

A NEW MODEL IN HEALTH TOURISM MARKETING: INTEGRATED MARKETING OF HUMAN AND PET HEALTH TOURISM

Sağlık Turizmi Pazarlamasında Yeni Bir Model; İnsan Ve Evcil Hayvan Sağlık Turizminin Entegre Pazarlanması

Tolgay Ercan¹

ABSTRACT

This study proposes a conceptual model that integrates human and pet healthcare services to enhance Türkiye's competitiveness in the international health tourism market. The model is based on the assumption that international patients increasingly travel with their pets and that pets are widely perceived as family members, which in turn drives rising demand for veterinary healthcare services. This integration is expected to generate cross-selling opportunities within health tourism packages, enhance destination attractiveness, and strengthen overall service value. The study is based on secondary data obtained from a literature review and sector reports, and provides a comprehensive analysis using PESTEL analysis, Porter's Five Forces model, and the 7P Service Marketing Mix framework. The findings indicate that pet health tourism represents a niche yet high-value segment within the broader health tourism ecosystem. Increasing pet ownership, digital transformation, and evolving consumer expectations create a favorable environment for integrated service models. In this context, the model is considered to have the potential to enhance customer satisfaction, diversify service offerings, and generate long-term competitive advantages. In conclusion, the study demonstrates that the integrated human-pet health tourism model offers an innovative and scalable approach that can contribute to Türkiye's health tourism strategy and provides a conceptual foundation for future empirical research and practical implementation studies.

Keywords: Human Health Tourism, PESTEL, Pet Health Tourism, Porter's Five Forces, 7P Marketing Mix

ÖZET

Bu araştırma, Türkiye'nin uluslararası sağlık turizmi pazarındaki rekabet gücünü artırmak amacıyla insan ve evcil hayvan sağlık hizmetlerini entegre eden kavramsal bir model önermektedir. Model, uluslararası hastaların seyahat süreçlerinde evcil hayvanlarını beraberinde getirme eğiliminin artması ve evcil hayvanların aile üyesi olarak algılanmasına bağlı olarak veteriner sağlık hizmetlerine yönelik talebin yükselmesi varsayımına dayanmaktadır. Bu entegrasyonun, sağlık turizmi paketlerinde çapraz satış fırsatları yaratabileceği, destinasyon çekiciliğini artırabileceği ve hizmet değerini güçlendirebileceği öngörülmektedir. Çalışma, literatür taraması ve sektör raporlarına dayalı ikincil veri analizine dayanmakta olup PESTEL analizi, Porter'ın Beş Gücü modeli ve 7P Hizmet Pazarlama Karması çerçeveleri kullanılarak bütüncül bir değerlendirme sunmaktadır. Bulgular, evcil hayvan sağlık turizminin mevcut sağlık turizmi ekosistemi içinde niş ancak yüksek değer potansiyeline sahip bir alan olduğunu göstermektedir. Artan evcil hayvan sahipliği, dijitalleşme ve değişen tüketici beklentileri, entegre hizmet modelleri için elverişli bir zemin oluşturmaktadır. Bu bağlamda modelin, müşteri memnuniyetini artırma, hizmet çeşitliliğini geliştirme ve uzun vadeli rekabet avantajı sağlama potansiyeline sahip olduğu değerlendirilmektedir. Sonuç olarak çalışma, entegre insan-evcil hayvan sağlık turizmi modelinin Türkiye'nin sağlık turizmi stratejisine katkı sunabilecek yenilikçi ve ölçeklenebilir bir yaklaşım sunduğunu ve gelecekteki uygulamalı araştırmalar için kavramsal bir temel oluşturduğunu ortaya koymaktadır. **Anahtar Kelimeler:** İnsan Sağlığı Turizmi, PESTEL, Evcil Hayvan Sağlığı Turizmi, Porter'ın Beş Kuvveti, 7P Pazarlama Karması

1. ORCID: 0000-0002-6893-4358

1.Dr. Öğr. Üyesi, Tıbbi Hizmetler ve Teknikler Bölümü, Tıbbi Tanıtım ve Pazarlama Programı
tolgayercan@cumhuriyet.edu.tr

Ercan, T. (2026) "A New Model in Health Tourism Marketing: Integrated Marketing Of Human And Pet Health Tourism " *Akademi Sosyal Bilimler Dergisi*, C.13, S.2, s. 134-150

Makale Geliş Tarihi: 8 Aralık 2025 Kabul Tarihi: 5 Mayıs 2026



This article is licensed under a Creative Commons Attribution-Noncommercial 4.0 International license.

Bu makale Creative Commons Atıf-Gayri Ticari 4.0 Uluslararası Lisansı ile lisanslanmıştır.

GENİŞLETİLMİŞ ÖZET

Turizm sektörü, dünya çapında en hızlı büyüyen ve rekabetçi sektörlerden biridir (Habibi vd., 2022; Sofronov, 2018). Sağlık turizmi, bu sektörün hızla büyüyen alanlarından biri olup, farklı ülkelerden gelen hastalar sayesinde ulusal ekonomilere döviz kazandırır (Ağazade & Ergün, 2024; Basirat vd., 2025). Bu turizm türü, uluslararası hastaların tanınal, önleyici veya tedavi süreçlerini tatille birleştirmesine olanak tanır (Halkiopoulos vd., 2021). Uzun bekleme süreleri, ulaşım kolaylıkları ve kaliteli, uygun maliyetli hizmet arayışı, bireylerin yurt dışında sağlık hizmeti alma eğilimini artırmaktadır (Mishra & Sharma, 2021).

Türkiye, son yıllarda uyguladığı başarılı turizm politikaları ile sağlık turizminde yükselen bir destinasyon olmuştur (Kuşat & Esen, 2022). Devlet desteği, akredite sağlık kurumları, gelişmiş ulaşım ağı, deneyimli iş gücü ve uygun maliyetli tedavi fırsatları Türkiye'yi güçlü kılar (Al-Natour, 2020; Ali & Torun, 2025). Paydaş katılımı ve iş birliği, pazar payını artırmada kritik öneme sahiptir (Yılmaz vd., 2021). Hindistan, Singapur ve Tayland gibi ülkeler, sağlık turizmi gelirleriyle dış ticaret açıklarını kapatmaktadır ve sektörleri her yıl büyümektedir (Eryer, 2024).

Turizmde değer yaratmak ve rekabet avantajı sağlamak çeviklik, yenilik ve pazar zekası gerektirir (Stylos vd., 2021). Türkiye'nin uluslararası pazardan daha fazla pay alabilmesi için stratejik farklılaşma önemlidir (Uslu vd., 2021). Küresel sağlık turizmi trendlerine göre, destinasyon seçimlerini etkileyen faktörlerin araştırılması önemli olmaktadır (Chaulagain vd., 2021).

Evcil hayvan sahipleri, sağlık turizmi bağlamında önemli bir pazar grubudur. Dünya nüfusunun üçte biri evcil hayvan sahibidir ve onları aile bireyi olarak görmektedir (Buhalis & Chan, 2023). Bu, bireylerin kendi tedavileriyle eş zamanlı olarak evcil hayvanları için sağlık ve bakım hizmeti satın alma olasılığını artırmaktadır. Destinasyonlar, evcil hayvan sahipleri ve hayvanları için sağlık hizmetlerini çeşitlendirerek rekabet avantajı elde edebilir (Meng vd., 2024).

Evcil hayvan sağlık turizmi, sahiplerin kaliteli veteriner hizmeti almak için seyahat etmesi olarak tanımlanır (Wu & Chang, 2023). İnsan ve veteriner sağlık hizmetlerinin paket programlar içinde entegrasyonu, kapsamlı ve eş zamanlı hizmet sunumuna olanak sağlar ve destinasyon deneyimini zenginleştirir.

Bu çalışma, Türkiye'nin sağlık turizminde rekabetçiliğini artırmak amacıyla insan ve veteriner sağlık hizmetlerini entegre eden stratejik bir çerçeve sunmaktadır (Almodawer vd., 2025). Model, Türkiye'yi tercih eden insan hastalara veteriner hizmeti, Türkiye'ye sağlık için gelen evcil hayvan sahiplerine insan sağlık hizmeti sunmayı öngörmektedir. Model, PESTEL analizi, Porter'ın Beş Kuvveti ve 7P Pazarlama Karması çerçevesinde geliştirilmiş olup bu çalışma "bir+bir=üç" sinerjik etkisini göstermektedir.

Türkiye, JCI akredite hastaneleri, ileri teknoloji altyapısı ve uygun maliyetli tedavi paketleri ile uluslararası hastalara yüksek standartlı hizmet sunmaktadır (Büyük & Akkuş, 2024). Evcil hayvan sağlık turizmi ise iç hastalıkları, cerrahi ve rehabilitasyon gibi hizmetleri kapsamaktadır (Altuğ vd., 2017). Ancak Türkiye'de dijital platform eksikliği sektörde gelişimi sınırlamaktadır. Uluslararası örnekler, BringFido ve PetFriendly.io gibi platformların pazarı büyüttüğünü göstermektedir. Bu bağlamda, Türkiye'nin hem veteriner sağlık turizmini profesyonelleştirmek hem de pazarlama faaliyetlerini sistematik bir şekilde yapılandırmak için stratejik bir dijital platforma ihtiyacı olduğu açıktır.

