



A SWOT Analysis on Halal Medical Tourism Market in Türkiye

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Abstract

Aim: This study aims to evaluate Türkiye's position in the Halal Medical Tourism (HMT) market by examining its strengths, weaknesses, and overall potential within the broader context of health and medical tourism.

Method: A qualitative research design was employed. The study was conducted through a literature-based approach using secondary data on health tourism, medical tourism, and halal medical tourism. A SWOT analysis framework was applied to synthesize findings and assess Türkiye's Halal Medical Tourism market in terms of internal and external factors.

Results: The analysis indicates that Türkiye's main strengths in Halal Medical Tourism include an advanced healthcare infrastructure, relatively affordable treatment costs, and cultural and religious affinity

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with Muslim-majority countries. Identified weaknesses include limited foreign language proficiency among healthcare staff and inadequate international promotion of Türkiye's halal-compliant medical services. Overall, the findings suggest that Türkiye holds considerable potential to become a prominent destination in Halal Medical Tourism.

Conclusion: Türkiye has a strong structural and contextual basis to develop its Halal Medical Tourism market. However, realizing this potential requires strengthening global promotion efforts, improving foreign language competencies among personnel, and developing more clearly defined and standardized halal healthcare practices.

Keywords: Halal Medical Tourism, Health Tourism, SWOT Analysis, Türkiye.

INTRODUCTION

With the spread and progress of tourism activities on a global scale, health tourism, which is a type of tourism covering every period of the year as an alternative to seasonal coastal tourism, has become increasingly important in the world and in Türkiye. The main purpose of health tourism is to protect, improve the health of people and find a cure for their diseases. For these reasons, all kinds of trips they make are called health tourism (Özsarı and Karatana, 2013). Health tourism diversifies within itself, following the demand and supply cycle. Travel for purposes such as seeking medical treatment or seeking cures for illnesses through surgical procedures is referred to as "Medical Tourism." Travel to benefit from thermal springs and spa-wellness facilities is referred to as "Thermal and Spa-Wellness Tourism." International travel by older people seeking healthcare, care, and rehabilitation services is referred to as "Elderly Tourism" (Göde et. al., 2021).

Sociologically, the religious beliefs of individuals are of great importance in their lives that cannot be ignored Decently. The fact that people's beliefs and attitudes are formative in all aspects of their lives has also been effective in people's consumption preferences (Gürhan, 2017). Due to the different beliefs of individuals on the axis of religion, it has led to the emergence of certification systems for manufactured goods and services according to beliefs. A "Halal Certification System" has been developed for goods and services produced and offered according to religious rules (Güzel and Kartal, 2017). In this context, the "Medical Tourism Marketing" attracts attention in the international arena (Mohezar et. all, 2017).

According to Mohsin et. al. (2016), halal tourism refers to the provision of tourism products and services that meet the needs of Muslim travelers by facilitating worship and dietary requirements in accordance with Islamic teachings.

In this study, the data includes an explanation of the concepts of Halal Medical Tourism within the scope of Health Tourism, Types of Health Tourism and Health Tourism. After that, a SWOT analysis of “Halal Medical Tourism” for Türkiye will be conducted. An analysis will be made by considering the “strong sides”, “weak sides”, “opportunities” and “threats” of Türkiye in terms of Halal Medical Tourism in the light of the relevant literature. This study is thought to contribute to the field of literature because this field is a new and not yet very concentrated field of study.

1. HEALTH TOURISM FROM A GLOBAL PERSPECTIVE AND TYPES

Individuals should stay somewhere other than their place of residence with the intention of healing their diseases or protecting their current health and to benefit from these health services, their planned travel actions are called health tourism (Aydın, 2012). People traveling for this purpose are called health tourists. Health tourism is a type of tourism that is anchored by natural resources such as hot springs, human resources such as tourists and professionals in their fields, and financial resources such as ultra-capital-funded health companies (Özkurt, 2007).

For health tourists, since there is no obligation to receive services during a certain season, trips can be made for the purpose of receiving health services at any time of the year. Countries will be able to benefit from the economic contributions of health tourism with the plans and strategies they will implement considering this increase in health tourism (Yiğit and Açıkgöz, 2023). Estimates of the medical tourism market volume vary across different studies because there are no global statistics available for the sector. However, according to the World Health Organization, the sector's financial volume is constantly increasing. Various associations estimate the medical tourism market's volume to reach \$3 trillion by 2025 (İle and Tıgu, 2017).

Türkiye has become one of the preferred countries in health tourism due to its location in the world, cultural richness and many historical monuments it hosts on its territory, as well as coordinating the provision of quality services in health services with these tourism factors (Kantar and Işık, 2014). In recent years, it is seen that Türkiye also wants to take a share from this marketing with the works of the Ministry of Health, plans and policies developed within the scope

of this sector in development plans, city hospitals providing a wide range of services. Its geographical location, qualified health workforce, quality health service provision, high health technology it has and the possibility of visa-free travel with many countries reveal the potential that Türkiye can become one of the leading countries in the health tourism sector (Özkan, 2019). Health tourism provides important economic contributions for countries. Türkiye has positive advantages in this sector thanks to the quality of its health service providers and its regional location (Şıktaş and Künü, 2021). In this section, explanations of the trips for health purposes are given according to their types.

