

International Health Tourism: A Strategic Comparison of Türkiye and Germany

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Abstract

Aim: This study aims to conduct an in-depth analysis of the competitive dynamics of health tourism in Türkiye and Germany by utilizing current data. The primary goal is to identify the strategic advantages and challenges each country faces within the health tourism sector.

Method: The research employs a comparative approach, analyzing quantitative data related to healthcare costs, treatment options, service quality, patient safety, and satisfaction levels in both Türkiye and Germany. Secondary data sources, such as industry reports and healthcare statistics, form the foundation of this analysis.

Results: The study reveals that Türkiye emerges as an attractive destination due to its cost advantages, with healthcare services being 50-70% lower compared to Germany, alongside a wide variety of treatment options. Its geographical position and accessibility further enhance its appeal to health tourists. In contrast, Germany is recognized for its high-quality healthcare services, accredited hospitals, and specialized professionals, ensuring patient safety and treatment excellence. Both countries report high patient satisfaction rates; however, Türkiye faces certain service-related challenges that can impact the patient experience negatively.

Conclusion: This research presents a clear overview of the strategic positions and potential growth areas of both Türkiye and Germany in health tourism. It serves as a valuable reference for future development strategies aimed at strengthening their competitive standings in the international health tourism market.

Keywords: Health tourism, patient satisfaction, cost, health policy.

Uluslararası Sağlık Turizmi: Türkiye ve Almanya'nın Stratejik Karşılaştırması

Öz

Amaç: Bu çalışma, Türkiye ve Almanya'daki sağlık turizminin rekabetçi dinamiklerini güncel veriler kullanarak derinlemesine analiz etmeyi amaçlamaktadır. Temel hedef, her iki ülkenin sağlık turizmi sektöründeki stratejik avantajlarını ve karşılaştıkları zorlukları belirlemektir.

Yöntem: Araştırma, Türkiye ve Almanya'daki sağlık hizmetleri maliyetleri, tedavi seçenekleri, hizmet kalitesi, hasta güvenliği ve memnuniyet seviyeleri ile ilgili niceliksel verileri analiz eden karşılaştırmalı bir yaklaşım benimsemektedir. Bu analiz, sektör raporları ve sağlık istatistikleri gibi ikincil veri kaynaklarına dayanmaktadır.

Bulgular: Çalışma, Türkiye'nin maliyet avantajlarıyla dikkat çeken bir destinasyon olarak öne çıktığını ortaya koymaktadır; Türkiye'nin sağlık hizmetleri Almanya'ya kıyasla %50-70 daha düşük maliyetlerle sunulmakta ve çok çeşitli tedavi seçenekleri sunulmaktadır. Coğrafi konumu ve erişilebilirliği de sağlık turistleri için cazibesini artırmaktadır. Öte yandan, Almanya yüksek kaliteli sağlık hizmetleri, akredite hastaneler ve uzmanlaşmış profesyonelleri ile hasta güvenliği ve tedavi mükemmeliyetini garanti etmektedir. Her iki ülke de yüksek hasta memnuniyeti oranlarına sahipken, Türkiye'nin bazı hizmetle ilgili zorlukları, hasta deneyimini olumsuz yönde etkileyebilmektedir.

Sonuç: Bu araştırma, Türkiye ve Almanya'nın sağlık turizmindeki stratejik konumları ve potansiyel büyüme alanları hakkında net bir genel bakış sunmaktadır. Bu çalışma, her iki ülkenin uluslararası sağlık turizmi

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pazarındaki rekabetçi konumlarını güçlendirmeye yönelik gelecekteki gelişim stratejileri için değerli bir referans sağlamaktadır.

Anahtar Sözcükler: Sağlık turizmi, hasta memnuniyeti, maliyet, sağlık politikası.

Introduction

Health tourism, which involves international travel for medical care, has become a rapidly expanding sector in recent years. This sector has gained increasing attention due to its ability to offer access to high-quality healthcare, cost advantages, and diverse treatment options¹. Türkiye and Germany have emerged as key destinations in this field, with notable differences in the services they provide to international patients.

