

TURKEY AS A HEALTH TOURISM DESTINATION: AN ANALYSIS OF ONLINE SEARCH BEHAVIOR AND MARKET INSIGHTS

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Abstract

Health tourism is a type of tourism that refers to individuals traveling from their home country to another country to receive healthcare services. This type of tourism encompasses areas such as medical treatment, cosmetic surgery, dental care, rehabilitation, thermal health services, alternative medicine practices, or elderly and disabled care. Turkey, with its extensive resources and capabilities, has significant potential in health tourism.

This study aims to analyze Turkey's position in internet searches related to health, considering its significant market share in global health tourism. In this context, searches conducted through search engines on the internet were examined. Health-related searches associated with Turkey were explored on a global scale. Searches from the past five years were analyzed, and the geographical distribution of searches targeting Turkey was presented. Furthermore, the searches conducted by users within the scope of health tourism were analyzed based on specific topics. Through this approach, data on target markets and focus areas of treatment were obtained.

Keywords: Health tourism, online search behavior, hair transplant, dental treatment, Turkey health tourism

1. INTRODUCTION

Health tourism is a rapidly growing sector driven by globalization, increased health awareness, and improvements in transportation opportunities in recent years. The fundamental definition of health tourism involves individuals traveling to different regions to receive healthcare services. Activities in this field encompass various services such as medical treatment, cosmetic surgery, dental procedures, wellness therapies, and rehabilitation. Additionally, they integrate touristic experiences that align with individuals' efforts to improve their health (Connell, 2006). The growing global significance of health tourism is reshaping both the healthcare and tourism industries.

Several key factors contribute to the rapid development of health tourism. Firstly, advancements in the quality of medical services and the diversification of treatment methods play a crucial role. Modern healthcare infrastructures and specialized clinics in many countries offer high-quality services at globally competitive prices. This has encouraged more people to seek treatment outside their home countries (Lunt et al., 2011). Furthermore, with the influence of advancing digital media and globalization, access to information about health tourism has become more accessible, laying the groundwork for individuals to prefer healthcare services abroad.

Economic factors also play a significant role in the growth of health tourism. Due to the availability of high-quality healthcare services at lower costs, health tourism has become a substantial source of revenue for healthcare institutions, especially in developing countries (Crooks et al., 2010). For instance, countries such as Turkey, India, Thailand, and South Korea have emerged as major global destinations in the health tourism sector. This new industry significantly contributes to national economies (Glinos et al., 2010).

Another aspect of health tourism is the desire of patients not only to undergo treatment but also to relax, rejuvenate, and gain cultural experiences. This factor has expanded health tourism into a broader concept beyond traditional medical services (Cheng, 2013). Health tourism offers an experience that extends beyond medical interventions, combining wellness, aesthetics, and psychological comfort for individuals.

This article will address the fundamental dynamics of health tourism, the key players in the sector, and the demand for health tourism to Turkey. Additionally, it will focus on potential trends in health tourism directed toward Turkey. By evaluating data on Turkey's target markets and preferred treatment types in health tourism, strategic recommendations for the sector will be presented.

2. THE CONCEPT OF HEALTH TOURISM AND ITS TYPES

The emergence of health tourism, a specialized form of tourism, stems from individuals traveling and staying outside their place of residence with the aim of receiving treatment. While there are numerous definitions of the concept of health tourism, they generally share common elements such as the purpose of travel and the duration of the stay. Planned travel undertaken to receive healthcare services in a location other than one's residence is referred to as "health tourism," and those undertaking such travel are called "health tourists" (Cohen, 2008: 25).

Another definition describes health tourism as traveling to a different location to preserve, enhance, or treat health conditions, staying at least 24 hours, and benefiting from both health and tourism services during this period. The growth of the world population, improvements in quality of life, and rising healthcare costs in certain countries have led patients to seek treatment in countries that offer more affordable and high-quality healthcare services. This has resulted in the establishment of the health tourism sector (Kantar & Işık, 2014).