In recent years, the concept of health tourism has evolved beyond conventional treatments, incorporating preventive care, wellness, and advanced technological health services. According to Connell (2013), modern health tourism is shaped by globalization, cultural exchange, and the commodification of healthcare, where patients seek both cost efficiency and quality treatment abroad. Similarly, Teoh et. al. (2024) emphasized that the integration of digital health systems and artificial intelligence has accelerated cross-border access to medical services, making global health tourism a more data-driven and patient-centered field.

1.1. Medical Tourism

Medical tourism is an international travel that combines entertainment and health and is Decoupled by physicians in order to benefit from the treatments performed in health institutions (Gülen and Demirci, 2012). Problems of access to health services at an appropriate time and cost, the inability of health insurance and individual incomes to cover the services to be offered, and the fact that the quality of health services is gradually increasing in developed countries have increased the importance of medical tourism (Connell, 2011). Applications such as aesthetic surgery, dentistry, cardiology and cardiac surgery, orthopedic surgery, obesity surgery, fertility and reproductive system, organ transplantation, eye surgery, diagnostics and controls are the activities covered by medical tourism (Lunt et. all, 2011). The fact that the number of medical tourists is increasing every day and the income earned as a result shows that Türkiye is an important target country in the sector (Buzcu and Birdir 2019).

1.2. Thermal and Spa-Wellness Tourism

Thermal tourism, also known as spa tourism, is defined by the Ministry of Culture and Tourism (2019) as follows; It is the use of thermal treatment practices such as thermo-mineral

water bathing, drinking and mud bathing in combination with other methods such as physical therapy, rehabilitation and exercise, as well as the use of thermal waters for entertainment and recreation activities (Özkan, 2019). Balneotherapy is applied by using mineralized thermal water sources, Thalassotherapy is applied by taking advantage of the marine climate and using sea water, the treatments applied by taking advantage of climate characteristics are called Climatherapy, and the treatments applied by using fresh waters are called Hydrotherapy (Özbek, 1991). People go to Spa centers to look younger, more dynamic and more beautiful, and Spa tourism is a new type of tourism within health tourism by taking advantage of Spa methods, which are an application that gives mental, physical well-being, relaxation and pleasure (Gülen and Demirci, 2012). Spa-wellness centers located in hotels with international standards in the world and in Türkiye can also attract attention with investments with modern equipment and high service quality in hotels in Türkiye, Türkiye continues its spa culture even recently thanks to its rich mineral hot water resources, and the Ministry of Culture and Tourism is conducting important studies on thermal tourism for the development of health tourism (Güzel Şahin and Tuzlukaya, 2020).

1.3. Disability Tourism and Elderly Health and Care Tourism

The inability and limitation in the vital and daily activities that a person must do on his own because of a congenital or subsequent ailment or because of an accident can be defined as a disability. It is the loss of a person's physical or spiritual integrity in a temporary or permanent way, because of birth or aging. Disabled people constitute the largest minority in the world. The mass formed by these people is an important private market in the world. This marketing also creates a sector called disabled tourism. Disabled tourism is very important for tourism enterprises since these people are not alone on their travels, they also have their companions with them (Zengin and Eryılmaz 2013). Participating in tourism activities and traveling is a significant challenge for people with disabilities. In developed countries, individuals with disabilities are largely encouraged to engage in tourism activities (Bulgan, 2015).

Although old age is a natural process in the lives of living things, as age progresses, some physical decreases occur in the organism and a physical, spiritual and social decrease occurs. Old age does not progress the same for everyone, some people have an active life in their old age, while others may be physically and mentally dependent (Bilir, 2018). Biological aging is a process in which the zygote begins to form and ends with death. Social aging is a period that differs according

to the society in which a person lives, starting with the retirement period today. Psychological aging is a disability that occurs with age, such as perception problems, slowing down in thinking speed and loss of attention. Chronological aging is known as age and the years that a person has left behind (Acar Genç, 2022). The World Health Organization has classified old age as follows; 65-74 years is young old age, 75-84 years is old age, 85 years and older is old age (Sözeri, 2023). Aging can cause individuals to be unable to perform their daily vital functions, along with conditions such as illness and disability, making it mandatory for people to receive specialist support during their old age. Elderly care should cover adequate nutrition, clothing, housing and continuous care services of the elderly (Kaya and Derse, 2023). What should be considered in elder tourism is that the priorities and needs of elderly individuals should be determined and addressed during the trips they make, and the infrastructure should be created considering these priorities (Çataloğlu, 2020).

1.4. Halal Medical Tourism

This section includes the titles of Halal Concept and Halal Market, Halal Medicine and Halal Medicine Market and Halal Medical Tourism.

1.4.1. The Concept of Halal and The Halal Market

According to the data of 2022, the Muslim population, which is more than 25% of the total population in the world, is about 2 billion. The gender distribution of the Muslim population is 49.2% Female and 50.8% Male. While the average age is 25, 70% of the Muslim population is under the age of 40. Muslims live in more than 200 countries. There are 48 countries in the world where more than 50% of the population is Muslim, and 28 countries where between 10% and 50% of the population is Muslim. Dec. in 2030, it is expected that Muslims will increase to about 2.3 billion, over 27% of the total world population (Global Muslim Travel Index, 2023). There are predictions that the human population will increase by 32% in the future. There are also predictions that the Muslim population will increase by 70%. It is predicted that Muslims will constitute more than 30% of the total human population in the future, and that there will be nearly 3 billion Muslims by 2060 (Pew Research Center, 2017). As the increase in the Muslim population and the increase in the number of Muslims traveling will increase directly, the volume of the sector will also increase (Chandra, 2014).