Türkiye has positioned itself as a significant hub for health tourism, particularly in fields such as aesthetic surgery, dentistry, and in vitro fertilization (IVF). This success is attributed to its strategic geographical location, rich historical background, and advanced healthcare infrastructure²⁻⁴. Competitive pricing and a wide variety of treatment options make Türkiye an attractive destination for health tourists³. Conversely, Germany is known for its high-quality healthcare services, renowned specialized professionals, and cutting-edge medical technology, making it a trusted destination for international patients, especially in fields such as oncology and cardiology⁵.

The objective of this study is to compare current health tourism data between Türkiye and Germany, assessing each country's strengths and weaknesses. By doing so, this research aims to offer strategic insights for countries striving to enhance their competitiveness in the global health tourism market².

Literature Review

Health tourism, which involves international travel for medical care, has become a rapidly expanding sector in recent years. This growth can be attributed to its ability to offer access to high-quality healthcare services, cost advantages, and a diverse range of treatment options¹. Both Türkiye and Germany have emerged as significant players in the global health tourism market, with each country offering unique services to international patients.

Türkiye has become an important destination for health tourism, particularly in fields such as aesthetic surgery, dentistry, and in vitro fertilization (IVF). The country's geographical location, historical background, and rapidly advancing healthcare infrastructure have played a major role in this success⁴. Competitive pricing and the availability of a broad range of treatments position Türkiye as an attractive choice for health tourists seeking affordable yet high-quality care³. On the other hand, Germany is known for its high-quality healthcare services, specialized healthcare professionals, and state-of-the-art medical technology, which have contributed to its status as a trusted destination for international patients, particularly in specialized fields such as oncology and cardiology⁵.

Türkiye's strategic position at the crossroads of Europe and Asia makes it easily accessible to patients from both regions, adding to its appeal in the health tourism sector. Furthermore, its health tourism statistics indicate a rapid increase in the number of

international patients, as it continues to build on its strong healthcare system and establish itself as a global leader³. Conversely, Germany's healthcare sector stands out due to its advanced medical technology and internationally recognized medical professionals, positioning it as a leader in specialized treatments⁶.

This study aims to compare current health tourism data between Türkiye and Germany, analyzing the strengths and weaknesses of each country. By assessing the respective healthcare infrastructure, patient satisfaction, and cost-effectiveness in each destination, the study provides insights into the factors driving the competitiveness of both countries in the health tourism industry². The findings of this research are valuable for countries striving to improve their health tourism sectors and enhance their competitive standing in the global market.

The analysis will focus on various dimensions of health tourism, including patient satisfaction, healthcare quality, costs, and the effectiveness of marketing strategies in attracting international patients. While Türkiye has made significant strides in offering cost-effective healthcare services, Germany's reputation for top-tier medical technology and expertise continues to draw international patients, particularly for complex treatments⁷⁻¹¹. Furthermore, studies on health tourism satisfaction and its impact on patient decisions highlight the importance of both cost and quality in influencing patients' choices of destination⁹.

This comparison is critical for understanding how both countries can capitalize on their strengths and address their weaknesses to better cater to the growing global demand for medical tourism. The research aims to offer strategic recommendations based on the current trends in health tourism and the economic impact of medical tourism on both countries⁷⁻⁸.

The literature frequently discusses the competitive implications of Türkiye's cost advantages in health tourism and Germany's provision of high technology¹. Additionally, determining patient satisfaction levels in both countries and analyzing the factors affecting this satisfaction play a significant role in the development of health tourism strategies².

Building on the aforementioned studies, this research aims to gain a deeper understanding of Türkiye and Germany's competitive positions in health tourism³. The investigation of factors influencing health tourists' preferences is intended to contribute to the development of health tourism strategies in both countries. Understanding these differences is crucial for developing effective health tourism strategies. This research addresses the following key research questions:

What are the main differences between Türkiye and Germany in terms of health tourism services and competitive advantages?

