 2013).

1. RESEARCH METHODOLOGY

In the study, the general views of health tourism of the health services of the A-B class private hospitals and C class clinics registered according to their investments and capacities for health tourism, the service process evaluations of the medical tourism sector and the factors that are effective in preferring A and B private class hospitals and C class clinics that come with medical tourism, were taken as the basis of this successful; qualitative research design case study.

The data obtained by applying the interview formula in the model framework from the factors in the literature, the ones reached within the scope of the research conducted with qualitative analysis and the ones who were wanted to be interviewed were selected with the convenience sampling, and 7 health managers of A Class private hospitals interested in health tourism, 15 health managers of B Class private hospitals interested in health tourism, 7 health managers of C Class clinics interested in health tourism, a total of 29 managers, were interviewed with semi-interviews and interruptions were made in order to reveal all the processes that play a role in the choices of preferences and expectations for medical tourism as much as possible.

The sample is considered sufficient as it was concluded that the saturation point was reached with the opinions of these participants in the interviews.

When participants' opinions were solicited, the percentages of the data were provided in the findings related to the Service Process Theme.

The audio obtained because of the interviews is cut and decrypted without any changes to the content by the person who made the recording. The interviews with the participants were analyzed with MAXQDA Analytics Pro, a computer-aided qualitative data analysis program.

2. ANALYSIS



Figure 5: Code Cloud of Important Findings from Qualitative Analysis on Health Tourism in Private Hospitals and Clinics

Hospital Service Quality and Personnel

One of the most frequently mentioned themes in the code cloud is "Quality Personnel" and "Hospital Service Quality". Participants highlighted the significance of well-trained medical staff and high service standards in health tourism.

A hospital administrator stated: "Our hospital has internationally accredited doctors, which increases trust among foreign patients."

Another participant emphasized: "The satisfaction of international patients largely depends on the quality of healthcare personnel and their ability to communicate effectively."

Challenges in Health Tourism: Language Barriers and Compliance Issues

Another key issue raised in the analysis is "Language Knowledge of Employees" and "Translator Support". The inability to communicate effectively with international patients negatively affects the patient experience.

A patient consultant shared their experience: "Many of our foreign patients require translators, but we don't always have enough staff available, which leads to misunderstandings."

A hospital manager suggested: "Providing foreign language training to healthcare staff would significantly improve patient satisfaction and operational efficiency."

Marketing and Advertising in Health Tourism

The themes "Increasing Advertisements and Promotions" and "Digital Advertising" indicate the need for better marketing strategies in attracting international patients.

A marketing executive stated: "Compared to other countries, our hospitals do not utilize digital advertising effectively. Many potential patients are unaware of the affordable and high-quality treatments we offer."

Another participant added: "There should be more collaboration between healthcare providers and international travel agencies to promote medical tourism."

Infrastructure and Accessibility Issues

The terms "Low International Access" and "Capacity Insufficiency" suggest significant barriers in hospital infrastructure and accessibility for international patients.

A medical tourism coordinator mentioned: "Even though we offer high-quality services, international patients face difficulties in reaching our hospitals due to visa issues and limited direct flights."

Another hospital administrator noted: "Our hospital lacks enough specialized departments to accommodate the increasing demand from international patients."

Future Recommendations and Industry Improvements

Based on these findings, several recommendations can be made to improve health tourism services:

Enhancing Foreign Language Training: Healthcare personnel should receive language training to improve patient communication.

Strengthening International Marketing Strategies: More emphasis should be placed on digital marketing and collaborations with foreign health institutions.

Improving Infrastructure and Accessibility: Easier visa procedures and better flight connectivity should be developed for medical tourists.

Expanding International Collaborations: Hospitals should work closely with global insurance providers and intermediary institutions to streamline patient processes.

The distribution of participant expressions according to intensity is shown in Figure 5. The codes shown in larger font indicate more intensively used expressions, while those in smaller font indicate less intensively used codes.

Thematic Representation of Findings

As seen in Figure 6, the findings are grouped under 3 themes. These are macro view, opinions regarding the current situation of the sector, and service process.