Throughout its historical development, the tourism sector has expanded beyond its traditional sub-sectors such as accommodation, food and beverage, travel, sports activities, and entertainment. Over time, it has also started to provide services in many other sub-sectors. While supply and demand are key determinants of these services, the development of economic, socio-cultural factors, and tourism awareness also play a significant role in the formation and delivery of these services. In the health sector, factors such as the number of hospitals and physicians in a country, the cost of services, and social facilities have contributed to the development of health tourism (Buyrukoğlu & Mercan, 2023).

Various classifications have been proposed for the types of health tourism. Generally, it is categorized into four main types: medical tourism, thermal/spa/wellness tourism, elderly tourism, and disabled tourism (Cohen, 2008: 25-26). In another classification, health tourism is similarly divided into four groups: medical tourism, thermal tourism, disabled tourism, and elderly tourism (Kantar & Işık, 2014).

Medical tourism refers to the tourism movements where individuals travel to foreign countries, often distant ones, to undergo medical treatments or surgeries at lower costs due to high treatment expenses in their home countries (İçok, 2009). Thermal tourism, a concept that has been used by humans since ancient times, is defined as "tourism resulting from various treatment methods, such as thermomineral water baths, drinking, inhalation, mud baths, and other supportive therapies like climate therapy, physical therapy, rehabilitation, exercise, psychotherapy, and diet, in addition to the use of thermal waters for recreational and leisure purposes" (Şengül & Bulut, 2019).

There are various definitions related to the concept of disability, and similar diverse definitions exist for disabled tourism. Recently, terms such as "accessible tourism" or "barrier-free tourism" have been increasingly used. In brief, disabled tourism refers to tourism activities carried out by people with disabilities (Buhalis & Darcy, 2011: 2). Elderly tourism, on the other hand, refers to the travel of elderly individuals who require care to other countries in order to meet their needs (Çetinkaya & Zengin, 2009: 172). While elderly tourism shares similarities with the concept of "third-age tourism," it is distinct from third-age tourism because it is specifically focused on healthcare and health preservation (Gençay, 2007: 175). The services provided for elderly care include rehabilitation services, physical activities, and social services (Denizli, 2023: 61).

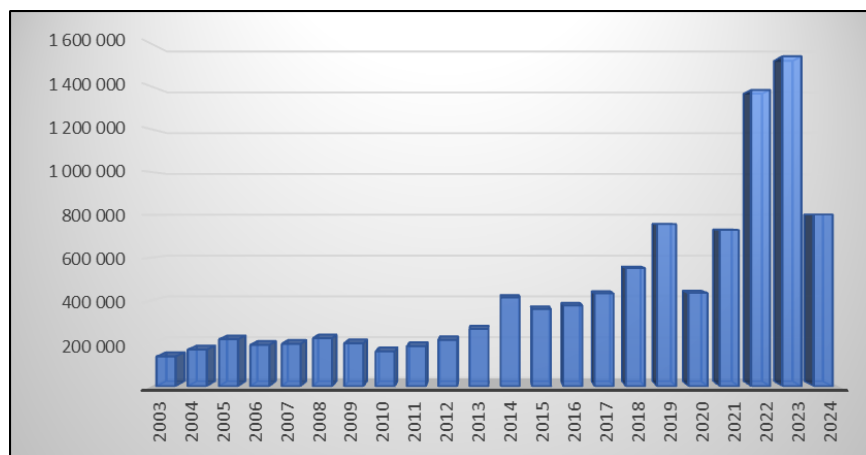
3. TURKEY'S POSITION AND IMPORTANCE IN HEALTH TOURISM

Both general tourism and health tourism revenues are significant sources of income for Turkey. The country's geopolitical location, its unique natural and cultural wealth, the affordable treatment costs offered in medical tourism, short waiting times, skilled and trained workforce, the number of accredited hospitals, high-quality healthcare services, and world-renowned doctors have made Turkey one of the leading destinations in international health tourism (Şengel & Şeyho, 2023).

Between 2005 and 2010, awareness of health tourism began to emerge within civil society organizations, the public sector, and the private sector in Turkey. From 2010 to 2014, health tourism was included in the Strategic Action Plan. In 2010, the Health Tourism Unit was established to manage health tourism services under a single authority, and in 2011, the first regulatory changes related to health tourism were published. Health tourism became part of the Ministry of Health's 2023 vision, and it has been included in government policies and programs (Bulut & Şengül, 2019).