How do healthcare quality, patient satisfaction, and cost structures impact the health tourism sector in Türkiye and Germany?

What factors influence international patients' choices when selecting Türkiye or Germany for medical treatment?

How can both countries improve their health tourism strategies to strengthen their positions in the global health tourism market?

This study is based on a descriptive research model aimed at comparing the current data on health tourism in Türkiye and Germany. The research seeks to analyze various quantitative data to evaluate the health tourism potential of both countries.

The primary data for the research has been obtained from official sources containing statistical information related to health tourism in Türkiye and Germany⁴⁻⁸. Specifically, health tourism statistics, patient satisfaction reports, and accreditation data for the period 2018-2022 were obtained from the Türkiye Ministry of Health; annual reports and statistics related to health tourism from the Federal Statistical Office of Germany; data on accredited hospitals from Joint Commission International (JCI); and general statistics and cost reports related to health tourism from the World Data Bank and OECD.

The collected data will be utilized to conduct a comparative analysis of both countries' positions in the health tourism market and their growth potentials. The analysis will be structured around the following topics⁹:

Visitor Numbers: Annual numbers of health tourists arriving in Türkiye and Germany.

Cost Structures: Economic differences in the provision of healthcare services between the two countries based on the costs of specific types of treatment.

Patient Satisfaction: Survey results and statistics indicating the levels of satisfaction among health tourists in both countries.

Treatment Diversity: An analysis of the preferred treatment areas among health tourists.

Material and Methods

This study is a descriptive and comparative research that analyzes the health tourism sectors of Türkiye and Germany from a strategic perspective. The study employs secondary data analysis to examine the key advantages, challenges, and competitive positions of both countries in the health tourism sector.

The research is guided by the following key questions.

What are the main differences between Türkiye and Germany in terms of health tourism?

Which factors influence health tourists' preference for Türkiye or Germany?

How do Türkiye and Germany compare in terms of healthcare quality, costs, and patient satisfaction?

These research questions provide a framework for analyzing health tourism trends, patient satisfaction, service quality, and cost structures in both countries.

Data Sources: The primary data for this study was obtained from official national sources, including health tourism statistics, patient satisfaction surveys, and accreditation data from relevant authorities. These include:

Türkiye Ministry of Health: Official health tourism statistics and patient satisfaction reports from 2018 to 2022 were analyzed^{4,10}.

Federal Statistical Office of Germany (Destatis): Health tourism reports, including demographic data and tourism statistics, were utilized to compare the health tourism trends between the two countries⁶.

Joint Commission International (JCI): Data on accredited hospitals in both Türkiye and Germany was reviewed to assess the quality standards in healthcare services⁵.

OECD and World Data Bank: Reports from the OECD and World Data Bank provided additional insights into healthcare costs, patient satisfaction rates, and key economic indicators related to health tourism^{7,8}.

Research Methodology: A **descriptive research model** was applied to compare the health tourism potential of Türkiye and Germany. This model focuses on evaluating key indicators related to health tourism, such as the number of health tourists, treatment costs, and patient satisfaction. The data was analyzed using a **comparative analysis approach**, allowing for a direct comparison between both countries' health tourism sectors.

Visitor Numbers: Data on the annual number of international health tourists visiting Türkiye and Germany from 2018 to 2022 were collected to determine trends in health tourism volumes^{4,7,8,10,12}.

Cost Structures: The study examined economic differences in healthcare service provision between Türkiye and Germany, focusing on treatment costs for popular health tourism services such as aesthetic surgery, dental implants, and orthopedic surgeries. The cost data was extracted from official statistics and reports from both countries^{4,8}.

Patient Satisfaction: Surveys and statistics on patient satisfaction in both countries were analyzed to evaluate how well health tourists perceive the healthcare services provided. This included data from government and industry reports on healthcare satisfaction in Türkiye and Germany^{4,6,7}.

Treatment Diversity: The study analyzed the variety of treatments offered in each country, focusing on the most popular areas of treatment such as aesthetic surgery, fertility treatments, and oncology.