It is not possible for religious beliefs, which have an influential place in human life, not to have an impact on consumer preferences (Yener, 2011). Therefore, some certification systems have been established for the consumption needs of people of different beliefs in the world. Halal certified products produced and prepared based on Islamic rules are produced for Muslim consumers, Kosher certified products produced and prepared according to Jewish rules are produced for Jewish consumers, and vegetarian products are produced for Hindus (Güzel and Kartal, 2017). The term "Halal," which has become universal in Islam, means what is permissible, that is, lawful. Not limited to food and drink, the concept of halal is a broad concept that shapes the lives of Muslims, including security, social justice, and a sustainable environment (Baharuddin et. al, 2015). The Halal industry continues to grow in volume worldwide, and its growing potential has been recognized by multinational companies. It is estimated that the Halal market will reach approximately US\$ 9.17 trillion by 2025 (Putra et. al, 2023). It is known that Islamic Medical Tourism activities have an economic share in the Halal industry, but there is no precise statistical data. Although there is literature on sectoral trends for a few countries, no detailed data has been found (Bilim et. al, 2017), and therefore, no numerical data has been found on the Islamic medical tourism market volume worldwide, and its growing potential has been recognized by multinational companies. It is estimated that the Halal market will reach approximately US\$ 9.17 trillion by 2025 (Putra et. al, 2023). It is known that Islamic Medical Tourism activities have an economic share in the Halal industry, but there is no precise statistical data. Although there is literature on sectoral trends for a few countries, no detailed data has been found (Bilim et. al, 2017), and therefore, no numerical data has been found on the Islamic medical tourism market volume.

1.4.2. Halal Medical Products

It would be wrong to limit the halal industry market only to the food sector because it is a wide-ranging industry that also includes tourism, pharmaceuticals and cosmetics, media and recreation sectors (Hidayat et. al, 2021). When considering the healthcare sector, it's crucial that all materials used in the sector, from products to sutures, are obtained using natural or synthetic techniques. There are three types of animal-sourced production methods specifically for surgical sutures. Sutures are produced in various ways: catgut sutures derived from the intestines of goats, sheep, cows, and pigs; reconstituted collagen sutures produced from animals like cattle and buffalo; and sutures made from silk (Zarmani et. al, 2020). In Islam, patients are permitted to use

products that are considered haram for treatment in cases where there is no alternative. Except in cases of necessity, all medications must be made from halal raw materials and meet halal standards. Currently, there are various ways to obtain raw materials from various sources. Because producing medications in accordance with beliefs and individual attitudes will increase the success of treatment (Arslan et.al, 2019). Saudi Arabia ranks first in pharmaceutical exports to the Organization of Islamic Cooperation countries with \$5.61 billion, Türkiye ranks second with \$4.96 billion, and Nigeria ranks third with \$2.84 billion (Dinar Standart, 2022).

1.4.3. Halal Medical Tourism

The Islamic Medical Tourism sector has recently become a popular area within health tourism. This specialized field, based on the principles of monotheism, encompasses the provision of healthcare services within an Islamic framework (Mohezar et. al, 2017). The concept of Islamic healthcare can be defined as healthcare services provided to meet the needs of Muslim patients. In addition to healthcare services, a hospital providing Islamic healthcare services must provide services and facilities that enable staff, patients, and their families to pray, provide halal medicine, and provide halal food and beverages (Zawawi and Othman, 2018). In their study, Moghavvemi et. al. (2014) stated that Muslim patients expected doctors to provide services in accordance with their religion and to provide them with halal medicines, and that saying Bismillah and Alhamdulillah reassured them and that they liked this spiritually.

Through Islamic medical tourism, Muslim health tourists will be able to enjoy both the entertainment and shopping opportunities of tourism activities and visit the historical sites of Muslim destinations. In addition to meeting all the requirements of health tourism, the employment of personnel with Islamic knowledge is crucial for the sector's desirability (Rahman and Zailani, 2016). Conducting leisure activities outside of treatments within the Halal tourism concept is a factor that increases satisfaction for Muslim health tourists. Hotels, restaurants, and hospitals should be prepared and presented free of non-halal ingredients such as pork and alcohol (Iranmanesh et. al, 2018).

In their study, Zailani et. al. (2016) stated that Muslim patients emphasized the importance of halal food choices and the availability of places of worship in hospitals, and that gender-specific services consistent with Islamic understandings of chastity should be offered, or, if this is not possible, a “knock, wait, and enter” policy would be appropriate. They also highlighted that

patients and their relatives should be informed about the use of medications containing non-halal ingredients. Similarly, Iranmanesh et. al. (2018) found that Muslim medical tourists appreciated physicians who demonstrated Islamic sensitivity in their services and perceived those who prescribed or recommended halal-compliant treatments as more competent. The growing importance of these religious and ethical preferences among Muslim patients has also influenced the increase in medical tourism flows to Türkiye, as illustrated in Figure 1.

