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CONTENTS

CHAPTER 1

PRE-SERVICE EFL TEACHERS' PERCEPTIONS OF CHATGPT IN LANGUAGE TEACHING AND LEARNING

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INTRODUCTION

Artificial intelligence (AI) is identified as one of the critical turning points in human history (Copeland, 1998). Recent studies suggest that fast development of this technological field has contributed to changes in the labor market, industrial production, and cognitively demanding areas including education and language teaching. AI brought many innovations for educational settings. It has the potential to reduce teachers' workload by assisting with many tasks such as enhancing assessment processes (Vittorini et al., 2020), individualizing students' learning processes (Hasibuan & Azizah, 2023), lesson planning and content development (Hashem et al., 2023). The rapid development of digital technologies has extremely influenced English Language Teaching (ELT). AI-based applications have come to the forefront in the field of English as a Foreign Language (EFL) teaching and have started to be used in increasingly different ways. Innovations such as personalized and automated feedback systems, speech recognition technologies and online translation tools (Kasımi & Fidan, 2023; Zhou & Hou, 2025) directly affect teaching processes in the field of English as a Foreign Language instruction.

Researchers try to understand how technology-mediated environments affect both teaching and learning processes. The recent studies provide a comprehensive perspective by examining teachers' experiences with educational technology, students' perceptions of technology use in ELT classrooms, and the pedagogical opportunities and risks associated with ChatGPT as an emerging artificial intelligence tool in language education (Alharthi, 2024; Hong, 2023; Tencere, 2018). Technology-enhanced ELT environments are mostly perceived as beneficial and motivating for language learners. Most students report that digital tools contribute to comprehension, particularly through the simultaneous use of visual and auditory input, which supports different learning styles and reduces monotony in language classes (Tencere, 2018; Pavlenko & Syzenko 2024; Rahim et. al. 2023). Technology also enables learners to access authentic materials, fostering awareness of language use in real life context. Moreover, students associate technology use with increased academic success and more efficient learning processes. However, these positive perceptions are accompanied by concerns regarding accessibility and equity. The high cost of technological devices and unequal access to digital infrastructure remain important challenges. Teachers' experiences highlight the complexity of technology integration in ELT classrooms. While educators generally express positive attitudes toward digital tools, actual classroom implementation tends to be limited to basic technologies such as presentation software, multimedia resources, and online platforms. More sophisticated uses of technology, particularly those that promote interaction, collaboration, and learner autonomy, are less adopted. Insufficient training, lack of time, heavy workloads, and inadequate institutional support are barriers. These findings indicate that technological availability alone is insufficient to transform teaching practices (Al-khresheh, 2024).

Intelligent chatbots have caught the attention of language educators as they can interact with learners in their target language instantly and realistically (Lee et al., 2020; Fryer et al., 2020). A chatbot which offers synchronous support and tutoring is a computer application that simulates natural conversations with users through text and/or voice. AI-powered chatbots which improve over time can communicate with users intelligently, continuously and act as tireless language-learning assistants (Fryer et al., 2020; Kim, 2018). AI-powered chatbots can contribute the teaching and learning progress by providing rich linguistic input and conversation practice (Huang et al., 2022; Kim et al., 2019). It can grasp,

acquire, and apply information in a variety of jobs at a human level (Schroer, 2023). They are always available and students can practise their language skills anytime and anywhere (Haristiani, 2019). This real-time assistance improves learning by creating opportunities to interact (Ellis, 1999). If the input is challenging for a learner, AI-powered chatbots can provide personalized learning materials (Kuhail et al., 2023). Shortly, these chatbots facilitate an authentic, interactive language-learning environment (Chiu et al., 2023). Moreover, AI-powered chatbots can give evaluations and provide immediate feedback (Huang et al., 2022; Kuhail et al., 2023), also they help students to sustain their motivation and diminish shyness among language learners (Kohnke, 2023). One of the most advanced AI-powered chatbots is ChatGPT ("generative, pre-trained transformer"), which was designed by the Microsoft-backed company OpenAI and released in November 2022. ChatGPT supports language learning by simulating authentic interactions. It can supply the unknown meaning of a word in context, provide sample sentences, correct and explain language mistakes, create texts in various genres, develop questions, offer dictionary definitions, give example sentences and translate the sentences. The literature suggests that ChatGPT can function as a supplementary tutor, assisting learners with writing, vocabulary development, grammatical explanations, and idea generation. For teachers, it has the potential to reduce workload by supporting formative assessment and material preparation. The emergence of ChatGPT introduces a new paradigm in ELT by expanding the scope of technology use beyond traditional digital tools. As a large language model, ChatGPT offers opportunities for personalized learning, immediate feedback, and autonomous language practice, which are particularly valuable in contexts where exposure to authentic English interaction is limited (Hong, 2023).

This study aims to reveal pre-service EFL teachers' perceptions of ChatGPT. In this line, the research questions are:

1) What are the attitudes of pre-service EFL teachers toward the use of ChatGPT in language learning and teaching?
2) How do pre-service EFL teachers perceive the benefits and challenges of ChatGPT in language learning and teaching?

1. METHODOLOGY

1.1. Participants

A total of 14 (9 females, 5 males) pre-service EFL teachers studying in the English Language Teaching department from a state university in the Western region of Turkey participated in the study. The participants consisted of students in the 2nd, 3rd, and 4th grades of the university and their ages were between 18 and 23. The inclusion criterion was to be studying in the English Language Teaching program. Participation was voluntary. They were informed that they should respond to the 8 open-ended questions according to their own opinions and they should express their own ideas.

1.2. Data collection and analysis

Qualitative data collection was carried out through an online questionnaire via Google Forms, which included demographic information and open-ended questions. Among the demographic data questions, open-ended questions (see the Appendix) were used to determine the perceptions of the participants with AI. This digital distribution method ensured timely and efficient data collection from EFL students. Purposeful sampling was used in this study. The participants were reached using snowball sampling technique. The criterion of "data

saturation" was considered during the data collection process. Participants were informed about the study's objectives, the voluntary nature of their participation, and the confidentiality of their responses. The collection of the data lasted four weeks since the participants were approached randomly. After the data were collected, responses for each item were estimated separately and content analysis was performed. The data were collected during the 2024-2025 academic period.

The data derived from the open-ended questionnaire underwent a through qualitative analysis process. The analysis began with the compilation and systematic organization of all responses, which were reviewed multiple times to achieve a comprehensive understanding of the data. Prior to the qualitative analysis, the demographic section of the questionnaire was examined using quantitative methods to offer a descriptive profile of the participants. Subsequently, a structured coding process was conducted to identify key patterns and express viewpoints among students. These preliminary codes informed the thematic analysis, during which related codes were grouped into broader themes reflecting students' perspectives on the integration of ChatGPT in ELT.

2. RESULTS

Two main themes emerging from participants' narratives are presented, each providing a perspective through which the benefits and challenges of ChatGPT's integration into ELT are explored.

The first theme: Pedagogical implications and benefits of ChatGPT use

Many students described ChatGPT as an intelligent, easily accessible, and helpful assistant.

P1: "An artificial intelligence tool that uses the information from everywhere to form a coherent answer"

P3: "ChatGPT is a source that helps me understand complex subjects better".

P4: "An easy access to information"

P8: "It is an artificial intelligence that helps us to find almost every information in seconds." smarter and faster version of Google

P9: "smarter and faster version of Google"

P11: "it is like a thief assistant. it steals information- sometimes infos are incorrect- from all over the web make it a paragraph and present it to you"

P13: "ChatGPT is a tool that helps people in many ways."

P14: "A specialized artificial intelligence robot to access the information you are looking for."

Many students stated that they used ChatGPT for various purposes.

P2: "preparing my homework or asking some topics from our lectures which I have problems about understanding"

P3: *"Personally, I use ChatGPT for research purposes."*

P5: *"For language learning, academic plans."*

P7: *"To help me write long essays sometimes."*

P10: *"research - daily questions that come to mind- homework"*

P11: *"For homework, presentations, lesson plans or things I am curious about etc."*

P14: *"I use it to create a research path for myself, to consolidate and bring together the ideas that come to my mind, and to get ideas for some research resources thanks to the large database."*

Many students stated that ChatGPT is more effective in writing skills.

P2: *"I think it is more useful for writing. We made a homework about making ChatGPT write some genres"*

P4: *"I think it's most effective in writing. It can help with everything from drafting an outline to writing a novel."*

P5: *"Writing, it corrects my faults in essay most of the time. For instance, grammer, spelling, words etc."*

P7: *"In my opinion,chatgpt is more influential in writing because it corrects completely spellong and grammar errors"*

P9: *"I believe it is in the writing field. For example, ChatGPT can easily detect and highlight grammatical errors, unclear sentence structures, or repetitive expressions."*

P11: *"I think it is really advanced in writing."*

P13: *"Writing and Reading. Since it has originally created as a chatbot, these skills work perfectly fine in my opinion"*

When students were asked the main advantages of using ChatGPT in language teaching, they explained the benefits.

P2: *"It's really creative and useful when it comes to preparing lesson plans. I must admit that even myself took the advantage of this opportunity while preparing some of my micro-teachings."*

P4: *"It provides and suggests more language learning sources"*

P5: *"Saves time. It works fast."*

P7: *"It know almost everything about the language, so it is a good advantage to learning more accurate."*

P8: *"It can be used as a private tutor, and this gives the person an advantage."*

P11: *"I can say that it has the ability to provide quick responses by benefiting from different sources at the same time."*

P12: *"It really improves your writing."*

The second theme: Challenges of ChatGPT's integration into ELT

When students were asked whether they would use ChatGPT to learn a new foreign language, most stated that they did not consider it as a safe resource for language learning.

P2: "Probably, I wouldn't because I do not see it as a useful way to learn a new language."

P5: "I would probably consider using Duolingo rather than ChatGPT. Since I have never tried using ChatGPT in that term, I cannot make any comment on that."

P6: "Yes, I think artificial intelligence is a tool equipped with many skills in learning a new language"

P8: "I would use other resources besides ChatGPT because I think it is not enough to teach a language alone."

P9: "no because it is not academic"

In response to questions about accuracy verification, most students indicated that they cross-checked ChatGPT's responses.

P2: "Sometimes it can give wrong answers, but if I push it more it will give me the correct one"

P4: "If I am just asking for some advice, I do not test. However, if I am using it for my lectures, I test it."

P6: "When I use ChatGPT for my home-works and such, of course I checked the accuracy of it. It's just a tool for making the process easier, at the end of the day I am the one responsible for doing those things not AI."

P10: "Yes, especially for my papers and sometimes it gives wrong answers."

P12: "Often, I ask Google again or search from academic sources."

P13: "I ask it to show me the source.

In response to questions regarding the main disadvantages of ChatGPT in language teaching, students highlighted various shortcomings.

P2: "It can be unreliable sometimes"

P3: "As I mentioned before, it can be useful, but I think language is a whole experience and teaching must include real life human interactions, which I think ChatGPT still needs to improve to reach that dimension of communication."

P5: "It corrodes the habit of learning information from books and encyclopedias"

P7: "Like I said before it knows almost everything not all and that's why it can make mistakes. So there should always be someone there to verify or correct it."

P10: "false information and false leading"

P11: "Limited capacity to understand difficult or sensitive issues."

P13: "it is not as effective as native speakers."

When the students were asked how they evaluate the use of ChatGPT from an ethical perspective, they answered that they do not consider it ethical or reliable if it is not used properly.

P1: "Personally I don't think it's the most ethical. The authors of some sources don't allow their work to be used without permission, but AI does that."

P2: "It can cause some problems sometimes."

P4: "It often ignores ethical values"

P7: "I think there is no problem when it is used accurate."

P10: "it steals."

P12: "The important thing is whether you use ChatGPT for a guidance or copying all the work. If you are plagiarizing, then there is a big ethical issue that's for sure."

When the students were asked if their teachers encourage them to use ChatGPT or not, they answered that the answers may change according to the task they gave as homework.

P3: "for idea purposes."

P5: "Not really."

P6: "I don't think so"

P12: "yes, we use it as a tool for our works."

P11: "Not exactly."

P13: "It depends on the situation. Sometimes they can encourage us to use ChatGPT if there are no ethical issues related."

P14: "Not every time but yes they can use."

The results of the study indicate that by offering individualized feedback, vocabulary recommendations and grammatical corrections, ChatGPT can support the development of students' writing skills and enhance their confidence in written expression. In this study, participants indicated that they used ChatGPT safely for a range of purposes, including lesson planning, text summarization, and research activities. They also added that they define ChatGPT as smart, fast and helpful assistant. Nevertheless, they reported that they were unwilling to use ChatGPT for learning a new foreign language, as they did not perceive it as a trustworthy and safe resource and believed that effective language learning requires interaction beyond what this technology can adequately offer. Moreover, most students expressed ethical concerns that may arise from the use of AI-based language learning tools such as ChatGPT. They did not consider these tools to be ethical or reliable due to issues related to data privacy and potential bias in the model's responses. Most students reported a lack of trust in the accuracy of ChatGPT's responses and stated that they often seek

verification from other academic sources. While participants of this study acknowledged the potential of ChatGPT to enhance personalized and dynamic learning interactions, they also expressed notable concerns about linguistic fidelity, the risk of excessive dependence on the tool, and the potential suppression of students' creativity.

3. DISCUSSION

AI tools created an innovative language learning environment by combining modern technology and pedagogical principles. As it is more accessible, effective, and interactive, it has increased students' motivation by supporting the language learning process. As a result of this innovative approach, the language learning process has become more efficient and effective. The rise of artificial intelligence has enabled the use of chatbots to support more personalized and interactive learning experiences (Rahim et al., 2023).

Many studies have explored how teachers' perceptions of educational technologies influence their willingness to adopt and integrate innovative tools into classroom instruction (Aljohani, 2021; Harakchiyska & Vassilev, 2024; Zhang et al., 2023). Harakchiyska & Vassilev (2024) studied the attitude of Bulgarian pre-service teachers to use AI in EFL instruction. The results of their study indicated that participants have an encouraging attitude and willingness to adopt AI. Furthermore, the study indicated that pre-service EFL teachers believed AI-based technologies support the development of learners' communicative skills and enhance their comprehension of orally and visually delivered texts. Aljohani (2021) observed the beliefs and attitudes of EFL teachers and students in Saudi Arabia. They found that teachers and students had positive attitudes towards using AI in learning the English language. Zhang et al (2023), analyzed the key factors shaping preservice teachers' willingness to accept AI-based tools. The findings indicated that usefulness and ease of use were the most significant predictors of pre-service teachers' intentions to employ AI technologies. Moreover, gender differences were shown to influence attitudes, increasing female pre-service teachers' worries about AI use. The study also emphasized challenges arising from weak connections between theory, pedagogy, and ethics. Rahim et. al (2023) investigated the perception of the students towards the usage of ChatGPT as a language learning tool. The results of their study stated that most students believe that using ChatGPT will help them improve their writing skills. They also believe that using ChatGPT will make learning English more interesting. The results of their study are in line with this study as most of the pre-service EFL students in Turkey believe that ChatGPT is more influential in writing.

