



## **A STUDY ON HEALTH TOURISM, THE RISING VALUE IN SERVICES EXPORTS OF TURKEY**

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### **Abstract:**

*After import substitution policies in the 1980s Türkiye, which implemented an export-led growth model in foreign trade, has made important strides in balancing the current account deficit in goods trade after the 2000s with services exports led by tourism and transportation services. In particular, serious developments have been achieved since 2012 with various steps and support mechanisms taken to increase the foreign exchange revenues obtained from service trade and to make them sustainable. The fact that health tourism, which is considered a sub-branch of tourism activities, is one of the leading sectors that benefit from supports as a foreign exchange earning activity, is considered to be an indicator of the importance of this issue. Turkey, with its health system infrastructure equipped with modern medical devices and experienced / competent health personnel, has given a relatively successful exam under pandemic conditions and has reinforced its image as an assertive and important destination in terms of health tourism. Within the scope of the author's doctoral thesis on Service Export and Health Tourism, the findings obtained from the focus group discussions on the strengths and weaknesses of Turkey's health tourism, the steps to be taken towards branding and the future trends are summarized in this study and it is aimed to shed light on the future studies on this subject.*

### **Keywords:**

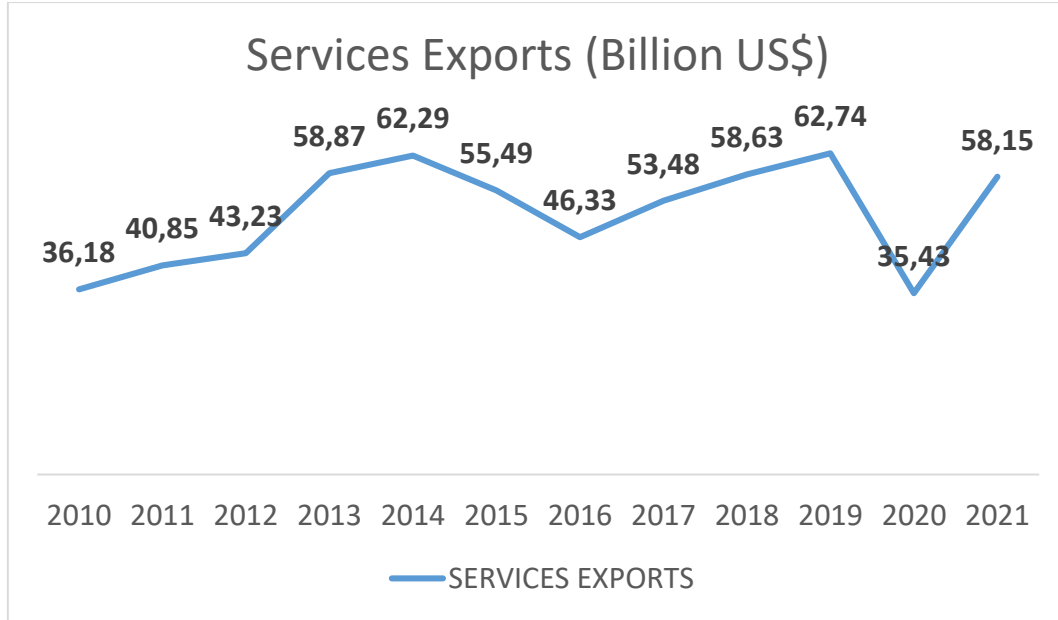
Services Sector, Services Export, Health Services, Health Tourism

### **1. Introduction**

The decisions taken by the 43rd Government on January 24, 1980 have been a turning point for the Turkish economy. With the decisions taken, Turkey started to follow policies that prioritize liberalization and pursue an export-based growth strategy instead of import-substituting industrial policies. With the acceleration of foreign trade and export movements after those dates, serious developments were also observed in the Turkish industry.

Analyzing the foreign trade data of Turkey in 2021 which is obtained from the Central Bank of the Republic of Turkey (CBRT); it is seen that the total export of agricultural, industrial and mining (goods) products is US\$ 224.69 billion, while the exports of the services sector are US\$ 58.15 billion in the same period. It is also observed that the import of goods in 2021 is US\$ 253.98 billion, and the imports of the services sector are US\$ 31.6 billion. While Turkey has a foreign trade deficit of approximately US\$ 29.28 billion in goods trade, it has a foreign trade surplus of approximately US\$ 26.55 billion in services trade. The services sector has a very important place in the Turkish economy, as in all developed countries' economies. According to the data received from the Turkish Statistical Institute (TUIK) for 2021, the services sector has 61.5% share of Turkey's gross domestic product (GDP) and contributes 55.3% to the country's employment. These data clearly reveal the importance of the services sector, not only with the foreign trade surplus it provides to the Turkish economy, but also with its contribution to the GDP and employment rates.