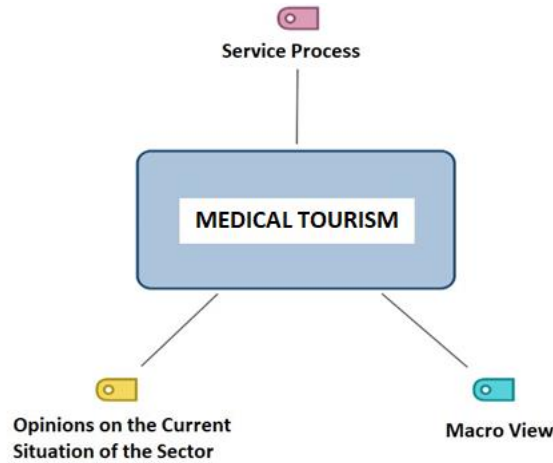


Figure 6: Representation of Themes

Findings Related to the Macro View Theme

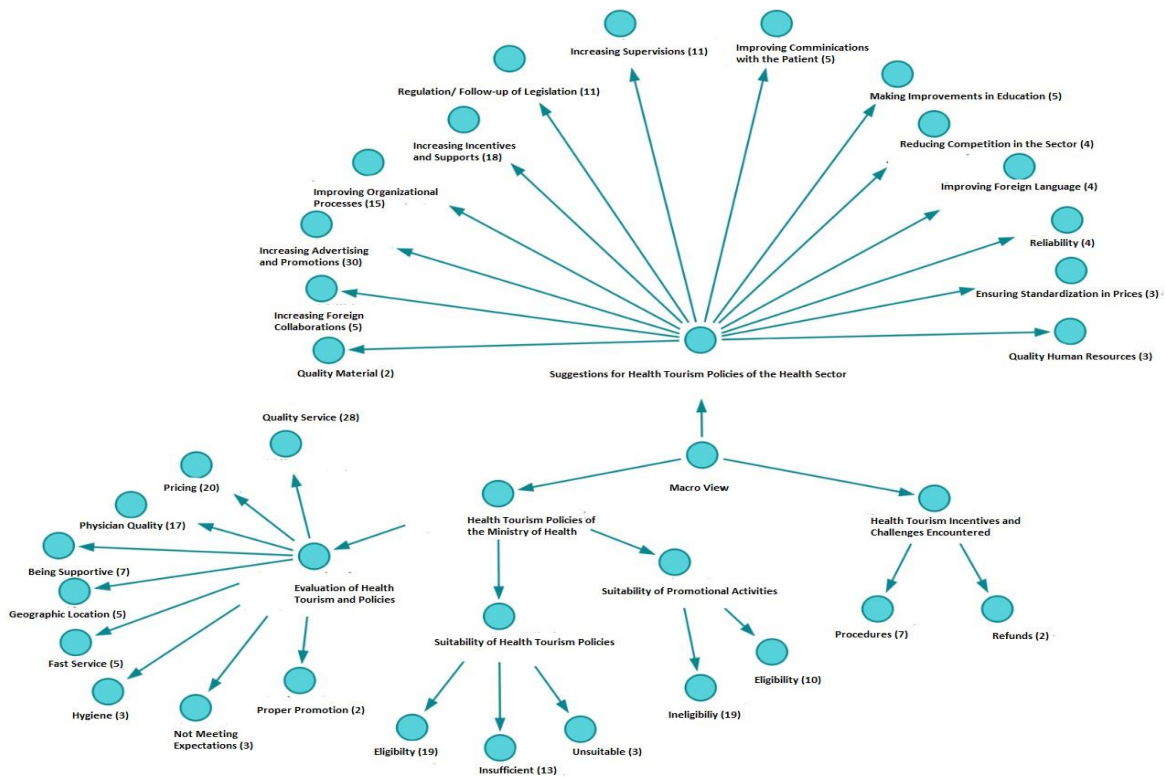


Figure 7: Hierarchical code-subcode representation of the Macro View theme

Within the scope of the research, 3 categories belonging to the theme of "Macro Perspective", which is one of the themes addressed within the scope of the research, were formed in Figure 7.

These are; health tourism policies of the Ministry of Health, recommendations to health tourism policies of the health sector, health tourism incentives and difficulties encountered.

Health Ministry's Health Tourism Policies

Under the category of Health Ministry's Health Tourism Policies, 3 codes have been created. These are: evaluation of health tourism and policies, appropriateness of health tourism policies, appropriateness of promotional activities.

Evaluation of Health Tourism and Policies

Under the code Evaluation of Health Tourism and Policies, participants have mentioned 9 different sub-codes. These are: quality of service, pricing, quality of physicians, geographical location, fast service, supportiveness, hygiene, meeting expectations, correct promotion.

Appropriateness of Health Tourism Policies

Under the code Appropriateness of Health Tourism Policies, participants have mentioned 3 different sub-codes. These are: being appropriate, being inadequate, not being appropriate. Some participants also expressed the view, *"I find it appropriate but I think efforts should be increased to further develop it."*

Appropriateness of Promotional Activities

Under the code Appropriateness of Promotional Activities, participants have mentioned 2 different sub-codes. These are: being appropriate, not being appropriate.