Data Analysis Methodology: This study employs a **comparative analysis approach** to evaluate the health tourism sectors of Türkiye and Germany. The collected data has been analyzed based on the following key indicators:

Number of Health Tourists: The annual number of international patients visiting Türkiye and Germany for medical purposes.

Cost Structures: A comparison of treatment costs for selected medical services in Türkiye and Germany.

Patient Satisfaction: An assessment of patient satisfaction levels based on surveys and reports from both countries.

Diversity of Treatments: An analysis of the most sought-after medical services in each country, including aesthetic surgery, orthopedics, oncology, and dental treatments.

The data has been analyzed using **descriptive statistics**, with key findings presented in tables and figures to highlight the differences between Türkiye and Germany in the health tourism market.

Ethical Considerations: This study used publicly available secondary data from reputable sources such as government health ministries, statistical offices, and international organizations. No direct patient or personal data was used, and all information utilized for analysis was anonymized and aggregated. As the study was based solely on secondary data, ethical approval was not required.

Results

Data on Health Tourism

Health tourism is a rapidly developing sector worldwide, influenced by factors such as changing patient demands, cost advantages, and access to various treatment options¹⁰. Health tourism data plays a critical role in understanding the provision of healthcare services and the competitive advantages of different countries¹¹. The current data on health tourism in Türkiye and Germany reveals the strengths and weaknesses of each country's healthcare systems, providing potential health tourists with the opportunity for comparison. This section aims to detail important indicators of health tourism data in Türkiye and Germany, focusing on visitor numbers, cost structures, and patient satisfaction.

Table 1. Population and change rates of Türkiye and Germany in the last 5 years

Year	Population of Türkiye (Million)	Population Change Rate in Türkiye (%)	Population of Germany (Million)	Population Change Rate in Germany (%)
2018	82.00	1.50	82.97	0.3
2019	82.58	1.09	83.02	0.38
2020	83.38	0.97	83.17	0.18
2021	84.15	0.92	83.24	0.08
2022	84.98	0.99	83.29	0.06

In the last five years, Türkiye's population has increased from 82.58 million to 85.33 million. During this period, Türkiye's annual population growth rate has been calculated at an average of 0.99%. This population increase can be attributed to Türkiye's young and dynamic demographic structure. High fertility rates and migration factors are among the primary reasons for this growth (Table 1).

In contrast, Germany's population has risen from approximately 83.02 million to 83.54 million over the same period, with an average annual population change rate of 0.30%. The population growth in Germany is relatively modest compared to Türkiye, reflecting the effects of an aging demographic structure and migration policies. While Germany faces lower fertility rates, migration plays a significant role in population growth (Table 1).

Table 2. Total number of tourists visiting Türkiye and Germany in the last 5 years, and those visiting for health tourism

Year	Total Number of Tourists Visiting Türkiye (Million)	Number of Tourists Visiting Türkiye for Health Tourism	Total Number of Tourists Visiting Germany (Million)	Number of Tourists Visiting Germany for Health Tourism
2018	45	500	38	250
2019	45	600	39,6	275
2020	15	388	12	200
2021	30	642,444	9,7	250
2022	51	1.2 million	31	270

In 2022, Türkiye hosted a total of 51 million tourists, up from approximately 45 million in 2019, prior to the pandemic. That year, Türkiye saw significant growth in health tourism, attracting 1.2 million health tourists, which represents a 66% increase compared to 2021, when 642,444 health tourists were welcomed (Table 2). The most sought-after treatments in Türkiye include dental services, orthopedic surgeries, and aesthetic surgery. In 2022, the revenue from health tourism exceeded \$2.1 billion⁷.

Germany welcomed approximately 9.7 million international tourists in 2021, down from around 39.6 million in 2019 due to the pandemic's impact. However, tourism began to recover in 2022. Germany attracts about 250,000 health tourists annually (Table 2). German health tourism is primarily distinguished by its advanced medical technology and specialized treatments, although the total number of health tourists remains lower compared to Türkiye¹².