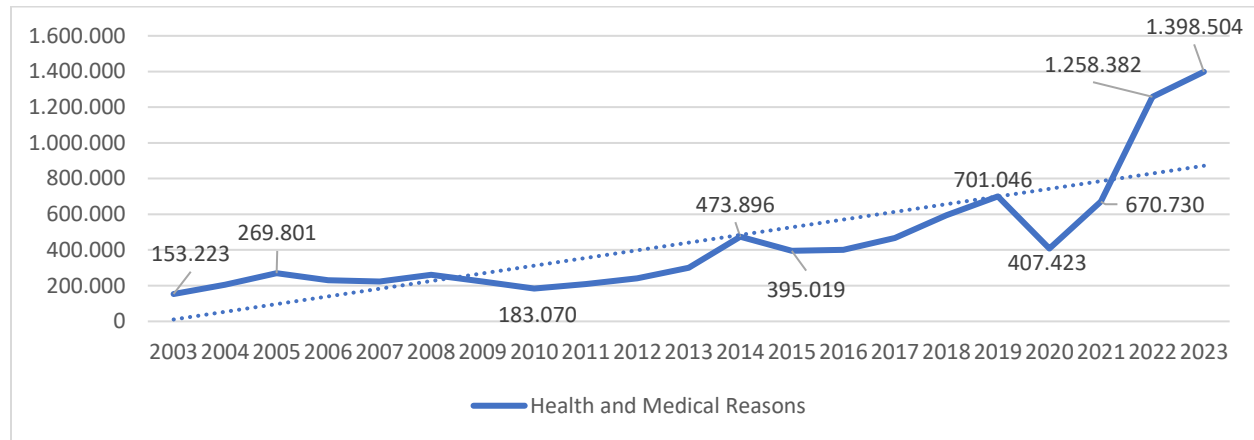


Figure 1. Graph of the Number of Visitors Coming to Türkiye for Health and Medical Reasons (Reference: TURKSTAT, 2024).

According to data published by the Turkish Statistical Institute (TURKSTAT, 2024), a total of 16.3 million visitors arrived in Türkiye in 2003, among whom 153,223 individuals traveled for health and medical purposes. In contrast, by 2022, the total number of international visitors had increased to 51.4 million, with 1,258,382 of them identified as medical or health tourists. These figures clearly demonstrate a significant growth in Türkiye's health tourism sector over the past two decades, reflecting the country's expanding capacity and attractiveness as a medical tourism destination.

Table 1. Statistics of Visitors Coming to Türkiye for Health and Medical Reasons by Year

2003	153.223	2014	473.896
2004	204.790	2015	395.019
2005	269.801	2016	400.699
2006	230.171	2017	467.302
2007	223.882	2018	594.851
2008	261.240	2019	701.046

2009	222.597	2020	407.423
2010	183.070	2021	670.730
2011	208.524	2022	1.258.382
2012	240.682	2023	1.398.504
2013	300.102	2024	-

(TURKSTAT, 2024)

As shown in Table 2, the number of health and medical tourists visiting Türkiye has exhibited a remarkable upward trend over the past two decades. In 2003, only 153,223 international visitors arrived for medical purposes, whereas by 2023, this figure had increased nearly ninefold, reaching 1,398,504. This steady rise, despite temporary fluctuations caused by global crises such as the COVID-19 pandemic in 2020, underscores Türkiye's growing reputation and competitiveness in the international health tourism market. The consistent increase after 2021 also reflects the effectiveness of national strategies and investments in promoting Türkiye as a leading destination for high-quality, cost-effective, and culturally compatible medical services. This upward trajectory indicates that Türkiye is steadily transforming from a regional service provider into a globally recognized hub for medical and wellness tourism.

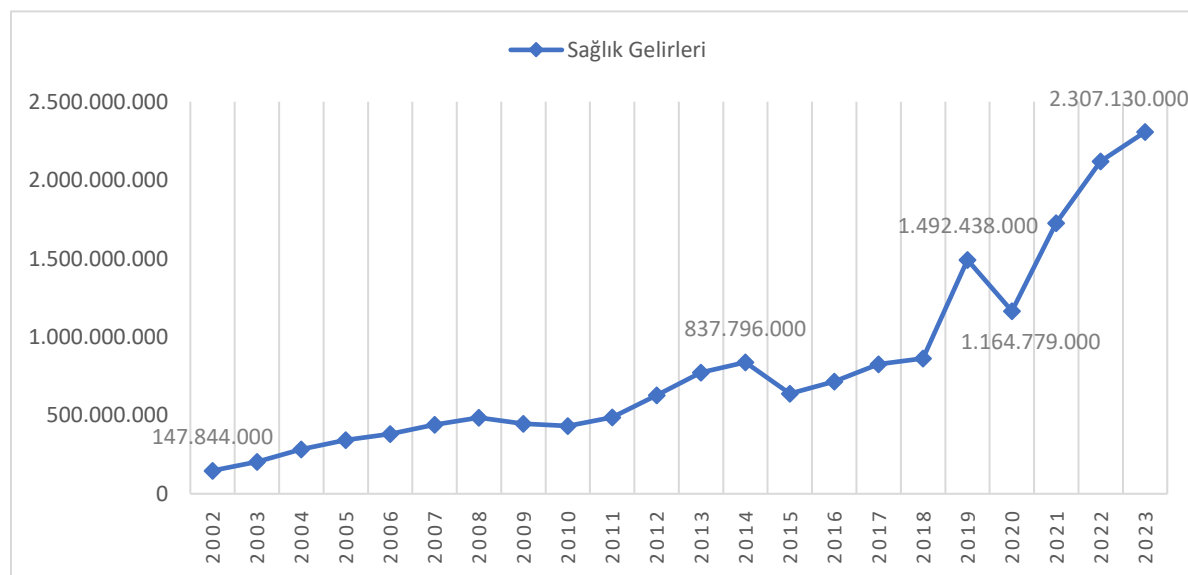


Figure 2. Graph of Health Expenditures in Tourism Revenues of Türkiye (\$) (TURKSTAT, 2024).