"Turkey needs to organize campaigns and promotions to promote itself as a health destination. Trade, tourism, health, and USSAŞ should also promote themselves. Turkey is a very successful destination in the world; with physician quality, current technology, service quality, price-quality balance, it is a very correct destination in terms of price-benefit equation. If we talk about these, there should only be promotions that show Turkey's direction in health services, and at this point, we can say that Turkey is not even at zero in this regard. When done, it will be an area that will make a difference in the world. Policies, vision, strategies have been created but there are always shortcomings." This view of not being appropriate has been evaluated as a clear description of the opinion.

Recommendations for Health Tourism Policies in the Healthcare Sector

Under the category of Recommendations for Health Tourism Policies in the Healthcare Sector, 14 codes have been created. These are: increasing advertising and promotion, increasing incentives and support, improving organizational processes, increasing inspections, regulating/following legislation, improving communication with patients, increasing international collaborations, making improvements in education, reducing competition in the sector, improving foreign language proficiency, reliability, standardizing prices, quality human resources, quality materials.

"Increasing inspections and possibly differentiating institutions that can perform Health Tourism."

"Monitoring the policies they create."

"I believe that the satisfaction level of patients should be measured, i.e., creating an environment where patients can express their feelings and thoughts after treatment."

"Increasing international collaborations of foundation universities providing education in the health field, advantages for the establishment of special zones and complexes for health tourism (tax, grant, land allocation, etc.)"

"Professional standards can be developed, academic training on health tourism can be organized in relevant departments of universities, efforts can be made to improve foreign language proficiency for stronger communication and patient satisfaction."

"I believe that there should be joint action, that there are values lost due to competition, and that health tourism should not only bring financial gains but also benefits to our country and hospitals in every aspect."

"Providing foreign language and orientation in a good way (for the whole team)."

"Trustworthy, auditable, and accurate service."

"Regulating price competition in line with the interests of the country and setting a minimum price instead of a maximum price, ensuring standardization."

"Developing the qualifications and quantity of personnel working in health tourism."

"Being able to provide quality materials" are the evaluations highlighted by the participants.

Health Tourism Incentives and Challenges

Under the category of Health Tourism Incentives and Challenges, 2 codes have been created. These are: procedures and reimbursements.

"Preparing quite a lot of bureaucratic paperwork is necessary to benefit from the incentives. Simplifying the process in this regard reduces the difficulties." and "In general, we benefit. But I think this scope should be expanded a bit more and reimbursements should be made faster."

Table 1: Frequency of codes in Macro view theme according to participant

	H1	H2	H3	H4	H5	H6	H7	H8	H9	H10	H11	H12	H13	H14	H15	H16	H17	H18	H19	H20	H21	H22	H23	H24	H25	H26	H27	H28	H29	H30	Σ		
Macro View																															0		
Health Tourism Policies of the Ministry of Health																																0	
Evaluation of Health Tourism and Policies																																0	
Quality Service	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	2	1	1	1	2	2	1	1	1	1	1	28	
Pricing	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	20	
Physician Quality	1	1				1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	2	1	1	1	1	1	1	1	1	1	1	17	
Geographic Location									1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	5	
Fast Service		1							1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	5	
Being Supportive	1	1					1														1	1	1	1	1	1	1	1	1	1	1	7	
Hygiene						1															2											3	
Not Meeting Expectations									1										1				1									3	
Making Promotional Activities													1		1																	2	
Suitability of Health Tourism Policies																																0	
Eligibility	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	19	
Insufficient	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	13	
Unsuitable											1													1		1						3	
Suitability of Promotional Activities																																0	
Ineligibility	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	19	
Eligibility		1				1							1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	10	
Suggestions for Health Tourism Policies of the Health																																0	
Increasing Advertisements and Promotions	2	1	1			1	1	1	2	2	2	2	2	1	1	2			1	1	3	1	1	1	1	2	1	2	1	1	30		
Increasing Incentives and Support	2	1				1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	2	1	1	1	1	1	1	1	1	1	1	18	
Improving Organizational Processes	2	2	1								1	1	1	1	1	2	2	1			1	1	1	1	1	1	1	1	1	1	1	15	
Increasing Inspections		1	1	1																2	1	2										11	
Regulation/Follow-up of Legislation	1														1	1	1	1														11	
Improving Communication with the Patient		1	1				1	1																								5	
Increasing International Collaborations													1			1																5	
Making Improvements in Education		1											2								1	1										5	
Reducing Competition in the Sector	1																															4	
Improvement of Foreign Language		1																														4	
Reliability																					1	2										4	
Ensuring Standardization in Prices	1																															3	
Quality Human Resources	1																															3	
Quality Material							1																										2
Health Tourism Incentives and Challenges Encountered																																	0
Procedure							1																										7
Refunds																																	2
Σ	12	13	10	7	8	7	8	10	10	9	9	7	9	7	8	12	6	8	13	14	17	11	6	11	12	11	6	7	7	8	283		

The Macro View theme was analyzed according to the participants. Accordingly, participants frequently mentioned the codes of quality service, pricing, and increasing advertising and promotions.

