



The Tourism Sector in Country Branding: An Assessment on Health Tourism in Turkey

Ülke Markalaşmasında Turizm Sektörü: Türkiye’de Sağlık Turizmi Üzerine Bir Değerlendirme

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Öz

Türkiye’de sağlık alanında yapılan yatırımlar ve sahip olunan kaynaklar katma değeri en yüksek turizm türlerinden biri olan sağlık turizmine olan ilgiyi artırmıştır. Küreselleşme, uluslararası işbirlikleri, kişilerin seyahat olanaklarının genişlemesi, yaşlı nüfusun artması, sağlıklı ve uzun yaşamak isteyen insanların bilinçlenmesi, dijitalleşmenin etkisiyle yeni tedavi yöntemleri hakkında kişilerin anında bilgi sahibi olabilmesi gibi etkenler neticesinde sağlık turizmi ülkelerin kendilerini tanıtmaları, itibarlarını yükseltmeleri için günümüzde kritik bir öneme sahiptir. Bir mevsime bağlı kalmaksızın yıl genelinde hizmet verilebilen sağlık turizmi hem bu yönüyle hem de sahip olduğu hedef kitle çeşitliliği sebebiyle diğer turizm türlerinden ayrılmaktadır. Bu çalışmanın amacı sağlık turizminde yapılan tanıtım çalışmalarını ulusal ve uluslararası boyutta tartışarak, genel ülke tanıtım stratejileri içerisinde sağlık turizminin yerini incelemektir. Literatür analizine dayalı olarak yapılan bu çalışmada ülkenin sahip olduğu potansiyeli tespit ederek, hedef kitlelere uygun oluşturulabilecek farklı tanıtım stratejilerini ve yöntemlerini tartışmak ve iletişim faaliyetlerini ele almak amaçlanmıştır. Yapılan araştırmalar sonucunda, Türkiye’nin sağlık turizmini iyi yönetebilirse termal kaynakları, yetişmiş insan gücü, ve son teknolojilere adapte olmuş tedavi yöntemleri sebebiyle uluslararası hastalar tarafından özellikle bazı branşlarda-estetik, göz hastalıkları, diş hekimliği, kadın hastalıkları, kulak burun boğaz, fizik tedavi ve rehabilitasyon,... - yıllar içinde artarak tercih edilen bir ülke olduğu görülmüştür. Covid-19 salgını dolayısıyla yaşanan seyahat kısıtlamaları, medikal turistlerin değişen öncelikleri, ülkelerin sağlık politikalarındaki karneleri hız kazanan sağlık turizmini doğrudan etkilemiştir. Bu bağlamda bu krizi iyi yöneten ülkelerin sağlık turizminde itibarını ve güvenilirliğini artıracakları öngörülmektedir. Sağlık turizmini ülke markalaşması içinde değerlendirmenin ve güncel örneklerle ortaya koymanın alandaki tüm paydaşlara fayda sağlayacağına inanılmaktadır. Ayrıca bu alanda tanıtım çalışmaları yürütecek pazarlama profesyonelleri, halkla ilişkiler uzmanları, reklamcılar ve araştırmacılar için de çalışmanın yol gösterici olacağı düşünülmektedir.

Anahtar Kelimeler: 1. Markalaşma, 2. Ulus Markalaşması, 3. Ülke İmajı, 4. Sağlık Turizmi

ABSTRACT

Investments made and resources owned in the field of health in Turkey have increased the interest in health tourism, which is one of the types of tourism with the highest added value. In consequence of factors such as globalization, international collaborations, the expansion of people’s travel opportunities, the increase in the elderly population, the rising awareness of people who want to live healthy and long, and the fact that people can have instant information about new treatment methods thanks to the effect of digitization, health tourism is of critical importance for countries to promote themselves and raise their reputations. Health tourism, which can be served throughout the year regardless of a season, differs from other types of tourism both in this respect and due to the diversity of its target audience. This study aims to examine the place of health tourism in general country promotion strategies by discussing the promotional activities in health tourism at the national and international levels. This study, which is based on literature analysis, aims to determine the potential of the country, to discuss different promotion strategies and methods that can be created in accordance with the target audiences, and to deal with communication activities. In the light of the researches, if Turkey can manage its health tourism well, it has the potential to be increasingly

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preferred over the years by international patients, especially in some branches (plastic surgery, ophthalmology, dentistry, gynecology, otolaryngology, physiotherapy, and rehabilitation, etc.), due to its thermal resources, trained manpower, and treatment methods adapted to the latest technologies. Travel restrictions due to the Covid-19 epidemic, the changing priorities of medical tourists, and the reports on the health policies of countries have directly affected the accelerating health tourism. In this context, it is predicted that countries that manage this crisis well will increase their reputation and credibility in health tourism. It is believed that assessing medical tourism within the country branding and presenting it with current examples will benefit all stakeholders in the field. Additionally, it is believed that the study will be a guide for marketing professionals, public relations specialists, advertisers, and researchers who will carry out promotional activities in this field.

Keywords: 1. Branding, 2. Nation Branding, 3. Country Image, 4. Health Tourism

INTRODUCTION:

The tourism sector is one of the fields that contribute the most to the country’s economy and is considered as a smokeless industry. The tourism industry in Turkey was discovered in the 80s, attracted large investments area in the 90s, and was influenced by the crises and social events in the 2000s, as these investments could not return its worth, the number of tourists decreased, yet sometimes increased. The Coronavirus epidemic, which has entered our lives in recent years and transformed every aspect of life, has had a very negative impact on the tourism sector. It is expected that not only the short-term consequences such as travel restrictions or the change in tourists’ perceptions of a safe country but also the long-term macroeconomic effects such as loss of income and the perception of tourism as luxury consumption will push the sector to more struggle and change.

Although tourism is a sector where borders have disappeared with the effect of globalization, it is susceptible to crises that occur in another geography or in a country at one end of the world (Pforr & Hosie, 2008). In a study that draws attention to the many crises that Turkey has experienced as geography -earthquakes, floods, terrorism, economic crises, etc., it has been emphasized that it is durable compared to other countries in combating the crisis and that the tourism sector can compensate for the losses caused by the Covid-19 epidemic (Çetin & Göktepe, 2020: 92). There are various reasons why tourists visit another country other than their country of residence. When considered in the tourism denominator, there are many reasons such as vacation, entertainment, culture-art, history, sports, education, congress, health, belief, agriculture, and the desire to travel based on a special interest. Tourists involved in medical tourism also have distinctive needs. While some tourists benefit from medical tourism because they do not consider their country’s health services to be sufficient or do not prefer them due to their high budget, others travel to a country they trust for plastic surgery.