Türkiye has demonstrated rapid growth in health tourism, supported by low costs, a wide range of treatment options, and advanced infrastructures in areas such as cosmetic and dental services. Conversely, Germany stands out in health tourism primarily for its advanced technology and high-risk specialized treatments (Table 2). Nevertheless, Germany attracts fewer health tourists compared to Türkiye's health tourism volume^{7,12}.

Table 3. Major treatment areas for patients visiting Türkiye and Germany for health tourism

Treatment Area	Percentage of Patients Visiting Türkiye (%)	Percentage of Patients Visiting Germany (%)
Dental Health (Implants, Aesthetic Dental Treatment)	30%	10%
Aesthetic and Plastic Surgery	25%	15%
Eye Surgery (Laser Eye Surgery)	15%	5%
Orthopedic Surgeries (Knee Replacement, Hip Replacement)	10%	25%
Heart Surgery	5%	20%
Oncology Treatment (Cancer Treatment)	3%	15%
Rehabilitation Services	5%	10%
In Vitro Fertilization (IVF)	7%	5%

Türkiye stands out for its affordable and high-quality services in areas such as dental health (30%), aesthetic surgery (25%), and eye surgery (15%). The country receives significant demand for dental implants and aesthetic surgeries from many European countries and the Middle East^{5,7}.

Germany, on the other hand, is preferred as a health tourism destination primarily for orthopedic surgeries (25%), heart surgeries (20%), and oncology treatments (15%) (Table 3). Germany is particularly favored for complex and high-risk treatments due to the advanced technology and specialized physicians it offers in these fields^{5,7}.

Table 4. Number of accredited healthcare institutions in Türkiye and Germany by JCI for the years 2018-2022

Year	Number of Accredited Hospitals in Türkiye	Number of Accredited Hospitals in Germany
2018	45	250
2019	47	260
2020	48	270
2021	50	275
2022	52	280

In Türkiye, the quality of healthcare services is assessed by international accreditation organizations such as the Joint Commission International (JCI) and ISO 9001^{13,14}. Hospitals in Türkiye, particularly in major cities, place significant importance on obtaining these accreditations (Table 4). The Turkish Ministry of Health aims to align all healthcare institutions with local and international standards through the implementation of Health Quality Standards (SKS)^{5,13-16}. As of 2022, more than 50 hospitals in Türkiye have been accredited by JCI. To enhance the quality of healthcare services in Türkiye, the Ministry of Health mandates the implementation of SKS in all healthcare institutions. These standards encompass criteria such as patient safety, service quality, and patient satisfaction (Table 4). The reforms implemented post-2020 aim to make the SKS processes more effective^{5,16,17}.

In Germany, healthcare institutions generally adhere to international quality standards. Germany operates a healthcare system that implements quality management systems such as DIN EN ISO 9001 and Kooperation für Transparenz und Qualität im Gesundheitswesen (KTQ). University hospitals and private hospitals, in particular, are quite active in pursuing international accreditations. Many hospitals in Germany are involved in both national and international accreditation processes. Additionally, there are hospitals with JCI certification. Healthcare services in Germany are typically based on quality management standards such as ISO 9001 and the EFQM Excellence Model. These standards are applied to enhance both patient safety and the effectiveness of treatment processes. Furthermore, hospitals in Germany are working towards developing a patient-centered service approach through KTQ accreditations^{5,18}.

Table 5. Average service costs in health tourism in Türkiye and Germany for the years 2018-2022