Findings Regarding Opinions on the Current State of the Sector Theme

Four categories have been created for the theme of "Opinions on the Current State of the Sector," which is one of the themes addressed in the research (Figure 8). These are; the weaknesses of hospitals, strengths of hospitals, combination of health tourism with local tourism types, health tourism activities in hospitals.

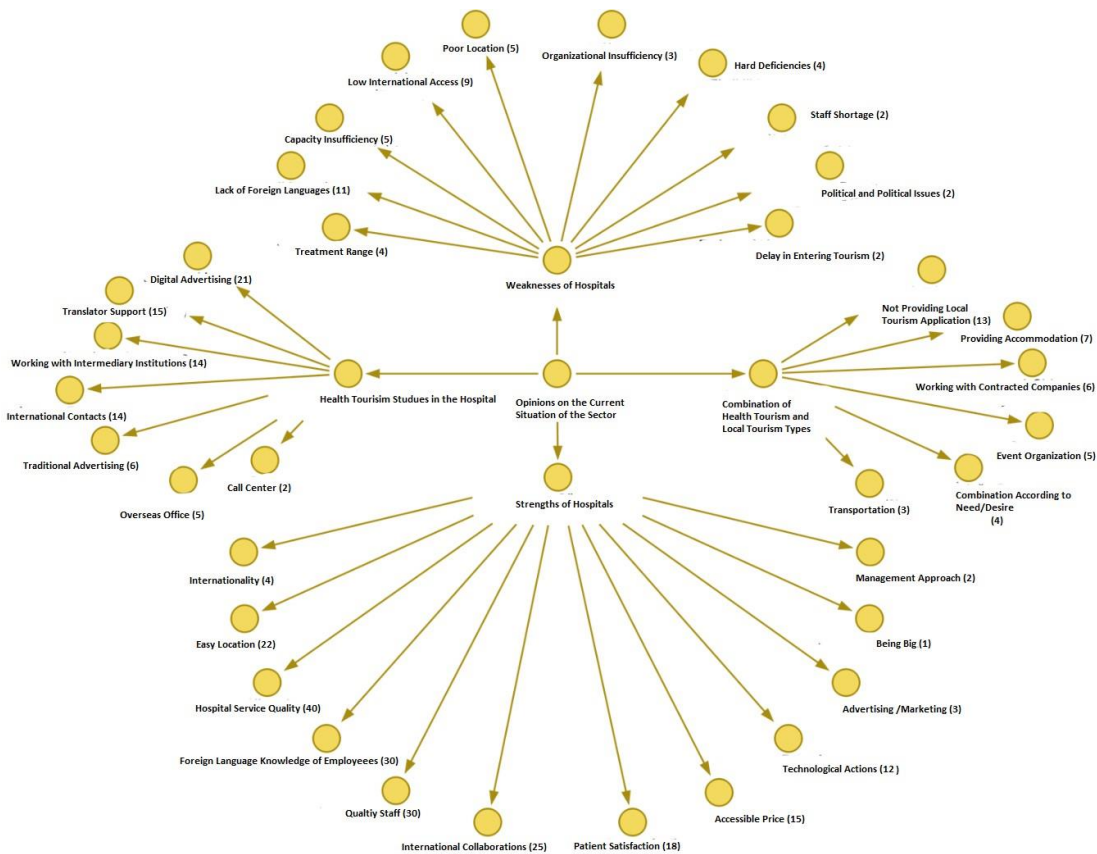


Figure 8: Hierarchical code-subcode representation of the theme of opinions on the current state of the sector

1. Weaknesses of Hospitals

This category reveals the main problems in the health tourism sector:

Low International Access (8):

Participants stated that many private hospitals in Turkey do not have sufficient connections to manage the international patient flow. Problems experienced in patient transfers and visa processes were particularly emphasized.

Lack of Foreign Languages (13):

It was stated that there is difficulty in communicating with health tourists and that sufficient importance is not given to foreign language education of healthcare personnel.

Lack of Organization (10):

Participants stated that patient management and special service processes for international patients are not yet fully established.

Political and Policy Problems (3):

Some participants emphasized that the constant change of health tourism policies and uncertainties in visa processes negatively affect the sector.

2. Strengths of Hospitals

This category reflects the competitive advantages of the health tourism sector:

Quality Health Personnel (10):

One of Turkey's greatest advantages in the field of health tourism is that it has well-educated and experienced health personnel.

Affordable Price (12):

Participants stated that the fact that health services in Turkey are more affordable compared to Europe and the US is an attractive factor for foreign patients.

International Collaborations (21):

It was emphasized that especially large private hospitals increase patient flow by making agreements with international insurance companies and health institutions.