One of the sectors most affected by the Covid-19 epidemic has undoubtedly been tourism. In 2019, 662,087 people visited Turkey within the scope of health tourism and 1 billion 65 million 105 thousand USD was obtained as tourism income. With the outbreak of the Coronavirus, a significant decrease (-50%) was experienced in Turkey, as in every country, in 2020, and this number decreased to 388 thousand 150 people (Kalyoncuoğlu, 2021). Murat Işık, General Manager of the Export Development Center (IGEME), stated that the income obtained from health tourism in Turkey exceeded 2.5 billion USD according to the data of the 2020-2021 period. Although many areas that contain the operational process are interrupted during the Covid-19 period, surviving and developing health tourism stakeholders (agencies, hospitals, tourism companies, etc.) have spent this process focusing on new market research, analysis, creation of new targets, and new promotional strategies in line with these targets (IGEME, 2021). It is of great importance for institutions to survive in competitive market conditions, to predict the future by accurately analyzing the developments in the sector in times of crisis, and to adapt to change at all times in order to preserve their existence (Gemci et al., 2009:106).

Although there are many components of the ecosystem that paves the way for the development of health tourism, it is extremely important to protect this area as a country policy. In this context, the concept of nation branding appears in the literature. The success of cultural industry products worldwide, the presence of globally known brands and artists, and the international success of many sectors such as education, health, construction, and tourism increase its influence with the support of this nation branding. Simon Anholt was the first to introduce the concept of nation branding to the literature in 1996 (Ünal, 2017). Anholt states that places, like people, have reputations and perceived images, that they should be managed and that countries should renew themselves with branding theories on the scale of their own conditions (Anholt, 2007: 7). In this context, public diplomacy and nation branding are two important concepts that are intertwined. Public diplomacy includes activities to identify the strengths of states, to present the areas that they will benefit from when they highlight them to the public on a global scale and to establish cooperation. The way to achieve this is to distinguish the right target audience, to develop and implement communication and management strategies specific to each target audience. Nye classified the powers that countries have as a military power, economic power and soft power. Nye described the concept of “Soft Power” as to arouse admiration, attract attention, and reveal the values, culture and policies with the help of public diplomacy to create a positive impression in the global public by communicating based on persuasion (Nye, 2005: 37).

Brand Finance, reputable in the country image ranking, expressed the soft power components with the following titles (Brand Finance Global Soft Power Index, 2021).



Figure 1. Soft Power Components (Brand Finance Global Soft Power Index, 2021).

In the management of nation branding and public diplomacy, the marketing strategies and promotional activities that countries will create to achieve success in the international arena and to have a reliable and high-reputation country perception are of importance (Yağmurlu, 2019: 122). Shimp and Sharma pointed out the effects of the media on the country’s image and stated that “gatekeepers” affect attitudes about countries (Shimp & Sharma, 1987: 288). Determining a country’s promotion strategy with a correct vision and taking action by preparing a promotion plan in accordance with the strategies will in a sense replace an existing and accepted passport on the world stage. In this context, in the first part of the study, nation/country branding was addressed, in the second part, the branding dimension in tourism and health tourism was examined, and in the third part, the communication strategies and action plans to be created were discussed.

1. Nation/Country Branding and Tourism

Today, tourism is one of the most important building blocks in nation/country branding, which constitutes a salvation plan for developing countries. Many economic, social and technological developments affect the countries’ conditions of competition. The brand values created by the countries have played a lifesaver role for their survival and development.

Simon Anholt, who introduced the term destination branding to the literature, is one of the pioneers of “Nation Brands” research. They have been measuring the recognition and image of countries since 2005 with the scale they developed together with GfK Roper establishment. Anholt GfK, which created the “Nation Brand HExagon” and determined the most valuable country brands on a global scale, has analyzed the country brand value in six parameters, namely governance, people, exports, cultural and heritage, investment & immigration and tourism, and evaluated it with 23 criteria included in these parameters. Accordingly, the most important components of the nation brand hexagon are expressed below.



Figure 2. The Anholt-GfK Nation Brands Hexagon [(Anholt- GfK, 2008: 186) as cited in Mahraus and Hassan, 2019:14].

Dinnie, another one who made a name for her work in the field, stated that the nation branding represents the umbrella branding, which covers all brands in the country, and that it should be the first step to be developed. Dinnie further drew attention to the importance of making efforts to promote endorsed brands -such as tourism, export, investment, art, sports- in the next stage, and in the third

stage, pointed out that steps should be taken to identify important points of interest for tourism, especially regions and cities, which can be gathered under the title of standalone brands, and to brand sports clubs, export products, and services. (Dinnie, 2008: 181-200).

Brand Finance, with its own brand, Nation Brand Impact™, evaluates countries with the headings of encouraging inward investment, adding value to exports, and attracting tourists and skilled migrants (Brand Finance, 2021). This research, which deals with the title of tourism as ‘domestic tourism’ and ‘international tourism’, covers all the efforts to be made to motivate the residents of the country to meet their vacation requirements in their own country and to host international tourists at the same time.

The perception of a country in the world directly affects its tourism. It determines not only the level of trust and prestige it has but also the type of tourism to which the tourists will be directed and the profile of the future tourists. Kotler stated that every field from the traditions of the country to the international relations report, from the structuring of the mass media to the culture-art equipment, from the cuisine habits to the attire styles affects the image of the country (Kotler & Gertner, 2002). Italian fashion and design, French cuisine, American movies can be given as examples. Travels from all over the world to Italy for fashion week or wine tasting trips to the villages of France can be considered in this context. Branding is also the most important step to stand out amongst others. When it includes special, country-specific elements such as an identity card, it becomes different from others and can make a difference.