In 2002, a total tourism income of approximately 12 billion 420 million 519 thousand dollars was obtained, of which approximately 147 million 844 thousand dollars were obtained

from health expenditures. A total tourism income of approximately 46 billion 477 million 871 thousand dollars was generated in 2022, and approximately 2 billion 119 million 59 thousand dollars of these revenues were obtained from health expenditures (TURKSTAT, 2024). It can be said that medical tourism revenues have increased by about 20 times in a period of 20 years.

Table 2. Medical Tourism Revenues of Türkiye by year (\$)

2002	147.844.000	2013	772.901.000
2003	203.703.000	2014	837.796.000
2004	283.789.000	2015	638.622.000
2005	343.181.000	2016	715.438.000
2006	382.412.000	2017	827.331.000
2007	441.677.000	2018	863.307.000
2008	486.342.000	2019	1.492.438.000
2009	447.296.000	2020	1.164.779.000
2010	433.398.000	2021	1.726.973.000
2011	488.443.000	2022	2.119.059.000
2012	627.862.000	2023	2.307.130.000

(TURKSTAT, 2024).

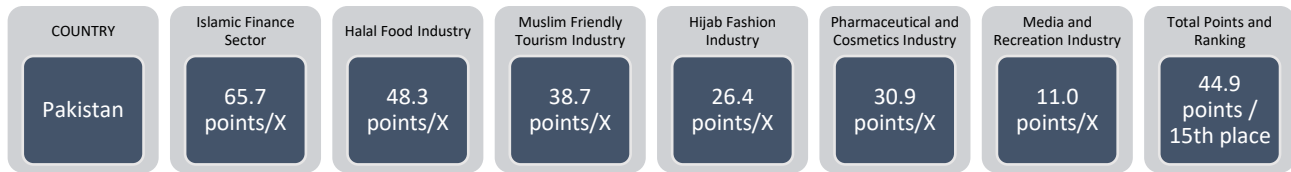
Health tourism represents a distinct subsector within the broader tourism industry, primarily due to its inclusion of healthcare services domain characterized by high complexity and strict regulatory requirements. For this reason, individuals traveling for medical purposes often require guidance and coordination from specialized health tourism agencies. According to the Regulation on International Health Tourism and Tourist Health issued by the Ministry of Health of the Republic of Türkiye, intermediary institutions or agencies operating in this field must fulfill specific criteria and obtain official authorization certificates to engage in health tourism activities (Göde et. al., 2021). Effective management of health tourism processes by qualified professionals and authorized organizations is crucial to ensuring service quality and patient safety. This management necessitates adherence to professional quality standards and systematic coordination throughout the treatment and travel process. Moreover, when these agencies operate under standardized frameworks and their staff possess a strong awareness of quality management principles, it contributes significantly to service excellence, patient satisfaction, and institutional profitability (Uyanık Çavuşoğlu, 2018).

The most common purpose of people traveling for health reasons is to become healthier. Travel to recover from illness and receive medical treatment is called medical tourism; travel where people find relief from ailments using hot springs and thermal spas is called wellness tourism; and travel for the elderly to improve their health is called senior tourism (Göde et. al., 2021). In this context, the global competitiveness of countries in the halal and medical tourism sectors can be better understood by examining their overall performance in the Islamic economy. Table 3 presents the Global Islamic Economy Indicator (GIEI) scores of the top 15 countries, highlighting Türkiye's position among leading nations in this field.

Table 3. Global Islamic Economy Indicator Score Table of 15 Countries

COUNTRY	Islamic Finance Sector	Halal Food Industry	Muslim Friendly Tourism Industry	Hijab Fashion Industry	Pharmaceutical and Cosmetics Industry	Media and Recreation Industry	Total Points and Ranking
MALAYSIA	426.9 points / 1st place	123.4 points / 1st place	193.5 points / 1st place	46.0 points / 9th place	83.9 points / 2nd place	97.3 points / 1st place	207.2 points / 1st place
SAUDI ARABIA	218.6 points / 2nd place	56.6 points / 8th place	69.2 points / 7th place	19.3 points/ X	34.3 points/ X	29.7 points / X	97.8 points / 2nd place
UAE	114.6 Points / 5th place	63.3 points / 5th place	78.6 points / 5th place	171.8 points / 1st place	53.6 points / 8th place	63.8 points / 3rd place	90.2 points / 3rd place
Indonesia	91.0 points/ 6th place	71.1 points/ 2nd place	58.0 points/ X	68.0 points/ 3rd place	46.3 points/ 9th place	26.8 points/ X	68.5 points/ 4th place
TÜRKİYE	51.0 points/ X	69.8 points/ 3rd place	106.7 points/ 3rd place	95.1 points/ 2nd place	55.0 points/ 7th place	53.5 points/ 5th place	67.3 points/ 5th place
Bahrain	121.9 points/ 3rd place	44.5 points/ X	89.3 points/ 4th place	18.6 points/ X	29.4 points/ X	30.1 points/ X	66.7 points/ 6th place