The main objective of this study was to examine the attitudes of pre-service EFL teachers toward the use of ChatGPT in language learning and teaching. The results of the study were evaluated based on the responses provided by the participants. Their views on the use of ChatGPT were analyzed in terms of its perceived benefits and drawbacks. The results indicated that most students didn't consider ChatGPT as a safe resource for language learning. This result is contradictory to what Rahim et. al (2023) had found because the participants of their study believed ChatGPT as a supportive learning tool and it can engage students through real-world scenarios and support language development in an enjoyable and motivating manner.

Hınız's (2024) study indicated both favorable and unfavorable perceptions among in-service teachers and learners regarding generative AI tools, including ChatGPT. They believed that AI tools enhance language proficiency, but they also argued about the potential risks such as plagiarism, diminished cognitive engagement, and reduced critical thinking. Özkan et al. (2024) reported that while AI was regarded by pre-service and in-service EFL

teachers as enhancing and individualizing teaching practices, it also provoked concerns about ethical challenges and the lack of sufficient training opportunities. Farhi et al. (2023) examined ChatGPT usage among students in the United Arab Emirates, their views, concerns, and perceived ethics. The findings of their study showed that students consider ChatGPT a revolutionary technology that helps students in many ways but also, they have ethical concerns, so they recommend the development of institutional policies and guidelines for the use of AI-based tools such as ChatGPT in educational settings. The results of the current study align with the previous studies, indicating that although ChatGPT is considered to contribute to education, it has concerning shortcomings in certain aspects.

The number of studies examining pre-service teachers' perceptions of AI is increasing in Turkey. The qualitative findings of Yetkin and Özer-Altınkaya (2024) revealed indecisive attitudes among pre-service teachers toward AI, while the quantitative results reported by Eyüp and Kayhan (2023) suggested that AI-related anxiety affects their overall attitudes toward technology use. The study by Taşçı and Tunaz (2024) demonstrated that while pre-service EFL teachers viewed AI tools as beneficial for efficiency and information access, they have concerns related to job security, data privacy, and the risk of diminished critical thinking skills. The findings of Derinalp and Halife (2025) were consistent with those of the present study, with participants in both studies reporting challenges associated with AI, including limited understanding, susceptibility to misguidance, increased anxiety, and ethical concerns such as cheating and plagiarism. Arslan (2025) highlighted the insufficient technical and pedagogical expertise of university-level EFL instructors and emphasized the necessity of professional development in this area. The findings suggest that pre-service EFL teachers' perceptions of AI technologies are complex and evolving, encompassing not only favorable and unfavorable views but also emotional factors such as anxiety and uncertainty, alongside pedagogical aspects including usefulness and ease of use.

In conclusion, with continued advancements in AI technologies, ChatGPT is expected to play an increasingly important role in English language teaching by facilitating personalized learning and offering interactive support to language learners. Nonetheless, the limitations and ethical implications associated with its use should be carefully considered.

4. CONCLUSION

The increasing replacement of traditional knowledge exchange with digital practices has placed technology as a key element of contemporary language teaching and learning (Chapelle & Sauro, 2017). The shift from traditional knowledge exchange to digital technologies has contributed to greater accessibility, increased learner engagement and enhanced educational efficiency. ChatGPT's capacity to present personalized learning experiences emphasizes the urgent need for teachers and curriculum designers to strategically integrate AI tools into instructional frameworks (Al-khresheh, 2024).

In summary, this study highlights that pre-service EFL teachers have nuanced perceptions of using ChatGPT in language teaching and learning. The findings reveal that while there is some optimism about the tool's potential, participants also expressed concerns about issues such as a lack of understanding of AI, susceptibility to misguidance, increased anxiety, and ethical concerns like cheating and plagiarism. These insights underline the importance of incorporating ethical guidelines and critical digital literacy into teacher education programs. Future research could expand on these findings by exploring diverse educational contexts and larger sample sizes to further validate these results.

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APPENDIX

These are the open-ended questions used to collect data in the study:

1) Define ChatGPT
2) What purposes do you use ChatGPT for?
3) Have you ever used ChatGPT when preparing homework, presentations or lesson plans?
4) Which language skills (writing, speaking, reading, listening) do you think ChatGPT is more effective in?
5) If you need to learn a new language, would you use ChatGPT? Why or why not?
6) Have you ever examined the accuracy of the answers given by ChatGPT?
7) How do you evaluate whether the answers provided by ChatGPT are reliable or not?
8) Do your teachers encourage you to use ChatGPT?

CHAPTER 2

THE POETICS OF REMEMBRANCE: INDIVIDUAL AND COLLECTIVE MEMORY IN OTTOMAN DIVAN POETRY

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Introduction

Memory is not merely a repository wherein the past is preserved; it is, simultaneously, an

atelier in which the present is constructed. In Divan poetry, the act of remembrance *zikr*, *yâd*, *hâtır*, *nisyân* transcends the boundaries of individual experience, transmuting into the poetic articulation of collective consciousness. This study examines the memory metaphors in classical Turkish poetry through the axes of Jan Assmann's (2011) cultural memory theory and Paul Ricoeur's (2004) phenomenology of memory. Maurice Halbwachs's (1925/1992) concept of collective memory and Pierre Nora's (1989) theory of *lieux de mémoire* complete the theoretical foundation of this investigation.

Proceeding from the divans of sixteenth- to eighteenth-century poets, this research analyzes the three fundamental functions of memory in Divan poetry the transmission of personal experience, the establishment of cultural continuity, and the construction of identity within a conceptual framework. Paul Connerton's (1989) tripartite typology inscriptive, incorporated, and habit memory and Marianne Hirsch's (2012) concept of *postmemory* furnish contemporary lenses through which the intergenerational transmission of memory in classical poetry may be examined.

The permeability between individual and collective memory constitutes the central problematic of this study: How does the poet's personal *hâtır* transform into communal *yâd*? Through what pathways do the templates of collective memory shape individual remembrance? These questions reveal that the memory poetics of Divan poetry reflects both the distinctive memory tradition of Islamic culture and the shared dimensions of universal memory experience.

To remember is not merely to summon the past anew but to reconstruct it. Every act of *zikr*whether the invocation of a name or the imaginative revivification of a place reshapes the past according to the exigencies of the present. Divan poetry offers one of the most refined laboratories for this operation of reconstruction: while the poet pours his individual experience (*hâtır*) into the molds of collective memory (*yâd*), he simultaneously transforms these molds with his own poetic voice. The individual flows into the communal, and the communal into the individual; this bidirectional permeability is the distinctive quality of Divan poetry's memory poetics.

Contemporary memory studies have illuminated the mechanisms of this permeability from various perspectives. Jan Assmann's (2011) cultural memory theory demonstrates that memory, beyond being an individual faculty, is a social construct transmitted across generations through symbolic forms texts, rituals, monuments. Paul Ricoeur's (2004) phenomenology of memory emphasizes that remembrance is not only a cognitive act but also an ethical one: what we remember, what we choose to forget, determines who we are. Maurice Halbwachs's (1925/1992) concept of collective memory reveals that even individual memories are shaped within social frameworks (*cadres sociaux*), while Pierre Nora's (1989) theory of *lieux de mémoire* analyzes how modern societies fix memory to specific places, objects, and practices.

This theoretical foundation provides a fertile framework for understanding the memory functions of Divan poetry. However, a caveat is necessary: this study does not claim that sixteenth- to eighteenth-century poets "anticipated" modern memory theories. Such a claim would be anachronistic both historically and epistemologically. Instead, the study adopts the principle of *conceptual resonance*: meaningful correspondences are sought between different epistemological traditions Islamic cosmology and Western literary theory without forcing one upon the other. Connerton's (1989) typology of social memory (inscriptive, incorporated, and habit memory) and Hirsch's (2012) concept of *postmemory* provide additional tools for identifying these resonances.

Research Problem and Questions

Memory in Divan poetry has rarely been subjected to systematic examination. Existing studies have generally remained limited to the cataloguing of specific motifs (separation, longing, death); how memory functions as a poetic *strategy*, and which rhetorical and symbolic mechanisms facilitate the transitions between its individual and collective dimensions, have not been sufficiently interrogated.

This study seeks answers to the following questions:

1. What semantic and symbolic functions do memory concepts such as *zikr*, *nisyân*, *hâtır*, and *yâd* assume in Divan poetry?

2. Through what poetic strategies are the transitions between individual memory (the poet's personal experience) and collective memory (cultural and religious remembrance) accomplished?

3. What conceptual tools do contemporary memory theories particularly those of Assmann, Ricoeur, Halbwachs, and Nora offer for understanding the memory poetics of Divan poetry?

Contribution and Structure of the Study

This research aims to offer three fundamental contributions to Divan poetry studies: (1) a systematic semantic analysis of memory concepts; (2) the identification of the poetic mechanisms underlying the interaction between individual and collective memory; (3) the establishment of a dialogic ground between classical Turkish poetry and contemporary memory theories that avoids anachronism.

The study is structured as follows: The first section summarizes the memory theories of Assmann, Ricoeur, Halbwachs, and Nora, identifying possible points of resonance with Divan poetry. The second section analyzes the interaction between individual and collective memory through a conceptual schema. The third section examines the semantic and symbolic dimensions of the concepts *zikr*, *nisyân*, *hâtır*, and *yâd*. The fourth section addresses the three fundamental functions of the memory metaphor. The fifth and sixth sections apply the concepts of Connerton and Hirsch to Divan poetry. The seventh section analyzes the individual memory approaches of selected poets. The conclusion evaluates the findings and offers suggestions for future research.

1. Theoretical Framework: The Conceptual Ground of Contemporary Memory Studies

Memory exceeds a private archive of images; it is socially constructed, culturally transmitted, and freighted with ethical-political weight. This section addresses four foundational theorists of contemporary memory studies Jan Assmann, Paul Ricoeur, Maurice Halbwachs, and Pierre Nora presenting the conceptual tools to be employed in understanding the memory poetics of Divan poetry. The aim here is not to "apply" these theories directly to Ottoman poetry but to establish a fertile dialogic ground conceptual resonance between two different epistemological traditions.

1.1. Jan Assmann: The Architecture of Cultural Memory

Jan Assmann's *Cultural Memory and Early Civilization* (2011) elevates memory beyond individual psychology, conceptualizing it as a cultural phenomenon. Assmann draws a

fundamental distinction between *communicative memory* and *cultural memory*. Communicative memory encompasses approximately three generations, is transmitted through everyday communication, and possesses a relatively fluid structure. Cultural memory, by contrast, extends beyond generations, is fixed through symbolic forms sacred texts, rituals, monuments, poetry and is sustained by institutional structures.

Assmann ascribes three properties to cultural memory: *coherence* memory functions as a meaning-producing system rather than a heap of scattered impressions; *duration* it traverses generations through deliberate transmission; *organization* institutional structures (temples, schools, literary canons) safeguard and relay it.

These three characteristics raise thought-provoking questions regarding the memory functions of Divan poetry. Did the Divan tradition itself function as a repository of cultural memory spanning centuries? Might the *mazmuns*, meters, and narrative patterns that the poet inherited from his masters be read as the poetic equivalents of what Assmann calls "symbolic forms"? The sections that follow pursue these questions through close readings of specific couplets.

1.2. Paul Ricoeur: The Phenomenology and Ethics of Memory

Paul Ricoeur's comprehensive work *Memory, History, Forgetting* (2004) analyzes memory as a three-layered phenomenon. The first layer is the *pathic level*: the passive reception of memory, memories "coming" to us, appearing unbidden. The second layer is the *practical level*: the active use of memory, the conscious effort to remember, the searching for and reconstruction of memories. The third layer is the *ethical level*: the moral dimension of remembrance to whom, and what, are we obligated to remember? Is there a right to forget, and if so, what are its limits?

Ricoeur's layered analysis offers a rich framework for understanding the memory experience in Divan poetry. The distinction between a poet saying "it fell upon my *hâtır*" and "I *yâd* it" may reflect the transition between pathic and practical levels. On the other hand, collective practices such as commemorating martyrs and remembering Karbala resonate with Ricoeur's concept of the "duty of memory" (*devoir de mémoire*). A methodological caution: Ricoeur's categories were not consciously deployed by Ottoman poets, yet they serve as heuristic instruments for discerning memory's manifold dimensions in classical verse.

1.3. Maurice Halbwachs: The Social Frameworks of Memory

Maurice Halbwachs's *On Collective Memory* (1925/1992) stands as one of the foundational texts of memory studies. Halbwachs's central thesis represents a radical social constructionism: there is no such thing as individual memory independent of social frameworks (*cadres sociaux*). Even the "personal" memories we believe we remember are shaped within the frameworks provided by the groups to which we belong family, religion, profession, nation.

This perspective problematizes the "individual" versus "collective" memory distinction in Divan poetry. Even the poet's most seemingly intimate memory recalling the beloved's face, reliving the pain of separation is expressed within the *mazmuns*, images, and narrative patterns offered by the Divan tradition. Individual experience finds voice through collective forms; collective forms are revivified through individual experience. This dialectic constitutes one of the central problematics of the study.

1.4. Pierre Nora: Sites of Memory

Pierre Nora's article "Between Memory and History: Les Lieux de Mémoire" (1989) introduces the concept of *sites of memory*. According to Nora, modern societies have lost "living memory" (*milieux de mémoire*) and have substituted for it "sites of memory" (*lieux de mémoire*) that fix memory to specific places, objects, and rituals. These sites monuments, museums, holidays, sacred texts are points where memory crystallizes and intensifies.

Certain places in Divan poetry carry an intensity that may be read in resonance with Nora's concept. Sites such as the Kaaba, Medina, Karbala, and Mount Sinai are not merely geographical coordinates but symbolic nodes where collective memory intensifies. When the poet invokes these places, he activates, beyond an individual act of remembrance, accumulated meanings spanning centuries. A transposition caution applies: Nora forged his concept for French national memory; adapting it to the Ottoman-Islamic milieu demands sensitivity to that context's distinctive dynamics above all, the ontological status of the sacred.

Theoretical Synthesis: The Principle of Conceptual Resonance

The perspectives offered by these four theorists form a conceptual network that is both complementary and at times in tension. Assmann explains how memory is transmitted through cultural forms; Ricoeur addresses the phenomenological layers and ethical dimensions of memory; Halbwachs analyzes the social construction of memory; Nora examines the spatial crystallization of memory.