İnsan ve evcil hayvan sağlık turizmini entegre bir modelde sunmak, stratejik ve operasyonel fırsatlar yaratır. PESTEL ve Porter analizi, makro ve mikro koşulları netleştirirken, 7P Pazarlama Karması müşteri deneyimini güçlendirir. Entegre ürün, fiyat, dağıtım ve promosyon stratejileri, kapsamlı ve sinerjik bir hizmet deneyimi sunar. Standart süreçler, eğitimli personel ve modern altyapı, müşteri memnuniyetini artırır ve tekrar satın alımları teşvik eder. Bu bütüncül yaklaşım, güvenli, yüksek kaliteli ve sürdürülebilir sağlık turizmi deneyimi sağlar.

Önerilen model, insan ve evcil hayvan sağlığı hizmetlerinin entegrasyonundan doğan sinerjiyi vurgulamakta ve potansiyel pratik öneriler sunmaktadır (Bir+Bir=Üç yaklaşımı).

İnsan ve evcil hayvan sağlık hizmetlerinin entegrasyonu, destinasyonun rekabet avantajını artırmakta ve pazarlama stratejileri ile desteklendiğinde sürdürülebilir bir model ortaya koymaktadır. Stratejik dijital platform önerileri, standart hizmet protokolleri ve eğitimli personel ile birlikte, pratik uygulama için yol gösterici niteliktedir. Bu çerçevede, modelin saha testleri ve pilot uygulamalarla değerlendirilmesi, akademik ve sektörel katkıları güçlendirecektir.

INTRODUCTION

The tourism sector is among the fastest-growing and most competitive sectors on a global scale (Habibi et al., 2022; Sofronov, 2018; World Tourism Barometer, 2025). Health tourism, one of the most important and rapidly growing areas of this sector, provides high added value to national economies by generating foreign currency inflows for patients from different countries (Ağazade & Ergün, 2024; Basirat et al., 2025; Shabankareh et al., 2025). Health tourism is a specialized type of tourism aimed at international patients seeking to combine diagnostic, preventative, or treatment processes with vacations. Services are designed and marketed to meet both the healthcare and tourism needs of individuals (Halkiopoulous et al., 2021). Long waiting times, reduced travel barriers, and the search for quality, affordable services increase the tendency to use healthcare services in other countries (Mishra & Sharma, 2021; Dryglas & Smith, 2024; Tyan et al., 2021; Vovk et al., 2021).

Türkiye has become a rising destination in health tourism thanks to the successful tourism policies it has implemented in recent years (Kuşat & Esen, 2022; Taşkın et al., 2024). Government support, authorized healthcare facilities, a developed transportation network, accredited healthcare institutions, an experienced workforce, and affordable treatment opportunities position Türkiye as a strong destination (Al-Natour, 2020; Ali & Torun, 2025; Kantaş et al., 2025; Yalman & Arık, 2025). Stakeholder participation and collaboration are critical to increasing Türkiye's market share (Yılmaz et al., 2021). Countries such as India, Singapore, and Thailand cover their foreign trade deficits with health tourism revenues, and the sector is growing every year (Eryer, 2024; Sinet et al., 2025; Mustafa et al., 2021).

Creating value and gaining competitive advantage in the tourism sector requires agility, innovation, and strong market intelligence (Stylos et al., 2021). For Türkiye to capture a larger share of the international market, practices that provide strategic differentiation and competitive advantage are needed (Uslu et al., 2021). Considering global medical tourism trends, it is important to investigate the factors influencing destination choices (Chaulagain et al., 2021).

Pet owners are a key target market in the context of health tourism. This group, comprising approximately one-third of the global population, considers their pets to be family members and seeks veterinary services in the event of health issues. This trend increases the likelihood of individuals purchasing health, care, or companionship services for their pets alongside their own treatment, creating new value in health tourism. Diversifying services for pet owners and animals gives destinations a competitive advantage, contributes to the health tourism economy, and can influence destination choice. (Buhalis & Chan, 2023; Hidalgo-Fernández et al., 2023; Meng et al., 2024; Veas-González et al., 2025). Indeed, pet owners' travels for their own treatment also increase the demand for pet health tourism (Research and Markets, 2023).

Medical tourism for pets is defined as pet owners traveling to other countries to receive quality veterinary services, and it offers new research opportunities in the fields of tourism, veterinary medicine, marketing, and health sciences (Wu and Chang, 2023; Wen et al., 2023). In health tourism marketing, designing services tailored to individual needs and developing products that enhance destinations' competitiveness are crucial (Halkiopoulous et al., 2021).

Today, problems such as overcapacity, intense competition, a relative decrease in the number of customers, and insufficient product differentiation, which are observed in many markets, are making the competitive environment in which businesses operate increasingly complex. Under these conditions, businesses are required to develop effective marketing strategies to achieve sustainable success (Buana et al., 2024).

The integration between functions that identify customer and market needs and those responsible for product development enables firms to generate customer value and synergy by combining diverse areas of expertise. This integration is widely regarded as a strategic approach that strengthens competitive advantage (Rein, 2004).

Within this framework, the integration of human and veterinary health services represents an innovative approach that may enhance competitive capacity in the market by creating additional customer value (Timokhina et al., 2021). In this regard, integrated service offerings that combine human and veterinary healthcare services can contribute to the development of a more holistic service structure within the health tourism sector.

Building on this perspective, this study develops a strategic framework for the integration of human and veterinary health services within health tourism, aiming to enhance Türkiye's competitiveness in the global market (Almodawer et al., 2025). The proposed model suggests the provision of complementary services, where pet-related services are offered to international patients traveling for human healthcare, and human healthcare services are made available to tourists traveling with their pets.

The framework is grounded in Porter's Five Forces, PESTEL, and the 7P Marketing Mix analyses, and is designed to generate synergistic value and strengthen strategic differentiation in the health tourism market.

MATERIALS AND METHODS

This study proposes a strategic model that integrates human and pet healthcare services, aiming to increase Türkiye's competitive advantage in the health tourism sector. The research was conducted using secondary data analysis, drawing on literature review, sectoral reports, and national/international data. Three analytical methods were used in the research. First, the PESTEL analysis assessed Türkiye's macroenvironmental factors across political, economic, sociocultural, technological, environmental, and legal dimensions. Second, Porter's Five Forces analyzed the competitive landscape through existing competitors, threats from new entrants, substitute products, bargaining power of suppliers, and bargaining power of buyers. Third, the 7P Service Marketing Mix examined the design and marketing strategies of human and pet healthcare services across product, price, distribution, promotion, people, physical evidence, and process dimensions. (Porter, 1980; Grudtsyn and Chistobaev, 2024; Mojaradi et al., 2021; Nurhayaty, 2022). Despite being a rapidly growing global sector, pet health tourism is underdeveloped in Türkiye. A lack of digital infrastructure and limited service offerings hinder international competition. The proposed model integrates human and pet health tourism, creating cross-selling opportunities and enhancing Türkiye's competitiveness.

This research proposes a conceptual model integrating human and pet health tourism based on existing literature and secondary data. The proposed model has not yet been implemented in the field, and the aim of the study is to provide a theoretical contribution to the literature.

2.1. Limits of the Research

This study proposes a conceptual model based solely on a literature review and secondary data; therefore, the model's validity in the field has not been tested. The research was conducted only within the context of Türkiye, and its comparative generalizability to other countries is limited. The model covers health and pet tourism but excludes the pharmaceutical, insurance, and regulatory sectors. The integration of human and pet services has not been evaluated from cultural, ethical, and psychological perspectives, and costs and investment risks have not been analyzed. These limitations should be interpreted in light of the conceptual nature of the study and the fact that the model has not yet been implemented.

RESULTS & FINDINGS

PESTEL analysis enables businesses to assess the external environment—political, economic, social, technological, environmental, and legal factors—identifying opportunities and threats and supporting robust strategic decisions. (Yüksel, 2012)

3.1. Human Health Tourism PESTEL Analysis

Political: Support for health tourism was expanded with Decree No. 5448, published on April 20, 2022, covering service export registration, market entry documents, agency commissions, travel health insurance, employment, foreign language and health tourism training, transportation, advertising, event support, and the HİSER project. Expenses are 100% supported up to 9,600,000 TL annually. The Medical Waste Control Regulation ensures environmentally safe and health-compliant waste management. **Economic:** Between 2019 and 2025, the number of patients visiting Türkiye for health tourism and associated revenues fluctuated annually. In 2019, 756,926 patients generated \$1,459,132 thousand. Patient numbers dropped to 435,691 in 2020 due to COVID-19. Between 2021 and 2023, patients numbered 729,592, 1,381,807, and 1,538,643, with revenues of \$2,016,262, 2,206,750, and \$3,006,092 thousand, respectively. In 2024, 1,506,442 health tourists contributed \$3,022,957 thousand. In the first nine months of 2025, 1,080,387 patients generated \$2,185,974 thousand. **Social:** The HealthTürkiye web portal facilitates international patients' access to healthcare, offering health visa support, accommodation and transfer planning, treatment selection, and online cost control. The International Patient Call Center operates 24/7 in six languages, and stakeholder collaboration is supported via USHAŞ-organized international business forums. **Technological:** The HealthTürkiye web portal digitally facilitates treatment program selection, cost control, and online ordering processes. The portal is integrated with the international patient call center in six languages. USHAŞ Academy offers training programs for international healthcare professionals. Virtual fairs are organized digitally. The Medical Waste Control Regulation covers the disposal of waste according to international standards. **Environmental:** The Medical Waste Control Regulation regulates the separate collection, transportation, temporary storage, transport to processing facilities, and disposal of waste at source without harming the environment or human health. **Legal:** Decree No. 5448 establishes the legal framework for incentives for the health tourism sector, determining the types, rates, and upper limits of support. The Medical Waste Control Regulation covers legal regulations. The HealthTürkiye brand is a trademark of USHAŞ, affiliated with the Ministry of Health of the Republic of Türkiye (Official Gazette, 2022; Tursab, 2022; USHAŞ, 2025).