Country	Treatment Type / Year	Dental Implant	Heart Bypass Surgery	Laser Eye Surgery	Knee Replacement Surgery	Liposuction	Aesthetic Nose Surgery
Türkiye	2018	\$500	\$12,000	\$1,200	\$8,000	\$2,000	\$2,500
	2019	\$550	\$13,000	\$1,300	\$8,500	\$2,200	\$2,600
	2020	\$600	\$14,000	\$1,400	\$9,000	\$2,300	\$2,700
	2021	\$650	\$14,500	\$1,450	\$9,500	\$2,500	\$2,800
	2022	\$700	\$15,000	\$1,500	\$10,000	\$2,800	\$3,000
Germany	2018	\$3,500	\$40,000	\$4,500	\$25,000	\$6,500	\$7,000
	2019	\$3,600	\$42,000	\$4,600	\$26,000	\$7,000	\$7,200
	2020	\$3,800	\$43,000	\$4,700	\$27,000	\$7,200	\$7,400
	2021	\$4,000	\$44,000	\$4,800	\$28,000	\$7,500	\$7,600
	2022	\$4,200	\$45,000	\$5,000	\$29,000	\$8,000	\$8,000

Türkiye continues to be a highly competitive destination for health tourism in terms of service costs. From 2018 to 2022, while costs for various treatment types have increased, prices in Türkiye remain significantly lower compared to those in Germany (Table 5). Germany offers health tourism services at higher costs, which are attributed to advanced technologies and specialized treatments that require significant expertise. Although prices in Germany have steadily increased over the years, the overall costs are still much higher when compared to Türkiye^{7,12}.

Table 6. Health tourism revenues in Türkiye and Germany for the years 2018-2022 (Billion USD)

Year	Health Tourism Revenue in Türkiye (Billion USD)	Health Tourism Revenue in Germany (Billion USD)
2018	1,5	1,2
2019	1,65	1,3
2020	1,05 (Pandemic Impact)	0,9 (Pandemic Impact)
2021	1,75	1,1
2022	2,1	1,1

Türkiye has demonstrated a steady increase in health tourism revenues between 2018 and 2022. Although there was a decline in 2020 due to the COVID-19 pandemic, Türkiye experienced a significant recovery in health tourism in 2021 and 2022 (Table 6). By 2022, Türkiye's revenue from health tourism reached approximately \$2.1 billion^{19,20}.

While Germany has a smaller health tourism market compared to Türkiye, it generates significant revenues due to advanced technology and specialized treatments. However, Germany's revenue growth has been slower due to Türkiye's broader range of treatment options and cost advantages (Table 6). Germany particularly excels in generating high revenues from treatments such as heart surgery, oncology, and orthopedics^{6,21}.

Table 7. Patient satisfaction rates of health tourists visiting Türkiye and Germany for the years 2018-2022

Year	Patient Satisfaction in Türkiye (%)	Patient Satisfaction in Germany (%)
2018	85%	90%
2019	87%	91%
2020	82% (Pandemic Impact)	88% (Pandemic Impact)
2021	86%	89%
2022	88%	91%

Türkiye achieves high satisfaction rates among health tourism patients due to competitive prices and rapid treatment times. Satisfaction levels are particularly high in areas such as aesthetic surgery, eye treatments, and dental health. Although there was a general decline in satisfaction due to the COVID-19 pandemic in 2020, patient satisfaction in Türkiye rose again to 88% in 2022²².

Germany, on the other hand, generally boasts higher satisfaction rates due to its advanced technological infrastructure, specialized physicians, and high treatment quality. Patients seeking high-tech treatments such as heart surgery, oncology, and orthopedics in Germany typically report satisfaction rates of 90% or above⁶.

Health tourism is one of Türkiye's economic and strategic objectives. Between 2018 and 2022, the Turkish Ministry of Health provided various incentives to develop health tourism through the International Health Services Inc.²³. These incentives include the provision of healthcare services in accordance with international standards, promotional campaigns, investments in private hospitals, and support for health tourism companies (Table 7). Additionally, Türkiye has developed an expedited accreditation system for health tourism services, aligning the quality of healthcare nationwide with international standards such as JCI and ISO^{23,24}.

In Germany, health tourism primarily focuses on high-tech treatments that require specialized expertise. The country's health tourism policies are supported by advanced medical devices and skilled healthcare professionals²⁵. Health policies are typically implemented through university hospitals and private healthcare institutions, concentrating on areas such as cancer treatments, orthopedic surgeries, and cardiovascular diseases (Table 7). Germany promotes cross-border healthcare services in close cooperation with EU countries^{26,27}.