This study, rather than "applying" these concepts to Divan poetry, adopts the principle of *conceptual resonance*. This principle signifies the following: meaningful correspondences may be sought between different epistemological traditions Western memory theories and Ottoman-Islamic poetics without reducing one to the other. These correspondences can illuminate both traditions: contemporary theories may help make visible the memory dimensions of Divan poetry, while the practices of Divan poetry may test and enrich the universality claims of these theories.

Research Aims, Scope, and Method

Research Aims

The fundamental aim of this study is to examine the memory concepts in Divan poetry *zikr*, *nisyân*, *hâtır*, *yâd* through the conceptual tools offered by contemporary memory studies, and to reveal the poetic mechanisms underlying the transitions between individual and collective memory.

Data Sources and Sample

The primary data source for this research is the divans of sixteenth- to eighteenth-century Ottoman poets. This period was selected because it represents the "classical" maturity of Divan poetry and because memory concepts were elaborated within a rich semantic network during this era.

Method of Analysis

The research adopts a qualitative textual analysis method. The analytical process comprises three stages:

Stage 1 Concept Identification and Semantic Mapping: Couplets containing *zikr*, *nisyân*, *hâtır*, *yâd*, and related concepts were identified in the selected divans, and the semantic fields of these concepts were mapped.

Stage 2 Poetic Strategy Analysis: The identified couplets were examined in terms of the rhetorical devices through which transitions between individual and collective memory are achieved.

Stage 3 Conceptual Resonance Evaluation: The identified poetic strategies were compared with the conceptual frameworks offered by contemporary memory theories.

Limitations

This research has certain significant limitations: (1) The study is limited to sixteenth- to eighteenth-century poets; (2) The research relies predominantly on Western memory theories; (3) The translation of Ottoman memory concepts into contemporary theoretical terms may inevitably result in certain losses of meaning.

2. Findings: Poetic Transitions Between Individual and Collective Memory

2.1. The Dialectic of Individual and Collective Memory

In Divan poetry, memory does not remain a purely individual experience; the poet's personal *hâtır* is shaped within the *mazmuns*, images, and narrative patterns offered by the tradition, transmuting into collective *yâd*. The transformation runs both ways: collective memory's templates also sculpt individual recall.

2.1.1. Individual → Collective Transition

When the poet's personal experience the pain of separation, the longing for union, the mourning of loss is expressed within the tradition's *mazmuns*, this experience becomes potentially shareable by every reader.

2.1.2. Collective → Individual Transition

Conversely, the grand narratives of collective memory Karbala, Layla and Majnun, the story of Joseph are employed to frame the poet's individual experience.

2.2. The Semantic and Symbolic Map of Memory Concepts

2.2.1. Zikr: Remembrance and Invocation

Zikr, of Arabic origin, carries the meanings of both "remembering" and "invoking, mentioning." In Islamic tradition, *zikr* denotes especially the practice of invoking God; in this sense, *zikr* is not merely a cognitive remembrance but simultaneously a devotional and existential act.

2.2.2. Nisyân: Forgetting

Nisyân, of Arabic origin, means "forgetting." In Divan poetry, *nisyân* is generally presented as a negative state: the forgetting of the beloved signifies faithlessness and betrayal.

2.2.3. Hâtır Memory/Heart

Hâtır, of Arabic origin, carries the meanings of both "memory, mind" and "heart, inner world." This polysemy is extremely significant for Divan poetry's understanding of memory.

2.2.4. Yâd Commemoration and Remembrance

Yâd, of Persian origin, means "commemoration, remembrance." In Divan poetry, *yâd* is generally used as an expression of respect and love: to "*yâd*" someone is not merely to remember them but to honor them through remembrance.

2.3. The Three Fundamental Functions of the Memory Metaphor

2.3.1. Transmission of Personal Experience

Memory is the fundamental means through which the poet transmits personal experiences love, separation, loss, longing to the reader.

2.3.2. Establishment of Cultural Continuity

Memory metaphors ensure the intergenerational transmission of cultural values, narratives, and practices.

2.3.3. Construction of Identity

Memory plays a central role in the construction of both individual and collective identity.

3. Discussion: Theoretical Resonances and Poet-Specific Readings

3.1. Connerton's Typology of Social Memory and Divan Poetry

The typology of social memory developed by Paul Connerton in *How Societies Remember* (1989) analyzes how memory is socially transmitted through three distinct modalities: *inscriptive memory*, *incorporated memory* (embodied memory), and *habit-memory*.

3.2. Hirsch's Concept of Postmemory and Intergenerational Memory Transmission

The concept of *postmemory* developed by Marianne Hirsch in *The Generation of Postmemory* (2012) analyzes how traumatic experiences are transmitted from those who directly lived them to subsequent generations. In Divan poetry, the memories of Karbala carry a strong resonance with Hirsch's concept of *postmemory*.

Metā'-ı ḫūn-ı 'azīzāna müşterī olma

Bu Kerbelâ'da olan bey' men yezîd midür

(Nâbî, Ghazal 99/4)

(Do not make the blood of the beloved ones a commodity, a pretext for gain; for the transaction made at Karbala is the transaction of Yazīd.)

The poet employs the Karbala event as a metaphor through "the blood of the beloved," presenting this traumatic event ironically and critically as an "auction/bargaining" (*bey' men yezid*), thereby creating a critical memory inscription. This is a powerful example demonstrating how the image of "Karbala" in collective memory is encoded in the context of oppression and injustice.

The couplet perfectly fits the theoretical infrastructure of the article in its use of the Karbala event both as a historical reference (cultural memory) and as a "figure of remembrance" for a contemporary situation.

3.3. Poet-Specific Readings

3.3.1. Fuzûlî: Nostalgic and Sufi Memory

In Fuzûlî's poetry, memory is predominantly associated with loss and longing.

<div align="center">

'Ārıżuñ yādıyla nemnāk olsa müjgānum n'ola

Żāyi' olmaz gül temennāsıyla vėrmek ḫāre ṣu

(Fuzûlî, Qasida 3/7)

(If my eyelashes grow moist with the memory of your cheek, so be it; for watering the thorn in hope of the rose is not in vain.)

</div>

In this couplet, the concept of "*yâd*" (remembrance/memory) appears directly. The relationship between the "remembrance" of the beloved's cheek and the moistening of the eyes (a bodily response) exemplifies perfectly the melancholic dimension of memory.

By establishing the connection between "*yâd*" (memory) and "*gül temennası*" (longing for the rose), this is the couplet that best reflects the act of "creating presence in absence," which forms the foundation of Fuzûlî's memory poetics.

<div align="center">

Ẓulmet-i ḥayretde ẕikrüñdür maña vird-i zebān

Ṭūṭiyem gūyā yemüm şekker yėrüm Hindūstān

(Fuzûlî, Qasida 29/1)

(In the darkness of bewilderment, your invocation is the litany of my tongue; as I speak your name, I am like a parrot my word is sugar, my nourishment is India.)

</div>

Through the concept of "*zikr*," the repetitive and linguistic dimension of memory is emphasized.

3.3.2. Koca Ragıp Pasha: Cultural Continuity and the Memory of Renown

In the poetry of Koca Ragıp Pasha, memory is particularly associated with the concepts of renown (*nâm*) and permanence (*bekâ*).

<div align="center">

Ehl-i feyziñ eşeri ḳalmasa da nâmı ḳalır

Zikr-i Cem dâ'ir-i bezm olmadadır câm şikest

(Koca Ragıp Pasha, Ghazal 15/6)

(Even if the works of the people of grace disappear, their name endures; though the assembly has dispersed, the memory of Jamshid still echoes in that broken cup.)

</div>

This couplet, by elaborating the idea that "even if one's work disappears, one's name (*nâm*) shall remain," directly addresses the themes of "memory of renown" and "cultural continuity" that

are to be discussed in the section on Bâkî. The phrase "*zikr-i Cem*" (the remembrance of Jamshid) is also an allusion to collective memory.

3.3.3. Nef'î: Critical and Polemical Memory

Space constraints preclude extended analyses of Nef'î's polemical deployment of memory in panegyric (*qasida*) and satire (*hiciv*), and of Şeyh Gâlib's mystical-existential elaborations; these merit separate treatment.

Conclusion and Evaluation

Summary of Findings and Return to Research Questions

This study aimed to examine memory concepts in Divan poetry *zikr*, *nisyân*, *hâtır*, *yâd* through the conceptual tools offered by contemporary memory theories and to reveal the poetic mechanisms underlying the transitions between individual and collective memory.

The first question asked what semantic and symbolic functions memory concepts such as *zikr*, *nisyân*, *hâtır*, and *yâd* assume in Divan poetry. The findings have revealed that these concepts are not univocal terms but rather carry multilayered semantic fields.

The second question asked through what poetic strategies the transitions between individual and collective memory are accomplished. The study has proposed that a mediating stratum here termed "poetic mediation" enables transitions between individual and collective memory: the poet's singular *hâtır* is cast into the traditional molds of collective *yâd*, yet simultaneously reshapes those molds.

The third question asked what conceptual tools contemporary memory theories offer for understanding the memory poetics of Divan poetry. The study has adopted the principle of *conceptual resonance* rather than the direct "application" of these theories.

Theoretical and Methodological Contributions of the Study

This research offers several potential contributions to the field of Divan poetry studies and to memory studies: (1) the formulation of the principle of *conceptual resonance* as a methodological tool; (2) the creation of a systematic semantic map of memory concepts in Divan poetry; (3) the conceptualization of the transition between individual and collective memory through the concept of "poetic mediation."

Limitations and Self-Critique

This study has significant limitations: empirical foundation, theoretical balance, periodical limitations, and issues of translation/terminology.

Suggestions for Future Research

Digital humanities and corpus analysis: With the creation of reliable digital divan corpora, large-scale scanning of memory concepts will become possible.

Memory in Islamic philosophy and Sufism: A systematic analysis of the concept of memory in Islamic thought merits a separate study.

Cross-cultural poetics of memory: The memory concepts of Divan poetry may be examined comparatively with other literary traditions.

Memory and performance: The performative dimension of Divan poetry constitutes a separate research topic.

Coda: The Poetic Duty of Remembrance

Memory is not merely to preserve the past but to construct the present and build a bridge to the future. The Divan poets have left their couplets as *yâdigâr* memento, remnant, legacy. When these couplets are still read centuries later, the poet's voice echoes anew; collective memory comes alive in the individual reading experience.

Ricoeur's concept of the "duty of memory" (*devoir de mémoire*) is thought-provoking in this context: to remember certain things is not merely a choice but an obligation. Divan poetry has transformed this obligation into an aesthetic form.

This study proposes that the memory poetics of Divan poetry is not merely a matter of historical curiosity but rather still offers a fertile ground for reflection on the relationships between remembering and forgetting, individual and collective, past and present.

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CHAPTER 3

RECONCEPTUALIZING CONSUMER DECISION-MAKING IN THE DIGITAL AGE:
AN INTEGRATED PERSPECTIVE ON MOMENTS OF TRUTH AND MICRO-MOMENTS

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1. Introduction

Over the past two decades, digitalization has profoundly reshaped the cognitive, emotional, and behavioral foundations of consumer behavior. As a result, consumer decision-making has undergone a fundamental transformation not only in terms of speed, but also in its structure, logic, and interaction patterns (Lemon & Verhoef, 2016). The widespread diffusion of digital technologies has radically facilitated consumers' access to information, while the diversification of information sources has rendered the decision-making process significantly richer and considerably more complex. Consequently, traditional consumer decision-making models, particularly those based on linear and sequential processing stages such as AIDA and the Engel–Kollat–Blackwell model, have increasingly proven inadequate in explaining contemporary consumer behavior (Hoyer, MacInnis, & Pieters, 2023).

Unlike the past, the digital consumer has moved beyond passive information acquisition and has become a proactive designer of the decision-making process. Enabled by the data abundance, content diversity, and interaction opportunities offered by the digital ecosystem, this transformation has not only accelerated decision-making but has also positioned the consumer as the central agent of the process. Consumers now exercise greater control over information search, evaluation, filtering, comparison, and sharing activities; moreover, their interactions with brands are no longer limited to firm-generated messages. Instead, consumers increasingly engage with brands through self-selected digital communities, social networks, short-form video platforms, algorithm-based recommendation systems, and user-generated content (Verhoef et al., 2021). Within this digital environment, consumer behavior is primarily shaped by social proof, algorithmic rankings, and electronic word-of-mouth (eWOM). In particular, the rapid rise of short-video formats such as TikTok, YouTube Shorts, and Instagram Reels has dramatically transformed information acquisition and evaluation processes, rendering decision-making more visual, faster, and increasingly affect-driven. According to findings from TikTok Marketing Science (2024), more than half of consumers consult short-video reviews prior to making a purchase decision, with such content substantially overshadowing the influence of traditional advertising. Furthermore, artificial intelligence and recommendation algorithms have assumed an increasingly dominant role in shaping consumer behavior. Google's *Visual Search Behavior Report* (2024) indicates that a large proportion of product discovery in mobile environments is guided by algorithmic recommendations (Google AI Team, 2024). Similarly, recent research on the recommendation systems employed by Amazon, Netflix, and TikTok demonstrates that algorithmically curated content significantly narrows consumers' choice sets and exerts a strong influence on purchase decisions (Gómez-Uribe & Hunt, 2016; Sunstein, 2023).

Digital transformation has thus shifted the consumer journey from a purely individual cognitive process to a collective decision-making mechanism shaped by social, cultural, and technological stimuli. The "collective intelligence" generated within digital communities such as Reddit, Ekşi Sözlük, and Discord groups has become a critical factor influencing consumers' perceptions, trust formation, and risk assessments (Kozinets, 2020; Schau, Muñiz, & Arnould, 2009). Accordingly, consumers increasingly operate within a shared decision ecosystem that relies not only on personal knowledge, but also on community evaluations, user experiences, and algorithmic guidance. In this context, the digitalization of consumer behavior can be understood as involving three fundamental structural transformations (McKinsey, 2017; Edelman & Singer, 2015):

1. The transformation of the decision-making process from a linear structure into a cyclical, dynamic, and feedback-driven system;
2. The emergence of omni-channel behavior, in which consumers seamlessly move across multiple touchpoints;

3. The increasing dominance of new digital drivers in the decision-making process, such as social proof, short-form video content, and AI-powered recommendation systems.

Departure from a Linear Decision-Making Process. Traditional models of consumer behavior are based on the assumption that the decision-making process unfolds through clearly defined, sequential stages. However, due to the acceleration of information flows and the ease of access enabled by digitalization, contemporary consumer behavior is no longer linear. McKinsey's (2009, 2017) digital consumer decision journey model demonstrates that consumer decision-making is characterized by a repetitive, feedback-driven, and multidirectional cycle. Consumers may return to earlier stages, switch between information sources, and encounter new touchpoints throughout the entire journey. This dynamic increases the unpredictability of the consumer journey and reduces firms' ability to tightly control the decision-making process. Consequently, brands are now required to adopt far more comprehensive experience management strategies in order to influence consumer behavior not only before purchase, but throughout the entire customer journey (Edelman & Singer, 2015).