Pet Health Tourism Pestel Analysis

The transition to a digital identification system for pets in Türkiye is crucial for digitizing animal health data and determining the number of adopted animals, thus ensuring security during pet transport. **Political:** Vaccine production centers are planned to be established through public-private partnerships. **Economic:** The number of licensed veterinary drugs is 1,826 (73% domestic), the number of vaccines is 505 (25% domestic), and import costs are in the region of \$1 million. **Social:** There are 7,671 veterinary clinics and 80 veterinary polyclinics in Türkiye. Pet ownership and demand are increasing; animal welfare initiatives are underway. **Technological:** Biosafe laboratories and the production of vaccines and diagnostic kits are being implemented. **Environmental:** Biosafety is ensured through animal movement control, quarantine, and disinfection practices. **Legal:** The legal framework for pet health tourism is defined by Animal Protection Law No. 5199 and its amendment No. 7527. The Veterinary Clinic and Polyclinic Regulations ensure a safe service environment by mandating the establishment of nursing homes, hospitals, and operating rooms, along with a digital recordkeeping system and a designated veterinarian system, sterilization, infection control, and medical waste management. Veterinary animal hospitals established in Türkiye, both public and private, provide adequate infrastructure for pet health tourism (Official Gazette, 2004; 2011; Ministry of Agriculture and Forestry, 2025).

Table 1: PESTEL integrated assessment of human health tourism and pet health tourism

PESTEL	Integrated Market Assessment
Political	Integrating health and veterinary policies, accreditation, authorization documents and government support in both markets can increase service quality and international trust..
Economic	Cost-effective human and pet health service packages, cross-selling opportunities, and integrating the economic advantages of the packages together can increase competition and demand in both markets.
Social	People's trust, satisfaction and loyalty; cultural fit and communication quality can increase customer experience and preferences.
Technological	The effectiveness of services to be marketed integrated with telemedicine - veterinary practices, technological devices and digital tracking systems can be increased.
Environmental	Sustainability, energy and waste management practices in hospitals and clinics can increase service quality, brand value and reputation in the integrated market.
Legal	Patient and animal rights, medical/veterinary liability and ethical regulations can increase trust in the integrated marketplace.

3.2. Porter's Five Forces Analysis of Human and Pet Health Tourism

Porter's Five Forces of Competition Model is an analytical method that assesses the competitive structure of an industry based on external environmental factors. The model examines competition through the threat of entry, substitute products, buyers, suppliers, and existing competitors, and examines the interactions within the industry from a broad perspective. In this context, the competitive structure of the industry is examined within the context of both human health tourism and pet health tourism (Adroitmarketresearch, 2025; Alfonso et al., 2022; Çağatay, 2021; Ebrahim & Ganguli, 2019; Finmodelslab, 2025; Gan & Frederick, 2011; Grudtsyn & Chistobaev, 2024; Medicaltourism, 2025; Mojaradi et al., 2021; Porter, 1980; Ştefan et al., 2023; Thilagavathi Krishnan & Shankar Chelliah, 2013):

The Threat of New Entrants to the Human Health Tourism Market: The most powerful competitive factor in the healthcare sector is the threat posed by new entrants. New competitors aim to gain greater market share, and barriers to entry are determined by capital requirements, access to distribution channels, brand awareness, and government regulations. While the international health tourism sector offers opportunities for new entrepreneurs due to low barriers to entry and growing demand, strong customer loyalty and established networks with accredited healthcare providers can pose barriers to new businesses **The Threat of Substitute Products in Human**

Health Tourism: Patient-centered practices can favor healthcare services, therapies, telemedicine, and wellness tourism. This increases the importance of substitute products. Preventive care services reduce treatment demand and strengthen the impact of substitute options. Meanwhile, treatment costs and regulations limit the opportunities for substitute products.

Bargaining Power of Customers in Human Health Tourism: The number of customers, the importance of the product, the purchasing volume, and the level of technical knowledge determine their bargaining power. Customers' high integration power and access to digital information increase their bargaining power. The internet, social media, and digital platforms increase patient awareness and bargaining power by facilitating access to information. Price transparency and the sharing of service details enable patients to make informed decisions and compel providers to offer competitive prices and high-quality service. Positive customer experiences strengthen customer loyalty and increase repurchase intentions.

Bargaining Power of Suppliers in Human Health Tourism: Supplier bargaining power is determined by the number of suppliers, available alternatives, fixed costs, and integration strengths. Accreditation standards, international hospitals, and intermediaries increase the likelihood of selecting JCI-accredited institutions. As of 2023, around 1,100 healthcare institutions were JCI-accredited, primarily in countries such as India, Mexico, and Thailand. Accreditation, as a marker of quality and trust, strengthens supplier bargaining power, while institutions with advanced technology and high standards create significant barriers for new competitors.

Competition Among Current Competitors in Human Health Tourism: Porter's strategies—low-cost leadership, differentiation, and focus—help manage competition. Low-cost leadership provides price advantages, differentiation distinguishes offerings, and focus targets specific segments. Travel agencies support health tourists with affordable logistics. Thailand boosts appeal through cost-effective strategies, India leads via cost leadership and diversification, and US agencies often adopt differentiation with premium, personalized packages. Competition intensity depends on capital, technology, quality, capacity, competitor numbers, fixed costs, and entry barriers. The global health tourism market is rapidly growing, with countries such as Canada, Singapore, Japan, Spain, the UK, India, Thailand, Mexico, and Dubai experiencing strong competition. Brand reputation on digital platforms shapes patient preferences.

The Threat of New Entrants in Pet Health Tourism: High capital requirements for AI-powered diagnostic and treatment solutions pose a significant barrier to new ventures. However, televeterinary and mobile clinics reduce costs, enabling market entry in rural areas, supported by government subsidies. Entry is limited by high R&D costs, complex approvals, supply chain expertise, and brand loyalty. While traditional pharmaceutical and biologics segments are challenging, digital health, televeterinary platforms, and AI-based devices have lower barriers. During the pandemic, 47% of pet owners used televeterinary services, 75% were satisfied, and 60% willing to pay, though usage declined afterward amid regulatory uncertainty. The global veterinary care market is expected to grow, driven by pet ownership, technological advances, telemedicine, and preventive care demand.

The Threat of Substitution in Pet Health Tourism: Tele-veterinary medicine is emerging as an alternative to traditional clinic visits in rural areas. The proliferation of insurance policies is encouraging owners to opt for more technologically advanced treatments, reducing the appeal of traditional care options. Low-cost local clinics, over-the-counter (OTC) products, and online veterinary referral platforms are creating a substitution effect. Economic fluctuations may increase the preference for affordable care options over advanced treatments. Televeterinary medicine poses a moderate threat as a substitute for in-person services.

Bargaining Power of Buyers in Pet Health Tourism: Pet owners are becoming increasingly aware; access to digital information and price comparisons are influencing their purchasing behavior. Insurance penetration is driving demand for regular and advanced care, while low insurance penetration increases cost sensitivity. The increase in the number of clinics is increasing bargaining power. Services include preventive care, routine checkups, televeterinary services, and nutritional consultations. Pricing is available through fee-for-service, packages, or insurance-backed plans.

Bargaining Power of Suppliers in Pet Health Tourism: Veterinary pharmaceutical manufacturers, biotechnology companies, and R&D-focused technology providers have strong bargaining power. A limited number of suppliers offers an advantage over clinics. Increasing pet ownership and the growth of the middle class are driving demand for veterinarians. Technology-enabled services, premium pet products, and digital applications present new opportunities.

Competition Among Current Competitors in Pet Health Tourism: The global pet health tourism market is growing rapidly, reaching \$66 billion by 2025 and \$120 billion by 2033. This growth is driven by increased pet ownership, awareness, and insurance penetration. As corporate groups replace independent clinics, competition is driven by economies of scale, technology investments, brand strength, and service diversity. The market is concentrated in the US, Germany, India, China, Mexico, Brazil, and Canada. Multinational companies (Zoetis, Merck, Elanco) are increasing competition with their R&D, product portfolio, and digital solutions. While televet solutions in Europe improve efficiency and cost-effectiveness, regulatory differences make market entry difficult. (Fortune Business Insights, 2025; HealthforAnimals, 2025; Industryresearch, 2025; Kenresearch, 2025; Mordorintelligence, 2025; Eti & Yorulmaz, 2025). Futuremarketinsights, 2025; Marketresearchfuture, 2025; Yahoo, 2025).