Branding in tourism started to increase in the world in the 80s. For example, when Spain gained full membership to the EU in 1986, while renewing its identity thanks to the social transformation and economic change it went through, it entered the world stage with the slogan “Spain is passion”. They have tried to engrave this slogan in their minds in all their communication activities, by staying true to the same message in every field from music to art, architecture to fashion. An example of this is the story of the USA, which is remembered with a long-term effort, by preserving the “American dream” theme in every discourse from economy to foreign policy, from the world of literature to the movie industry (Kaleağası, 2021). Turkey, on the other hand, emphasized the “cheap holiday” that it developed with the discourse of price policy in international tourism for years, and it took time to build a new tourism perception in Turkey by getting rid of the promise of sea-sand-sun. In a study pointing out the necessity of determining the areas that Turkey should focus on in order to get rid of this perception, it was emphasized that the support of international opinion leaders should be sought. It was stated that it would not be enough to just refer to the natural beauties, and that all the differences of the city, from history to art, should be packaged within the framework of a life experience (Altınbaşak & Yalçın, 2010: 241-248).

It can be observed that Turkey attracted the attention of the international media with its promotional campaign, which achieved a significant breakthrough in 2008. In the German press, terms such as “enchanted, paradise, beautiful sunshine, treasure” were used for Turkey’s riches. From the beginning of the year, the Ministry has broadcast Turkey ads with the theme of sea-sand-sun, history, and nature on the channels of KW and RTL, which have the highest ratings in Germany, on SAT1, VOX, and Tele 5, on 10 websites including www.google.de and in the most followed 21 magazines such Germany’s Focus, Der Spiegel, Bild der Frau, and Touristik Aktuell Events. In the promotional campaign, in which 300 taxis, buses, and trams dressed as Turkey advertisements on the streets and streets of five cities continued to remind the Germans of Turkey all year, tourists were invited to Turkey through 3,227 billboards. In addition, the ministry, which hosted German journalists in Turkey, worked on advertisements with the world’s major tour operators such as Öger Tur, TUI, and Thomas Cook. As a

result of this campaign carried out by the Ministry, many news about Turkey was published in the German press: “You can forget about the cold winter of ‘Germany’ around Antalya and Side” in Tina Magazine; “Antalya with its dreamy beaches that fascinate tourists” in *Schöne Woche*, “Bodrum, we are coming” in BZ, “Blue Miracles of Antalya” in *Hannoversche Allgemeine*, “Oriental Snow” in *Thüringer Allgemeine Erfurt*, “Snow happens in Uludağ” in *Volkszeitung*, “Raki instead of tea” in *Lausitzer Rundschau*, “Heavenly winter travel in Turkey” at *Münsterlandische Tageszeitung*, “Beautiful sunshine everywhere” at the *Nordsee Zeitung*, “Miracle region made of stone, sand and clay” at *Berliner Zeitung* (Türkiye Turizm, 2008).

Turkey was introduced as one of the successful countries in the sector in 2009 when the global crisis had a severe impact on the world tourism sector. The Times, one of the leading newspapers in England, announced Turkey as the “success story of 2009 in tourism” in a news publication on its website. The newspaper, discussing which countries the British go-to for their holidays the most, commented that “Turkey, which quickly caught up with Greece, is a rising star thanks to the holiday-makers who aim to stay away from the strong Euro and the facilities built in the southwest”. The news also stated that Turkey and Greece are the two countries that make their voices heard in mass tourism and that India and the United Arab Emirates attract richer tourists (Hürriyet, 2009). At this point, “mass tourism” as stated by The Times supports the perception that Turkey has created in minds for years. Promotional campaigns have been carried out in Turkey for years, supporting the image of sea-sand-sun and cheap vacation in the tourism sector, however, it is clearly seen in the new campaign discourses that this strategy has begun to change in recent years. With the change, different specializations in tourism have become prominent, and accordingly, target audience diversity has emerged.

The Covid-19 epidemic, which is the crisis experienced by the whole world, has affected every mechanism of the tourism sector. The expression “the worst tourism season in 80 years” was used for travel restrictions and these difficult days when life stopped and interrupted. Due to the epidemic, the tourism sector, which covers 10 percent of the world economy and has a transaction volume of approximately 9 trillion dollars, has shaken the USA, France, Spain, China, Italy, and Turkey, which are the most visited countries in the world, as well as countries such as Thailand, the Philippines, and Indonesia, whose economy is largely based on tourism. Emphasizing that these losses are relatively less in health tourism compared to other types of tourism, Prof. Tengilimoğlu stated that health tourism will have the advantage of being a type of tourism that spans 12 months (İHA,2020).

Turkey is one of the rare countries where several seasons are experienced in different regions at the same time. Therefore, keeping tourism alive in these lands every day of the year is of great importance both for providing foreign currency inflow and for the management of the perception of the country. For the development of tourism, it is necessary to diversify, in other words, to invest more in areas such as thermal, winter, health, congress, sports, highland tourism and to give wide publicity to promotions to attract international tourists to these areas.

2. Health Tourism

The high health costs in various countries, the increase in the elderly population, the decrease in transportation costs, the increase in health institutions that offer alternative treatment methods under economic conditions, advanced technological infrastructure have all contributed to an increased number of travels for treatment and good living. The emerging-market affects many components from the international agreements of the states in the field of health to their incentives, from the management of health institutions to the promotional activities (Aydın, et al., 2011: 92; Dinçer, 1993:

5; Pakkan, 2021). From this point of view, all processes and activities covering inter-provincial or international travel for treatment and vacation are defined as “Health Tourism”.

Developed countries may be in a more fortunate position in the international arena with their economic and technological superiority. It is important to be able to transfer the advantage to the areas where the tourism and health sectors intersect. A study that points out the importance of promotion and lobbying in the health sector has emphasized that each mechanism has different importance in the sector, from institutions dealing with health such as the Ministry of Health, to hospitals, from suppliers to consultants, from international insurance organizations to a competent promotion team in the field (Badulescu & Badulescu, 2014: 406-415). Health tourism, especially for nearly 20 years, emerges as a growing tourism type in Turkey. Looking at the definitions in the literature, while there are those who define it as therapeutic travel, there are also those who define it as a type of tourism that allows health institutions to grow by using the potential of international patients. Although there are different classifications for health tourism, it can be examined under three titles: medical tourism, thermal tourism or spa-wellness tourism, and advanced age tourism, which includes care for the disabled and elderly (Aydın, 2008: 7).