Patient Satisfaction (15):

Participants stated that providing health services with a patient-focused approach increases patient satisfaction.

3. Integration of Health Tourism with Local Tourism Types

This heading discusses how health tourism can be integrated with other types of tourism:

Provision of Accommodation (7):

Participants stated that some hospitals provide special accommodation services for health tourists and that this improves the patient experience.

Transportation Services (3):

It was stated that the services provided by hospitals regarding airport transfers and urban transportation directly affect patient satisfaction.

Event Organization (3):

Participants stated that organizing cultural and social events for health tourists provides a more attractive experience for patients.

Weaknesses of Hospitals

Under the category of Weaknesses of Hospitals, 10 codes have been created.

These are: lack of foreign language skills, limited international access, inadequate capacity, poor location, range of treatments, lack of equipment, organizational inadequacy, insufficient staff, political and policy issues, delay in entering tourism.

Strengths of Hospitals

Under the category of Strengths of Hospitals, 12 codes have been created.

These are: employees' foreign language skills, hospital service quality, quality staff, international collaborations, convenient location, patient satisfaction, accessible pricing, technological actions, internationality, advertising/marketing, management approach and size.

Combination of Medical Tourism and Local Tourism Types

Under the category of Combination of Medical Tourism with Local Tourism Types, 6 codes have been created. These are: not providing local tourism practices, providing accommodation, working with contracted companies, event organization, combination according to needs/preferences and transportation.

"We can combine with local tourism according to the needs or preferences of the patient." (combination according to needs/preferences) and "We combine our treatment products with transportation and accommodation products. According to standard process procedures that can be fixed, we can include products in them." are the issues highlighted by the participants.

Medical Tourism Activities in Hospitals

Under the category of Medical Tourism Activities in Hospitals, 7 codes have been created. These are: digital advertising, interpreter support, working with intermediary organizations, international contacts, traditional advertising, foreign offices, call center.

"We use all web and social media promotion tools,"

"Yes, thanks to our interpreters, we can provide services to our patients in their own languages very comfortably."

"We ensure that doctors are taken abroad to contact their counterparts or patients." "We organize outdoor advertising, billboards, TV, newspapers, magazines, but the most important promotion is to satisfy the patient, which attracts other patients." "We open offices and pre-diagnosis centers or clinics, even hospitals abroad." "Under the Turquality, we can plan all activities. Translator, foreign offices, call center, etc." has been expressed in health tourism activities in hospitals.

Table 2: Opinions on the Current State of the Sector According to Participant Profile

	H1	H2	H3	H4	H5	H6	H7	H8	H9	H10	H11	H12	H13	H14	H15	H16	H17	H18	H19	H20	H21	H22	H23	H24	H25	H26	H27	H28	H29	H30	Σ		
Opinions on the Current Situation of the Sector																															0		
Weaknesses of Hospitals																															0		
Lack of Foreign Languages						1	1					1			1	2				1			1	1	1	1		1		2	11		
Low International Access						1					1				1		1				1			1	1	1	1			1		9	
Capacity Insufficiency																								1								5	
Bad Location				1						1								1														5	
Treatment Range	1												1							1											1	4	
Hardware Deficiencies	1											1					1															4	
Organizational Incompetence				1										1													1					3	
Staff Shortage																							1									2	
Political and Political Issues	1																							1								2	
Delay in Entering Tourism								1																1								2	
Strengths of Hospitals																															0		
Foreign Language Knowledge of Employees	1	1	1	1	1	2			1	2	1	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	30	
Hospital Service Quality	2	1	1	2	2	2	2	2	1	2	1	1				2	2	2	2			2	1	1	2	2		2	1	1	1	40	
Quality Staff	3	2	1	1	1	1		2	1	1	1	1	2			1	2	3	2	1			2		1			1	1	1	1	30	
International Collaborations	1	1	1	1	1		1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	25	
Easy Location	3	1			1			1	2		2	1	1	2	2						1				2	2			1	1	1	22	
Patient Satisfaction	1		1	1	1	1	1	1	1	1	1	1	1	1	1	2				2			2	1	2		1			2		18	
Accessible Price	1						1			1			2	1	1	2				2	1	1	1	1				1				15	
Technological Actions	3	1			1							1					2	1					1		2							12	
Internationality					2		1									1																4	
Advertising/Marketing				1							1													1								3	
Management Approach																		1	1													2	
Being Big								1																								1	
Combination of Health Tourism and Local Tourism Types																															0		
Not Providing Local Tourism App	1					1		1	1			1	1			1						1	1	1	1	1	1	1	1	1	1	13	
Providing Accommodation		1					1			1	1					1												1			1		7
Working with Contracted Companies			1					1	1										1			1	1									6	
Event Organization									1								1	1	1				1									5	
Combination According to Need/Desire				1																								1	1			4	
Transport										1							1													1			3
Health Tourism Studies in the Hospital																															0		
Digital Advertising	1			1	1	1	2	1	1	1		1			1	1			1	1	1	1	1	1	1	1	1	1	1	1	1	21	
Translator Support	1		1		1	1	1				1		1	1	1				1	1	1		1	1		1		1				15	
Working with Intermediary Institutions	1	2		1			2	1			1				1	1				1	1		2				1		1	1	1	14	
International Contacts	1	1							1	1				1	1					1	1		1	1	1				1	1	1	14	
Traditional Advertising	1	1			1																									1	1	1	6
Overseas Office											1					1																	5
Call Center																																	2
Σ	23	13	12	11	13	12	13	14	14	11	12	11	9	8	13	15	16	17	11	10	12	13	13	12	11	7	9	9	10	10	364		