Table 2: Porter 5G integrated assessment of human health tourism and pet health tourism

Porter 5 Power	Integrated Market Assessment
Intensity of Competition	JCI accreditation and service diversity provide differentiation in both markets, and cross-marketing with integrated packages can provide advantages.
Purchasing Power of Suppliers	The price and quality impact of pharmaceutical, medical and veterinary equipment providers can be optimized through integrated cost management.
Purchasing Power of Buyers	People can create new values through cross-marketing by offering integrated packages that are price and quality sensitive.
Threat of Substitute Goods	Alternative services such as telemedicine and televeterinary medicine can be offered in an integrated manner in both markets and create high standards in services.
New Entry Threat	The quality standards of integrated delivery clinics can create a strong presentation with accreditation managements.

3.3. Transition to 7P Service Marketing Analysis

PESTEL and Porter's Five Forces Analysis illustrate the macro environment and competition in the human and pet health tourism industry; the 7P Mix of service marketing provides micro-level guidance for strategy.

Evaluation of Human Health Tourism with 7P

Product: Türkiye offers high-quality, state-of-the-art services to patients coming from abroad for treatment in nearly all medical specialties, including internal medicine, surgery, basic medicine, dental care, hair transplantation, and rehabilitation services. These services are supported by national and international accreditation; there are more than 50 JCI-certified hospitals across Türkiye. These hospitals are located in major cities such as Istanbul, Ankara, Izmir, and Antalya, as well as in regions of strategic importance for health tourism. **Price:** Private healthcare institutions in Türkiye offer medical procedures performed using modern methods at more affordable prices compared to those in their countries of origin. This provides a significant price advantage for health tourism. Service packages offer optional additional services such as accommodation, transfers, foreign language translation support, flight ticket reservations, tourist activities, and visas. This approach allows tourists to choose service packages based on their needs and preferences. **Place:** In Türkiye, health tourism services are provided through authorized healthcare facilities and intermediary organizations. According to 2025 data, the number of hospitals eligible for authorization is 661, medical centers 194, practices 3,443, polyclinics 1,826, and agencies 1,366. Authorization certificates are issued by the Ministry of Health for healthcare facilities and by USHAŞ for intermediary organizations. To increase the international accessibility of services, healthcare facilities and intermediary organizations are required to create websites with foreign language options and publish accreditation documents. **Promotion:** The Ministry of Trade supports health tourism in distinguishing itself in global competition and adding value to the national economy. 175 institutions are promoted through the "Heal in Türkiye" web portal, and applications are constantly increasing. In 2023, 733 million TL in support was provided to the healthcare sector. Promotional activities are carried out through participation in international patient call centers, the USHAŞ Academy, and fairs/exhibitions. **Process:** Healthcare services processes have been standardized and improved within the scope of the Health Transformation Program. The program strengthened central coordination to ensure effective, efficient, and equitable service delivery, increased financial accessibility, and strengthened primary healthcare services. Furthermore, processes have been standardized according to accreditation requirements, and hospitals are required to publish their accreditation status annually. **People:** In 2024, the total healthcare personnel numbered 1,436,686. Among these, 221,133 are physicians, 50,434 dentists, 264,857 nurses, and 42,324 pharmacists. The number of physician visits per capita is 12.2, and the number of dentist visits per capita is 0.73. **Physical Evidence:** According to 2024 data, Türkiye has 1,562 hospitals, 268,359 beds, and 183,033 qualified beds. Intensive care capacity is 49,010. Advanced technological equipment such as MRI, CT, ultrasound, Doppler, echocardiography, mammography, and hemodialysis devices are prominent in health tourism. Within the scope of emergency health services, 3,498 emergency aid stations and 5,664 ambulances are operating. Primary health care facilities include 28,845 family medicine units, 8,228 family health centers, 973 Community Health Centers, and 417 KETEMs. The hospital bed occupancy rate is 59.8%, the average length

of stay is 4.2 days, and the bed turnover rate is 51.7% (Büyük & Akkuş, 2024; İçöz, 2009; Taşkent, 2023; TUSEB, 2024; TMC, 2025; Usta & Serdarasan, 2020; SHGM, 2025; Official Gazette, 2025a, 2025b; Ministry of Trade, 2025; USHAŞ, 2025; Health Statistics Yearbook, 2024; SDP, 2008).

Evaluating Pet Health Tourism with 7p

Product: Pet health tourism should offer health packages covering internal medicine, surgery, and basic veterinary sciences, along with rehabilitation and specialized pet packages to increase diversity. International veterinary hospital accreditation can document quality and strengthen processes. Veterinary faculty services include treatments for oral, foot, skin, congenital, joint, muscle, gastrointestinal, and urogenital conditions, with technological solutions such as laser applications and mobile ultrasound widely used. **Price:** Keeping prices low (28.1%) is an important strategy implemented in clinics to increase patient numbers and ensure customer retention (Aral et al., 2010; Hayat et al., 2019). **Place:** In Türkiye, veterinary faculties and clinics serve regional and national animal health with modern and fully equipped animal hospitals. They provide treatment for domestic, farm, wild, and exotic animals through collaborations with universities, public, and private sectors. Some clinics also offer home visits (56.3%). **Promotion:** Promotional and marketing activities of veterinary clinics include improving service quality (87.5%), establishing good relationships with patient owners (93.8%), and promotional activities (53.1%). These practices are important for expanding clinics' customer bases and enhancing brand credibility. **Process:** The most important factors in patient satisfaction are the veterinarian's knowledge and experience, communication skills, and availability when needed. The technical staff and support services within the clinic also directly contribute to the quality of patient care. The effectiveness of patient registration and tracking systems is a key factor determining the quality of service processes. The procedures and treatment processes implemented in clinics directly affect patient satisfaction. Effective process management helps reduce professional and ethical issues. **People:** Under the Council of Higher Education (YÖK), veterinary medicine education is provided at 31 universities, and the Department of Laboratory and Veterinary Health is trained as a specialist workforce at 62 universities. **Physical Evidence:** The interior design, comfort, and equipment of clinics are important criteria evaluated by patient owners. The availability of care and hairdressing services, along with the availability of technological equipment, provides physical evidence to support the quality of the service. Türkiye stands out in health tourism with its advanced infrastructure and high-quality services, and the Health Tourism Complication Insurance reduces the risk of post-treatment complications for international patients, increasing the country's credibility (Aral et al., 2010; Arslan Altuğ et al., 2017; Çevrimli et al., 2019; Değirmencioğlu & Karamustafa, 2025; Dinç & Or, 2014; Hayat et al., 2019; Kaygısız, 2004; Kulualp et al., 2016; Sarierler & Kılıç, 2003; Sinmez & Aykun, 2021; VEDEK, 2025; YÖK, 2025).

Table 3: 7P integrated assessment of human health tourism and animal health tourism

7P	Integrated Market Assessment
Product	A comprehensive service portfolio can be created by integrating internal, surgical, rehabilitation, dental, hair transplantation and pet packages.
Price	By integrating packages and cross-selling strategies, customer loyalty can be achieved with affordable pricing advantages.
Place	The demand for integrated accessibility services can be increased with certified hospitals, clinics, medical centers and mobile services.
Promotion	Awareness can be created in communication and visibility by providing integrated marketing with web portals, fairs, call centers and promotional activities.
Process	Confidence in service quality can be strengthened by marketing standard services, accreditation and digital tracking systems in an integrated manner.
People	Opportunities can be increased by turning the number of personnel into an advantage by using their competencies in an integrated manner.
Physical Evidence	By integrating physical infrastructure, technology and service evidence, awareness of trust, quality and brand value can be created.

The PESTEL analysis examines Türkiye's human and pet health tourism at a macro level, assessing political, economic, social, technological, environmental, and legal factors. Porter's Five Forces analysis highlights industry competition, supplier and buyer power, substitute products, and entry threats, identifying strategic opportunities and risks. Service design is considered through the 7Ps of Service Marketing—product, price, distribution, promotion, process, personnel, and physical evidence. JCI accreditation, affordable packages, and advanced technology provide key opportunities in human health tourism, while expert personnel, service variety, and price are crucial for pet health tourism. This integrated approach informs strategic and operational marketing decisions from macro to micro levels.