Turkey ranks 7th among all countries in the field of health tourism, with 40 healthcare institutions accredited internationally, which positively contributes to the preferences of medical tourists. Countries such as those in the Middle East, as well as Germany, the United Kingdom, Russia, Azerbaijan, Kazakhstan, Turkmenistan, Uzbekistan, and Afghanistan, are the leading countries that send the most health tourists to Turkey (Ministry of Trade, 2024).

Graph 1. Number of Health Tourists by Year (Turkey)



Source: TUIK, 2024

International patients coming to Turkey for health tourism have a wide range of treatment options. The most preferred clinics and specialties by international patients in Turkey include gynecology, internal medicine, ophthalmology, medical biochemistry, general surgery, dentistry, orthopedics and traumatology, infectious diseases, and ear, nose, and throat (ENT) (USHAŞ, 2022).

4. LITERATURE REVIEW

There is a significant amount of research on the topic of health tourism in the literature. These studies can be grouped into international studies focused on the Turkey destination, medical tourism, thermal tourism, and elderly care. In this study, the topics related to health tourism found in the literature are examined, with a particular focus on Turkey from an international perspective. Studies that treat Turkey as a health destination are presented in sequence.

Özsarı and Karatana (2013) note in their study that significant progress has been made in the field of health tourism in Turkey. However, they argue that Turkey has not yet achieved the desired position in the global market for health tourism across its various sectors, given its potential. Turkey has both strengths and weaknesses in this competitive environment. Barca, Akdeve, and Balay (2013) emphasize that for Turkey to capture a larger share of the growing health tourism market, new visions and approaches are needed.

Health tourism can serve as a catalyst and accelerator in Turkey's transition from a low-value-added economic model to a high-value-added knowledge economy. As a country that has not yet made significant strides in the knowledge economy, Turkey could become one of the leading nations by declaring health tourism as a strategic sector and increasing efforts in this direction. Turkey is recognized as one of the few countries in the world with competence in both the healthcare and tourism sectors, and it appears to have the potential to become a leader in health tourism, which integrates these two sectors.

Yılmaz, Sariaydın, and Sönal (2020) point out that Turkey offers year-round vacation opportunities with its underground and surface diversity. They highlight the country's natural beauty, historical richness, and central geographic location between the Middle East and Europe as significant advantages. Furthermore, they mention that Turkey is one of the key attraction centers for health tourism worldwide due to its ability to provide affordable and high-quality healthcare services.

Özkan (2019) argues that if the Turkish Ministry of Health, the tourism sector, and private healthcare organizations coordinate their health plans, policies, and investments, Turkey will achieve its deserved position in both health and medical tourism.

Altın et al. (2013) state in their study that for the development of health tourism, which contributes to Turkey's economy in various ways, hospitals aiming to focus on health tourism must select target markets carefully in order to gain a share of the international tourism market. In this regard, competitors' marketing strategies should be reviewed, and Turkey should develop marketing strategies that highlight its distinct advantages over its competitors.

Aktepe (2013) emphasizes in his study that Turkey needs to clearly define its target markets within health tourism. From this perspective, European countries will be the main focus of health tourism demand. Additionally, Gulf countries, with their high income levels and the absence of established social security systems, are also important countries to consider.

In his study, Kılavuz (2018) notes that improvements have been made in the physical infrastructure and medical competence in both public and private hospitals in Turkey's medical tourism sector. Measures have also been taken to facilitate the process for health tourists, leading to the conclusion that Turkey aims to become a leading country in the sector (Kılavuz, 2018:58).

Bulgan et al. (2016) identify the advantages and disadvantages of Turkey in the medical tourism sector. Disadvantages include insufficient service quality, lack of adequate infrastructure in sub-sectors, a shortage of specialized doctors, and limited accommodation options (Bulgan, Öksay & Korucu, 2016:45). According to the findings of this study, patient satisfaction in Turkey will increase, leading to a competitive advantage, development of international relations, increased economic prosperity, and an extended tourism season.