Opinions on the Current State of the Sector theme has been examined according to the participants. Accordingly, participants frequently mentioned hospital service quality, employees' foreign language skills, digital advertising, and international collaborations codes.

Findings Related to the Service Process Theme

Three categories have been created for the theme of "Service Process," which is one of the themes addressed in the research.

These are: post-procedure patient follow-up process, frequently visited branches for health tourism, and payment methods for patients.

Post-procedure patient follow-up process

Under the category of Post-procedure Patient Follow-up Process, 3 codes have been created. These are: online follow-up, follow-up through health services in other countries, regular follow-up.

Frequently Visited Branches for Medical Tourism

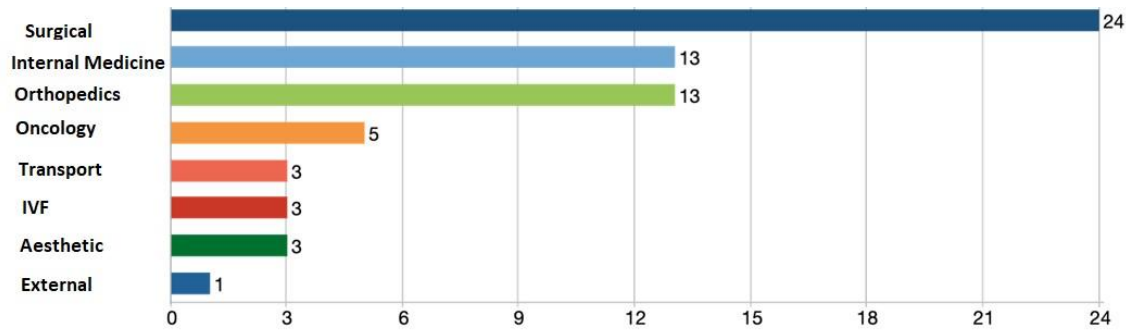


Figure 9: Frequently visited branches for medical tourism

Accordingly, surgery, internal medicine, and orthopedics are the most preferred branches.

Patients' Payment Methods

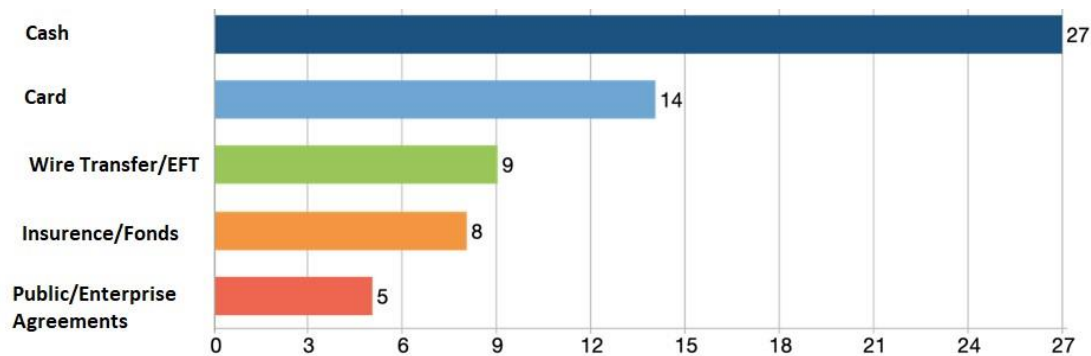


Figure 10: Patients' payment methods

Accordingly, cash, card, and bank transfers are frequently used payment methods for patients coming for medical tourism.