Table 4. PESTEL, Porter 5G, 7P Integrated Assessment

7P	PESTLE and Porter 5G Effect	Integrated Market Assessment
Product	Political: Accreditation and regulations; Technological: Advanced devices; Competition: Service differentiation	By integrating human and pet packages, comprehensive and synergistic service delivery is provided; cross-selling and brand trust are increased.
Price	Economic: Package costs, government subsidies; Buyer power: Customer price sensitivity	Integrated pricing provides cost-effectiveness and economic advantages; it can increase demand and customer loyalty.
Place	Social/Economic: Transportation and access; Threat of new entrants: New facilities	The customer base expands with accessible integrated services; synergies can be created through both physical and digital channels.
Promotion	Social: Trust, cultural fit; Competition: Awareness raising	Integrated promotion can build brand awareness and trust. Cross-marketing can reach both human and pet customers, providing even more added value.
Process	Legal: Ethics and Standards; Technological: Digital tracking; Threat of substitution: Alternative services	Integrating standardized and digitalized processes together can further increase service quality and customer satisfaction, creating potential customer opportunities.
People	Social: Education, communication skills; Buyer power: Expectation of satisfaction	A more integrated customer experience is achieved with educated, professional healthcare workforce; satisfaction and loyalty can be ensured, which can increase repeat purchases and preferences.
Physical Evidence	Environmental: Hygiene, sustainable facilities; Technological: Equipment; Competition: Differentiation	With the integration of physical facilities and technology, trust, quality and brand value increase and a synergistic experience is offered.
Strategic	Technology, Accreditation, Cost, Competition, Trust	A marketing strategy integrating human and pet health tourism can create a synergistic market position by offering a comprehensive, safe, and high-quality service experience (One+One=Three). This approach differentiates the sector, opens new opportunities, strengthens brand reputation, and increases repeat purchase intentions through a more diverse customer experience.

Integrating PESTEL, Porter's Five Forces, and the 7P Service Marketing Mix enables customer-centric strategic differentiation in human and pet health tourism. This approach strengthens the sector, providing safe, high-quality, accessible, and comprehensive services. At the macro level, PESTEL and Porter analyses offer insights into competition and environmental conditions, while the 7P framework guides opportunity identification, service design, and differentiation at the micro level. This holistic approach enhances brand trust, customer satisfaction, and competitive advantage, creating a synergistic market position and strategic success (Jusuf, 2024).

Discussion and Conclusion

This study proposes an integrated conceptual model combining human and pet healthcare services to strengthen Türkiye's position in the international health tourism market. The integration of pet healthcare services into human health tourism packages may enhance perceived value, increase destination trust, and provide a competitive advantage in niche tourism markets. This approach highlights an ecosystem in which multiple stakeholders collaboratively generate shared value.

The perception of pets as family members is a key factor that increases the likelihood of acceptance and preference for integrated health tourism packages (Choi et al., 2025). Moreover, previous studies emphasize that highlighting practical benefits and innovative experiences in pet-friendly tourism significantly increases demand (Veas-González et al., 2025). This creates a synergistic effect that may further enhance the potential demand for the proposed model.

Rising pet ownership rates, digitalization in healthcare services, and evolving consumer expectations collectively create a favorable environment for integrated service models. In this context, combining human and pet healthcare services can provide a more holistic customer experience, increase cross-selling opportunities, and strengthen destination branding. Therefore, the proposed model should not be considered merely a marketing innovation, but also a strategic transformation in health tourism.

However, the implementation of such a model may face structural challenges due to its multi-stakeholder nature. The literature indicates that communication gaps, data-sharing limitations, and weak institutional coordination are significant barriers in health tourism systems (Dibb et al., 2008; Simkin, 2002). Similarly, factors such as inadequate infrastructure, language and communication barriers, high costs, and weak marketing strategies are among the main constraints affecting health tourism development (Askari et al., 2025; Jalali et al., 2025).

In this regard, strengthening digital infrastructure, standardizing service processes, and enhancing inter-organizational coordination are critical requirements. In particular, tourism agencies should play a central coordinating role in ensuring effective integration between human healthcare providers and veterinary service providers. Through such coordination, agencies can facilitate synchronized service delivery, improve operational efficiency, and ensure a seamless customer experience across both human and pet healthcare services.

Development of the Pet Health Market and Preliminary Feasibility Study Potential in Türkiye

Pet ownership is increasing globally, creating a growing demand for veterinary healthcare services and pet-oriented tourism models. In the United States, approximately 66% of households own at least one pet, while in Europe this rate ranges between 46–49%. It reaches 59% in Russia, 45% in Romania, and 58% in South America (FEDIAF, 2025; Dogster, 2026). These figures demonstrate that pet ownership is a global phenomenon rather than a regionally confined trend.

The increasing perception of pets as family members has led to rising expenditures on health, care, and insurance services. Accordingly, pet ownership represents not only a demographic shift but also a structural transformation in global consumption patterns. This transformation is reflected in the expansion of high-value pet-related industries.

The global pet economy has reached approximately €340 billion, while the pet care market is projected to grow from \$181.9 billion in 2025 to \$283.7 billion by 2033 (Grand View Research, 2025; The Global Statistics, 2026). The United States alone accounts for a substantial share of this market, with expenditures exceeding \$150 billion annually. Similarly, the European pet market demonstrates strong sectoral diversification, including veterinary services (€34–37 billion), pet food (€29.2 billion), and related services (€24.5 billion) (Lawson, 2025).

Overall, these figures indicate that the pet sector is not limited to care services but represents a comprehensive animal health and service ecosystem with significant economic value. Within this context, veterinary healthcare services emerge as a key driver for new service domains, including veterinary tourism and health tourism integration.

From Türkiye's perspective, the country hosts 1,398,580 international health tourists annually (USHAŞ, 2025), demonstrating a strong inbound healthcare demand. When this population is evaluated alongside global pet ownership rates (35–55%), it can be inferred that a substantial proportion of healthcare tourists may also be pet owners.

International studies indicate that approximately 72% of pet owners travel with their pets at least once per year, while 40% travel more frequently (Palacios Rubio & Nelloolichalil, 2024). Therefore, it is reasonable to assume that a significant share of healthcare tourists visiting Türkiye may include pets in their travel behavior. This creates a substantial potential demand base for pet healthcare services within the country.

Türkiye's strong healthcare infrastructure further supports this potential. The country has over 1,500 healthcare facilities, 268,000 hospital beds, and more than 50 JCI-accredited hospitals. In addition, city hospitals such as Ankara Bilkent and Etlik represent large-scale integrated healthcare complexes with advanced capacity and infrastructure, contributing significantly to health tourism development (KHGM, 2026).

In parallel, Türkiye has a well-established veterinary education and service network, including more than 30 veterinary faculties, research centers, and private clinics. This structure ensures both qualified workforce development and expanding clinical service capacity in pet healthcare.

When evaluated collectively, these global demand trends and Türkiye's supply-side capabilities indicate that the pet health and care sector represents a rapidly growing, high-potential market. In this context, integrating human and pet healthcare services may generate a new, high value-added hybrid tourism model, strengthening Türkiye's competitive position in health tourism.

To demonstrate this potential, European veterinary service price levels and Türkiye's incoming health tourist volume are used as benchmark variables to construct the economic assumptions underlying the proposed model.

Table 5. Veterinary Service Prices in European Countries (Euro - €)

Country	Consultation (€)	Vaccination (€)	Sterilization (€)	Dental Cleaning (€)	National Average (€)
Norway	100	75	500	650	331.25
Germany	60	45	275	350	182.50
France	52.5	40	250	300	160.63
Italy	45	35	215	265	140.00
Spain	40	30	185	225	120.00
Poland	30	22.5	115	150	79.38
Bulgaria	22.5	17.5	75	110	56.25
Europe Average Benchmark:					152.9 €

(PetLifeCalc, 2025)

Table 5 shows the price distribution for veterinary health services (consultation, vaccination, sterilization, and dental cleaning) in European countries, with an average benchmark value of €152.9 used as a reference for Türkiye (PetLifeCalc, 2025)

Table 6. Pet Health Tourism in Türkiye – Integrated Demand and Economic Impact Model.

Scenario	Health Tourist	Traveling with a Pet (%)	Number of Pets	Service Utilization Rate	Animals in Service Areas	Average Service (€)	Total Economic Contribution (€)
Conservative	1.398.580	60%	~839.148	1%	~8.391	152.9	~1.28 Million €
Medium (Base Case)	1.398.580	72%	~1.006.978	2%	~20.140	152.9	~3.08 Million €
Optimistic	1.398.580	80%	~1.118.864	5%	~55.943	152.9	~8.55 Million €

Table 6 presents an integrated model showing the demand for pet health tourism services in Türkiye under different scenarios and the resulting potential economic contribution.

Based on the number of health tourists visiting Türkiye (1,398,580) and international literature indicating that 60–80% of travelers travel with their pets, three scenario frameworks were developed for the pet health tourism market. Within this context, the main veterinary services considered include consultation, vaccination, neutering/sterilization, and dental care (prophylaxis and periodontal treatment).

The average European veterinary service price of €152.9 was used as a benchmark reference value. The utilization rate of veterinary services by incoming pets was assessed under three conservative scenarios of 1%, 2%, and 5%, reflecting the fact that these services are optional rather than essential components of tourism expenditure. Accordingly, the low scenario represents minimal uptake, the base scenario reflects a literature-consistent moderate adoption level, and the optimistic scenario assumes the emergence of advanced pet-friendly tourism behavior.