Seamless Transitions Across Digital Channels (Omni-Channel Behavior). Consumers are no longer decision-makers who operate within a single channel; rather, they have become multi-channel users who repeatedly engage with physical stores, mobile applications, social media platforms, e-commerce websites, short-form video content, and search engines within the same journey. Verhoef, Kannan, and Inman (2015) conceptualize this pattern of digital consumer behavior as "omni-channel navigation," emphasizing that consumers integrate and coordinate multiple channels in a complementary manner. For example, a consumer may examine a product in a physical store, research prices via comparison websites on a mobile device, watch review videos on TikTok, view long-form evaluations on YouTube, read influencer comments on Instagram, and ultimately complete the purchase on an e-commerce platform. This behavior not only accelerates the decision-making process but also enables consumers to reorganize information sources according to their specific needs.

The Increasing Role of Social Proof, Short-Form Video Content, and Artificial Intelligence in Decision-Making. In the digital era, one of the most influential factors shaping consumer purchase decisions is social proof. Online reviews (eWOM), social media posts, user-generated content (UGC), and short-form video platforms such as TikTok, YouTube Shorts, and Instagram Reels have become primary sources of information, particularly among younger consumers (NielsenIQ, 2024). This transformation has shifted the flow of information within the consumer journey from brand-to-consumer communication toward consumer-to-consumer interaction, thereby rendering the decision-making process increasingly community-driven. At the same time, AI-powered search engines, visual recognition technologies, and recommendation algorithms profoundly influence consumers' information search behaviors. Recent studies from 2024 indicate that consumers frequently rely on AI-based platforms as initial touchpoints in their purchase decisions (Google AI Team, 2024; Voice Commerce Insights, 2024).

Theoretical Importance of the Customer Journey and Research Gaps. The customer journey literature emphasizes that consumer behavior is not solely rational, but also encompasses emotional, experiential, and relational dimensions (Lemon & Verhoef, 2016). Nevertheless, several gaps remain in the existing literature. First, the ways in which digital touchpoints influence one another have not been sufficiently explained. Second, the extent to which AI-driven behaviors reshape the decision journey has not yet been fully modeled. Third, the impact of short-form video platforms (e.g., TikTok and Reels) on the decision-making process represents a relatively new phenomenon, and the associated theoretical frameworks are still under development. Finally, the feedback loops within the customer journey (e.g., TMOT leading to a new FMOT) have not been comprehensively examined. In this regard, the customer

journey provides a critical framework, both theoretically and empirically, for understanding digital consumer behavior.

The "Autonomous Journey" of the Digital Consumer. One of the most distinctive characteristics of the digital consumer is the increasing level of autonomy. Consumers now engage in a journey in which they independently decide:

- when to search for information,
- which sources to trust,
- on which platform to complete the purchase,
- how to share their experiences, and
- how to interact with brands.

This phenomenon is referred to in the literature as consumer autonomy, indicating a shift in power toward consumers in their relationships with brands. In this context, McKinsey's digital consumer decision journey model highlights that consumers take control of the information-gathering process, form decisions autonomously, and shape their own journeys through seamless transitions across digital channels (Court et al., 2009; McKinsey, 2017).

2. The Expanding Nature of the Digital Customer Journey

The digital customer journey has evolved into a multidimensional structure that encompasses not only multiple touchpoints, but also consumers' cognitive processes, emotional responses, social interactions, perceptual evaluations, and overall user experiences. Consumers no longer engage with brands through a linear sequence of interactions; instead, they communicate through an interconnected and often simultaneous network of multi-channel touchpoints. Social media platforms, search engines, short-form video applications, online reviews, influencer content, price comparison websites, mobile applications, augmented reality (AR) experiences, and AI-based recommendation systems have become integral components of the consumer decision-making process (Verhoef, Kannan, & Inman, 2015; Davenport, Guha, Grewal, & Bressgott, 2020).

Recent research indicates that the growing complexity of the customer journey stems not only from the increasing number of touchpoints, but also from the frequency of interactions among these touchpoints, algorithmic guidance, the diversity of content formats, and the rising level of consumer autonomy. For example, a global study conducted in 2024 revealed that consumers are exposed to an average of 22 different digital touchpoints throughout their purchase journey (Accenture Digital Consumer Pulse Report, 2024). This development both complicates the management of the customer journey and creates new strategic opportunities for firms. Social media and short-form video platforms, in particular, play a critical role in shaping decision-making processes among younger consumers. On platforms such as TikTok, Instagram Reels, and YouTube Shorts, consumers not only discover products but also shape their evaluations by drawing on the experiences of others (TikTok Marketing Science, 2024). The algorithm-driven content flows on these platforms increase consumers' exposure to brands without their explicit awareness, thereby redefining the early stages of the purchase journey (Bucher, 2021). Similarly, AI-based recommendation systems—such as those used by Amazon, Netflix, TikTok, and Google search—narrow consumers' decision spaces, restructure choice sets, and reduce uncertainty in the purchase process. An examination of Netflix's recommendation engine by Gómez-Uribe and Hunt (2016) demonstrates that algorithms substantially influence consumption behavior and that a significant share of preferred content is delivered through

recommendation systems. Contemporary retail studies further confirm that such algorithmic guidance exerts comparable effects on product selection decisions .

Accordingly, the primary strategic priority for firms within the digital customer journey is to understand this multilayered process, optimize touchpoints, and position the brand within the consumer's mental consideration set before decision triggers emerge. Edelman and Singer (2015) emphasize that early-stage intervention in the customer decision process is a key determinant of long-term brand loyalty and repeat purchase behavior. Consistent with this view, a McKinsey study published in 2024 reports that increasing brand visibility during the early phases of the purchase journey raises the likelihood of purchase by more than 30 percent (McKinsey Digital Consumer Discovery Study, 2024).

The expanding nature of the customer journey has made experience design a critical source of competitive advantage for firms. Lemon and Verhoef (2016) emphasize that customer experience is determined not by a single touchpoint, but by the cumulative experience formed throughout the entire journey. The cumulative nature of consumer experience increases the perceptual weight of each touchpoint and makes a holistic evaluation of the process essential.

In conclusion, the digital customer journey extends beyond traditional touchpoint analyses and represents a multi-source, multi-actor, and data-driven process in which cognitive, emotional, social, and technological components are deeply intertwined. In this process, firms' success depends not only on their ability to manage touchpoints, but also on their capacity to understand the algorithmic, cultural, and community dynamics that shape the consumer journey. To explain the increasingly complex digital consumer journey in greater depth, there is a need for conceptual frameworks that identify the critical touchpoints of the decision-making process; in this regard, the Moments of Truth approach plays a pivotal role in understanding consumer experience in the digital age.

3. The Moments of Truth Framework and Its Transformation in the Digital Age

Although the Moments of Truth framework (FMOT, SMOT, TMOT, ZMOT, and Micro-Moments) was first introduced by Normann within the context of services marketing (Normann, 1991), digital transformation has turned it into a more holistic and behaviorally oriented model for explaining the multidimensional nature of consumer behavior. The marketing literature demonstrates that these critical moments encountered throughout the consumer decision journey shape not only product evaluations, but also perception formation, brand trust, attitude development, and purchase motivations. Recent studies reveal that the Moments of Truth framework has been redefined particularly in relation to consumer psychology, digital trust, social proof mechanisms, short-form video content consumption, and AI-driven touchpoints, positioning it at the core of digital marketing strategies. This transformation indicates that Moments of Truth are no longer limited to initial product encounters or usage experiences; rather, they have become fundamental components of a comprehensive decision architecture shaped by micro-interactions, social references, and algorithmic guidance experienced throughout digital touchpoints (Lemon & Verhoef, 2016; Verhoef et al., 2021; Davenport et al., 2020; Kahneman, 2011).

With digitalization, the Moments of Truth framework has evolved into a more dynamic structure that conceptualizes the consumer decision process as a series of instantaneous and fragmented experiences. In traditional marketing perspectives, decision making largely relied on rational evaluations and limited information sets; in contrast, in digital environments this process has transformed into a complex behavioral domain in which cognitive heuristics, emotional responses, and social influences are intensely activated (Kahneman, 2011). Within

this context, Moments of Truth are regarded as behavioral inflection points that provide insights not only into "what" consumers purchase, but also into "why" and "how" they make decisions.

In particular, the proliferation of digital touchpoints has redefined the formation of Moments of Truth. Social media feeds, search engine results, short-form video content, online reviews, and AI-powered recommendations generate a multitude of stimuli to which consumers are often exposed unconsciously; these stimuli continuously create micro decision moments within the consumer's perceptual field (Lemon & Verhoef, 2016; Davenport et al., 2020). Consequently, Moments of Truth are no longer isolated or singular events, but have evolved into accumulative clusters of experiences that interact with one another, trigger subsequent moments, and are reinforced through feedback loops throughout the consumer journey.

3.1. First Moment of Truth (FMOT)

The First Moment of Truth (FMOT) refers to the critical decision moment in which consumers first encounter a brand in a meaningful way and form their initial perceptions. The concept was originally introduced by Procter & Gamble to describe the consumer's first interaction with a product at the physical shelf in a retail environment (Procter & Gamble, 2005). However, with digitalization, the spatial, temporal, and contextual nature of FMOT has been fundamentally transformed; initial encounters now occur primarily through digital screens and interfaces rather than physical shelves.

In the digital age, FMOT largely emerges within algorithmically organized visibility spaces. The consumer's first point of contact no longer depends on a brand's physical accessibility, but rather on the ranking and presentation logic determined by search engines, social media platforms, and recommendation systems. In this context, the digital transformation of FMOT materializes across several key touchpoints:

- Search engine results pages (Google SERP),

- Discovery and feed pages of social media platforms,

- Recommended content on short-video platforms such as TikTok and Instagram,

- Visual search technologies (e.g., Google Lens),

- AI-driven, personalized algorithmic advertising displays.

The literature indicates that initial encounters in digital environments exert disproportionately strong effects on consumer perception and brand evaluation. Search engine rankings and digital visibility directly shape FMOT by determining which brands enter consumers' consideration sets (Jerath, Ma, & Park, 2014; De Haan, Wiesel, & Pauwels, 2016). These early exposures leave lasting imprints on subsequent evaluation, preference formation, and purchase behavior (Lemon & Verhoef, 2016).

On social media and short-video platforms, FMOT often arises not through deliberate search behavior but via algorithmic content recommendations. Algorithms prioritize content based on users' past behaviors, interests, and contextual signals, leading the initial contact moment to increasingly take the form of *incidental discovery* (Bucher, 2018; Flanagin, Winter, & Metzger, 2022). As a result, FMOT shifts from a consumer-initiated process to a perception-forming moment orchestrated by platform architectures.

In this regard, the diffusion of AI-based recommendation systems has placed algorithmic mediation at the core of FMOT formation. Recommendation algorithms narrow consumers' choice sets by determining which brands become visible and in what order they are

encountered, creating powerful steering effects at the earliest stages of the decision process (Gómez-Uribe & Hunt, 2016; Davenport et al., 2020;). Marketing research highlights that such algorithmic curation partially constrains consumers' perceptual autonomy and transforms decision architectures into platform-centric structures (Sunstein, 2023).

Recent studies have further deepened the understanding of AI and algorithmic influence in marketing contexts. Haenlein et al. (2022) demonstrate that consumer–brand interactions on digital platforms are increasingly shaped by artificial intelligence, turning initial contact moments into a critical competitive arena for marketing strategies. Similarly, Google's 2024 reports on AI and visual search behavior confirm that, particularly in mobile contexts, a substantial share of product discovery occurs through algorithmic recommendations and visual recognition systems (Google AI Team, 2024).

In conclusion, digital FMOT has moved partially beyond the direct control of brands; visibility and first impressions are now largely determined by the algorithmic structures of digital platforms. This shift necessitates a strategic transition from traditional shelf-placement logic toward search engine optimization, algorithmic visibility management, and platform-adaptive content strategies within contemporary marketing practice (Verhoef et al., 2021).

3.2. Second Moment of Truth (SMOT): Evaluation of the Experience and Its Deepening Structure

The Second Moment of Truth (SMOT) refers to the critical stage in which consumers actually experience a product or service and evaluate this experience by comparing it with the expectations formed prior to purchase. In traditional marketing literature, SMOT has largely been conceptualized as a moment limited to the evaluation of product performance. However, within the digitalized customer journey, this concept has acquired a much broader, more complex, and multidimensional meaning. In today's digital economy, SMOT encompasses not only the functional performance of the product but also a holistic set of experiences ranging from delivery processes and packaging quality to customer service, return procedures, and post-purchase support mechanisms (Hoyer, MacInnis, & Pieters, 2023; Lemon & Verhoef, 2016).

In purchases conducted through digital platforms, the consumer experience often extends beyond the brand's direct sphere of control and is jointly shaped by logistics providers, platform infrastructures, automated customer support systems, and third-party service providers. This situation transforms SMOT from a single touchpoint into a multilayered experience cluster in which multiple touchpoints are evaluated simultaneously. Research shows that when assessing post-purchase satisfaction, consumers consider the entire process as much as the product itself, and that a single negative touchpoint can overshadow the overall experience (Lemon & Verhoef, 2016; Voorhees et al., 2017).

Recent literature (2024–2025) indicates that, in digital contexts, SMOT is particularly concentrated around five core areas. First, experience consistency refers to the alignment of service levels across all touchpoints through which consumers interact with a brand; discrepancies between online promises and actual experiences have become one of the primary drivers of dissatisfaction. Second, chatbot-based customer support plays a significant role in consumers' problem-solving and information-seeking processes during SMOT. However, the perceived level of empathy and problem-solving capability of these systems directly influences consumer satisfaction (Davenport et al., 2020).

Third, fast delivery and seamless return experiences have become as critical as product quality for digital consumers. In particular, delayed deliveries or complicated return processes in e-commerce contexts lead to negative evaluations of SMOT and undermine trust in the brand

(Hübner, Holzapfel, & Kuhn, 2016; McKinsey, 2024). Fourth, platform reliability indicates that consumers evaluate not only the brand itself but also the payment infrastructure, data security, and institutional credibility of the platform on which the transaction takes place. Platform-based trust perceptions have thus become a decisive factor shaping whether SMOT is evaluated positively or negatively (Pavlou & Gefen, 2004; Flanagin, Winter, & Metzger, 2022). Finally, the quality of post-purchase communication, including transparent information about order status, delivery notifications, and warranty processes, enhances consumers' sense of control over the experience, whereas a lack of such information generates uncertainty and dissatisfaction (Voorhees et al., 2017).