Table 8. Visa information for health tourism travel to Türkiye and Germany

Country	Visa Type	Required Documents	Visa Duration	Visa Processing Time	Visa Fee
Türkiye	C Type Health Visa	Invitation letter, financial proof, travel insurance	Up to 90 days	1-5 business days	30-90 USD
Germany	Schengen / National Health Visa	Invitation letter, proof of treatment payment, accommodation document	90 days or longer	3 weeks or longer	80-100 Euro

Patients coming to Türkiye for health tourism typically need to obtain a "C Type Health Visa." The visa application process includes documents such as an official invitation letter from the hospital or clinic, proof of financial resources, travel insurance, and travel documents. Visa applications can be submitted through Türkiye's official e-visa platform or via consulates (Table 8). The processing time for visas generally takes 1 to 5 business days, with visa fees ranging from 30 to 90 USD²⁸.

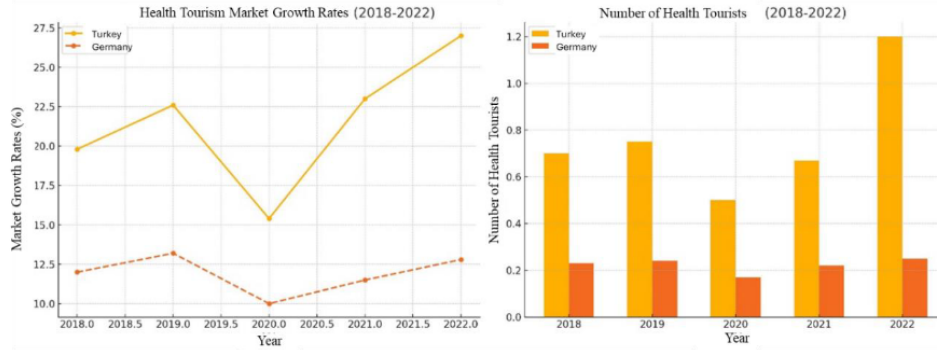
For patients wishing to travel to Germany for health tourism, a "Schengen Health Visa" or a "National Health Visa" for long-term treatments is required. A Schengen visa is necessary for short-term treatments, while a national visa must be obtained for treatments lasting more than three months. Required documents for the visa application include an invitation letter from the hospital or clinic, proof of payment for medical treatment expenses, and documentation of accommodation (Table 8). The visa application process usually takes about 3 weeks, but it can be expedited in urgent situations²⁹.

Türkiye has shown a high growth rate in health tourism due to its cost-effective services, advanced technology, and wide range of treatment options¹⁷. Although there was a decline in 2020 due to the COVID-19 pandemic, a rapid recovery was observed in 2021 and 2022. Particularly high demand in cosmetic surgery and dental treatments has contributed significantly to the rapid growth of the market³⁰. Germany's health tourism market has exhibited more stable growth, focusing on treatments that require advanced technology. German health tourism has shown limited growth, particularly in complex procedures such as cancer treatments, cardiovascular surgeries, and orthopedic surgeries. Despite the decline during the pandemic, a steady recovery was noted in 2022^{25,31}.

Table 9. Health tourism market growth rates in Türkiye and Germany

Year	Growth Rate in Türkiye (%)	Growth Rate in Germany (%)
2018	19,8	12
2019	22,6	13,2
2020	15,4	10
2021	23	11,5
2022	27	12,8

Türkiye's market growth has been supported by low costs and shorter waiting times. Particularly, hair transplants, dental treatments, and aesthetic surgeries have emerged as the most popular services. In contrast, Germany has experienced more limited yet stable growth in its market, driven by high-quality medical services and the use of advanced technology. Germany specializes in high-cost but complex medical procedures^{30,32}.

Figure 2. Competitive data for health tourism in Türkiye and Germany

Türkiye's annual health tourism market growth rates exhibited a consistent increase from 2018 to 2022³³. Despite a decline during the pandemic in 2020, a rapid recovery was observed in 2021 and 2022. The number of health tourists in Türkiye rose from approximately 700,000 in 2018 to 1.2 million in 2022. The country's competitive pricing and wide range of treatment options have attracted more international patients³⁴.