Table 3: Opinions on the Service Process According to Participant Profile

	H1	H2	H3	H4	H5	H6	H7	H8	H9	H10	H11	H12	H13	H14	H15	H16	H17	H18	H19	H20	H21	H22	H23	H24	H25	H26	H27	H28	H29	H30	Σ	
Service Process																																0
Post Procedure Patient Follow-up Process																																0
Online Tracking				1			1		1	1				1	1		1				1	1	1	1		1	1	1	1	1	1	14
Follow-up Through Health Services in Other Country	1			1				1		1	1						1			1	1	1	1				1		1		12	
Regular Follow-up														1					1					1			1		1		5	
Branches Frequently Visited for Health Tourism																																0
Surgical	1	1			1	1		1	1	1		1	1	1	1		1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	24
Internal Medicine	1			1		1			1			1	1	1			1		1	1	1	1	1		1		1		1		13	
Orthopedics		1		1		1					1	1	1	1			1	1	1	1		1			1			1		1	13	
Oncology				1	1					1	1	1	1				1	1	1	1		1							1		5	
Transport				1						1				1																	3	
IVF		1					1																						1		3	
Aesthetic																				1						1					3	
External																											1				1	
Payment Methods of Patients																																0
Cash	1	1		1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	27
Card		1		1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	14
Wire Transfer /EFT		1		1					1		1						1	1	1	1												9
Insurance/Funds	1							1					1							1	1	1									8	
Public/Enterprise Agreements	1												1							1	1	1									5	
Σ	6	6	0	8	5	5	2	6	4	6	5	3	4	5	7	3	6	4	6	7	9	6	4	9	3	5	5	6	6	8	159	

The Service Process theme has been examined according to the participants. Accordingly, surgery, cash, online follow-up, and card codes are among the frequently mentioned codes.

3. DISCUSSION

In medical tourism many factors influence the quality of service.

First, when we look at the human factors, the knowledge, skills, and education level of healthcare workers, as well as their foreign language proficiency, along with the expertise of intermediaries and agency workers, directly affect the quality of service in health tourism. As frequently emphasized in the literature, human resources in institutions providing services in the field of health tourism are critically important, as highlighted in this study as well. In addition to medical competencies, some organizations need to adopt a management style suitable for international relations and cultural bridges as part of their management capacity. With the increasing competition in international health tourism markets, the intensity of domestic competition has intensified competition between organizations. Having a strong workforce both in medical and management areas will provide significant advantages for healthcare institutions (Sur, 2024). These factors align with the results found in our study. These views were also expressed by participants, overlapping with the "strengths and weaknesses" theme in the findings section.

Secondly, the physical factors of healthcare institutions in health tourism are important elements that directly affect the patient's experience and satisfaction during the treatment process.

A modern infrastructure, meeting hygiene and safety standards, being easily accessible, and prioritizing patient comfort make a healthcare facility attractive to health tourists. Additionally, the availability of accessibility options and special services that can meet the needs of patients from different cultures makes healthcare institutions preferred centers. Healthcare institutions aiming to gain a competitive advantage in the field of health tourism must adopt patient-centered and sustainable solutions in their physical structures (Sur, 2024). Physical factors, including the institution's equipment, infrastructure, the technology used, the quality of accommodation facilities, and hygiene conditions, directly affect service quality (Nicolaidis, 2011). These factors also align with the results of our study, and these views were expressed by participants, overlapping with the "strengths and weaknesses" theme in the findings.

The third factor determining the level of health tourism is the social factor. Among the social factors, the ability of an institution to introduce itself internationally, build trust, meet patients, organize relationship processes, manage transportation, take a moderate approach to cultural differences, and establish cultural bridges is essential. Social factors in health tourism are critical elements that influence the treatment process of patients and determine their level of satisfaction. Health tourists may face challenges such as cultural differences, language barriers, and social adaptation when in a foreign country. Therefore, it is crucial for healthcare institutions to provide a culturally respectful environment, offer multilingual support services, and be sensitive to social needs. Additionally, providing cultural adaptation, respecting patient rights, and offering psychological support services are key components of social factors. All of these social factors contribute to making patients feel safer in a foreign country and more satisfied with their healthcare experience, ultimately increasing the success of the health tourism sector (Nicolaidis, 2011).

The fourth factor that determines the level of health tourism is the organizational factor. Organizational factors in health tourism include effective management and organizational structure, qualified and trained personnel, patient relations and coordination units, quality management and accreditation standards, continuity of services, operational efficiency, communication and language support, and strategic planning and marketing. Among these, service quality, efficiency, and patient satisfaction play a decisive role. A well-structured organization in a healthcare institution ensures that patient care processes operate effectively and efficiently. In this context, an experienced management team, trained healthcare personnel, and operational procedures aligned with international standards help meet the needs of health tourists. Moreover,