Emotional responses play a central role in the evaluation of SMOT. Experiences in digital environments can rapidly trigger consumers' momentary emotional states; delivery delays, unsuccessful interactions with automated customer service systems, or ambiguous processes may lead to negative emotions such as frustration and anger. These emotional reactions can cause the overall experience to be perceived negatively even when product performance itself is satisfactory. This demonstrates that SMOT is closely related not only to *what* happens during the experience but also to *how* it is felt by the consumer.

In addition, SMOT can be viewed as a stage in which consumers' perceived level of control is tested. Order tracking, traceability of return processes, and ease of access to customer service strengthen consumers' perceptions of control over the experience. When perceived control is weakened, stress, distrust, and cognitive dissonance may emerge (Hoffman & Novak, 2018). Accordingly, SMOT is shaped not only by the outcome of the experience but also by consumers' perceptions of how the process is designed and managed.

From a theoretical perspective, SMOT is commonly explained through expectancy–disconfirmation theory. Consumers compare the expectations formed during the FMOT and ZMOT stages with the actual experience encountered during SMOT; the outcome of this comparison manifests as satisfaction, disappointment, or cognitive dissonance (Oliver, 1980; Hoyer et al., 2023). In digital contexts, where expectations are largely shaped by algorithmic content, social proof, and platform promises, the strategic importance of SMOT within the customer journey becomes even more pronounced.

Moreover, from a relationship marketing perspective, SMOT represents a critical turning point at which the brand–consumer relationship is either strengthened or weakened. Consumers use brands' responses to errors, complaint handling practices, and problem-resolution approaches as key reference points in their long-term relationship evaluations (Voorhees et al., 2017). In this sense, SMOT becomes one of the foundational stages that determine the initiation of the loyalty cycle.

Finally, SMOT is positioned as a strategic threshold within the digital customer journey that triggers behavioral and social outcomes. The experience formed at this stage directly influences consumers' repurchase intentions, brand loyalty, and the sharing, evaluation, and feedback behaviors they will display in the subsequent stage, namely the Third Moment of Truth (TMOT). Positive SMOT experiences may lead to online praise and brand advocacy, whereas negative experiences can trigger complaints, low ratings, and negative electronic word-of-mouth behaviors (Kozinets, 2020; Flanagin et al., 2022). For this reason, SMOT should be regarded as one of the fundamental breaking points in digital marketing strategies where customer satisfaction is either created or lost.

3.3. Third Moment of Truth (TMOT): The Moment When Experience Is Shared

The Third Moment of Truth (TMOT) refers to the stage at which consumers share their experiences with a product or service with others, provide evaluations, and transform these experiences into a public source of information. TMOT is not merely an individual feedback moment; rather, it represents a critical turning point at which the social, collective, and amplifying dimensions of the digital customer journey become visible. At this stage, consumers make their experiences observable through online reviews, ratings, social media posts, short video content, and platform-based feedback mechanisms, thereby turning individual experiences into collective references that influence other consumers' decision-making processes (Kozinets et al., 2010).

In traditional marketing literature, word-of-mouth (WOM) communication was conceptualized as an interpersonal interaction occurring within limited social circles. With digitalization, however, TMOT has evolved into electronic word-of-mouth (eWOM), characterized by scalability, permanence, and algorithmic redistribution. Digital platforms not only enable consumers to share their experiences but also mediate the ranking, amplification, and systematic presentation of these experiences to other users. This transformation has made the marketing impact of TMOT far stronger and more unpredictable than in the past (Chevalier & Mayzlin, 2006; Flanagin et al., 2022).

Key Drivers of TMOT's Transformation.

The rise of short-form video content (TikTok, Instagram Reels). One of the most salient drivers of TMOT's transformation in recent years is the dominance of short video–based evaluations over text-based reviews. Platforms such as TikTok, Instagram Reels, and YouTube Shorts allow consumers to convey their experiences in visual, emotional, and narrative forms, enabling rapid diffusion through high engagement rates. Recent studies show that experience-sharing in short video formats enhances perceived credibility and exerts a stronger influence on purchase intention compared to text-based reviews (TikTok Marketing Science, 2024).

The growing impact of user-generated content (UGC) on purchase decisions.UGC produced during the TMOT stage is often perceived as more credible and persuasive than firms' official communications. Consumers tend to regard experience-based content created by other users with similar needs as more impartial and trustworthy, particularly during evaluation and alternative comparison stages. The literature confirms that UGC exerts strong effects on brand attitudes, perceived value, and purchase intention (Schau et al., 2009; Kozinets, 2020).

Advances in digital trust and fake-review filtering technologies.Another important factor shaping TMOT is the development of algorithmic filtering systems designed to detect fake reviews and manipulative content. As of 2024, major e-commerce and social media platforms increasingly rely on AI-based trust systems to highlight credible reviews while suppressing low-quality or deceptive content. This shift has led TMOT to be evaluated not only in terms of volume but also in terms of content quality and credibility (NielsenIQ, 2024; Flanagin et al., 2022).

The decisive role of viral evaluations in consumer behavior.Perhaps the most striking feature of TMOT in the digital age is the potential for a single consumer experience to go viral and influence the purchasing behavior of large audiences in a short period of time. Particularly on short video platforms, widely shared positive or negative experiences can trigger sudden demand surges or reputational crises for brands. Recent empirical studies demonstrate that viral user evaluations directly affect perceived risk, brand trust, and alternative evaluation processes (Sunstein, 2023).

From a theoretical perspective, TMOT can be explained through social proof theory and normative influence. In situations characterized by uncertainty, consumers shape their preferences by relying on others' experiences; content with high visibility and strong engagement serves as a powerful directional cue (Cialdini, 2009). The selective amplification of such content by platform algorithms further reinforces the influence of TMOT.

In conclusion, TMOT represents the stage in the digital customer journey at which experience shifts from being individual to becoming a collective input into decision-making. The content generated at this stage not only reflects the satisfaction level of the focal consumer but also serves as the starting point for new ZMOT and FMOT processes for other consumers (Kozinets et al., 2010; Flanagin, Winter, & Metzger, 2022). Accordingly, TMOT should be viewed not merely as an output to be monitored, but as a central process that must be actively managed, analyzed, and strategically addressed within digital marketing strategies (Edelman & Singer, 2015; Lemon & Verhoef, 2016).

At this point, the customer journey no longer follows a linear progression; instead, experience-based content produced during TMOT triggers research and evaluation behaviors in other consumers, initiating a new cycle of cognitive inquiry (Court et al., 2009; McKinsey, 2017). Reviews, ratings, short video evaluations, and user experiences shared on digital platforms become core inputs for pre-purchase information search and play a decisive role at the earliest stages of the decision-making process (Chevalier & Mayzlin, 2006; NielsenIQ, 2024). Consequently, experience sharing at TMOT directly evolves into a research-oriented decision stage (ZMOT), reshaping consumer behavior through collective, experience-based knowledge production (Cialdini, 2009; Kozinets, 2020).

3.4. Zero Moment of Truth (ZMOT): The Research-Oriented Consumer

Another key reason why ZMOT has risen to such a central position in the digital age is the growing consumer need to manage cognitive load. While the abundance of information in digital environments can facilitate decision-making, it can also make it more complex, bringing the phenomenon of information overload to the forefront. When consumers are confronted with numerous alternatives and information sources, they tend to rely on heuristic shortcuts and references they perceive as trustworthy in order to simplify the decision process (Eppler & Mengis, 2004; Bettman et al., 1998). In this respect, ZMOT has become not only a stage of information gathering but also a decision phase in which filtering and prioritization mechanisms are activated to reduce cognitive burden.

Contemporary research indicates that during the ZMOT process, consumers hierarchically structure information sources based on credibility, visibility, and algorithmic ranking. In particular, content that appears at the top of search engine results becomes a primary reference point by narrowing the consumer's consideration set and shaping decision priorities (Pan et al., 2007). Similarly, in omnichannel contexts, even when consumers simultaneously use multiple digital touchpoints, they tend to evaluate these channels in an ordered manner according to perceived trust and functionality (Verhoef et al., 2015). With the diffusion of algorithmic curation, platforms' trust signals and ranking logics create an implicit hierarchy across information sources, thereby influencing which content consumers attend to (Flanagin, Winter & Metzger, 2022). This structure demonstrates, as emphasized in the consumer behavior literature, that information search operates through a systematic and prioritized cognitive architecture (Hoyer, MacInnis & Pieters, 2023). While search engine results often function as the starting point, social media content and user experiences come into play in the phases of validating information and emotionally interpreting it. In particular, first-page results and algorithmically promoted content determine the consumer's alternative set by narrowing the

decision space (Pan et al., 2007; Flanagin et al., 2022). This reveals that although ZMOT appears to be a "free" research process, it is in fact largely shaped by platform architectures and algorithmic designs.

Another defining dimension of ZMOT is the management of perceived risk. Especially in purchases that are high-cost, highly uncertain, or personally consequential, consumers experience ZMOT more intensely and for longer durations. Perceived financial, performance, social, and psychological risks directly influence information search behavior. In digital contexts, perceived risk can be partially reduced through access to others' experiences; therefore, ZMOT also functions as a risk-reduction mechanism (Kozinets et al., 2010).

Experience-based content plays a critical role in lowering perceived risk during the ZMOT stage. Sharing how a product is used, how it performs under real conditions, and what potential problems may arise enables consumers to conduct a mental simulation of the experience. This, in turn, transforms ZMOT into not only a cognitive phase but also a space of experiential pre-living, where consumers "try out" the offering in their minds before purchase (Lemon & Verhoef, 2016).

At this point, the impact of short-video platforms on ZMOT becomes even more evident. The combined presentation of visual and auditory cues allows consumers to mentally "test" a product or service, often generating stronger persuasion effects than text-based information. The 2024–2025 literature shows that short-video content increases both the perceived credibility and memorability of information at the ZMOT stage (NielsenIQ, 2024). As a result, ZMOT is increasingly evolving into a visually intensive, sensory-driven research phase.

The social context of ZMOT is also strengthening. Digital communities, forums, and platform-based user networks function as normative reference groups within the consumer decision process. Consumers tend to find the opinions of individuals who share similar needs, lifestyles, or value systems more credible, a pattern that aligns with social identity theory (Kozinets, 2020). In this sense, ZMOT hosts decision mechanisms grounded not only in individual rational evaluation but also in social belonging and identity congruence.

Developments in AI-based systems further transform the structural nature of ZMOT. Personalized search results, recommendation systems ranking content based on past behavior, and the growing adoption of voice search technologies redefine how consumers access information. These systems can steer consumers toward particular alternatives without their explicit awareness, turning ZMOT into a semi-autonomous decision phase (Sunstein, 2023; Davenport et al., 2020). This shift also places algorithmic transparency and ethical debates at the center of the ZMOT literature.

From a theoretical standpoint, ZMOT is closely associated with approaches such as bounded rationality and structured rationality. In situations where consumers cannot process all available information, they make decisions through reliable signals and heuristic shortcuts (Simon, 1955; Bettman et al., 1998). ZMOT provides a cognitive environment in which these shortcuts are heavily utilized and where social proof, algorithmic ranking, and visual cues guide decision-making.

ZMOT's position within the customer journey makes it not only a precursor to FMOT but also an input to TMOT. The content consumed during ZMOT shapes how consumers evaluate and later share their own experiences in subsequent stages. In this regard, ZMOT can be conceptualized as the primary production space of expectation formation within the customer journey (Lemon & Verhoef, 2016; McKinsey, 2017).

In conclusion, ZMOT is a multilayered decision phase in which the cognitive, social, and technological dimensions of consumer behavior intersect in the digital age. Shaped simultaneously by information abundance, algorithmic mediation, and social proof mechanisms, this stage has become one of the most critical thresholds determining the direction of the customer journey. For this reason, in contemporary marketing strategies ZMOT should be approached not merely as a matter of "being visible," but through holistic strategies that build trust, emphasize transparency, leverage experience-based content, and demonstrate algorithmic awareness (Lemon & Verhoef, 2016; Flanagin, Winter & Metzger, 2022). Yet the digital customer journey does not remain confined to the research and evaluation behaviors concentrated in ZMOT; rather, this cognitive preparation is complemented by short, contextual, goal-driven decision disruptions that arise at different moments of everyday life. Consumers activate the mental framework they develop during information gathering through mobile devices in response to immediate situational needs, making micro-level decisions accordingly. This shows that decision-making in the customer journey is not composed solely of long and deliberate evaluations, but also of instantaneous, situational, and context-sensitive interactions (Court et al., 2009; Verhoef et al., 2015). In this context, the next complementary dimension of the customer journey, Micro-Moments, refers to the critical decision moments in which consumers seek answers to "here and now" needs, most often through mobile devices, and rapidly translate intent into behavior.

3.5. Micro-Moments: Mobile Decision Moments

Micro-Moments, as defined by Google, are decision moments that arise when consumers turn to their mobile devices because they want to "know, go, do, or buy" (Think With Google, 2017). The concept of Micro-Moments refers to critical interaction moments in which consumers, driven by sudden needs that emerge within the flow of everyday life, turn to mobile devices and make rapid, context-sensitive decisions. First conceptualized by Google, the Micro-Moments approach suggests that the digital consumer's decision process is no longer composed only of prolonged evaluation stages, but also of short, high-intent, and often intuitive decision breaks (Lecinski, 2015). In the digital age, the continuous accessibility of smartphones has made Micro-Moments one of the most visible and influential components of the customer journey.

From a theoretical perspective, Micro-Moments can be viewed as micro-thresholds where the cognitive preparation shaped in ZMOT is converted into behavior. Consumers quickly activate the knowledge, perceptions, and expectations previously acquired during ZMOT in a particular context and moment of need. Thus, Micro-Moments serve as critical connection points that close the gap between cognitive evaluation and actual behavior in the customer journey (Lemon & Verhoef, 2016; Court et al., 2009).

With digitalization, the most distinctive characteristic of Micro-Moments is their temporal brevity and high intensity of intent. Rather than engaging in lengthy analyses, consumers in these moments gravitate toward information that is rapidly accessible, reliable, and contextually meaningful. Research shows that a large majority of mobile users search within the first few minutes after recognizing a need, and that this short time window is decisive for the final decision (Google Consumer Insights, 2024).

Micro-Moments are classified in the literature around four primary decision intents: wanting to know (I-want-to-know), wanting to go (I-want-to-go), wanting to do (I-want-to-do), and wanting to buy (I-want-to-buy) (Lecinski, 2015; Google Consumer Insights, 2024; Hoyer, MacInnis & Pieters, 2023).

- I-want-to-know moments: These are moments when the consumer feels the need to obtain quick information about a topic, product, or service. They often resemble a

continuation of ZMOT and aim to close an information gap. However, within the Micro-Moments perspective, this search tends to be shorter, more surface-level, and more contextual (Lecinski, 2015; Hoyer et al., 2023).