In this study, unlike the studies found in the literature, the international tourism demand directed towards Turkey will be examined. In this regard, internet searches related to Turkey provide realistic data. By offering useful data for forecasting target markets and understanding target treatment types, this study will contribute to the literature.

5. RESEARCH METHOD AND METHODOLOGY

In this study, search engine trends related to health tourism topics directed towards Turkey are examined. In this context, searches made by people worldwide regarding health topics related to Turkey have been analyzed. To this end, data from Google Trends, which shows the frequency of searches by entering different keywords within a specific time frame, developed by Google, has been used. Research has been conducted based on data covering the last five years (2019-2024).

In this study, secondary data obtained through Google Trends was used. Google Trends is a database that provides search data from Google search engine, images, YouTube, news, and shopping channels for a specific region across 25 different categories. The data is presented in time intervals such as hour, day, week, month, and year. The data provided for the searched terms includes interest graphs, showing information on where, when, and how frequently a term has been searched. However, the data shown in the graph does not represent the absolute number of searches performed. The data is presented on a scale of 0 to 100, where 100 represents the highest popularity, 50 represents half of the popularity, and 0 indicates insufficient data for the term (Search Trends Help, 2024).

Global Health-Related Searches Directed Toward Turkey

In the analysis, the searches related to Turkey within the health topic group were examined first. The geographical density of searches for Turkey and the frequency of searches over time are presented in Figure 1.

Figure 1: Health-Related Internet Searches for Turkey Worldwide, 2019-2023



Source: Google Trends

When examining the distribution of health-related searches by country, it is observed that neighboring countries of Turkey are ranked at the top. According to search engine statistics, Cyprus, Azerbaijan, Iran, Bulgaria, and Georgia occupy the top 5 positions. The top 20 countries using the keyword "Turkey" for health-related searches are presented in Table 1.

Table 1. Top 20 Countries Using the Keyword "Turkey" for Health-Related Searches

1-5	6-10	11-15	16-20
Cyprus	Libya	Bosnia and Herzegovina	Iraq
Azerbaijan	Kuwait	Qatar	Netherlands
Iran	Syria	Jordan	Ireland
Bulgaria	United Kingdom	Germany	United Arab Emirates
Georgia	Lebanon	Kyrgyzstan	Kazakhstan

Source: Google Trends

It can be stated that the top 20 countries include nations from Asia, Africa, and Europe. From the European continent, the United Kingdom, Germany, the Netherlands, Bulgaria, and Bosnia and Herzegovina are included. From Asia, countries such as Iran, Georgia, Syria, the United Arab

Emirates, Qatar, Jordan, and Kuwait are represented. The continent with the highest interest is Asia.

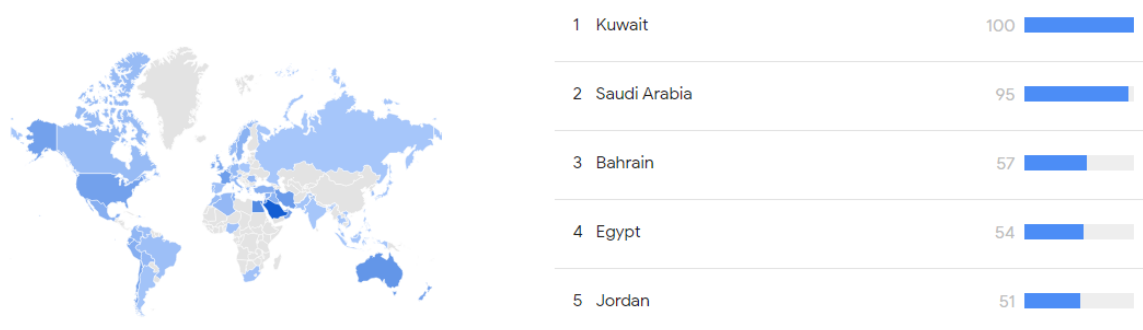
Table 2. Increasing Health Tourism Searches for Turkey Worldwide

sleeve gastrectomy	+%600	Hair Transplant	%10
cosmetic surgery	+%120	Teeth Turkey	%7
abdominoplasty	+%90	Turkey Dental	%7
Hair Transplantation	+%60	Rhinoplasty	%5
Organ transplantation	+%40	Dental Implants Turkey	%5

Source: Google Trends

The increasing and most relevant subtopics related to health-related searches for Turkey are shown in Table 3. Sleeve gastrectomy, cosmetic surgery, and abdominoplasty are the most increasing search topics. Among the most relevant topics, hair transplant ranks first. Dental treatments are also among the most relevant topics. Additionally, rhinoplasty is one of the most frequently matched searches.