The fact that human mobility has come to a standstill with the effect of the Pandemic has brought the services related to tourism and travel, which are the flagships of Turkey's service trade and exports, to a stagnation point as well, and in 2020 Turkey's services exports decreased by approximately 44%, amounting to US\$ 35.4 billion.



The Central Bank of the Republic of Turkey (CBRT)

With the rise in vaccination coverage rates and other measures taken in 2021, the effects of the pandemic started to decrease and Turkey's services exports again entered an increasing trend while amounting to US\$ 58.1 billion. The sub-fractions of the realized services exports are as follows;

**Table 1. The Central Bank of the Republic of Turkey (CBRT)**

| Services Exports   | 2020   | 2021   | Change (%) |
|--|--------|--------|------------|
| Passenger Transportation Services                          | 3.377  | 7.672  | 127,18     |
| Freight Transportation and Logistics Services              | 9.482  | 12.210 | 28,77      |
| Port Management and Ground Services                        | 3.421  | 5.067  | 48,11      |
| Travel Related Services (Tourism + Education + Healthcare) | 10.220 | 20.827 | 103,79     |
| Software and IT Services                                   | 2.092  | 2.576  | 23,14      |
| Entertainment and Cultural Services                        | 179    | 548    | 206,15     |
| Construction Business and Technical Consultancy Services   | 339    | 561    | 65,49      |
| Manufacturing Services on Physical Inputs Owned by Others  | 284    | 261    | -8,10      |
| Maintenance and Repair Services                            | 1.174  | 1.467  | 24,96      |
| Insurance and Pension Services                             | 970    | 2.758  | 184,33     |

|  |               |               |              |
|--|---------------|---------------|--------------|
| Financial Services                           | 374           | 588           | 57,22        |
| Intellectual Property Rights Usage Fees      | 220           | 228           | 3,64         |
| Other Services                               | 2.930         | 3.069         | 4,74         |
| Official Services                            | 367           | 321           | -12,53       |
| <b>TOTAL SERVICES EXPORTS (Million US\$)</b> | <b>35.429</b> | <b>58.153</b> | <b>64,14</b> |

As can be seen from the table, Travel Services (Tourism) continued to be the leader of Turkey's services exports both during the impacts of the Pandemic supervene and in 2021 when these effects were getting reduced.

Health Tourism is an important services sector component within Travel Services along with Educational Services.

According to the data of the Turkish Statistical Institute (TUIK), the number of tourists who preferred Turkey for treatment in the last 10 months of 2021 was 370.335, while the income obtained from these visits was US\$ 704.261 thousand dollars. According to the data of the Ministry of Health, the number of foreign patients who visited the country in the 10-month period was recorded as 718.164. However, it is considered that the statistics presented by TUIK on health tourism revenues do not show the full number of patients since they are determined through surveys conducted at border gates. With the studies carried out under the leadership of the Ministry of Trade, it is aimed to attract more health tourists and generate more income. In this way, it is aimed to increase the share of Turkey in the health tourism pie. (Turizm Günlüğü, 2022)

Although different data are announced by various institutions for health tourism with different measurement techniques, there is no clear data on the number of health tourists and the income obtained from them. Studies continue to be conducted by the Ministry of Trade, Ministry of Health and TUIK in order to measure health tourism data in a better way. When the studies are completed, it will be easier to make analysis and forecastings for the sector, to be more accurate in giving investment decisions for the sector, and to find resources for scientific research.

## 2. Health Tourism

Tourism, which is an important source of income for the economy of many countries, has been called “smokeless industry” in Turkey for a long time owing to the significant foreign exchange inflow. Health tourism, which is a sub-component of tourism and which provides much higher returns compared to normal tourism activities, has become one of the favorite topics in the economic literature, especially in the last 20 years. Tourism can be defined as the individual's moving out of the place of her/his residence, moving between places, using the products and services of these places or taking a temporary vacation (Gülmez, 2012). According to the United Nations World Tourism Organization (UNWTO) definition from 1993 tourism means; “The activities carried out by a person traveling for a certain period of time to a place other than her/his usual environment for the purpose of an activity, and through these activities an income is left to the visited place”. These travels can be for many different reasons such as: leisure, recreation and vacation; visiting relatives and friends; job and profession; health treatment; pilgrimages or faith (Tengilimoğlu, 2020). As can be clearly seen from this definition; travelling done on therapeutic terms is a tourism activity in general.