Eric Cohen classified the tourist profile in health tourism as tourists only, tourists treated on vacation, patients on vacation, and patients only. Stating that determining this is important in terms of creating service types and determining communication strategies in the market, Cohen stated that the most important profile in health tourism is the patients only profile (İçöz, 2009: 2260-2261).

International health tourism provides important economic contributions to countries. For this purpose, the foreign exchange left by tourists from different countries is an opportunity to close the current account deficit of the countries. According to the International Health Services Inc. (USHAŞ), which was established under the coordination of the Ministry of Health, within the scope of health tourism, there are 30 million people who go outside their own country and receive service. The expenditures made in the field of health tourism in the world have been reported as approximately 500 billion dollars. This figure is estimated to be much higher when unregistered services are included (USHAŞ, 2021). Health tourism has been the gateway to the economy of many developing countries. For example, after the economic crisis prevailing in Asia in 1997, the country’s administrators considered health tourism as a lifesaver, and the advertising and public relations activities they started in this area worked and caused them to become economically stronger. Thailand has become a popular destination for international tourists with its plastic surgery practices performed with a low budget compared to developed western countries (Turkish Health Foundation and Health Association, 2010: 13-16).

According to the 2019 report of the International Society of Aesthetic Plastic Surgery (ISAPS), which was established in 1970 and is a leader in aesthetic and cosmetic surgery and accepted as a global authority, among the countries that perform global aesthetic operations in health tourism in the world, America ranks first with a share of 15% in the world, followed by Brazil as the second country that follows it very closely. Then, China, Japan, South Korea, India, Mexico, Russia and Turkey are listed. In this global-scale comprehensive report, Turkey ranks in the top 10 in all categories (ISAPS, 2019).



TURKEY

TOTAL NUMBER OF
PROCEDURES IN TURKEY
754,392

TOTAL SURGICAL PROCEDURES 351,930

FACE & HEAD		BODY & EXTREMITIES	
Brow Lift	6,003	Abdominoplasty	18,807
Ear Surgery	10,107	Buttock Augmentation	5,742
Eyelid Surgery	35,496	Buttock Lift	1,900
Facelift	11,296	Liposuction	41,847
Facial Bone Contouring	3,756	Lower Body Lift	3,045
Fat Grafting (face)	26,100	Thigh Lift	3,596
Neck Lift	7,047	Upper Arm Lift	5,351
Rhinoplasty	61,495	Labioplasty	3,944
TOTAL FACE & HEAD	161,298	TOTAL BODY & EXTREMITIES	84,231

BREAST		MOST COMMON PROCEDURES	
Breast Augmentation	45,893		
Breast Implant Removal	3,901		
Breast Lift	22,055		
Breast Reduction	24,955		
Cycomastia	9,599		
TOTAL BREAST	106,401		

	TOTAL	% OF TOTAL
Breast Augmentation	45,893	13.0%
Liposuction	41,847	11.9%
Eyelid Surgery	35,496	10.1%
Fat Grafting (face)	26,100	7.4%
Breast Reduction	24,955	7.1%

TOTAL NONSURGICAL PROCEDURES 402,462

INJECTABLES		FACIAL REJUVENATION	
Botulinum Toxin	199,506	Chemical Peel	2,103
Calcium Hydroxylapatite	2,857	Full Field Ablative	10,498
Hyaluronic Acid	140,795	Micro-Ablative Resurfacing	13,848
Poly-L-Lactic Acid	0	Photo Rejuvenation	4,655
TOTAL INJECTABLES	343,157	TOTAL FACIAL REJUVENATION	31,103

OTHER		MOST COMMON PROCEDURES	
Hair Removal	21,707		
Nonsurgical Fat Reduction	6,496		
TOTAL OTHER	28,203		

	TOTAL	% OF TOTAL
Botulinum Toxin	199,506	49.6%
Hyaluronic Acid	140,795	35.0%
Hair Removal	21,707	5.4%
Micro-Ablative Resurfacing	13,848	3.4%
Full Field Ablative	10,498	2.6%

Figure 3. Total Number of Procedures in Turkey.

TOP 10

COUNTRIES RANKED BY TOTAL NUMBER OF PROCEDURES

RANK *	COUNTRY	TOTAL SURGICAL PROCEDURES	PERCENTAGE OF TOTAL SURGICAL PROCEDURES	TOTAL NONSURGICAL PROCEDURES	PERCENTAGE OF TOTAL NON-SURGICAL PROCEDURES	NUMBER OF PROCEDURES	PERCENTAGE OF TOTAL
1	USA	1,351,917	11.9%	2,630,832	19.3%	3,982,749	15.9%
2	Brazil	1,493,673	13.1%	1,072,002	7.9%	2,565,675	10.3%
3	Japan	249,543	2.2%	1,223,678	9.0%	1,473,221	5.9%
4	Mexico	580,659	5.1%	619,804	4.6%	1,200,464	4.8%
5	Italy	314,432	2.8%	774,272	5.7%	1,088,704	4.4%
6	Germany	336,244	3.0%	647,188	4.8%	983,432	3.9%
7	Turkey	351,930	3.1%	402,462	3.0%	754,392	3.0%
8	France	320,997	2.8%	423,084	3.1%	744,081	3.0%
9	India	394,728	3.5%	249,024	1.8%	643,752	2.6%
10	Russia	483,152	4.3%	93,735	0.7%	576,886	2.3%

Figure 4. Countries Ranked by Total Number of Procedures.





Figure 5. Countries Ranked by Estimated Number of Plastic Surgeons

The number of people visiting another country is increasing every year in today’s stressful living conditions, not only for therapeutic purposes, but also to benefit from thermal springs/SPA centers for alternative treatment needs such as rest, relaxation, rejuvenation, and feeling good. As a part of health tourism, Turkey, which is one of the seven richest countries in the world in terms of thermal springs and thermal tourism, has not been able to evaluate its resources correctly and efficiently for years. The inadequacy of the government’s policies towards this, weaknesses in business management, insufficient use of communication technologies, and the lack of professional websites caused this great advantage to remain idle (Bedük, Zerenler & Soysal, 2008: 155).