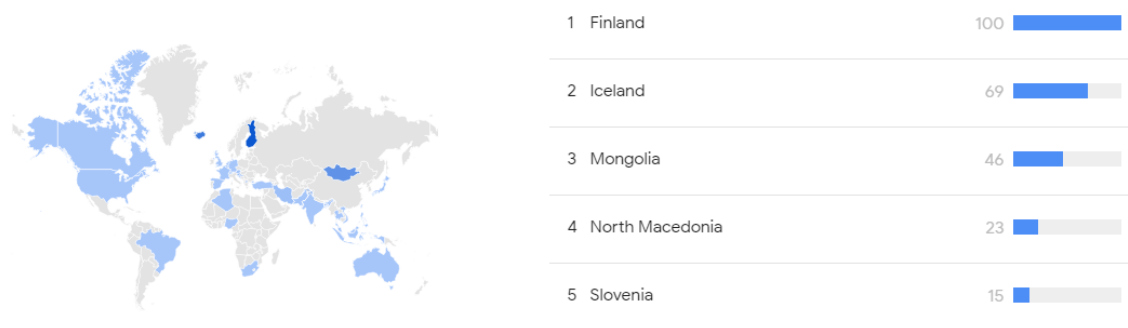
Figure 2. Searches for Sleeve Gastrectomy Related to Turkey



Source: Google Trends

The search topic with the highest increase over the last five years is sleeve gastrectomy, with a significant rise of 600%. Turkey is emerging as one of the leading countries in this area. The top five countries for searches related to Turkey in this field are Kuwait, Saudi Arabia, Bahrain, Cyprus, and Jordan.

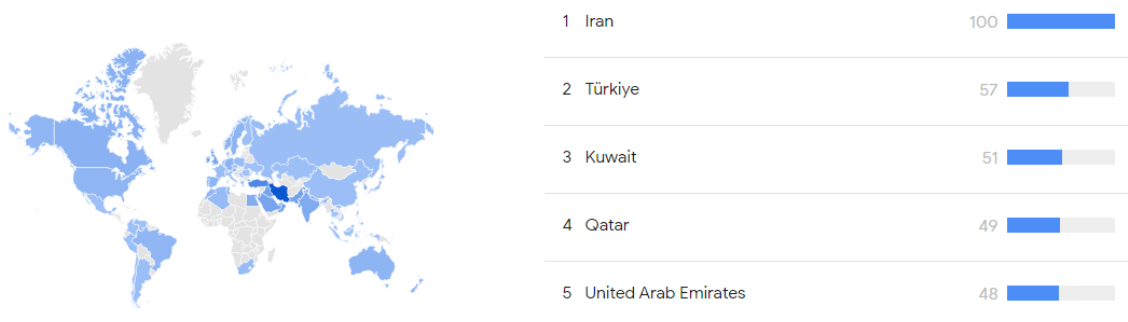
Figure 3. Search Queries for Cosmetic Surgery Related to Turkey



Source: Google Trends

The second most significant increase in search topics over the past five years is cosmetic surgery, with a substantial rise of 120%. Turkey is emerging as one of the leading countries in this field. The top five countries conducting searches related to this topic are Finland, Iceland, Mongolia, North Macedonia, and Slovenia. The countries searching for this topic are different from those searching for other topics, with European countries showing more interest in this area.