- I-want-to-go moments: These are moments when the consumer has the intention to go to a physical or digital location. Map applications, location-based searches, and mobile navigation play decisive roles in these moments. This type of Micro-Moment provides a concrete illustration of omnichannel behavior, as it shows the interweaving of offline and online touchpoints (Verhoef et al., 2015).

- I-want-to-do moments: These are moments when the consumer wants to learn how to do something, often turning to video content and step-by-step guides. YouTube, TikTok, and similar platforms are among the most intensive digital environments for these moments. Recent studies indicate that short-video formats strengthen learning and persuasion in this type of Micro-Moment (TikTok Marketing Science, 2024).

- I-want-to-buy moments: These are moments when purchase intent is at its highest and the decision quickly translates into behavior. This type is directly linked to FMOT and often occurs when information gathered in ZMOT is activated through a brief mental scan. Mobile payment systems, one-click purchases, and personalized recommendations enhance the effectiveness of these moments (Lemon & Verhoef, 2016; Sunstein, 2023).

Recent literature suggests that Micro-Moments increasingly take place under algorithmic mediation. Recommendation algorithms used in search engines, social media platforms, and e-commerce sites largely determine what content consumers encounter during Micro-Moments, leading to subtle, invisible steering of the decision process (Flanagin, Winter & Metzger, 2022). Consequently, Micro-Moments become hybrid decision moments shaped not only by individual intent but also by platform logics.

Strategically, Micro-Moments represent not merely touchpoints requiring quick responses but also critical opportunity spaces in which firms can build relationships with consumers based on trust, utility, and contextual relevance. Research demonstrates that the perceived usefulness and credibility of content delivered in Micro-Moments strongly influence brand attitudes and repurchase intention (Lemon & Verhoef, 2016; McKinsey, 2017).

In conclusion, Micro-Moments most clearly reflect the fragmented, instantaneous, and context-sensitive nature of decision-making in the digital customer journey. These moments explain how the cognitive framework formed in ZMOT is carried into subsequent moments of truth such as FMOT and SMOT, and provide a theoretical basis for why consumer behavior is not linear but discontinuous and cyclical. Therefore, in contemporary marketing strategies, Micro-Moments should be considered not only as "opportunities to be captured," but also as a central analytical lens for understanding the customer journey as a whole.

Conclusion

Digitalization has redefined consumer behavior not simply by adding new channels, but by transforming the structural logic of the decision-making process itself. As a result of this transformation, the consumer decision process has moved beyond traditional models composed of linear and predictable stages, evolving into a multilayered, cyclical, context-sensitive, and algorithmically shaped structure. The FMOT, SMOT, TMOT, ZMOT, and Micro-Moments framework offers a holistic and behaviorally robust theoretical foundation for explaining this complex transformation.

Research demonstrates that in the digital consumer decision process, the stages of information gathering, evaluation, experiencing, and sharing are no longer clearly separable; instead, they form a dynamic cycle that continuously feeds into and restarts itself. The cognitive framework shaped in ZMOT is activated through Micro-Moments in everyday contexts, becomes the first-touch perception in FMOT, is reinforced through experiential evaluation in SMOT, and turns into collective decision inputs in TMOT, thereby triggering new ZMOT and FMOT processes. This structure clearly shows why the digital customer journey operates not as a linear path but as a feedback-based, self-renewing system.

In this context, Micro-Moments are not merely a concept representing instantaneous decision reactions; they are positioned as a central decision mechanism that forms a functional bridge among FMOT, SMOT, TMOT, and ZMOT. Short, contextual, high-intent interactions emerging in the flow of everyday life generate micro-transition points that connect all stages of the decision process. This integrative role of Micro-Moments is critical for explaining why digital consumer behavior manifests as fragmented, speed-oriented, and context-sensitive.

Table 1. Micro-Moments as a Linking Mechanism Between ZMOT, FMOT, SMOT, and TMOT

Decision Stage	Primary Function	Relationship with Micro-Moments	Role in Digital Consumer Behavior	Strategic Implications for Marketing
ZMOT (Zero Moment of Truth)	Information search and evaluation	Micro-Moments enable the activation of the cognitive framework formed during ZMOT within immediate, situational contexts	Consumers use previously acquired information in short, context-dependent decision moments	Production of trustworthy, easily accessible, and algorithmically visible content
FMOT (First Moment of Truth)	Initial encounter and perception formation	"I-want-to-buy" and "I-want-to-go" Micro-Moments become the actual triggers of FMOT	First impressions are most often formed on mobile screens and within micro decision moments	Mobile-optimized, fast, and personalized touchpoints
SMOT (Second Moment of Truth)	Evaluation of the experience	"I-want-to-do" Micro-Moments meet information and support needs during the experience	The experience is shaped by micro-level support provided at the moment of use	Chatbots, real-time support, and experience consistency
TMOT (Third Moment of Truth)	Sharing of the experience	Micro-Moments generate the emotional and contextual triggers that initiate sharing behavior	Sharing behavior often occurs through immediate emotional reactions	Facilitating mechanisms that encourage users to share their experiences
Micro-Moments	Instant and contextual decision-making	Serve as a connective mechanism between ZMOT–FMOT–SMOT–TMOT	Render the decision-making process fragmented, rapid, and cyclical	Real-time, contextual, and data-driven marketing

As summarized in Table 1, Micro-Moments function in the digital customer journey not merely as a separate touchpoint, but as a dynamic decision infrastructure that connects all Moments of Truth. Perceptions and expectations formed during ZMOT are activated through Micro-Moments within the micro-contexts of everyday life; they shape first-touch perceptions in FMOT, guide the evaluation of experiences in SMOT, and lay the groundwork for the collective sharing of experiences in TMOT. This integration provides a theoretical basis for why the digital

consumer decision process is not linear, but instead exhibits a fragmented, feedback-driven, and context-sensitive structure.

From a digital marketing perspective, this transformation has narrowed brands' sphere of direct control over consumers, while increasing the importance of indirect influence mechanisms such as algorithmic visibility, social proof, and experience management. Marketing success now depends not only on the ability to produce messages or increase the number of touchpoints, but on the capacity to capture the right moments of truth at the right time, with the right content, and within the right context along the consumer's decision journey. In particular, algorithmic mediation, which shapes how consumers access information during ZMOT and Micro-Moments, makes it essential for marketing strategies to be approached with strong technical awareness.

From a consumer behavior perspective, digitalization has increased consumer autonomy; however, this autonomy operates not as absolute freedom but within a decision space structured by platforms. Although consumers believe they decide for themselves what information to search for and which sources to trust, these choices are often guided by algorithmic rankings, social approval signals, and content curation. This indicates the need to examine digital consumer behavior through both the lens of individual agency and that of technological mediation.

The importance of experience management within the FMOT and SMOT contexts has become even more pronounced in the digital age. First encounters now occur not on physical shelves, but on digital screens and within algorithmic feeds; and experience has evolved beyond product performance alone into a holistic structure encompassing delivery, customer service, and post-purchase processes. Therefore, digital marketing strategies must ensure alignment between consumer expectations and experiential outcomes; otherwise, negative experiences at SMOT can spread rapidly through TMOT and damage the brand's long-term value.

TMOT and Micro-Moments stand out as the stages that most clearly reflect the collective and instantaneous nature of digital consumer behavior. TMOT, initiated by experience sharing, evolves beyond individual satisfaction into community-based perception formation; Micro-Moments, in turn, enable these perceptions to translate into behavior within the micro-contexts of everyday life. This suggests that in digital marketing, content creation must be not only persuasive, but also useful, contextual, and trust-enhancing.

In conclusion, digitalized consumer behavior and the decision-making process exhibit a level of complexity, speed, and multidimensionality that cannot be explained through static models in the marketing literature. The Moments of Truth and Micro-Moments framework offers a powerful analytical lens for unpacking this complexity from both theoretical and managerial perspectives. Firms aiming to develop effective marketing strategies in the digital age must view the customer journey not merely as a chain of touchpoints, but as a dynamic decision ecosystem where cognitive, emotional, social, and technological interactions intersect. This approach will continue to be one of the key determinants of competitive advantage in the future of digital marketing.

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CHAPTER 4

LOVE METAPHYSICS IN DIVAN
POETRY
A READING IN THE LIGHT OF
CONTEMPORARY CONSCIOUSNESS
STUDIES

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Introduction

The ontological relationship between existence and consciousness constitutes one of the most ancient enigmas in human history. The concept of "love" (*'aşk*), occupying a central position in the Divan poetry tradition, manifests not merely as a lyrical emotional state but as an epistemological foundation for apprehending reality and a multi-layered state of consciousness. This study aims to re-read the love metaphysics in Divan poetry from the perspective of contemporary consciousness studies and neurophenomenology. The research engages in a dialectical relationship between modern theoretical frameworks such as David Chalmers's conceptualization of the "hard problem," Thomas Nagel's emphasis on subjective experience, and Tononi's Integrated Information Theory (IIT) and classical poetry's perception of love. It is argued that the love metaphor functions not as a mere rhetorical ornamentation but as a phenomenological map that expands the ontological boundaries of consciousness through the progression from "*aşk-ı mecazî*" (metaphorical love) to "*aşk-ı hakikî*" (true love) and ultimately to "*fenâ fi'l-aşk*" (annihilation in love). This architecture of consciousness, traceable in the poetics of Fuzûlî, Bâkî, Şeyh Gâlib, and other classical masters, presents striking structural parallels with modern neuroscience's concepts of "information integration" and "awareness expansion." The study concludes that the love metaphysics of Divan poetry offers an interdisciplinary potential that reflects both the insights of the Islamic mystical tradition and the phenomenological dimensions of universal consciousness experience.

The phenomenal nature of human consciousness and the ontological status of love rank among the most challenging and intricate problematics of intellectual history. The question of "how" and "why" existence is experienced resonates across a broad spectrum extending from modern philosophy of mind to classical mystical traditions. Divan poetry, in this context, is not merely an object of aesthetic pleasure but simultaneously a refined phenomenology of consciousness constructed through the metaphor of "love." In this tradition, love transcends the relationship between subject (*âşık*/lover) and object (*mâşuk*/beloved), signifying an epistemological transformation process concerning the apprehension of reality. This study aims to subject the conception of love in Divan poetry to a hermeneutic reading in light of the "hard problem" of modern consciousness and neurophenomenological theories.

Contemporary consciousness studies have been situated on a new paradigmatic ground through the "hard problem" distinction crystallized by David Chalmers (1995) in *The Conscious Mind*. This approach, which focuses on the "subjective quality" (qualia) of experience beyond the mechanical explanation of cognitive functions, resonates deeply with Thomas Nagel's (1974) phenomenological inquiry in "What Is It Like to Be a Bat?" The subjective love experience that the Divan poet expresses through the language of "*hâl*" (state) exhibits a methodological parallelism with Nagel's emphasis on irreducible subjectivity. Similarly, Daniel Dennett's (1991) model explaining consciousness through multiple drafts and Giulio Tononi's (2008) mathematical theory modeling consciousness as "integrated information" offer contemporary conceptual tools for understanding the dialectic of "*kesret*" (multiplicity) and "*vahdet*" (unity) in classical poetry.

Particularly Antonio Damasio's (1999) neurobiological approach, which indicates the constitutive role of emotions and feelings in the construction of consciousness, corroborates the cognitive and affective centrality of the "*gönül*" (heart) concept in Divan poetry. Fuzûlî's aesthetics of suffering, Bâkî's rindane awareness, Nef'î's exuberant imagination, and Şeyh Gâlib's symbolic depth collectively present a rich topography of consciousness concerning love's transformative power (Fuzûlî, 1958; Nef'î, 1993; Bâkî, 1994; Şeyh Gâlib, 1994). The poetic universe these poets construct transforms love from a static theme into a dynamic "consciousness technology" that pushes the ontological boundaries of the subject.

The fundamental aim of this study is to render visible the potential consciousness layers contained in classical texts by filtering the love metaphysics in Divan poetry through the analytical lens offered by contemporary consciousness theories. Love is treated here not as a static theme but as a dynamic "consciousness technology" that challenges the subject's ontological boundaries, transforms the self, and opens the gates of perception. In this direction, the study aims to establish a phenomenological bridge between two different epistemic universes without falling into historical anachronism.

1. Contemporary Consciousness Studies and Divan Poetry Phenomenology
1.1. Chalmers's "Hard Problem" and the "Hâl" Language of Love

David Chalmers (1995) draws an ontological distinction in consciousness studies between "easy problems" (cognitive functions, reporting, attention) and the "hard problem." While easy problems concern how the brain processes information, the hard problem inquires why and how these processes transform into "subjective experience" (qualia). How physical processes evolve into first-person experience, such as "seeing red" or "feeling pain," stands at the boundary of materialist explanations. In Divan poetry, this distinction manifests in the tension between "*ilm*" (knowledge/*kîl ü kâl*/hearsay-words) and "*aşk*" (*hâl*/direct experience). For the poet, love is a qualia state that cannot be narrated, cannot be resolved by analytical reason, yet is known through tasting (*zauq*).

İlm kesbiyle rutbe-yi rıf'at
Ārzū-yı muḥāl imiş ancaḳ
'Işḳ imiş her nė var ālemde
'İlm bir ḳīl u ḳāl imiş ancaḳ
(Fuzûlî, Qiṭ'a 12)

(Exaltation cannot be attained through acquired knowledge; this is merely an impossible desire. Whatever exists in the universe is love; knowledge is nothing but hearsay passed from tongue to tongue.)

This couplet stands as the most renowned example in the literature that most clearly illustrates the ontological difference discussed in this study between "*ilm*" (cognitive/mechanical processes) and "*aşk*" (experiential/hard problem). The expression "*kîl ü kâl*" (hearsay/talk) precisely captures the inadequacy of functionalist explanations in Chalmers's "easy problem" definition.

The poet's epistemology here presages Chalmers's distinction: objective knowledge-transmission (the "easy problem") proves insufficient; truth demands subjective experience (the "hard problem").

1.2. Nagel's Phenomenology: "Being a Bat" and "Being a Lover"

Thomas Nagel (1974) emphasizes the irreducible subjectivity of consciousness with the question "What Is It Like to Be a Bat?" According to Nagel, knowing the objective neurobiology of a creature or state does not suffice to explain how it "feels from the inside." In Divan poetry, this phenomenological closure finds its counterpart in the topos that "only the one who suffers knows the state of love." The lover defends the inaccessibility of his own ontological reality against the "*zâhid*" (ascetic) or "*nâsih*" (advisor) figures who observe his experience from outside.

Zāhid-i bī-ḫod nė bilsin zevḳını ışḳ ehlinun
Bir aceb meydur maḥabbet kim icen huş-yār olur
(Fuzûlî, Ghazal 82/4)
(How could the formalist ascetic comprehend the pleasure of lovers? For love is such a
strange wine that whoever drinks it becomes not intoxicated but wise.)