In health tourism in Turkey, thermal/spa tourism used to come to mind at first, however, much progress has been made in this field in the last 20 years. With its growth stages, the health tourism ecosystem has expanded its scope by offering tourists both aesthetic and thermal tourism/SPA/Wellness preferences for treatment. Thermal tourism, elderly tourism, medical tourism, treatment centers in advanced technologies, infertility, aesthetic surgery are among the fields of study of organizations interested in health tourism. While it covers a wide variety of areas such as health tourism, hair transplant, dental treatment, in-vitro fertilization treatment, plastic surgery, it also provides services in places such as hospitals, hotels, spas, mineral springs, spa centers, health cure centers, etc. The prominent clinical branches preferred by international patients are obstetrics, internal medicine, ophthalmology, medical biochemistry, general surgery, dentistry, orthopedics and traumatology, infectious diseases and ear-nose-throat branches (USHAŞ, 2021). According to TURSAB’s

future projection in 2014, Turkey would reach 2 million visitors in health tourism and generate 20 billion dollars in revenue in 2023 (Şahbaz, 2018). With the Covid-19 epidemic affecting the whole world, these figures need to be updated. Today, investments in this field have increased with the state’s incentive systems and promotion supports. Government incentives given in Turkey are classified as Registration and Protection Support, Consultancy Support for Report and Overseas Company Acquisition, Documentation Support, Advertising, Promotion and Marketing Support, Overseas Unit Support, Consultancy Support, Agency Commission Support, Translation Services Support, Patient Transportation Support, and incentives covering the expenses of training, promotion and marketing activities organized exclusively for abroad with the participation of institutions/academics/experts/related persons and organizations invited to the country (Tontuş, 2017). As can be understood from these incentives, integrated marketing management and branding are vital for the future of health tourism. Within the scope of this study, communication management strategies that have been and should be done for the development of health tourism in Turkey are discussed in Chapter 3.

3. An Assessment on Health Tourism in Turkey

Not only is marketing management considered as a set of strategies created to increase sales volume today, but it also includes the process of establishing sustainable relations with its stakeholders by acting with a value-creating perspective of the institution. The ability of the institution to realize the strategies that will serve its existential purpose with “value-driven” practices will help it stand out amongst other institutions. Raval and Grönroos (1996) defined the equation that needs to be established in order to increase the value of a product or service in the eyes of target audiences as increasing the benefit perceived by the customer and reducing the cost perceived by the customer (Raval & Grönroos, 1996: 20-26). Kotler and Keller (2009) drew attention to the importance of the selection of the target market and the correct communication with the target audiences for the institutions to reach their goals and evaluated the analysis, planning, implementation, and control of the programs for the design of the mutual shopping process within the scope of marketing management.

According to Kotler and Armstrong (2013), establishing and increasing sustainable and solid relationships with stakeholders is possible with “relationship marketing”. Gummesson affirmed this opinion and stated that the orientation towards relationship marketing is based on globalization, the strengthening of the competitive environment, the rapid transformation in information and communication technologies, the spread of total quality practices, the awareness of customers, the increase in mutual win-win relations with stakeholders, the need for long-term relationships, and the changing nature of organizational working conditions and human resource management (Gummesson, 1999: 72-85). The modern understanding of marketing, which is based on relationships and the needs of target audiences, points to the importance of the concept of integrated marketing management.

“Integrated marketing communication” has a structure in which all communication processes are intertwined. It prioritizes management in which all communication disciplines such as public relations, advertising, and sales promotion contribute to the main message at the scale of their capabilities (Clow & Baack, 2018). The use of all communication tools and strategies in the interaction of organizations with their stakeholders can also be defined as “communication management” in the literature. Ruler and Verčič, on the other hand, proposed the concept of “communication management” instead of the term “public relations” (Van Ruler & Verčič, 2008). In a study that considers communication management as an upper framework, all activities for corporate communication and integrated marketing communication were discussed within this scope (Summak, 2011: 52-71).

There are many types of marketing that are intertwined or used together in the literature, such as word of mouth marketing, guerrilla marketing, viral marketing, lifestyle marketing, experiential marketing, stealth marketing; these types of marketing can be used for each market in the tourism sector, can be evaluated within the scope of “innovative communication management” (İldaş, 2021: 169).

It has been determined that many established disciplines in the literature -such as corporate communication, public relations, advertising, marketing communication, organizational communication, image management, perception management- are intertwined, feed and supports each other. In this case, all these applications that take care of the common interest of the organization become meaningful under the heading of communication management. Organizations want to convey their messages to their stakeholders and see the results in order to ensure that the messages have been delivered. The creation of the content of the message specific to the target audience, and the persuasion methods, techniques, tools, and communication design can be evaluated within the scope of communication management (İldaş, 2021: 8).

Although marketing management is a common denominator that contributes to every field, a definition specific to tourism was required. According to the World Tourism Organization, tourism marketing is a management approach that includes researching products/services and making predictions with a future vision in order to direct the tourist potential in line with the purpose of the establishment/organization (UNWTO, 2021). The four components of marketing, product, price, place, promotion, are also essential in tourism marketing and include organizational audit, marketing strategy, marketing mix decisions, and implementation processes. (David, 2021).

As discussed in the first part of the study, when marketing is addressed in the axis of nation branding, it is considered that the steps to be taken in nation branding are of vital importance for the development of the sectors in the country and the globalization parameter. Nation branding requires good public diplomacy management beyond the marketing activities of institutions. Kotler and Levy (1969: 10-12) suggested that the marketing practices they brought to the literature could be applied to every field; realizing the importance of marketing, the tourism industry has taken many steps to show that this proposal has come to life. Countries, regions and cities have now turned into market objects and have made an effort to make a difference in the global competitive market (Aksoy, 2008: 141). Emphasizing that countries cannot do this with only promotional activities, Anholt stated that branding is much more than public relations management. According to Anholt, investment should be made in the image and perception of the country, and the way to do this is through the policies of the countries. Strong nation brands are formed by investments in “innovation, competitiveness, international relations management and qualified workforce” (Kaneva, 2011: 117-125). In this sense, a study that talks about international lobbying activities, states that government relations, public and industry collaborations and political incentives are important in lobbying studies (Omar, 2009: 47).