In contrast, Germany's annual market growth rates for health tourism have been lower, experiencing a decline in 2020 due to the pandemic. However, a limited recovery was noted in 2021 and 2022³⁵. The number of health tourists in Germany increased from 230,000 in 2018 to 250,000 in 2022. Germany's complex treatments, based on advanced technology, attract fewer patients but result in higher revenue³⁶.

The analysis of these data aims to clarify the positions and growth potential of both countries in the health tourism market. Türkiye is particularly noted for its affordable and high-quality services in fields such as aesthetic surgery and dentistry, while Germany stands out for its high-tech healthcare services and specialized treatment methods. Research studies have identified factors influencing health tourists' preferences and satisfaction levels, contributing to the development of health tourism strategies in both countries^{13-15,17,24-27}.

In this context, the analysis of health tourism data from Türkiye and Germany provides a better understanding of the current health tourism potentials of these countries and establishes a significant foundation for developing strategies that cater to the needs of health tourists. The following paragraphs will detail the performances of both countries in light of recent data in the health tourism sector, yielding important insights into the competitive dynamics of the industry.

Conclusion and Recommendations

This study aimed to compare the current state of health tourism in Türkiye and Germany by analyzing key factors such as cost structures, patient satisfaction, healthcare quality, and accessibility. The findings highlight distinct advantages and challenges in both countries' health tourism sectors.

Türkiye is identified as a cost-effective destination that offers a diverse range of treatments, particularly in aesthetic surgery and dentistry, making it attractive to

international patients. Its geographical position, competitive pricing, and investment in health tourism infrastructure have contributed to its rapid market growth.

Conversely, Germany is distinguished by its advanced medical technology, high patient satisfaction rates, and specialized treatments in areas such as oncology and cardiology. However, challenges such as higher healthcare costs and longer waiting times may limit its ability to compete with more cost-effective destinations like Türkiye.

By assessing the key drivers influencing health tourists' preferences, this study provides insights into how both countries can strengthen their positions in the global health tourism market and improve their healthcare strategies.

Based on the findings of this study, the following recommendations are proposed:

Türkiye should prioritize accreditation processes to ensure compliance with international healthcare standards. The Ministry of Health can implement support programs to encourage hospitals to obtain certifications from organizations such as Joint Commission International (JCI). Strengthening accreditation will enhance healthcare quality and patient trust, reinforcing Türkiye's competitiveness in the global market.

Germany already upholds high accreditation standards, but efforts can be made to further streamline certification processes and enhance transparency in healthcare quality assessments.

Germany should explore strategies to manage and optimize healthcare costs, as its high service prices may discourage potential health tourists. Reviewing health policies to increase efficiency in service delivery and improve resource allocation could enhance cost-effectiveness.

Türkiye should continue leveraging its competitive pricing advantage, while also ensuring that affordable healthcare does not compromise service quality.

Türkiye should focus on promoting its affordability, accessibility, and service diversity through international campaigns and partnerships with medical travel agencies.

Germany should emphasize its specialized treatments, advanced technology, and high patient satisfaction rates to attract patients seeking high-risk or complex medical procedures.

Türkiye and Germany should conduct regular patient satisfaction surveys to evaluate tourists' healthcare experiences and identify areas for improvement.

The collected data should be integrated into decision-making processes to improve service quality and efficiency in both countries.

Türkiye and Germany could strengthen international cooperation in health tourism research, professional training, and medical education. Joint programs that support the exchange of expertise between healthcare professionals could improve overall service quality and innovation in both countries.

These policy recommendations will help Türkiye and Germany assess their health tourism potential more effectively and improve their competitiveness in the global market. By focusing on accreditation, cost efficiency, marketing strategies, patient

satisfaction, and collaboration, both countries can further enhance their positions in the rapidly evolving health tourism industry.

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