Figure 4. Hair Transplant Searches Related to Turkey

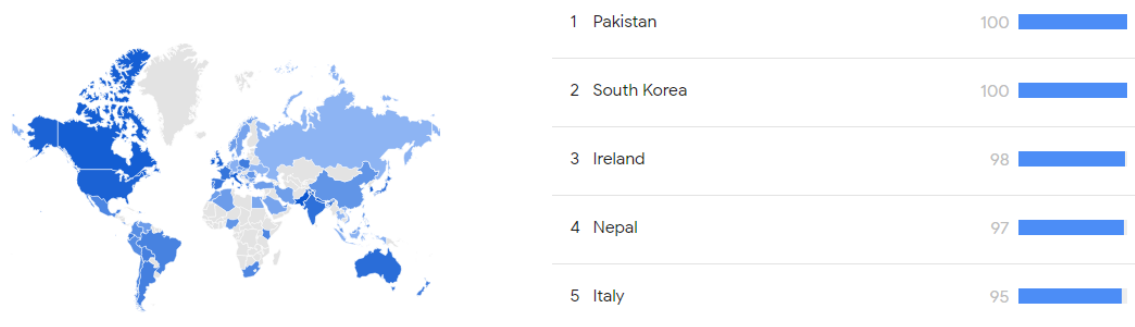


Source: Google Trends

Another relevant search topic in the last five years is hair transplant. Turkey is one of the countries recognized globally in this field, with a 60% increase. Turkey is advancing toward becoming one of the leading countries in this area. The top five countries conducting searches related to this topic in Turkey are Iran, Kuwait, Qatar, the United Arab Emirates, and Turkey itself, due to searches

made by its own citizens. It is observed that the countries searching for this topic are primarily Asian countries.

Figure 5. Organ Transplantation Searches Related to Turkey



Source: Google Trends

Another highly relevant search topic in the past five years is organ transplantation. The top five countries searching for this topic related to Turkey are Pakistan, South Korea, Ireland, Nepal, and Italy. The countries searching for information about Turkey in this area are notably different from others, with Asia, Europe, and Africa represented together.

Figure 6. Dental Implant Searches Related to Turkey



Source: Google Trends

Another area where Turkey leads is dental treatments. One of the most relevant search topics in the past five years is dental implants. The top five countries searching for this topic related to Turkey are Romania, the United States, Mexico, the United Kingdom, and Ecuador. The countries

searching for information about Turkey in this area are notably different from others, with the Americas being more dominant in this topic.

6. CONCLUSION

This study examines the topic of health tourism. Turkey is a country with a significant position in global health tourism. Especially in recent years, thanks to investments made by both the government and the private sector, Turkey has gained considerable momentum in health tourism.

With the new data sources provided by the digital world, we had the opportunity to analyze the interest in health tourism directed towards Turkey. We examined Google search data and tried to understand which countries around the world are showing interest in Turkey. We gained insights into the areas where Turkey has advantages. This allows Turkey to more effectively identify target markets in health tourism marketing. It also enables predictions regarding the types of treatments that are in demand in different countries.

Through this research, it was found that the interest in Turkey comes primarily from neighboring countries. There is a clear interest in treatments such as sleeve gastrectomy, cosmetic surgery, and abdominoplasty. Furthermore, the topics of Hair Transplantation and Dental treatments frequently appear in searches related to Turkey.

Turkey stands out in the field of health tourism due to its geographical location, cost advantages, high-quality healthcare services, and tourism infrastructure. However, in order to gain a larger market share in this sector, Turkey needs to take strategic and comprehensive steps. This study provides statistical information to help Turkey clearly identify its target markets. The following recommendations could assist Turkey in becoming one of the leading countries in health tourism:

- **Identify Focus Markets:** Based on the collected data, regions such as Europe, the Middle East, Africa, and North America should be selected as target markets.
- **Determine Focus Key Treatment Types:** Search engine data indicates that Turkey excels in areas such as sleeve gastrectomy, cosmetic surgery, abdominoplasty, hair transplantation, rhinoplasty,

and dental treatments. Marketing efforts targeting these treatment types could lead to greater efficiency.

Additionally, focusing on customer satisfaction and offering package deals could help Turkey rise further in health tourism. For example, packages that combine treatments with tourism, such as a hair transplant followed by a tour of Cappadocia, could provide both healthcare and tourism services. Patients could be offered a comfortable experience with services such as transfers, accommodation, and private tour guides. By promoting thermal facilities and spa centers, the scope of health tourism could be expanded.

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DISCLOSURE OF CONFLICT

The author(s) declare that they have no conflicts of interest.