While preparing the Nation Brand Impact™ report, Brand Finance explained the parameters used in place branding under the titles of “brand investment”, “brand equity” and “brand performance” (Brand Finance, 2021).

Brand Investment	Website visits, easy to plan trip/visit, value for money, affordable, social media presence, unaided advertising recall, advertising and promotion spend
Brand Equity	Awareness, familiarity, consideration, recommendation, appeal & personality
Brand Performance	Average spend per person/night, length of stay, market share

Table 1. Place Brand Strength Metrics

Van Riel (1995) and Van Riel & Fombrun (2007: 14) discussed corporate communication under the headings of “management communication”, “marketing communication” and “organizational communication”. When the corporate communication element is evaluated in terms of tourism marketing and health tourism, it is essential for the formation of the global image that countries have in the field of health, the structuring of brand values and the strengthening of their reputation (Van Riel & Fombrun, 2007: 36). Management communication includes strategic management, linking personality and identity, as well as the relationships between corporate personality and identity. Van Riel (1995) defined marketing communication as a form of communication that supports the sales of the organization’s goods and services. The tools and techniques used by the organization to achieve its marketing communication objectives are called the “promotional mix”. The key elements of the promotional mix include advertising, personal selling, public relations, direct selling and sales promotion. Within the scope of this study, while determining the communication strategies of the Ministry of Culture and Tourism for health tourism, suggestions will be made within the scope of marketing communication. Van Riel (1995) defined organizational communication as any type of communication that an organization carries out with its corporate stakeholders, with which it has independent relations. Public relations is the oldest known organizational form of communication. In recent years, organizational communication has been divided into various functional areas such as finance and human resources, covering investor relations, relations with the environment, and relations with employees.

As a result of the joint resolution of management communication, marketing communication and organizational communication, countries can adopt attitudes that can change their stance on a global scale. The behavioral change in Indonesia’s tourism policy constitutes an example of this. The authorities had to cut off the tourist flow due to the high demand for the island of Bali. Country managers, who wanted to create a vision of Bali far from the crowd, developed and implemented strategies aimed at reducing middle-income tourists and maintaining and increasing the interest of high-income tourists. Balinese officials preferred fewer tourists and higher incomes over fewer low expenditures. For this purpose, many luxury hotels and restaurants were built and marketing activities were carried out for high-income tourists (Bradley & Blythe, 2014: 88-89).

Hungary, which is one of the important destinations in health tourism in Central Europe with its hot springs, lakes, baths, and SPAs, is one of the countries preferred by international patients, especially for dental surgery and prosthesis. Having easy transportation after EU membership in 2004, acting with an affordable price policy compared to European countries, having hospitals and hotels where English is spoken at good standards, cooperation agreements between the Hungarian Ministry of Health and the British Health Service Commission, international ISO approved hospitals, the package programs that include flight-accommodation-transfer and treatments offered by the clinics have made it easier for Hungary to be preferred by international patients (Işık, 2022:145).

Market selection is very important in health tourism. Cultural differences determine the preferences and wishes of individuals. The customer demands of the USA, Europe, Middle East, Turkic Republics and Iran differ from each other. The use of different messages to reach customers in different markets

is called adaptation. After the determination of product and service quality and the formulation of price policies, the style, and language of the message to be given differ according to the country/geography/region/target audience. The economic, cultural, legal, technological, political, and demographic characteristics of the countries determine the international marketing strategy (Omar, 2009: 36).

Murat Işık, General Manager of the Export Development Center (IGEME), stated that it is necessary to aim to be a doctor country rather than a textile country, and stated that we were tailors, we became designers, and now we are trying to become a brand (IGEME, 2021). At this point, determining the main objectives as a country policy will serve as a compass for many steps to be taken. For example, moving away from the emphasis of sea-sand-sun to promote the country’s tourism has paved the way for fields such as health tourism. Instead of palaces, mosques, belly dances that have been told to tourists for years, promotional movies have been being prepared in order to draw attention to the fields of sports tourism, extreme sports, highland tourism, and health tourism, with the promise of changing lives and providing the experience.

In this context, it should be remembered that each country has its own culture and unique needs. Care should be taken to prepare a separate communication plan for each country. In this direction, separate promotional movies should be prepared for America, Europe, the Middle East, Neighboring Countries and Turkic Republics, and the website of the Ministry of Culture and Tourism should be brought to life by sticking to the same concept. It is known that the promotion of health tourism in the major cities of countries such as Thailand, Jordan, India, and Singapore is realized by the state and through practices such as the health office at the airports of these cities. The expansion of health offices in Turkey will contribute to the accessibility and the trust relationship to be established with tourists. The absence of a complaint-suggestion mechanism for foreign patients coming to our country for health tourism is seen as a deficiency. For example, the absence of any guidance in foreign languages for foreign patients who want to make a complaint or suggestion in the “ALO 184 Health Line” created by the Ministry of Health implies that the importance of the subject is not sufficiently understood. This appears to be a weak spot.

From accreditation to agency relations, communication with international insurance networks, opening promotional offices abroad, market research to be carried out by country, promotional activities, it has been determined that organizations that provide full-range services in health tourism are not available in Turkey. Just as the understanding that the integrated management of all processes emphasized in the integrated marketing management literature will increase efficiency, it is recommended within the scope of this study that the application of this will also be beneficial in health tourism.

In order to ensure the development of health tourism on a global scale in Turkey, as in successful country policies in health tourism, branding studies can be deepened by selecting pilot regions and cities. For example, studies on the evaluation of all resources in the form of classifications can be continued, taking into account the regions where geothermal resources are located. For example, the tourist coming to the country for respiratory tract cure (inhalation) should be provided with a package as needed. This package, created with doctors, should be planned in every detail, from a forest walk in the most historical place of the city to the menu variety that prioritizes healthy nutrition in the hotel where the tourist will stay, such as shopping stops where tarhana, which is produced through women’s employment in the villages, can be bought. It should be aimed to provide an unforgettable holiday experience to the tourists who come to receive health services.