professionally managed patient coordination makes it easier for foreign patients to adapt to the process, and collaboration among medical teams increases patient safety. Healthcare institutions with a strong organizational structure offer higher quality services, gain a competitive advantage internationally, and contribute to the growth of health tourism (source to be added). In terms of marketing channels and promotion, both traditional methods such as radio, television, and advertisements, as well as modern methods like social media and internet marketing, are of great importance. While traditional methods are still powerful, using the Turkish TV series industry for promotional activities can increase awareness. In the US, talk-show hosts and popular doctors featured in television programs have increased interest in aesthetic and cosmetic surgery. Similar efforts could be applied in Turkey. Furthermore, new studies should be conducted to address changing awareness in the areas of digital marketing and social media (Baysan, 2018). In Selvi's research, it was noted that healthcare institutions with high recognition and a positive image are not only preferred but also recommended by patients and their families to others. Turkey must also make efforts to increase its recognition and positive image in the sector (Selvi, 2012). Other significant factors that direct health tourists to seek healthcare in another country align with many features seen in Turkey. These include high-quality infrastructure and technological equipment at healthcare institutions, geographic location advantages, high-quality healthcare providers, the country's natural, historical, and cultural richness, adequate tourism, hotel, and transportation services, and diverse and affordable healthcare packages offered by hospitals (Aslan & Gün, 2018). Collaborating with overseas doctors in the medical tourism field and participating in international fairs and seminars, both privately and through government efforts, will contribute to the development of Turkey's health tourism sector. It will also be beneficial to take healthcare providers to these fairs and meetings, as this will increase communication and provide direct marketing opportunities (Alsharif et al., 2010). These views were also expressed by participants and align with the "current state of the sector" theme in the findings.

In a study by Dökmen (2019), the factors influencing patient preference were examined under two main categories: country selection and healthcare institution selection. In country selection, socio-economic status, political factors, regulations, and intermediary organizations are effective, while in healthcare institution selection, service quality, cost, communication, promotion, and technology are the key factors. The analyses, in line with these findings, overlap with the "service quality" theme.

Addressing these four factors diligently and ensuring the necessary conditions are met will not only increase patient satisfaction but also provide confidence to potential health tourists, leading them to choose our country and healthcare institutions for their treatment (Nicolaidis, 2011).

4. CONCLUSIONS

In this study, the findings and recommendations obtained as a result of interviews with a total of 29 health managers from Class A and B private hospitals and Class C clinics are as follows:

Evaluation of Medical Tourism and Policies

According to Class A and B private hospitals, the factors that are effective in health tourists coming to our country are: quality service, quality of the doctor staff, geographical location of the country, short waiting time for hospital procedures, adequacy of government incentives and hygienic health institutions. In class C clinics, cheap service, inadequate health tourism policies and advertising promotions are effective.

Suitability of Medical Tourism Policies

While Class A and B private hospitals found the current medical tourism policies appropriate, Class C clinics emphasized that some deficiencies should be eliminated.

Suitability of Promotional Activities

Class A and B private hospitals stated that their promotional activities were insufficient and that the Ministry of Commerce and the Ministry of Tourism should provide more support to these activities. Class C clinics, on the other hand, found their promotional activities sufficient.

Recommendations of the Health Sector for Medical Tourism Policies

Class A and B private hospitals stated that advertising and promotions should be increased, government incentives should be increased, authorized documents for health tourism should be obtained and inspections should be strengthened. Class C clinics suggested that foreign language levels should be increased, a safe environment should be provided, standardization in pricing should be ensured and staff quality should be increased.

Weaknesses of Hospitals

Class A and B private hospitals stated their weaknesses as low international collaborations, weakness in operational processes, and being quickly affected by political influences. Class C clinics, on the other hand, have brought up problems such as the employees' lack of foreign languages, lack of physical capacity and lack of equipment.

Strengths of Hospitals

Class A and B hospitals have strengths such as providing services in different languages, high service quality, strong human resources, international collaborations, central location, high patient satisfaction, accessible pricing policies and technological investments. Class C clinics stated that they were promoted through intermediary organizations and tools such as television and print media.

Health Tourism Studies

Class A and B hospitals stated that they promote themselves on the internet and social media, and deliver patients through their overseas offices and call center activities. Class C clinics stated that they communicate with health tourists by working with intermediary organizations and using translators.

These findings provide valuable insights into the strengths, weaknesses, and opportunities within Turkey's medical tourism sector. Further recommendations focus on enhancing promotional activities, addressing policy gaps, and improving service quality to attract more international patients.

The recommendations developed based on the research results are presented below:

- Promotion and advertising activities should be prioritized to develop medical tourism.
- In health tourism, both the image of the organization and the image of the country are involved. Errors made in this regard can result in negative consequences for the country. Therefore, the government should continue its oversight, including promotions and pricing.
- Quality and accreditation systems need to be adapted to the specific characteristics of health tourism.
- Special policies and resource planning should be developed to attract more health tourists to our country.
- The training of personnel with foreign language skills should be increased.

These findings provide important insights that can guide the development of policies in the health tourism sector and the improvement of service quality.

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