COUNTRY	Islamic Finance Sector	Halal Food Industry	Muslim Friendly Tourism Industry	Hijab Fashion Industry	Pharmaceutical and Cosmetics Industry	Media and Recreation Industry	Total Points and Ranking
Singapore	45.0 points/ X	57.8 points/ 7th place	107.1 points/ 2nd place	48.3 points/ 7th place	107.9 points/ 1st place	78.5 points/ 2nd place	65.0 points/ 7th place
COUNTRY	Islamic Finance Sector	Halal Food Industry	Muslim Friendly Tourism Industry	Hijab Fashion Industry	Pharmaceutical and Cosmetics Industry	Media and Recreation Industry	Total Points and Ranking
Kuwait	115.5 points/ 4th place	43.1 points/ X	69.0 points/ 8th place	17.5 points/ X	29.6 points/ X	29.2 points/ X	62.1 points/ 8th place
COUNTRY	Islamic Finance Sector	Halal Food Industry	Muslim Friendly Tourism Industry	Hijab Fashion Industry	Pharmaceutical and Cosmetics Industry	Media and Recreation Industry	Total Points and Ranking
Iranian	90.3 points / 7th place	48.1 points/X	52.1 points/X	25.4 points/X	42.3 points/X	24.9 points/X	56.0 points / 9th place
COUNTRY	Islamic Finance Sector	Halal Food Industry	Muslim Friendly Tourism Industry	Hijab Fashion Industry	Pharmaceutical and Cosmetics Industry	Media and Recreation Industry	Total Points and Ranking
Jordan	72.1 points / 10th place	51.3 points/X	58.4 points/X	19.3 points/X	44.6 points/X	25.7 points/X	51.8 points / 10th place
COUNTRY	Islamic Finance Sector	Halal Food Industry	Muslim Friendly Tourism Industry	Hijab Fashion Industry	Pharmaceutical and Cosmetics Industry	Media and Recreation Industry	Total Points and Ranking
Oman	74.5 points / 8th place	46.1 points/X	43.2 points/X	20.2 points/X	26.9 points/X	25.9 points/X	47.8 points / 11th place
COUNTRY	Islamic Finance Sector	Halal Food Industry	Muslim Friendly Tourism Industry	Hijab Fashion Industry	Pharmaceutical and Cosmetics Industry	Media and Recreation Industry	Total Points and Ranking
Qatar	73.4 points / 9th place	43.4 points/X	40.1 points/X	21.6 points/X	26.2 points/X	30.8 points/X	46.9 points / 12th place
COUNTRY	Islamic Finance Sector	Halal Food Industry	Muslim Friendly Tourism Industry	Hijab Fashion Industry	Pharmaceutical and Cosmetics Industry	Media and Recreation Industry	Total Points and Ranking
United Kingdom	49.0 points/ X	47.4 points/ X	31.4 points/ X	41.9 points/ X	45.2 points/ 10th place	52.9 points/ 6th place	46.1 points/ 13th place
COUNTRY	Islamic Finance Sector	Halal Food Industry	Muslim Friendly Tourism Industry	Hijab Fashion Industry	Pharmaceutical and Cosmetics Industry	Media and Recreation Industry	Total Points and Ranking
Kazakhstan	46.0 points/ X	59.2 points/ 6th place	60.8 points/ 9th place	26.6 points/ X	22.7 points/ X	26.4 points/ X	45.2 points/ 14th place



Reference: Dinar Standard, 2022

An examination of Table 3 reveals that Türkiye does not rank among the top ten countries in the Islamic Finance indicator. However, it demonstrates a comparatively strong performance across several other dimensions of the Islamic economy. Specifically, Türkiye ranks third in both the Halal Food and Muslim-Friendly Tourism indicators, second in Modest Fashion, seventh in Halal Medicine and Cosmetics, and fifth in Halal Media and Recreation.

According to the aggregate results of the Global Islamic Economy Indicator (GIEI), Türkiye holds an overall fifth position among the evaluated countries. The leading nations in the 2023 ranking are Malaysia (1st), Saudi Arabia (2nd), the United Arab Emirates (3rd), and Indonesia (4th), underscoring Malaysia's continued dominance and Türkiye's rising prominence in the global halal economy.

2. METHODOLOGY

This study was designed as a qualitative and descriptive research aiming to analyze Türkiye's position in the Halal Medical Tourism market through a structured analytical framework. The research relies entirely on secondary data sources, including official statistics from the Turkish Statistical Institute (TURKSTAT), the Dinar Standard reports, the Global Muslim Travel Index (GMTI), and various academic publications relevant to health and medical tourism. All data was collected through an extensive literature review, focusing on recent empirical studies, governmental reports, and global benchmarking indicators. In the analytical phase, the SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis method was employed to systematically evaluate Türkiye's status in the Halal Medical Tourism sector. This approach enabled a holistic assessment of internal and external factors influencing the sector's competitiveness. The study's methodological design aims to contribute to the limited academic literature on Halal Medical Tourism by providing an integrative framework that links healthcare infrastructure, religious compliance, and international market dynamics. Furthermore, the findings

are expected to offer strategic insights for policymakers and industry stakeholders seeking to enhance Türkiye's global position in this emerging niche market.

3. FINDINGS

The SWOT analysis conducted in this study provides a comprehensive overview of Türkiye's current position in the Halal Medical Tourism market. The findings reveal several internal strengths and weaknesses, as well as external opportunities and threats, that collectively shape the country's competitiveness in this emerging field. The following tables present a detailed summary of Türkiye's current conditions and performance indicators within the Halal Medical Tourism sector, as identified through the SWOT analysis.

3.1. SWOT Analysis of Türkiye Halal Medical Tourism Market Findings

In this section, a SWOT analysis will be made on Halal Medical Tourism in Türkiye within the scope of health tourism, with the titles of strengths, weaknesses, opportunities and threats.