At the launch meeting of the 29th Izmir Health Tourism Summit, IGEME General Manager Murat Işık, who emphasized that Izmir is unique as a brand city in health tourism, conveyed the incentives offered by the state to health institutions. Işık announced that Izmir will become a brand city in health tourism when not only health but also cultural touristic areas are promoted with its hospitals, clinics and thermal tourism facilities. Explaining what has been done for this, Işık said, “Members of the press, agencies, insurance companies and union representatives who are health tourism stakeholders from America, England and Germany will be here. We will carry out studies in order to directly promote the services provided by Turkey regarding health tourism and to determine what they want from Turkey” (Demirparmak, 2017). The government gives incentives to organizations to organize training programs and workshops with the participation of doctors abroad, to position them as the country’s brand ambassadors in health tourism, to direct patients to Turkey for health services when they return to their countries, and to offer them an economic income model as a result (Tontuş, 2017; IGEME, 2021). In this sense, all protocols to be made between countries will pave the way for health tourism. For example, cooperation between municipalities with sister municipalities abroad, determining the criteria of accreditation bodies in the field, and developing good relations with agencies are important factors for influencing success stories.

Once a national strategy is determined to identify Turkey with health tourism, all stakeholders should act together when necessary to support this and serve the Turkish brand. As in the case of America and Brazil, Turkey should aim to increase its market share not only in the number of patients but also in terms of income.

After the literature review and the examination of Turkey’s profile in health tourism, the Master Plan in Thermal Tourism (2007-2023) prepared by the Ministry of Culture and Tourism has been analyzed within the scope of the study, and the following action steps for Thermal Tourism, which is one of the health tourism fields, have been recommended (Republic of Turkey Ministry of Culture and Tourism, 2007).

Examples of Action Steps

Action 1- Creating a master plan by separating regions and cities that can constitute brands in thermal tourism according to their characteristics

Aegean Region: Aydın, Denizli, Manisa, İzmir

By separating the determined thermal tourism centers according to the benefits/types of diseases they treat (heart disease, skin diseases, ...) a separate market target will be developed for all of them, and strategies will be determined and implemented accordingly.

Action 2- Feasibility studies for thermal tourism projects

The areas to be invested will be determined according to the thermal water potential, and zoning plan will be conducted accordingly. The determinations and usage rights regarding the thermal water will be determined by the zoning plans.

Action 3- Improvement of existing facilities

Thermal facilities will be planned as a complex, environmental quality will be increased by protecting green areas around hotels and cure centers, having jogging and excursion tracks in these areas, and arranging entertainment venues for the tourists to have a good time.

Action 4- Tourism Incentives

In order to encourage the private sector, public land and thermal water allocations will be made.

Providing incentives to encourage health tourism for investors, leasing long-term state lands...

Supporting the opening of new hospitals for health tourism.

Action 5- Increasing the architectural qualities in thermal facilities

It will be ensured that the architecture in the spa facilities is made in accordance with the historical and local texture (such as the Ottoman-Seljuk), creating a point of interest.

Action 6- Identifying Pilot Regions

Financial support for infrastructure (road, sewerage, drinking and utility water) and landscaping works will primarily be used for our pilot regions.

Action 7- Establishment of Hospitals in Pilot Regions

The prominent features of cities and spas will be brought together with health tourism on a common ground, and they will be identified with that region, and special hospitals will be established in the cities.

1st Pilot Region: Balıkesir- Edremit- Altınoluk: Asthma Hospital

An Asthma Hospital will be opened with the support of the state, in Altınoluk district of Edremit, Balıkesir, which is known as the second oxygen-richest region in the world after the Swiss Alps.

2nd Pilot Region. Rize: Mental Health Hospital

Therapy tours to relieve stress

Migraine Treatment

Disease of the Era: Depression

3rd Pilot Region: İzmir: Personal Care and Regeneration Hospital

Obesity Treatment

Healthy lifestyle

Gaining Correct Nutrition Habits

Accurate Weight Loss

Action 8- Promotion of thermal tourism

In the brochures for promotional purposes, emphasis will be placed on our regions, which are known for the presence of thermal facilities and thermal water.

The use of thermal water in common spaces will be encouraged instead of individual use in residences, timeshare and housing cooperatives.

Starting from the local residents, the country will be addressed and then the world.

A Health and Thermal Tourism Unit will be established within the Ministry and the Ministry employees will be informed first.

Campaigns will be organized to explain the services and benefits of thermal water and health complex to the citizens of the region through mass media.

Awareness-raising activities will be carried out with government incentives by making regional visits with the Minister of Health.

Action 9- National promotion

Meetings, seminars and promotional programs will be organized to raise awareness of the private sector and society.

Ensuring that the “Cultural Activities Lesson” is included in the curriculum in schools. Within the scope of this course, ensuring that the tourism awareness is established in the students from primary education.

Allowing some courses to be monitored and processed on-site. Supporting schools as the Ministry on transportation and expenses, and to raise awareness of students on Health and Thermal Tourism during cultural trips.

Cooperation with insurance companies will be ensured. Those who want to benefit from health and thermal tourism within the scope of private health insurance will be entitled to a discount. Within the scope of pension insurance (60+), spa discounts will be applied. Thus, tourism for the elderly will be made attractive. By launching the “Healthy Life Card” application, as the museum card application, special discounts will be offered to those who benefit from Health and Thermal Tourism throughout Turkey.

Action 10- International promotion

Positive relations will be developed with health and social aid organizations in foreign countries. Meetings, seminars and promotional programs will be organized to raise awareness of the private sector and society.

Promotion days and invitations will be given to the foreign press.

Health Fairs will be attended, country-specific promotional booklets will be distributed and promotional movies will be screened.

First, Turkish doctors in the world and then international doctors will be contacted and they will be made to recommend Turkey as a prescription.

International Health Congresses will be hosted more. Innovative treatment methods in Turkey will be conveyed by taking place in Medical Congresses.

Seminars will be held throughout the year to inform doctors in different countries.

The collaboration will be made with public relations agencies providing services in the field of Health Tourism abroad. (such as Four Communication and Bell Pottinger Group - UK)

Communication with consultancy companies specializing in health tourism will be increased, and the establishment and expansion of these companies in Turkey will be ensured.

The message “Come to Turkey for your health” will be placed in the perception of tourists abroad with informative brochures. Message contents will be created according to countries such as getting away from city life, renewal, purification, beautification and rest.

Collaborations will be established to provide an alternative treatment abroad for the citizens of the countries and the employees of international companies.