This meets the principle of "unknowability of experience from outside" in Nagel's "What Is It Like to Be a Bat?" essay with the emphasis that the ascetic (the outside observer) cannot know the pleasure (inner experience) of the lover.

This condition, which Nagel calls the "first-person perspective," is constructed in classical poetry through love's intimacy and ineffability. The couplet expresses that the self-unaware ascetic (*zâhid-i bî-hod*) cannot know the pleasure of lovers, for love (*muhabbet*) is such a strange wine that whoever drinks it, far from becoming intoxicated, becomes "*huş-yâr*" (sober/awakened). This situation perfectly fits our study's phenomenological "experience" (qualia) discussion.

1.3. Dennett's "Multiple Drafts" Model and the States of the Heart

Daniel Dennett (1991), rejecting the Cartesian theater model, argues that consciousness emerges not through a central "I" but through the competition of parallel processes (multiple drafts) in the brain. Consciousness is not a singular, fixed stream but a chaotic narrative continuously being rewritten. The "*gönül*" (heart) metaphor in Divan poetry resembles Dennett's dynamic model as a space of emotion that cannot be fixed on a single state, sometimes (*gâhî*) this way, sometimes that, perpetually changing.

Gördüm seni elden iḫtiyārum gėtdi
Baḫdum ḳadüne ṣabr u ḳarārum gėtdi
Ḫāk oldum u her yana ġubārum gėtdi
el-Ḳıṣṣa ḳapunda i'tibārum gėtdi
(Fuzûlî, Rubā'ī 76)

(Once I saw you, my will was taken from me. I gazed upon your stature my patience and resolve departed. I became dust, scattered in every direction. In short, at your threshold, my self and dignity vanished.)

When viewed through Dennett's thesis of "loss of central control of consciousness" that consciousness is not managed by a "boss" but is a flow that changes instantaneously with external stimuli (I saw/I gazed) through "the loss of will (*ihtiyar*) and resolve," it is seen that Fuzûlî's words coincide with this perspective.

This "instability" and multidimensionality suggests that consciousness (the heart) is not a homogeneous substance but a process continuously reconstituted by momentary stimuli.

1.4. Integrated Information Theory (IIT) and the Experience of "Vahdet" (Unity)

The Integrated Information Theory (IIT) developed by Giulio Tononi (2008) explains consciousness through information integration (Phi) among the system's parts. The more "integrated" and irreducible a system, the higher its level of consciousness. In Divan poetry, the transition from the realm of "*kesret*" (multiplicity) to the realm of "*vahdet*" (unity) phenomenologically represents the integration of consciousness. The gathering of scattered desires and perceptions at a single focal point (the Beloved/the Truth) through love's attraction indicates an elevated state of consciousness.

Ma'nî bahrine talduk vücûd sırrını bulduk
İki cihân ser-te-ser cümle vücûdda bulduk
(Yûnus Emre, Ghazal 133/1)
(We dove into the sea of meaning and discovered the secret of existence; we found that both worlds, from end to end, were hidden within a single being.)

The finding of "both worlds" (multiplicity/*kesret*) "within a single existence" (*vahdet*) corresponds to IIT theory's "integrated information" and unity principle.

Ki bildim cümle Hakk imiş arada gayri yok imiş
Be-külli anda gark imiş ne ben vârım ne irfânım
(Niyâzî-i Mısrî Dîvânı Şerhi, p. 917)
(Now I understand that all that exists is the Truth; there is nothing else in between neither have I remained, nor my gnosis; everything is submerged in Him.)

Mısrî most clearly articulates the IIT (Integrated Information Theory) concept of "information integration" and the dissolution of parts within the whole through the philosophy of *vahdet-i vücûd* (unity of existence) with the statement "All is the Truth, there is nothing other in between."

1.5. The Entropy Hypothesis and the Dissolution of Reason

The "Entropic Brain Hypothesis" proposed by Carhart-Harris et al. (2014) and psychedelic consciousness studies suggest that the loosening of the brain's orderly (low-entropy) networks carries consciousness to a more flexible, primal, and mystical state. While normal waking consciousness requires a rigid order that maintains ego boundaries, experiences of love (or psychedelic experiences) dissolve these boundaries. In Divan poetry, the state of "reason being plundered," "*mecnunluk*" (madness), or being "*mest*" (intoxicated) corresponds precisely to this neural entropy increase that is, the transition from rigid rational patterns to a broader, boundless perception.

Mende Mecnūndan fūzūn āşıḳlıḳ isti'dādı var
'Āşıḳ-ı şādıḳ menem Mecnūnuñ ancaḳ adı var
(Fuzûlî, Ghazal 88/1)
(In me there is a capacity for love greater than Majnun's; I am the true lover Majnun merely has the name.)

The poet's claim that his potential for madness (*mecnunluk*) exceeds even that of Majnun expresses the transcendence of consciousness's rational boundaries (entropy increase).

In this context, "madness" is not a pathological disorder but, as Carhart-Harris defines as "primary process thought," a creative and boundary-transcending mode of consciousness.

2. Bodily and Cognitive Manifestations of Love from a Neuroscience Perspective
2.1. Damasio's "Somatic Marker" Hypothesis and the Corporeality of Love

Antonio Damasio (1999), in *The Feeling of What Happens*, argues that consciousness is not merely a mental process but emerges through the brain's mapping of bodily sensations (emotions) as feelings. According to the "Somatic Marker Hypothesis," signals from the body (heartbeat, blushing, trembling) form the foundation of decision-making and consciousness processes. In Divan poetry, love is a traumatic and transformative event that leaves concrete traces in the body, rather than an abstract concept. The lover's yellowed face (*ruh-i zerd*), bloody tears (*eşk-i hûnîn*), and burning breast (*sîne-i sûzân*) constitute Damasio's "bodily theater of emotion."

Gözyaşumdan sūz-ı pinhānum ḳılur ārif ḳıyās
Bī-ḫaber te'sīr-i encümden degül aḫter-şinās
(Fuzûlî, Ghazal 122/1)
(From the state of my tears, the wise one infers the hidden fire within me; just as the astronomer, not unaware of the influence of stars, discerns from their movements.)

This couplet describes how an inner state (*sūz-ı pinhân*/hidden burning) is reflected outward through a bodily marker (tears) and can be read as a "marker" (somatic marker).

Ten-i zārumda derd-i ışḳ gün günden füzūn olmāḳ
Yėten bī-derde tedbīr ile dermān ėtdügümdendür
(Fuzûlî, Ghazal 245/4)
(In my frail body, the pain of love grows day by day; for I sought through caution to cure those who have no pain.)

Derd ü firāḳ u ḥasret ilen cāna gelmişem
Küfr-i saçuñla vechüñe īmāna gelmişem
(Hatâyî, Ghazal 244/1)
(With love's pain, separation, and longing I came into life; from the infidelity of your black tresses, I came to faith in the light of your face.)

These descriptions, corresponding with Damasio's theory, demonstrate that love is not a cognitive "thought" but a physiological "state" that invades the entire organism.

2.2. The Reward System and the "Dopaminergic" Nature of Love

Anthropologist and neuroscientist Helen Fisher (2004) associates romantic love with dopaminergic pathways in the Ventral Tegmental Area (VTA) and Caudate Nucleus. Love is, rather than an emotion, a powerful motivation system (drive) based on reward-seeking. This system triggers focus on the target (the beloved), increased energy, and obsessive thinking. The theme of "seeking" and "insatiability" in Divan poetry is the poetic expression of this neurobiological cycle. Even when the lover attains *vuslat* (union), his desire does not extinguish; on the contrary, as we see in Fuzûlî's poetics, he wishes for "the pain to increase."

Çāre-yi bih-būdumı şordum mu'ālicden dėdi
Derd derd-i 'ışḳ ise mümkin degül şıḥḥat saña
(Fuzûlî, Ghazal 18/3)
(I asked the physician for a cure for my ailment; he said, "If this malady is love's malady, recovery is no longer possible for you.")

This is a classic example implying that the poet's pain has no cure and that he does not actually want to be rid of this pain (drive cycle).

Yā Rab belā-yı ḳayda Fużūlī esīrdür
Ol bī-dili bu dām-ı küdūretden ėt rehā
(Fuzûlî, Ghazal 2/7)
(O Lord! Fuzûlî is a captive to the tribulation of bondage; deliver that heartless lover from this trap of sorrow and defilement.)

The poet's desire for "*belâ*" (tribulation), from a modern neuroscientific perspective, is the demand for the perpetuation of the high arousal state and neurochemical reward cycle created by love.

2.3. The Dissolution of the "Default Mode Network" and Fenâ Fillâh

Neuroscientist Judson Brewer and his team (2011) have shown that meditation and mystical experiences reduce activity in the brain's "Default Mode Network" (DMN). The DMN is the network where "self" perception, autobiographical memory, and ego boundaries are constructed. A decrease in this network's activity leads to "selflessness" and a feeling of oneness with the universe. The concepts of "*fenâ*" (annihilation) and "*bî-hodluk*" (self-transcendence) in Divan poetry are phenomena parallel to the suppression of the DMN at the neurological level.

Menem bir ten velīkin cān anuñdur
Ki her kim cān ḳıyar cānān anuñdur
(Hatâyî, Ghazal 58/1)

(I am merely a body; but the soul within it belongs to the Beloved (the Truth). For whoever sacrifices their soul, know that the soul-mate belongs to them.)

The expression "I am a body but the soul is His" describes the withdrawal of the self (body/ego) and its yielding to the absolute existence (*cânân*) that is, the state of *fenâ*.

Here, love functions as a neurochemical key that destroys the boundaries erected by the DMN (the ego/self) and liberates consciousness from the prison of "I."

3. Psychedelic Consciousness Models and the Phenomenology of Mystical Love

3.1. Tagliazucchi's Network Dynamics and the Station of "Hayret" (Wonder)

Neuroimaging studies on psychedelic consciousness by Enzo Tagliazucchi and his team (2014) demonstrate that hierarchical brain networks dominant in normal waking consciousness dissolve in altered states of consciousness, giving rise to a more flexible, holistic connectivity. In Divan poetry, this state corresponds to the station of "*hayret*" (wonder), where reason's categorical boundaries collapse.

Feryād ki 'aks oldı ol kim göreyüm dėrdi
Āyīne-yi ruḥsāruñ levḥ-i dil-i ḥayrānı
(Fuzûlî, Ghazal 285/2)

(Alas! That which I wished to see appeared as a reflection; in the mirror of your radiant cheek, the tablet of my bewildered heart emerged.)

The expression "*dil-i hayrân*" (the heart in wonder) expresses consciousness's freezing before the beloved's face (*tecellî*/manifestation), the collapse of its accustomed categories, and the station of "*hayret*."

3.2. The REBUS Model and the Abandonment of "Rusûm" (Conventions)

The REBUS (Relaxed Beliefs Under Psychedelics) model developed by Carhart-Harris and Friston (2019) proposes that psychedelic substances loosen "high-level beliefs" (priors/expectations) in the brain. In Divan poetry, this process manifests as "breaking conventions" and abandoning societal/rational norms (*rusûm*).

Geçe dünya ile ukbâyı dahî etmeye âr
Bu yolun mihnetine ol katı merdâne gerek
(Niyâzî-i Mısrî Dîvânı Şerhi, p. 844)

(Let both this world and the next become worthless in your eyes; for to endure the hardship of this path of truth requires a truly courageous soul.)

Mısrî, advising release from worldly and otherworldly attachments and even the feeling of "*âr*" (shame/social norm), seemingly alludes to the REBUS model's "relaxation of beliefs" and "removal of boundaries."

Arılıḫ bi'llāh severmen hīç kimesne sevmezem
Tā tamāmı sevmişem būs u kenārum yoḫ durur
(Hatâyî, Ghazal 46/3)

(My purity is solely for Allah; I love no one else, for I have given all my love to Him, and thus no worldly intimacy remains in me.)

This treats the theme of renouncing everything (other objects/*rusûm*) in the name of "*arılık*" (purity).

Her ḳayd olursa maḥż-ı belādur ki bülbüle
Ger şāḫ-ı gülden olsa küdūret vėrür ḳafes
(Fuzûlî, Ghazal 485/5)

(For the nightingale, every constraint is pure tribulation; even if the cage were made of rose branches, it would still bring sorrow.)

Fuzûlî, stating that for the nightingale every "*kayd*" (bond/cage), even if made of rose branches, is a tribulation, supports the REBUS model's idea of "beliefs/bonds that need to be relaxed."

3.3. Mystical Experience Scales and the Perception of "Vahdet" (Unity)

The "Mystical Experience Questionnaire" (MEQ) used in psychedelic research defines the core features of the experience as "sense of unity," "sacredness," and "timelessness" (Barrett et al., 2015). "*Vahdet-i Vücûd*" (Unity of Existence), the ontological ground of Divan poetry, is the most refined poetic expression of this neurophenomenological experience.

Ẕerre-i bī-ḳıymetüz dürdāne ölmek izterüz
Ebr-i gevher-bār tek 'ummāna gelmişlerdenüz
(Hatâyî, Ghazal 168; p. 380 [Footnote variant])

(We are a worthless mote; yet we desire to perish like a pearl. For we too, like a jewel-raining cloud, have come to fall into the ocean of truth.)

The mote's desire to unite with the ocean (*ummân*) clearly expresses the mystical union experience. In this context, "*fenâ fi'l-aşk*" is the living of what modern science calls "ego dissolution" within a transcendent purpose and aesthetic form.

4. Consciousness Epistemology and Ontology in the Islamic Mystical Tradition
4.1. Ghazālī's Hierarchy of Knowledge: "Zevk" (Tasting) and Phenomenological Directness

Imam Ghazālī (1058–1111), in categorizing methods of knowledge acquisition in his works *Iḥyāʾ ʿUlūm al-Dīn* and *Al-Munqidh min al-Ḍalāl*, draws a definitive distinction between "*aql*" (reason/*naẓar*) and "*qalb*" (heart/*kashf*/*zawq*). According to Ghazālī, rational intellect offers indirect knowledge through concepts and representations, whereas heart-knowledge (*ma'rifa*) enables knowing by directly experiencing the object by "tasting" (*zawq*) it.

Ḫaṭāyī ḳāl evinden ḥāle yitdi
Bu bir ḥāl evidür ḳāl anda n'eyler
(Hatâyî, Ghazal 121/5)

(Hatâyî transcended the house of words and reached the station of experiential state; this is the abode of direct experience what use are mere words here?)

Hatâyî distinguishes between "*kāl evi*" (the world of words/theory) and "*hâl evi*" (the world of experience) and emphasizes that truth can only be tasted through *hâl*.