Based on these assumptions, the estimated economic contribution of pet health tourism to Türkiye is as follows:

- Conservative scenario (1%): approximately €1.28 million
- Base scenario (2%): approximately €3.08 million
- Optimistic scenario (5%): approximately €8.55 million

The results indicate that pet health tourism does not constitute a high-volume core segment within the current health tourism ecosystem but represents a high-value niche with significant growth potential. This suggests that Türkiye could diversify its health tourism portfolio through pet-related services and strengthen its competitive position in niche tourism markets.

According to USHAŞ 2025 data, Türkiye's total health tourism revenue is approximately USD 3,022,452 thousand (around USD 3.02 billion). Within this context, the proposed pet health tourism model contributes an additional €1.28–€8.55 million to the system. Although relatively limited in comparison to the overall sector volume, this contribution is strategically important as an emerging segment with long-term expansion potential.

Overall, the proposed integrated model should not be viewed merely as a complementary service but as an innovative and value-added approach that enhances the diversification of the health tourism ecosystem. When combined with human health tourism, it broadens the service portfolio, diversifies revenue streams, and strengthens destination competitiveness. Accordingly, the model can be considered a scalable and sustainable framework that may be integrated into Türkiye's broader health tourism strategy.

Human and Pet Health Tourism Integrated Marketing Model Scenario Process

This model represents a holistic service approach that re-imagines the international health tourism process through patient and pet integration.

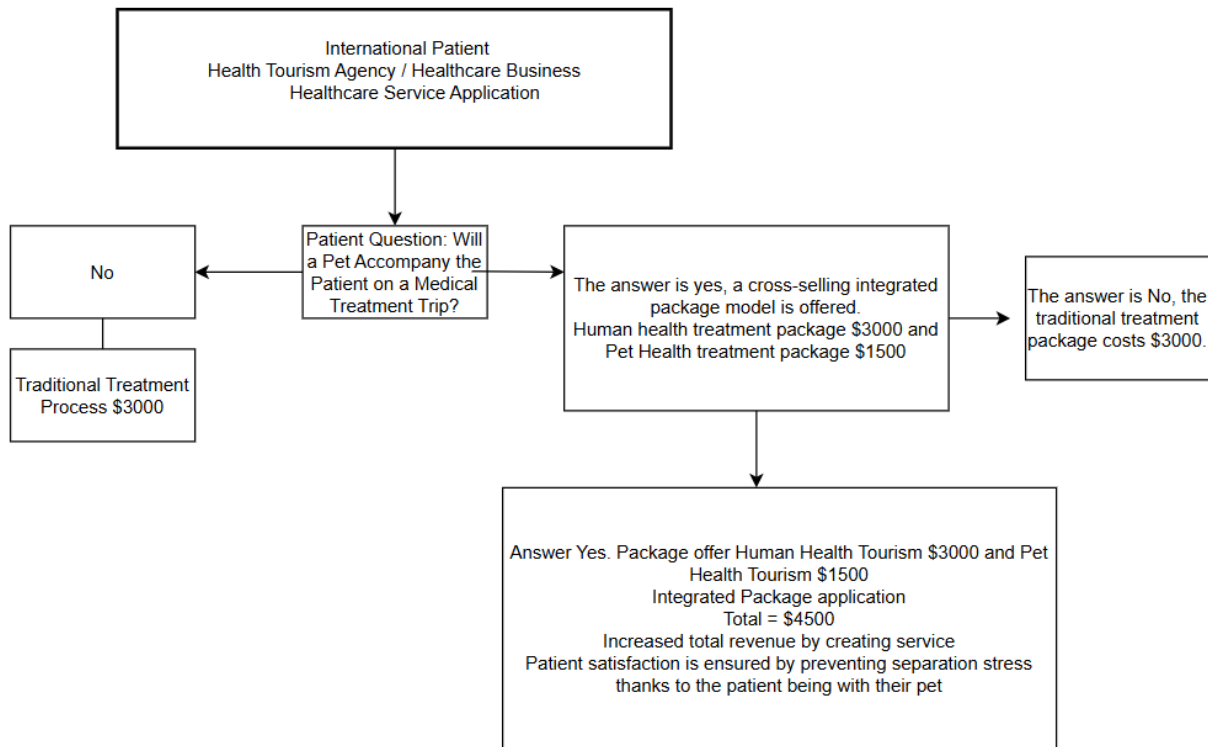
The process begins with an international patient contacting a healthcare business or health tourism agency to purchase healthcare services. At this stage, the patient requests a specific healthcare service, such as hair transplantation, dental treatment, or cosmetic surgery. Following the application, a standard health tourism package is created for the patient. This package includes medical treatment (e.g., hair transplantation), airfare, and accommodation services (optional), with a total cost of 3000 USD.

A critical decision point occurs within the process. At this stage, the patient is asked, "Will your pet accompany you on your trip?" This question is the fundamental element that triggers the cross-selling mechanism of the model.

If the patient states that they do not have a pet or will not bring one, the process continues according to the classic health tourism service model. In this case, only the standard human health tourism package worth 3000 USD is offered, and no additional services are suggested. However, if the patient states that they will be traveling with their pet, the system activates the cross-selling mechanism. Accordingly, an integrated health tourism package is offered to the patient.

The integrated package consists of two main components. The first component includes human health services (hair transplantation, dental treatment, or cosmetic surgery) as well as flight and accommodation services (optional). The second component focuses on pet services. This includes routine health checkups, vaccinations, parasite treatment, cosmetic and grooming services, veterinary services, pet-taxi, and various organizational activities such as transfers to pet-friendly hotels.

Figure 1. Human + Pet Integrated Health Tourism Model



In terms of pricing, the human health tourism package is set at 3000 USD and the pet service package at 1500 USD in the model. Thus, the total cost of the integrated package reaches 4500 USD. In the post-decision process, if the patient accepts the integrated package, the holistic health tourism model is applied; if they do not accept, the process continues with only the standard human health tourism service.

The main contribution of this model lies in its potential to increase revenue through a cross-selling mechanism, enhance patient experience, reduce travel barriers associated with pets, and elevate expectations within health tourism services by transforming the system into a more holistic and integrated structure.

This study is conceptual in nature and relies solely on secondary data; the proposed model has not yet been implemented in practice. Future empirical research may examine consumer demand dimensions, operational feasibility, and financial sustainability. In this regard, the study provides a theoretical foundation for evaluating new strategic configurations within the health tourism ecosystem.

Several structural barriers may affect the implementation of the proposed model, including insufficient digital infrastructure, lack of personnel experience in integrated service delivery, and coordination challenges between human and animal health service providers. Addressing these issues requires the development of a structured coordination mechanism, with tourism agencies potentially playing a central role as process managers. In this framework, tourism agencies could facilitate integration between healthcare providers and veterinary service providers, ensuring smoother service delivery and improved operational efficiency.

For effective implementation and commercialization of the model, three key requirements are emphasized. First, simultaneous booking systems should be established through a dedicated digital platform to enable efficient planning. Second, coordinated collaboration between human and animal health institutions must be ensured. Third, the value proposition of integrated services should be clearly communicated so that customers perceive the direct benefits of the combined offering.

Overall, the proposed model remains a theoretical framework that has not yet been tested in practice. However, future studies will enable empirical validation of the model and assessment of its proposed platform features, contributing to the development of practical and sustainable solutions in integrated health tourism. In this context, the “One+One=Three” concept highlights the synergistic value created by the joint provision of human and pet health services, where the combined effect exceeds the sum of individual services.

REFERENCES

- Adroitmarketresearch, (2025). <https://www.adroitmarketresearch.com>
- Ağazade, S., & Ergün, A. (2024). Health tourism revenues and real exchange rate relationship in Türkiye. *Journal of Quality Assurance in Hospitality & Tourism*, 25(5), 1402-1419.
- Alfonso, G. M. J., Jorge, S. M., & Orlando, G. M. J. (2022). Health Tourism: An Economic Alternative For Norte De Santander. *Journal of Language and Linguistic Studies*, 18(2).
- Ali, N. A., & Torun, N. (2025). Evaluation of Satisfaction of Somali Patients Coming to Turkey for Medical Tourism. *International Journal of Health Management and Tourism*, 10(1), 128-143.
- Almodawer, Y., Alam, S. S., Sinniah, S., & Ali, M. H. (2025). Health tourism in Malaysia: Understanding the drivers of satisfaction and revisit intention. *Tourism Recreation Research*, 50(5), 1088-1109.
- Al-Natour, D. L. H. (2020). A review on efforts of health tourism in Turkey. *International Journal of Social and Humanities Sciences Research (JSHSR)*, 7(59), 2739-2744.
- Altuğ, M. E., Deveci, M. Z. Y., İşler, C. T., Yurtal, Z., & Gönenci, R. (2017). Mustafa Kemal Üniversitesi Veteriner Fakültesi Cerrahi Kliniği'ne getirilen ortopedi olgularının genel değerlendirilmesi: 564 olgu (2009-2014). *Harran University Journal of the Faculty of Veterinary Medicine*, 6(2), 158-162.
- Aral, Y., Cevger, Y., Demir, P., & Aydın, E. (2010). Ankara ili evcil hayvan veteriner kliniklerinin yönetsel ve ekonomik açıdan değerlendirmesi. *Kafkas Üniversitesi Veteriner Fakültesi Dergisi*, 16(3).
- Askari, A., Delshad, Z., Dabirifard, M., Hajiabadi, F., Poursadeghiyan, M., Moghaddam, H. R., ... & Arbabi, Y. H. (2025). Explanation of challenges to health tourism development from the perspective of managers: A qualitative study. *Journal of education and health promotion*, 14(1), 283.