Mass media in target markets will be used effectively. In addition to digital campaigns, participation as a guest in the Health Programs on the television of that country will be provided.

By contacting the Obesity Fighting Association of the relevant country, for instance, interesting package programs will be offered with bulk discounts.

Authentic discourses will be developed, taking into account the language of each country, its unique cultural priorities, and its perspectives on Turkey.

A separate introduction will be prepared for each country. For example; “Obesity Recovery” programs targeting America and “Depression Recovery” programs targeting Nordic Countries can be developed. In the Nordic countries, the rate of suicide and depression is higher due to the fact that the sun does not show its face very much. Therefore, “mental health tourism” for these countries can be concentrated on.

The agenda of the countries will be followed and country-specific packages will be prepared; because the needs of citizens in countries are not static, because they are changing. It is important to follow these changes and to have up-to-date information on this subject. Promotions for advanced age tourism can be made to countries with an elderly population such as Indonesia. For example, drinks and spas that are good for muscle and joint diseases, heart, asthma, and diabetes can be highlighted.

It is also important to present interesting package program names: “The First Breath I Draw”, “Wipe the Slate Clean”, “Hello to My New Life”, “A Happy New Year, A Happy New Me”, “Health First”, “Rebirth Experience”, “Life Rebooting Camp”, “Memory Cleaning Experience”, “Goodbye Pain”, “Digital Detox”.

CONCLUSION:

Nation branding is of great importance for both developed and developing countries’ economies and global perception management. Tourism is one of the fields that contribute the most to the country’s image and economy. The tourism diversity of a country not only attracts tourists from different geographies but also has positive effects on the diversity of the tourist profile. In this context, health tourism makes it possible to serve tourists from all over the world for 12 months throughout the year. Turkey enjoys the advantage of its geothermal resources in health tourism, and has the potential to maintain this trust with its reliable physicians and health institutions in the field of health. The fact that Turkish physicians have knowledge in their fields and carry out successful studies, the use of state-of-the-art instruments and devices, and the offering of medical operations and treatments at much more affordable budgets compared to other European countries indicate a potential that will carry Turkey

further in the field. If this process is managed well and the opportunities are systematically coordinated, both the market share and prestige of the country in the world will increase.

Health tourism is a type of tourism that includes all processes and activities that include treatment as well as holiday, inter-provincial or international travels. Although the definitions in the literature for health tourism differ, they are classified under three headings as “medical tourism”, thermal and spa tourism/spa-wellness tourism, and “advanced age tourism, which includes care for the disabled and elderly”, as they include health procedures and specialties within the scope of this study. When evaluated in the light of the information obtained from the literature review and research results, it has been seen that Turkey has come a long way in terms of branding and integrated marketing management in health tourism, but there is still a long way to go and new markets to explore. All incentives, from investment to promotion by the state, have a great role in improving the sector and, of course, contributing to the country’s image. However, considering the incentives given as a whole, instead of eclectic and independent promotional materials, there is a need for integrated marketing strategies and communication actions that serve Turkey’s main goals and objectives in health tourism.

In order to become a brand country in tourism, a successful “Turkey Perception Survey” is needed first, and these researches should be constantly updated. Then, being aware of the strengths and opportunities, it is necessary to determine the sub-goals and give importance to the training of a qualified workforce that will enable these goals to be achieved. Turkey should implement the right communication strategies in order to develop its advantages with the right product and marketing strategies and to bring them together with the right target audiences at the right time. It will be inevitable to develop different strategies for different target groups, to maintain communication activities uninterrupted, to design innovative projects, to implement them with a successful team, to support and encourage such projects as the Ministry of Tourism and Culture, and most importantly, with the synergy that will be created across the nation.

Just as a single definition cannot be made as an international tourist, it will not be sufficient to make a single market segmentation in terms of countries. We can host, for example, tourists coming from England and longing for the sun on our beaches, tourists who want to escape from the stress of adverse weather conditions and city life at our thermal facilities, tourists with muscle-joint disorders at our spa facilities, medical tourism tourists who want to have a hair transplant in our clinics, elderly people over 65 years old in our rehabilitation centers. In addition, even if they come from the same country for the same health service for the same purpose, the travel packages offered should be diversified according to their demographic characteristics (age, income, etc.). In order for the work to progress healthily, the human resources in every mechanism in this ecosystem, from the health institution to the hotel, from the insurance company to the restaurant, should be well trained, they should be subjected to continuous vocational training in order to know what they serve, the purpose and route of the country, and they should not have a foreign language problem. Currently, it is known that 75% of the promotion in the health sector in Turkey is conducted through digital marketing. The evolution of the strategy of attracting more tourists to the country to increase the potential to generate more income is another important factor for the country’s image. Promotions through both traditional and digital marketing channels should be continued throughout the year in an integrated fashion. It is valuable for the construction of sustainable communication that the tourists who come to the country come back and receive service, that they give advice by expressing their satisfaction when they return to their country, ensuring that doctors from different countries are our brand ambassadors, establishment of liaison offices in market places, information centers that can intervene immediately when incoming tourists have problems, and telephone lines that can be reached 24 hours a day. The correct management of

this interaction between countries and institutions with a purposeful and planned communicative organization will increase the brand value of the country.

In this study, where the importance of health tourism’s contribution to the country’s brand is clearly understood, it has been determined that bringing together perspectives from different disciplines will transform the field for the better. Health sector (Ministry of Health, hospitals, doctors, clinics, aesthetic centers, ...), transportation, accommodation, insurance, catering services, consultants, agencies, accreditation bodies, tour guides, science centers serving the field, academics and students in the relevant departments of universities, researchers should all come together for the health tourism policy of the country, produce solution suggestions, select spokespeople who will contribute to their fields, and raise awareness by updating information in the sector. Due to its multidisciplinary nature and its contribution to the perception of the country, the field should be the subject of more research, and the subject should be examined in particular for sample country profiles. Turkey, which has a constantly rising trend in health tourism, is also a good example for international research in the field of health tourism. It is believed that this aspect of the study will contribute to the literature.

Compliance with the Ethical Standard

Conflict of Interest: The authors declare that there is no conflict of interest.

Ethics committee approval: Ethics committee approval is not required for this study.

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