Table 4. Türkiye's Strengths in the Halal Medical Tourism Sector

Theme	Description	Source
Healthcare Capacity	Strong health infrastructure, skilled professionals, and relatively low treatment costs enhance Türkiye's competitiveness.	Sülkü (2017)
Cultural Advantage	Predominantly Muslim population and cultural affinity attract Muslim tourists seeking Halal-compliant healthcare.	Bilim et. al. (2017)
Institutional Support	Presence of JCI-accredited hospitals, Turkish Airlines' global network, and the Halal Accreditation Agency (HAK).	Tosun & Mısırlıoğlu (2022)
Accessibility	Visa-free entry for citizens of multiple countries facilitates patient mobility.	Uysal Şahin & Şahin (2018)
Spiritual Integration	Cooperation protocol between the Ministry of Health and the Presidency of Religious Affairs ensures spiritual support services in hospitals.	DIB (2024)

Note: Compiled by the authors from secondary data sources

Table 4 highlights Türkiye's strong healthcare infrastructure, skilled workforce, and religious-cultural alignment with Muslim-majority nations. These strengths collectively contribute to Türkiye's appeal as a reliable and trusted Halal Medical Tourism destination. Institutional frameworks such as the Halal Accreditation Agency (HAK) reinforce quality assurance and international credibility. Such assets position Türkiye as a leading competitor in the global market for Halal healthcare services.

Table 5. Weaknesses of Türkiye in the Halal Medical Tourism Sector

Theme	Description	Source
Lack of Standardization	Limited standardization and insufficient data on Halal tourism despite Türkiye's OIC leadership.	Tekin et. al. (2017)
Language Barrier	Few healthcare professionals proficient in foreign languages limit patient communication.	Uysal Şahin & Şahin (2018)
Market Share Gap	Türkiye's share in global and Islamic medical tourism markets remains below potential.	Yıldız & Yıldız (2018)
Promotion Deficiency	Weak international marketing and lack of global recognition of Turkish healthcare services.	Sevim & Önder (2020), Tosun & Mısırlıoğlu (2022).
Brain Drain	Loss of qualified healthcare workers due to migration affects service quality.	Yılmaz (2023)

Note: Compiled by the authors from secondary data sources

Table 5 outlines Türkiye's structural and operational challenges within the Halal Medical Tourism sector. The absence of comprehensive standardization, coupled with language barriers and limited promotional efforts, restricts global visibility. Additionally, the ongoing brain drain among healthcare professionals undermines service quality and sustainability. Overcoming these weaknesses is essential for Türkiye to achieve a more stable and competitive market position.

Table 6. Opportunities for Türkiye in the Halal Medical Tourism Sector

Theme	Description	Source
Growing Muslim Demand	Rising Muslim population and income levels increase demand for Halal-compliant medical services.	Dilek & Çakmak (2017)
Culinary Compatibility	Türkiye's cuisine aligns with Islamic dietary rules, enhancing attractiveness for Muslim visitors.	Böyükylmaz et. al. (2019)
Post-9/11 Travel Trends	Muslim travelers prefer destinations in Muslim-majority countries such as Türkiye.	Tekin (2014)
Destination Preference	Muslim tourists increasingly favor Muslim-friendly destinations; Türkiye is well-positioned.	Bucak & Yiğit (2018)
Government Incentives	Tax benefits and state support create favorable conditions for health tourism investment.	Uysal Şahin & Şahin (2018)

Technological Advancement	Globalization and innovation offer new opportunities for digital health and medical tourism.	Sülkü (2017)
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Note: Compiled by the authors from secondary data sources

Table 6 emphasizes the expanding opportunities that can enhance Türkiye's role in Halal Medical Tourism. Rising global demand from Muslim populations, cultural familiarity, and strategic geographic positioning create favorable conditions for growth. Government incentives and technological advancements further contribute to market expansion and competitiveness. These opportunities, if effectively utilized, could solidify Türkiye's leadership in the global Halal healthcare market.

Table 7. Threats to Türkiye in the Halal Medical Tourism Sector

Theme	Description	Source
Regional Instability	Political and economic tensions in neighboring countries threaten sectoral stability.	Barca et. al. (2013)
Crisis Vulnerability	Health tourism is closely tied to general tourism and is vulnerable to global crises such as pandemics.	Aydın & Karam Mehmet Aydın (2015)
Workforce Competition	Aging Western populations increase global demand for healthcare professionals, creating labor shortages.	Barca et. al. (2013)
Regulatory Gaps	Lack of clear malpractice and privacy laws risks Türkiye's image if adverse events occur.	Aydın & Karam Mehmet Aydın (2015)
Market Competition	Countries like Malaysia, Thailand, and Singapore are expanding their Islamic medical tourism sectors.	Ratnasari et. al. (2022)
Non-Muslim Rivals	Non-Muslim-majority countries such as Japan and India compete due to proximity to Muslim regions.	Bilim et. al. (2017)

Note: Compiled by the authors from secondary data sources

Table 7 presents the external threats that may impede Türkiye's growth in the Halal Medical Tourism sector. Intensifying international competition, regulatory inconsistencies, and geopolitical instability represent significant risks. Furthermore, global crises and labor shortages may negatively impact patient inflows and operational continuity. Addressing these threats through proactive policy frameworks is vital for ensuring long-term sectoral resilience and sustainability.