- Basirat, S., Raoufi, S., Bazmandeh, D., Khamoushi, S., & Entezami, M. (2025). Ranking of AI-based criteria in health tourism using fuzzy SWARA method. *Computer and Decision Making: An International Journal*, 2, 530-545.
- Buana, M. A. W., & ZA, M. A. S. (2024). Darfiq's Cross-Marketing Strategy in Facing Competition. *Malacca: Journal of Management and Business Development*, 1(2), 103-123.
- Buhalis, D., & Chan, J. (2023). Traveling with pets: designing hospitality services for pet owners/parents and hotel guests. *International journal of contemporary hospitality management*, 35(12), 4217-4237.
- Büyük, Ö., & Akkuş, G. (2024). Medikal Turizm Verileri ve İstatistikleri: Gelişmekte Olan Ülkelerin Yükselişi ve Türkiye (Medical Tourism Data and Statistics: The Rise of Developing Countries and Turkey). *Journal of Tourism & Gastronomy Studies*, 12(2), 1105-1124.
- Chaulagain, S., Jahromi, M. F., & Fu, X. (2021). Americans' intention to visit Cuba as a medical tourism destination: A destination and country image perspective. *Tourism Management Perspectives*, 40, 100900.
- Choi, H., Jo, Y., Joo, Y., Jo, H., & Yoon, Y. S. (2025). The impact of pet attachment, perceived value, and travel motivation on loyalty and intention to support in pet tourism: a multi-method approach. *Asia Pacific Journal of Tourism Research*, 30(6), 735-748.
- Çağatay, A. (2021). M. Porter'ın Beş Güç Modeline Göre Tokat Sağlık Hizmetleri Sektörünün Covid-19 Sürecinde Rekabet Analizi. *Sosyal Bilimler Araştırmaları Dergisi*, 16(1), 78-94.
- Çevrimli, M. B., Mat, B., Günlü, A., Tekindal, M. A., & Günlü, Z. (2019). Hayvan hastanelerinde acil, veteriner klinik hizmetleri ve hasta sahibi memnuniyet kriterleri ölçekleri: Geçerlik ve güvenilirlik çalışması. *Ankara Üniversitesi Veteriner Fakültesi Dergisi*, 66(3), 247-254.
- Değirmencioglu, P. T., & Karamustafa, K. (2025). Sağlık Turizminde Türkiye'den Yeni Bir Sigorta: Sağlık Turizmi Komplikasyon Güvencesi Sigortası. *Pamukkale Üniversitesi Sosyal Bilimler Enstitüsü Dergisi*, (68), 405-418.
- Dibb, S., Simkin, L., & Wilson, D. (2008). Diagnosing and treating operational and implementation barriers in synoptic marketing planning. *Industrial Marketing Management*, 37(5), 539-553.
- Diñç, B., & Or, M.E. (2014). Farklı Tipte Lazerlerin Veteriner Hekimlikte Kullanımı. *TÜBAV Bilim Dergisi*, 7(3), 1-10.
- Dogster. (2026). Global pet ownership statistics. <https://www.dogster.com/statistics/global-pet-ownership-statistics>
- Dryglas, D., & Smith, M. K. (2024). A critical analysis of how Central European spas create health tourism experiencescapes. *Tourism Planning & Development*, 21(5), 570-593.
- Ebrahim, A. H., & Ganguli, S. (2019). A comparative analysis of medical tourism competitiveness of India, Thailand and Singapore. *Tourism: An International Interdisciplinary Journal*, 67(2), 102-115.
- Egenvall, A., Höglund, O. V., Hoffman, R., Valle, P. S., Andersen, P. H., Lönnell, C., ... & Bonnett, B. N. (2024). Prices for veterinary care of dogs, cats and horses in selected countries in Europe. *Frontiers in Veterinary Science*, 11, 1403483.
- Eryer, A. (2024). Sağlık Turizminin Ekonomik Boyutu: Türkiye Üzerine Bir Değerlendirme. *Journal of Economics and Research*, 5(1), 63-80.
- Eti, S., & Yorulmaz, H. (2025). Yönetim Araçları Seçiminde Sektör Analizi Ve Çok Kriterli Karar Verme Teknikleri Kullanımı: Hibrit Entropi-Topsis Metodu İle Sağlık Turizmi Aracı İşletmelerine Yönelik Bir Uygulama. *Kahramanmaraş Sütçü İmam Üniversitesi Mühendislik Bilimleri Dergisi*, 28(1), 230-244.
- FEDIAF. (2025). *Facts & figures report*. <https://europeanpetfood.org/about/statistics/>
- Finmodelslab, (2025). <https://finmodelslab.com>
- Fortune Business Insights, (2025). <https://www.fortunebusinessinsights.com>
- Futuremarketinsights, (2025). <https://www.futuremarketinsights.com>
- Gan, L. L., & Frederick, J. R. (2011). Medical tourism facilitators: Patterns of service differentiation. *Journal of Vacation marketing*, 17(3), 165-183.
- Grudtsyn, N. A., & Chistobaev, A. I. (2024). Marketing Strategies For Promoting Global And Regional Medical Tourism Markets. *Географический вестник*, (3 (70)), 162-177.
- Habibi, A., Mousavi, M., Jamali, S. M., & Ale Ebrahim, N. (2022). A bibliometric study of medical tourism. *Anatolia*, 33(3), 415-425.
- Halkiopoulos, C., Dimou, E., Kompothrekas, A., Telonis, G., & Boutsinas, B. (2021, June). The E-tour facilitator platform supporting an innovative health tourism marketing strategy. In *Culture and Tourism in a Smart, Globalized, and Sustainable World: 7th International Conference of IACuDiT, Hydra, Greece, 2020* (pp. 609-623). Cham: Springer International Publishing.

- Hayat, A., Yavuz, Ü., & Yener, K. (2019). Harran Üniversitesi Veteriner Fakültesi Cerrahi Kliniğine Getirilen Hastaların Değerlendirilmesi: 1742 olgu (2014-2017). *Harran Üniversitesi Veteriner Fakültesi Dergisi*, 8(2), 232-235.
- Health for Animals, (2025). <https://healthforanimals.org>
- Hidalgo-Fernández, A., Moral-Cuadra, S., Menor-Campos, A., & Lopez-Guzman, T. (2023). Pet tourism: Motivations and assessment in the destinations. *Consumer Behavior in Tourism and Hospitality*, 18(3), 335-350.
- Industryresearch, (2025). <https://www.industryresearch.com>
- İçöz, O. (2009). Sağlık Turizmi Kapsamında Medikal (Tibbi) Turizm Ve Türkiye'nin Olanakları. *Yaşar Üniversitesi E-Dergisi*, 4(14), 2257-2279.
- Jusuf, D. I. (2024). Integrated Marketing: A Powerful Strategy for Increasing Brand Awareness. *Best Journal of Administration and Management*, 2(3), 104-109.
- Kantaş Yılmaz, F., Karakuş, Ü. S., Atağ, A. Z., Bağ, E., & Aynacı, Y. (2025). Türkiye'de Sağlık Turizmi Ve Sektördeki İnsan Kaynağı Profiliinin İncelenmesi: Nitel Bir Araştırma. *Visionary E-Journal/Vizyoner Dergisi*, 16(47).
- Kaygısız, F. (2004). İstanbul ilindeki veteriner klinik işletmelerinin teknik ve mali yapıları ile işletmecilik sorunları üzerine bir araştırma. *İstanbul Üniversitesi Veteriner Fakültesi Dergisi*, 30(2), 63-78.
- Kenresearch, (2025). <https://www.kenresearch.com/industry-reports/global-veterinary-care-market>(Acces Date 25.11.2025)
- KHGM, (2026).T.C. Sağlık Bakanlığı, Kamu Hastaneleri Genel Müdürlüğü. (2026). Sağlık turizmi ve kurumsal faaliyetler. <https://khgm.saglik.gov.tr>
- Kulualp, K., Kılıç, S., & Muzoğlu, O. (2016). Glakomun Veteriner Cerrahi Açısından Değerlendirilmesi. *Fırat Üniversitesi Sağlık Bilimleri Veteriner Dergisi*, 30(1), 57-65.
- Kuşat, N., & Esen, E. (2022). Sağlık turizmi perspektifinden Türk sağlık sektörü rekabet gücü. *Uluslararası Global Turizm Araştırmaları Dergisi*, 6(1), 37-50.
- Lawson, C. (2025, November 19). Overview of the European pet, veterinary and animal health sector. Hyde Park Capital / GGI Global Alliance. <https://www.ggi.com/news/corporate-finance-m-%26-a/european-pet-vet-animal-health-sector-overview>
- Lee, D. E. (2006). Marketing veterinary services. *Veterinary Clinics: Small Animal Practice*, 36(2), 281-295.
- Marketresearchfuture, (2025). <https://www.marketresearchfuture.com>
- Medicaltourism, (2025). <https://www.medicaltourism.com/mti/home>
- Meng, B., Chi, X., Kim, J. J., Kim, G., Quan, W., & Han, H. (2024). Traveling with pets and staying at a pet-friendly hotel: A combination effect of the BRT, TPB, and NAM on consumer behaviors. *International Journal of Hospitality Management*, 120, 103771.
- Mishra, V., & Sharma, M. G. (2021). Framework for promotion of medical tourism: a case of India. *International Journal of Global Business and Competitiveness*, 16(Suppl 1), 103-111.
- Mojaradi, Z., Bozorgi-Amiri, A., & Hashemzadeh, S. (2021). Strategic planning for supply chain of health tourism in Iran: Razavi hospital. *Razavi International Journal of Medicine*, 9(2).
- Mordorintelligence, (2025). <https://www.mordorintelligence.com>
- Mustafa, Işık., Özsezer, Y., & Fikriye, Işık. (2021). Türkiye'de Sağlık Turizmi Pazarının Gelişiminin Cari İşlemler Açığının Giderilmesinde Katkısı. *Pearson Journal*, 6(11), 220-240. <http://dx.doi.org/10.46872/pj.238>
- Nurhayaty, M. (2022). Strategi mix marketing (product, price, place, promotion, eople, process, physical evidence) 7p di pd rasa galendo kabupaten ciamis. *Jurnal Media Teknologi*, 8(2), 119-127.
- PetLifeCalc. (2025). Europe pet costs: Complete guide to EU pet ownership expenses. <https://petlifecalc.com/guides/costs-by-country/europe-pet-costs>
- Porter, M. E. 1980. *Competitive Strategy: Techniques for Analyzing Industries and Competitors* New York: Free Press, 1980. (Republished with a new introduction, 1998.)
- Rein, G. L. (2004). From experience: creating synergy between marketing and research and development. *Journal of product innovation management*, 21(1), 33-43.
- Research and Markets, (2023). <https://www.researchandmarkets.com>
- Resmi Gazete, 2004,2011, 2022, 2025a,2025b <https://www.resmigazete.gov.tr>
- Sağlık İstatistikleri Yıllığı, (2024). <https://dosyasb.saglik.gov.tr>