The very first definition of health tourism, or in other words, medical tourism was made in 1987 as; a country's making international efforts for attracting tourists towards to its own health services, facilities and touristic opportunities by marketing. (Goodrich & Goodrich, 1987)

Health tourism can be broadly defined as people going from their place of residence to another place to be treated for health reasons. (Şener & Taşkın, 2013)

The Ministry of Health, Turkey's most important and prior public authority on health, defined health tourism in its study which was prepared in 2011 as; "planned travel from the place of residence to another place for any reason to receive health care" and in this study, those who make this trip are called as "health tourists". ” (T.C. Sağlık Bakanlığı, 2011).

According to the definition of the Ministry of Culture and Tourism (2018), health tourism is used for the purpose of improving the physical well-being of the person travelling to spas or other health centers for therapeutic purposes, or

aesthetic surgery operations, organ transplantation, dental treatment, physical therapy, rehabilitation, etc. and allowing health institutions to grow by using the international patient potential.

Health tourism can also be defined as going to another country for a temporary period to be treated in order to regain health. A person who goes to another country for treatment and health care is called a health tourist. Expensive health services in the country of residence, long waiting times for the treatment, insufficient technology and treatment opportunities, the desire to take a vacation during the treatment, adverse climatic conditions in the country of residence and thus needing to live in a country with a hot climate to recover are among the important reasons of the development and growth of health tourism (Aslanova, 2013).

Since the ancient times, people have travelled for various reasons. Despite the limited transportation opportunities, the thermal springs in various parts of Anatolia have been among the places frequently visited for health and healing. The increase in transportation opportunities with the help of developing technology in recent years has shortened travel times and made it more comfortable, making it easier for people in need to become health tourists.

It is difficult to understand how the health tourists make their choice. Patients are motivated by different stimulations such as being cost-favorable, having short waiting time, quality and diversity of health services, high technological equipment and treatment methods, procedures, inadequate or non-existent insurance in their own countries, being ethical, cultural proximity, norms, religion, food, and being able to take advantage of holidays (Mathijssen, 2019).

Indeed, it is possible to say that there are many factors in the formation of health tourism. Among the leading factors for people there are, them not wanting the healthcare service or operation they receive to come out; wanting to be treated in countries where technological opportunities and physician quality are better; wanting to evaluate various travel and holiday opportunities along with the treatment; wanting to get quality service than their own country with cheaper opportunities and preferring places with thermal springs.

The health tourism market has the highest growth rate in the World tourism industry (Taleghani, et al., 2011).

Today, many people carry out health tourism activities by going out of their countries to get a better quality health service at more affordable costs by eliminating the waiting time problem.

Health tourism; in terms of the added value it creates, employment and foreign exchange income, it has become one of the sectors that has made significant progress in the Turkish economy in the last 20 years. Turkey, which has become the health center of the Middle East in recent years, targets 2 million patients and 20 billion dollars income in 2023. (Turizm Günlüğü 2, 2022)

More than 30 countries in Asia, Africa and Eastern Europe are active in the field of health tourism. Asian countries are the first to come to mind in this field and have made their name known to the World. Thailand, Singapore, Malaysia, India and the Philippines are the most preferred countries by health tourists. There is a flow of health tourists mostly from the United States, Canada and Western European countries to Turkey, Asian and Latin American countries due to the reasons mentioned above. (Hopkins, et al., 2010).

Health tourism also contributes to many sectors with its expanding volume and potential. Turkey has important transportation advantages due to its geography. The fact that different climates can be experienced in different regions at the same time increases tourism options, making it a relatively advantageous and attractive destination for health tourism. Well-trained/competent human resources, diagnosis and treatment centers equipped with modern technological infrastructure and their prevalence stand out as factors that reinforce the advantages of health tourism. The volume and effects of health tourism, which creates significant added value for many sectors are growing day by day.

In addition to the benefits listed above, Turkey has various advantages in terms of medical tourism, wellness and thermal tourism, third age and disabled tourism. In this context, it would be useful to examine how much Turkey can utilize its current potential and to what extent it can do it in the future.