4. DISCUSSION

The SWOT analysis reveals that Türkiye possesses significant competitive advantages in halal medical tourism due to its modern healthcare infrastructure, qualified physicians, affordable service packages, and strong institutional support mechanisms. Studies highlight that Türkiye's advanced medical facilities and accreditation frameworks make it one of the most cost-effective destinations for international patients (Sag, 2019). As a result of the SWOT analysis, Türkiye's strengths in the field of halal medical tourism include its advanced healthcare infrastructure, qualified medical professionals, affordable treatment policies, advantageous geographical location, and institutional support such as the Halal Accreditation Agency. The main weaknesses identified are the lack of effective international promotion, the limited number of foreign-language-speaking personnel, and the ongoing brain drain in the healthcare sector. In terms of opportunities, the growing Muslim population, increasing halal awareness, Türkiye's cultural proximity to Muslim-majority countries, and its geographical advantages enhance the sector's growth potential. When compared with findings from previous studies, Türkiye is observed to have a robust healthcare infrastructure (Sülkü, 2017; Tosun and Mısırlıoğlu, 2022), yet there remains a need for improvement in halal standardization and international marketing efforts. As technologies used in healthcare services, well-trained human resources in the sector, and delivery methods advance, the needs and expectations of healthcare users are also diversifying. Changing demands and customer/patient expectations in healthcare delivery have transcended national borders. (Yorulmaz and Söyler, 2020). This trend is particularly critical in halal medical tourism, where patients expect not only clinical excellence but also full compliance with religious requirements such as prayer facilities, halal-certified medications, and gender-segregated services making the adaptation of Türkiye's advanced infrastructure to faith-sensitive care an urgent strategic priority.

However, weaknesses persist, particularly in global marketing visibility and brand positioning. The limited international awareness of Turkish healthcare services constrains its market share despite quality parity with developed nations (Collins et. al., 2022).

Another structural challenge concerns the retention of qualified health professionals. Recent research indicates that increasing physician emigration threatens the sustainability of service quality and continuity, emphasizing the need for long-term workforce retention strategies (Pirzada, 2022). On the other hand, Türkiye's geopolitical location and cultural affinity with

Muslim-majority regions create substantial growth opportunities. Bibliometric evidence confirms a surge in global scholarly and industrial attention toward halal and ethical healthcare tourism, with Türkiye frequently identified as a rising actor in this field (Jafar, 2023). Xu et. al. (2020), patient experience across the entire medical tourism process, including travel planning, treatment quality, and follow-up care—remains a decisive element of satisfaction and loyalty. Improving these aspects through digital platforms and multilingual communication could further enhance Türkiye's attractiveness.

Additionally, domestic studies underline the importance of developing legal and administrative frameworks to sustain ethical, transparent, and internationally compliant health tourism practices. Aslanova (2013) emphasized that the absence of a comprehensive legislative structure and insufficient coordination among health and tourism institutions remain major barriers to Türkiye's competitive positioning. Addressing these institutional deficiencies can help align Türkiye's health tourism with global standards and strengthen its halal tourism potential.

Comparative analyses with other regional competitors such as Malaysia, Thailand, and India further show that Türkiye's success depends on enhancing digital promotion and establishing internationally recognized halal certification standards (Battour & Ismail, 2021). Overall, while the country has built a robust foundation, improving standardization, branding, and human resource sustainability will be crucial for achieving long-term global competitiveness in halal medical tourism.

5. CONCLUSION

The purpose of medical tourists in these trips is to reach quality health services, to make the health services they will receive cheaper and to get rid of long waiting lines. They also want to benefit from tourism activities in these trips they make for health (Deniz, 2019). Halal medical tourism is the implementation of medical procedures in accordance with religious values and Islamic methods while receiving health services. Approaches such as Halal medicine and Muslim-friendly hospitals are the leading concepts of Halal Medical activities that have emerged based on providing medical practices within Halal boundaries as much as possible (Tosun & Mısırlıoğlu, 2022). Türkiye, with its all-season tourism opportunities and unique location between Asia and Europe, is a significant choice for health tourists. Furthermore, its proximity to neighboring

countries with shared languages, religions, and ethnicities is a positive factor (Çalhan & Arıcı, 2022). For potential medical tourists from countries that share a common ground with Türkiye historically and culturally, it is an important advantage for the country to be able to get a share from the sector (Sülkü, 2017).

Turkish citizens living outside Türkiye and citizens living in other Turkish states constitute a significant portion of the population, and it is important to ensure that these people choose Türkiye as a medical tourism destination. (Uysal Şahin & Şahin, 2018). The difficulties that medical tourists coming from countries that are culturally and linguistically different from Türkiye may encounter while receiving service due to these differences will affect their expectations and preferences. In this regard, the awareness of medical tourism parties should be improved, and they should act with mutual respect (Büyük, 2023).

Türkiye has achieved great success in the field of health within the scope of the “Health Transformation Program” launched in 2003. In particular, “Quality in Health” studies have been an important reform process that has brought the Turkish Health System to a new era. Quality and Accreditation studies in Health have delivered the current health service to the public in an effective, efficient, fair and objective manner and increased satisfaction with health services. The first parameter that a patient requesting international health services will evaluate will be the criterion of an accredited health institution. In this context, Quality and Accreditation studies in Health are an indispensable and important element for reliable health service delivery. Being an effective destination in the Medical Tourism Market on a global basis will be achieved by increasing the number of health facilities accredited by accreditation institutions on a global basis.

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