- Sarıerler, M., & Kılıç, N. (2003). Adnan Menderes Üniversitesi (ADÜ) veteriner fakültesi cerrahi kliniğine getirilen hastalara toplu bir bakış (1999-2003). *Uludağ Üniversitesi Veteriner Fakültesi Dergisi*, 22(1-2-3), 75-79.
- SDP, (2008). <https://ekutuphane.saglik.gov.tr>
- Shabankareh, M., Nazarian, A., Golestaneh, M. H., & Dalouchi, F. (2025). Health tourism and government supports. *International Journal of Emerging Markets*, 20(4), 1440-1464.
- SHGM, (2025). <https://shgmturizmdb.saglik.gov.tr>
- Simkin, L. (2002). Barriers impeding effective implementation of marketing plans—a training agenda. *Journal of Business & Industrial Marketing*, 17(1), 8-24.
- Sinet, U., Akdeniz, C., & Gaberli, Ü. (2025). Health Tourism Potential of Turkey under the Different Regimes: Macroeconomic Factors Affecting the International Competitiveness. *Ege Academic Review*, 25(3), 567-578.
- Sinmez, Ç. Ç., & Aykun, A. İ. (2021). Erciyes Üniversitesi Veteriner Fakültesi'nin son on yıllık (2011-2020) gelişim süreci üzerine bir değerlendirmesi. *Erciyes Üniversitesi Veteriner Fakültesi Dergisi*, 18(3), 196-212.
- Sofronov, B. (2018). The development of the travel and tourism industry in the world. *Annals of Spiru Haret University. Economic Series*, 18(4), 123-137.
- Stasia, A., & Pellegrino, A. (2025). The cost divide: Why veterinary medicinal products for dogs and cats in the EU cost more than their human equivalents. *Research in Veterinary Science*, 105977.
- Ștefan, S. C., Popa, I., & Tărăban, I. (2023). Strategic orientation of Romanian healthcare organizations from a contingency theory perspective based on Porter's generic strategy model. *Systems*, 11(10), 488.
- Stylos, N., Zwiagelaar, J., & Buhalis, D. (2021). Big data empowered agility for dynamic, volatile, and time-sensitive service industries: the case of tourism sector. *International Journal of Contemporary Hospitality Management*, 33(3), 1015-1036.
- Tarım ve Orman Bakanlığı (2025). <https://www.tarimorman.gov.tr>
- Taşkent, M. E. (2023). Türkiye'de Medikal Turizm Branşlarının Önceliklendirilmesi. *İşletme Akademisi Dergisi*, 4(4), 500-511.
- Taşkın, G. A., Tuna, M., & Birkan, İ. (2024). Türkiye's Tourism Success During and Post Covid-19. *Journal of Hospitality and Tourism Issues*, 6(1), 1-15.
- Thilagavathi Krishnan, T. K., & Shankar Chelliah, S. C. (2013). Medical tourism research: a conceptual framework of emerging business strategies in healthcare industry.
- Ticaret Bakanlığı, (2025). <https://ticaret.gov.tr>
- Timokhina, G., Shirochenskaya, I., Ivashkova, N., Murtuzalieva, T., & Shishkin, A. V. (2021). Improving the Company Competitiveness through the Development of Key Competencies: Marketing-Management Technologies and Practices. *Revista Geintec-Gestao Inovacao E Tecnologias*, 11(4), 917-934.
- TMC,(2025). <https://turkishmedicalcenters.com/tr>
- Tursab, (2022). <https://www.tursab.org.tr>
- TUSEB, (2024). <https://files.tuseb.gov.tr>
- Tyan, I., Guevara-Plaza, A., & Yagüe, M. I. (2021). The benefits of blockchain technology for medical tourism. *Sustainability*, 13(22), 12448.
- USHAS (2025). <https://www.ushas.com.tr>
- Uslu, Y. D., Kedikli, E., Yılmaz, E., Çiçek, A., Karataş, M., & Aydın, S. (2021). Developing strategies for increasing market share of Turkey on health tourism by using fuzzy AHP method. *Gümüşhane Üniversitesi Sağlık Bilimleri Dergisi*, 10(2), 159-171.
- Usta, S. K., & Serdarasan, Ş. (2020). Uyarlamalı Seçime-Dayalı Konjoint Analizi İle Medikal Turizm Hizmeti Tasarımı. *Hacettepe Sağlık İdaresi Dergisi*, 23(2), 317-332.
- Veas-González, I., Escobar-Farfán, M., Carrión-Bósquez, N., Bernal-Peralta, J., García-Salirrosas, E. E., Romero-Contreras, S., & Díaz-Díaz, C. (2025). Determinants of Pet-Friendly Tourism Behavior: An Empirical Analysis from Chile. *Animals*, 15(12), 1741.
- VEDEK, (2025). <https://www.vedek.org.tr>
- Vovk, V., Beztesna, L., & Pliashko, O. (2021). Identification of factors for the development of medical tourism in the world. *International Journal of Environmental Research and Public Health*, 18(21), 11205.
- Wen, J., Hu, F., & Aston, J. (2023). Canine cognitive dysfunction syndrome and pet tourism. *Annals of Tourism Research Empirical Insights*, 4(2), 100109.

World Tourism Barometer, (2025).<https://www.untourism.int>

Wu, H. C., & Chang, Y. Y. (2023). Pet attachment, experiential satisfaction and experiential loyalty in medical tourism for pets. *Tourism Recreation Research*, 48(2), 159-172.

Yahoo, (2025). <https://yahoo.com>

Yalman, İ. N., & Arık, Y. (2025). Türkiye’de Sağlık Turizminin Gelişmesini Etkileyen Faktörler. *Süleyman Demirel Üniversitesi Vizyoner Dergisi*, 16(46), 658-675.

Yılmaz & Yılmaz, N. (2022). Dünyada ve Türkiye’de dijital sağlık turizmi uygulamaları. *Sağlık Akademisyenleri Dergisi*, 9(1), 64-72.

Yılmaz, F. K., Capar, H., & Şeker, C. (2021). Process Analysis of a Public Policy in Turkey: Medical Tourism. *Süleyman Demirel Üniversitesi Vizyoner Dergisi*, 12(30), 417-433.

YÖK, (2025) <https://yokatlas.yok.gov.tr>

Yüksel, I. (2012). Developing a multi-criteria decision making model for PESTEL analysis. *International Journal of Business and Management*, 7(24), 52.

AUTHORS' CONTRIBUTION LEVELS: First Author 100%.

ETHICS COMMITTEE APPROVAL: No ethics committee approval was required for this study.

FINANCIAL SUPPORT: No financial support was received for this study.

CONFLICT OF INTEREST: There is no potential conflict of interest in this study.