### **3. Research**

#### **3.1. The Aim of the Research**

Determining the strengths and weaknesses of Turkey in health tourism as being a popular topic of recent times, and making decisions about the steps to be taken to turn these weaknesses into advantages by public and non-governmental organizations, educational institutions and the private sector, and as the next step of these efforts; creating a proposal set that will shed light on the whole industry by taking the opinions of the sectoral actors on

future trends and branding are among the primary objectives of this research. In addition, following the establishment of the General Directorate of International Service Trade, and the General Secretariat of the Services Exporters' Association (HIB), after the state supports that started in 2012 during the Ministry of Economy, helped the companies benefiting from the supports through HIB to identify the problems they faced and to benefit the sector more effectively and quickly from these supports.

### **3.2. The Significance of the Research**

Although there are various researches on health tourism, which have been carried out before to examine the strengths and weaknesses of the sector on a regional or national basis, no research on the future trends of the sector, the subject of state supports that contribute to the strengthening of the sector and the need and perception of branding has been encountered in the literature. Therefore, it is considered that this study, which includes a wide variety of sub-branches and a relatively broad range of health tourism, can shed light on the future studies in the sector and become an academic source.

With this study, it will be possible to predict the future of the sector through making a situation assesment. Moreover, it will be possible to evaluate the demands of the sector in terms of the elements of supports given to companies.

### **3.3. The Method of the Research**

This study was based on the focus group interview method. Focus group interviews are a qualitative data collection method that has been used frequently in researches in recent years. This method, which is also frequently used in market researches, is widely used in social sciences studies as an initial research method. Although it is commonly exercised together with one-on-one interviews and surveys in social sciences, this method is actually one of the most systematic data collection methods. (Çokluk, et al., 2011).

Considering this research as a preliminary study on this subject, focus group interviews are considered to be an appropriate method. With focus group interviews, it is possible to obtain important information by evaluating different perspectives and opinions on the researched subject.

### **3.4. The Focus Group Meetings**

Within the scope of the research, 5 Focus group meetings were organized with at least 6 participants who are competent enough to make decisions, on 5 different dates within a period of approximately 4 months between November 22, 2021 – March 10, 2022, and the subject was discussed with a wide audience that would cover all aspects of health tourism, or in other words, healthcare services exports and every aspect has been addressed. Four of the focus group meetings, three in Istanbul and one in Antalya, were physically held in a U-table arrangement, allowing the participants to interact with each other. The fifth and last meeting was held through the Zoom program in a digital platform

All focus group discussions were moderated by the same person and thus it was aimed to ensure the integrity of the process.

Questions of the Focus Group Meetings

1. What are the advantages (price, location, etc.) of Turkey compared to other countries in terms of Health Tourism?
2. What are the disadvantages in terms of Health Tourism?
3. What can be done to increase the brand value of Health Tourism?
4. What are the future trends in Health Tourism? What will we be talking about 20 years from now on?
5. What are your thoughts on the supports given by the Ministry of Trade for Health Tourism?

The interviews were completed by asking questions within the framework of a topic integrity.

### **3.5. Findings Related to Focus Group Meetings**

The first two focus group meetings were held in Istanbul with the participation of big-sized hospital groups and the second focus group meeting with the participation of the officials of medium-sized hospitals and medical centers. After the warm-up question about the definition of Health Tourism, the questions within the scope of the study were asked and the following findings were obtained from these authorities in summary.

|                        |   |
|------------------------|---|
| Advantages             | Quality of health services in Turkey, fast access opportunities, short waiting times, affordable costs, trained/competent human resources, advanced technological equipment and infrastructure, Istanbul brand, state supports, international accreditation, service quality, agility of the private sector, the establishment of HIB, the success of the Turkish health system in the pandemic process.  |
| Disadvantages          | Deteriorated political relations with countries, lack of standardization of service providers in the sector, lack of supervision, lack of coordination and as a result, different practices experienced in the sectoral sense, restriction of physicians from working in private hospitals since 2008, lack of multilingual staff,  |
| Increasing Brand Value | Increasing the service quality, not using the price advantage factor that threatens branding, creating a common brand for health tourism of Turkey such as “Turkish Healthcare”, “Heal in Turkey” etc, providing medical education to foreign students in Turkey., creating a global strategy and acting in coordination the government to work together with the private sector, the sector's participation in international activities with a common language and strategy, inspecting the health tourism agencies. establishing of a quality control authority in Turkey to be carried out in line with international quality standards. |
| Future Trends          | Institutional marriages, increase in mergings, Turkey's upgrading in health tourism, third age tourism, wellness tourism, increase in telemedicine applications, methods such as online consultation, cloud examination system, , increase in enriched services, accelerated increase in geriatrics and elderly health homes  |

|                |   |
|----------------|---|
| State Supports | The length of support file review periods, dissatisfaction with delays in support repayments, support for all foreign activities, informing foreign representatives and trade attachés about the support mechanisms, speeding up the processes, satisfaction with the patient-road support, |
|----------------|---|

In summary, the following findings were obtained in the focus group meetings with health tourism intermediary institutions and agencies;

|            |  |
|------------|--|
| Advantages | Turkey's hotel management experience and quality, having a culture of hospitality and competency for the elements of the services sectors, the availability of economically suitable conditions and the number of preparations and applications for treatments, the geographical location of the country and easy transportation opportunities, the abundance of tourism factors, technological healthcare infrastructure and fast supply of supplies, affordable treatment costs compared to competitors. |
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|---------------|---|
| Disadvantages | Lack of coordination between institutions, lack of qualified workforce and human resources, scarcity of people who can speak the language, problems with permission to employ foreign personel. |
|---------------|---|

|                        |  |
|------------------------|--|
| Increasing Brand Value | Creating a joint promotional act which is similar to the sea-sand-sun promotion used in tourism, emphasizing Turkey being the quality health tourism destination more than its price advantage, giving importance to inspections in order to prevent bad practices, having a strategy of communication and country promotion |
|------------------------|--|

|  |   |
|--|---|
|  | The increase in applications for beautification and rejuvenation after the Pandemic, completely artificial intelligence-based, language-free, chat bot and CRM- |
|--|---|

|               |   |
|---------------|---|
| Future Trends | supported consultation applications, the spread of telemedicine applications, innovations and developments in health tourism where many surgeries can be performed remotely with the help of technology and people do not even Travel to another health tourism destination, “remote health tourism” as an innovative title and term. |
|---------------|---|

|                |  |
|----------------|--|
| State Supports | Organizing an expo for healthcare services sector in the target countries by HIB, supporting SEO, Google Ads etc. for digital promotions, providing patient-road support for healthcare agencies as well, creating encouraging and facilitating methods for health tourism agency services, adding health tourism intermediary institutions to the Turquality legislation, including health tourism intermediary institutions in all studies in the field of health tourism, accelerating file review processes and reimbursements, expanding the scope of supports. |
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In summary, the following findings were obtained from other focus group interview participants (dental, eye, IVF treatment centers, hair and aesthetic centers, etc.) excluding hospitals, medical centers and health tourism intermediary institutions.

|            |   |
|------------|---|
| Advantages | Turkey's experience and competence in the tourism and services sectors, price advantage and the geographical location of the country, transportation opportunities, Turkey's being a country that can offer all the sub-components of health tourism at the same time, Turkey's success during and after the Pandemic, state supports, quality technical infrastructure, market potential within a 3-4 hour flight distance to Turkey and the absence of a serious competitor country around these markets. |
|------------|---|

|               |  |
|---------------|--|
| Disadvantages | Applications specific to some types of treatment (for example, not giving the service of IVF treatment to unmarried couples), general visa procedures for health |
|---------------|--|



|                        |  |
|------------------------|--|
|                        | tourists, malpractice problems in Turkey, quotas applied to health tourism investors.  |
| Increasing Brand Value | Putting the emphasis not on the price advantage but on quality, reliable and high technology service for brand positioning, cooperation with digital platforms and TV series-film industry in communication channels, using PR companies and foreign statesmen and celebrities who received medical treatment in Turkey in news doing promotion of Turkey's Health Tourism brand in international fairs, using the "Heal in Turkey" health portal as an effective channel. |
| Future Trends          | Having a similar shift from China to Turkey in health tourism as it happened in logistics sector after the Pandemic, health centers equipped to allow remote applications, increased digitalization and virtual applications.  |
| State Supports         | Actions in adding new support items to the legislation, complication insurance as a very important element for health tourism, regulations for including both foreign language and vocational training programs related to the problem of lack of qualified human resources  |

#### 4. Conclusion

Although there are many disadvantageous situations and many problems experienced in the sector, Turkey continues to progress both in services exports and in health tourism, which is a sub-component of services exports, and to increase the foreign exchange inputs it provides in this regard. As the leading representatives of the sector also stated during the meetings; having experienced and competent physicians and human resources, diagnosis and treatment centers equipped with the latest technology, the prevalence of these centers throughout Turkey, and the absence or relatively few waiting times, hotel management experience dating back for years, the genetic heritage of the Turkish people's characteristic of hospitality and competency in services sectors, and the advantages of transferring these to the health system are important factors that highlighting Turkey in health tourism.

Having a big potential of health tourism and mass of people who can be health tourists within a 4-hour flight distance to Turkey, a flight network that can bring this potential to Turkey with direct flights and Turkey being one of the most preferred destinations in the tourism sector in the World have made Turkey a notable attraction center in health tourism. Offering relatively economical treatment opportunities in many branches; especially aesthetics,

dental treatments, thermal and wellness opportunities in comparison with Western countries, having many tourism and travel opportunities such as history, culture, gastronomy, sea-sand-sun and faith tourism, and the fact that Turkey offers options in all sub-branches under health tourism are the factors that make Turkey stand out in the field of health tourism.

The political environment and the negativities between countries create serious disadvantages for the sector. However, staff who do not speak the language, weak links in the health tourism chain, problems that may occur in the reception and transfer of the patient, transactions and bad practices by incompetent, unsupervised persons and institutions, which are called under the counter, cause both creating a bad experience and serious damage to the perception of the country and the sector

The fact that the health tourism sector is of interest to many ministries (Ministry of Health, Ministry of Tourism, Ministry of Trade, etc.) sometimes brings along coordination problems. For this reason, the need for a supra-ministerial coordination and orchestration of the sector is frequently expressed both in the focus group meetings held within the scope of this study and in various workshops and meetings held regarding the sectors. Even solving this issue alone will enable the sector to progress much faster.

There is a need for branding of the sector and the creation of a Turkish brand for health tourism. In this regard, initiatives have been taken by the Ministry of Trade to create a “Heal in Turkey” brand and to continue these efforts through a portal. With the new Ministry of Trade support package, which was published in the Official Gazette on April 20, 2022, the expenditures to be made for the Portal were included in the scope of 100% support for 5 years. The number of organizations with JCI accreditation is increasing every year and certain quality standards are becoming widespread in the sector and brand awareness is increasing. While this trend continues, it is of great importance to execute inspections to prevent people and organizations under the counter.

Within the scope of this study, it is predicted that Turkey will make a name for itself as one of the leading countries in health tourism and its potential to become a pioneer in the World will be realized in terms of future trends in health tourism and what will be discussed in the future. Although telemedicine applications become widespread, assistants and diagnostic applications developed with artificial intelligence and CRM applications, remote surgeries with technological developments and opportunities are discussed, it is considered that the future projections cannot be predicted much today due to the rapid progress of technology.

Even though the establishment of the General Directorate of International Service Trade, the establishment of HIB and its transformation into a separate Secretariat General are considered positive in terms of state supports, since the length of file review periods and support repayments take a long time, Turkey cannot benefit as desired or expected from the support mechanisms which it gains an advantage over its competitors in the World. Extending state supports that are gladdening the sector such as patient-road support for all sector players and increasing support elements like employment supports, etc. will also pave the way for the sector. Making the support legislation simpler will also accelerate the support processes and contribute to the elimination of the sector's problems related to waiting.

Due to the role of services exports in meeting the country's current account deficit and its impact and contribution to the acceleration of the economy in general, it is seen that the political will attaches special importance to the services sector, which has not been taken into account for many years. Entrepreneurs and sector players who are aware of this special importance and support continue their initiatives to increase the sector and its exports. The number of HIB healthcare services sector members, which was around 400 at the end of 2021, has exceeded 650 as of July (Anon., 2022). The number of institutions with health tourism authorization certificates, which constitute the potential participants of the study, increased from 1676 to 2392. The number of companies benefiting from support for health tourism increased by 50% compared to the previous year and continues to increase. The number of companies in the Turquality and brand support program has also doubled in 4 years.

In the light of all these data and findings, Turkey continues on its way rapidly by turning the advantages that it has in health tourism, into opportunities. With the new support program declared by the Ministry of Trade, important opportunities have been conducted in order to realize the potential of the sector players. In order to accelerate the branding process of the sector, cooperation and coordination are needed. With coordination and regulations that will prevent brain drain, which is a serious threat to the sector, the sector will be ready for the World leadership in health tourism.

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