4.2. Ibn al-'Arabī and Waḥdat al-Wujūd: The Cosmic Field of Consciousness

Muḥyiddīn Ibn al-'Arabī (1165–1240) and the *Waḥdat al-Wujūd* (Unity of Existence) school he systematized conceives existence as an indivisible, singular, and absolute consciousness (*Wujūd-i Muṭlaq*). As William Chittick (1989) notes in his analyses, in this ontology individual consciousnesses (*ta'ayyunāt*) are, like waves in the ocean, limited and transient modulations of a single universal consciousness (the Truth).

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Ma'nî bahrine talduk vücûd sırrını bulduk
İki cihân ser-te-ser cümle vücûdda bulduk
(Yûnus Emre, Ghazal 133/1)

</div>

(We dove into the sea of meaning and discovered the secret of existence; and we found that both this world and the next are entirely contained within the unity of being.)

This summarizes the philosophy of *waḥdat al-wujūd* with the idea that the entire universe (both worlds) exists within a single being.

4.3. Mystical Psychology and the Stages of the Nafs: Evolutionary Rungs of Consciousness

Sufi psychology treats the human self (*nafs*) not as a static structure but as a dynamic, transforming process. The stages of the *nafs* exhibit parallelism with the consciousness levels predicted by modern developmental psychology or Ken Wilber's (2000) "integral psychology" model: *Nafs al-Ammāra* (Primal Consciousness), *Nafs al-Lawwāma* (Reflective Consciousness), and *Nafs al-Muṭma'inna* (Integrated Consciousness).

<div align="center">

Ḫālıḳını ol kişi bilür hemīn
Kim ne-durur nefsini bile yaḳīn
(Ahmedî, İskendernâme/7599, p. 901)

</div>

(A person knows their Creator only if they know with certainty what their own self truly is.)

This is essentially a direct translation of the hadith "*Man 'arafa nafsahu faqad 'arafa Rabbahu*" (Whoever knows himself knows his Lord) a saying often attributed to the Prophet, though not found in canonical hadith collections.

<div align="center">

Mûsâ'nun agdugı Tûr'ı yohsa Beytü'l-Ma'mûr'ı
İsrâfîl çaldugı Sûrı cümle vücûdda bulduk
(Yûnus Emre, Ghazal 133/5)

</div>

(Mount Sinai where Moses received revelation, the Bayt al-Ma'mūr where angels circumambulate, the trumpet that Israfil will blow to herald resurrection we found all of these manifested within our own being.)

This conveys that knowing one's self (*wujūd*/inner world) is equivalent to knowing universal truths.

5. Phenomenological Manifestations of Love in Divan Poets: Four Different Consciousness Modes

5.1. Fuzûlî: Consciousness Deepened Through Suffering (Qualia of Suffering)

In Fuzûlî's (d. 1556) poetic universe, love is constructed upon an aesthetics of "*derd*" (pain/suffering) that matures the subject, rather than a demand for "*vuslat*" (union). In contemporary philosophy of consciousness, it is discussed how the experience of pain (pain qualia) sharpens consciousness and intensifies the sense of "self." For Fuzûlî, pain is the sole fuel keeping the lover's existential awareness alive.

Işḳ derdiyle ḫoşem el çek 'ilācumdan ṭabīb
Ḳılma dermān kim helāküm zehri dermānuñdadur
(Fuzûlî, Ghazal 90/2)
(I am content with love's malady; physician, withdraw from my treatment; for the poison that would kill me lies in your cure.)

This couplet of Fuzûlî most clearly expresses the thesis treated in our study "taking pleasure from pain" (pain qualia) and existential consciousness being possible through "*derd*" (suffering). By seeing recovery (*dermân*) as the end of his own existence (*helâk*), the poet emphasizes the ontological necessity of suffering.

5.2. Bâkî: Rindâne Awareness and the Aesthetics of the Moment

Bâkî (d. 1600), in contrast to Fuzûlî's inward-turning melancholy, exhibits a "*rindâne*" consciousness mode that embraces the external world and life's transience (*fânilik*) with aesthetic pleasure. Bâkî's "*Gönül*" metaphor functions as a clear mirror reflecting worldly bounties and beauty.

Gâfil geçürme fursatı kim bâğ-ı 'âlemüñ
Gül devri gibi devleti nâ-pây-dârdur
(Bâkî, Ghazal 153/3)
(Do not let the opportunity slip by in heedlessness; for the fortune of this world's garden, like the season of roses, is fleeting.)

This style, counseling Bâkî's "*rindâne*" attitude and momentary awareness (mindfulness) in the face of time's transience (*nâ-pây-dâr* nature), corresponds to "The Aesthetics of the Moment."

5.3. Keçecizâde İzzet Molla: Creative Imagination and Expanding Consciousness

Keçecizâde İzzet Molla (d. 1786) presents an exuberant and hyperbolic consciousness structure that centers on the power of "*söz*" (logos). His love and praise are the product of an imagination (imaginative consciousness) that pushes boundaries.

Rüstem-i endişe kim sâhib-kırânımdur benüm
Kahramân-ı hâme ednâ pehlevânımdur benüm
(Keçecizâde İzzet Molla, Qaṣīda 4/1)
(He unites the heroic discourse of classical poetry with art; describing the poet's station as a Rustam-like feat, a champion's endeavor. Yet his sword is the pen, and his battlefield is thought.)

Keçecizâde İzzet Molla, through a strong *fakhriyya* (self-praise) example in which he sees himself as "Rüstem" (the legendary hero) and emphasizes "*hâme*" (pen) and "*endişe*" (thought), this couplet operates within the context of creative imagination.

5.4. Şeyh Gâlib: Symbolic Depth and Mystical Integration

The last great representative of Divan poetry, Şeyh Gâlib (d. 1799), presents love in his *mathnawī Hüsn ü Aşk* as a "secret" (*esrâr*) woven through complex symbols and allegories. Gâlib's consciousness synthesizes Fuzûlî's suffering, Bâkî's aesthetics, and Nef'î's imagination within the dense symbolism of "*Sebk-i Hindî*" (the Indian Style).

Kevser-i âteş-nihâdın adı eşk
Dûzah-ı Cennet-nümânın adı aşk
Bir lügat gördüm cünûn isminde ben
Anda hep cevr ü cefânın adı aşk

(Şeyh Gâlib, Qiṭ'a 23)

(The Kawthar (heavenly fountain) of fiery nature is called 'tears'; the Paradise-seeming Hell is called 'love.' I saw a dictionary entitled 'Madness'; therein, every cruelty and torment was named 'love.')

In this couplet, Şeyh Gâlib defines love as "Paradise-displaying Hell" (*dûzah-ı cennet-nümâ*) and tears as "fire-natured Kawthar," elevating to the summit the paradoxical integration and mystical symbolism discussed in our study. It exemplifies love's both burning and reward-giving (Paradise) nature as a neurophenomenological "mixed state."

5.5. Synthesis: Love as a Symbolic Consciousness System

These four different approaches in Divan poetry demonstrate that love is not a one-dimensional emotion but a multi-layered phenomenon triggering different consciousness modes such as (1) ontological deepening, (2) aesthetic awareness, (3) creative expansion, and (4) mystical integration. Love metaphors, in this context, function as a cultural consciousness map a symbolic system enabling poets to objectify and transmit subjective experience (qualia) within shared cultural codes.

6. Future Perspective: Consciousness Technologies and a Classical Model for Human Affect

6.1. Brain-Computer Interfaces (BCI) and the Mapping of "Gönül"

Brain-Computer Interfaces (BCI) aim to communicate with the external world by processing neural signals (Rao, 2013). However, current BCI technologies tend to classify emotions in coarse categories such as "positive/negative" or "calm/excited." The phenomenology of "love" in Divan poetry offers an intricate "emotion spectrum" that cannot be reduced to such binary coding. Paradoxical states described by Fuzûlî such as taking pleasure from pain or feeling separation within union (mixed states) constitute a "benchmark" for BCI research demonstrating the complexity of human consciousness.

6.2. Virtual Reality (VR) and the Construction of "Âlem-i Hayâl" (The Realm of Imagination)

Virtual Reality (VR) technologies construct immersive environments that create a sense of "presence" (Slater, 2009). In Divan poetry, the "realm of imagination" constructed by the poet through words is ontologically an archaic prototype of today's virtual reality.

Tā ḫayāl-i 'ārıżuñ geldi gözüme ḫˇāb tek
Giceler her dem gözine görinen meh-tāb tek

(Hatâyî, Ghazal 183/1)

(The image of your cheek descended upon my eyes like sleep; resembling the moonlight that appears to the eye every moment at night.)

The beloved's image coming to the eye like a dream (virtual) and appearing like real moonlight constitutes *âlem-i hayâl* (the realm of imagination).

6.3. Affective Computing and Ambiguity

"Affective Computing," pioneered by Rosalind Picard (1997), aims to enable machines to recognize human emotions. However, artificial intelligence generally operates on literal meanings and struggles to resolve irony, metaphor, or "*tevriye*" (double meaning). The "*mazmun*" system of Divan poetry, with its multi-layered emotional charge hidden behind words, constitutes a challenging testing ground for artificial intelligence's "Natural Language Processing" (NLP) capacity.

Naḳş-ı ḫaṭṭında elṭaf-ı ṣūret
Ṭarz-ı lafẓında eşref-i ma'nā
(Fuzûlî, Qaṣīda 38/20)
(In the calligraphy of your inscription lies the grace of form; in the manner of your speech lies the noblest meaning.)

By stating that in the manner of speech (*lafz*) exists "*eşref-i ma'nâ*" (the noblest/highest meaning), this emphasizes the "deep meaning" and aesthetic layer that artificial intelligence struggles with.

In conclusion, classical poetry, by representing the "hermeneutic" nature of human consciousness that cannot be contained in algorithmic models, preserves the aesthetic codes of "remaining human" in the age of artificial intelligence.

7. Conclusion and Discussion: A Dialogue Between Two Epistemologies

Love, the gravitational center of Divan poetry, emerges from this analysis not as a static literary theme but as a phenomenological process one that challenges and reshapes the ontological boundaries of consciousness itself. The enigma of subjective experience (qualia) that David Chalmers defined as the "hard problem" exhibits a deep structural similarity with the reality that Divan poets experienced centuries ago through the language of "*hâl*" (state), through "*zevk*" (tasting), and at the station of "*hayret*" (wonder).

Research findings demonstrate that Fuzûlî's aesthetics of suffering corresponds with Damasio's somatic markers; Bâkî's *rindâne* attitude with momentary awareness (mindfulness) processes; and Şeyh Gâlib's mystical symbolism with the "unity" (integration) principle predicted by Integrated Information Theory (IIT). This correspondence, of course, does not imply that classical poets possessed neuroscientific knowledge. What it reveals is something more fundamental: that poets and scientists alike have charted the same experiential terrain one in the language of neurons, the other in the language of metaphors.

In conclusion, Divan poetry and contemporary consciousness studies are narratives in two different languages of the same truth (human experience). One explains the mechanism "from outside" (third-person perspective/science), while the other offers the texture of experience "from inside" (first-person perspective/art). The dialogue between these two domains provides a rich phenomenological archive concerning humanity's emotional and spiritual capacity not only to literary history but also to interdisciplinary studies seeking to understand consciousness.

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Introduction

The ontological relationship between existence and consciousness constitutes one of the most ancient enigmas in human history. The concept of "love" (*'aşk*), occupying a central position in the Divan poetry tradition, manifests not merely as a lyrical emotional state but as an epistemological foundation for apprehending reality and a multi-layered state of consciousness. This study aims to re-read the love metaphysics in Divan poetry from the perspective of contemporary consciousness studies and neurophenomenology. The research engages in a dialectical relationship between modern theoretical frameworks such as David Chalmers's conceptualization of the "hard problem," Thomas Nagel's emphasis on subjective experience, and Tononi's Integrated Information Theory (IIT) and classical poetry's perception of love. It is argued that the love metaphor functions not as a mere rhetorical ornamentation but as a phenomenological map that expands the ontological boundaries of consciousness through the progression from "*aşk-ı mecazî*" (metaphorical love) to "*aşk-ı hakikî*" (true love) and ultimately to "*fenâ fi'l-aşk*" (annihilation in love). This architecture of consciousness, traceable in the poetics of Fuzûlî, Bâkî, Şeyh Gâlib, and other classical masters, presents striking structural parallels with modern neuroscience's concepts of "information integration" and "awareness expansion." The study concludes that the love metaphysics of Divan poetry offers an interdisciplinary potential that reflects both the insights of the Islamic mystical tradition and the phenomenological dimensions of universal consciousness experience.

The phenomenal nature of human consciousness and the ontological status of love rank among the most challenging and intricate problematics of intellectual history. The question of "how" and "why" existence is experienced resonates across a broad spectrum extending from modern philosophy of mind to classical mystical traditions. Divan poetry, in this context, is not merely an object of aesthetic pleasure but simultaneously a refined phenomenology of consciousness constructed through the metaphor of "love." In this tradition, love transcends the relationship between subject (*âşık*/lover) and object (*mâşuk*/beloved), signifying an epistemological transformation process concerning the apprehension of reality. This study aims to subject the conception of love in Divan poetry to a hermeneutic reading in light of the "hard problem" of modern consciousness and neurophenomenological theories.

Contemporary consciousness studies have been situated on a new paradigmatic ground through the "hard problem" distinction crystallized by David Chalmers (1995) in *The Conscious Mind*. This approach, which focuses on the "subjective quality" (qualia) of experience beyond the mechanical explanation of cognitive functions, resonates deeply with Thomas Nagel's (1974) phenomenological inquiry in "What Is It Like to Be a Bat?" The subjective love experience that the Divan poet expresses through the language of "*hâl*" (state) exhibits a methodological parallelism with Nagel's emphasis on irreducible subjectivity. Similarly, Daniel Dennett's (1991) model explaining consciousness through multiple drafts and Giulio Tononi's (2008) mathematical theory modeling consciousness as "integrated information" offer contemporary conceptual tools for understanding the dialectic of "*kesret*" (multiplicity) and "*vahdet*" (unity) in classical poetry.

Particularly Antonio Damasio's (1999) neurobiological approach, which indicates the constitutive role of emotions and feelings in the construction of consciousness, corroborates the cognitive and affective centrality of the "*gönül*" (heart) concept in Divan poetry. Fuzûlî's aesthetics of suffering, Bâkî's rindane awareness, Nef'î's exuberant imagination, and Şeyh Gâlib's symbolic depth collectively present a rich topography of consciousness concerning love's transformative power (Fuzûlî, 1958; Nef'î, 1993; Bâkî, 1994; Şeyh Gâlib, 1994). The poetic universe these poets construct transforms love from a static theme into a dynamic "consciousness technology" that pushes the ontological boundaries of the subject.

CHAPTER 5

THE ROLE AND RESPONSIBILITY OF PUBLIC RELATIONS FROM THE PERSPECTIVE OF CONTINGENCY THEORY IN BUSINESSES

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INTRODUCTION

The intense competitive conditions that emerged after the Industrial Revolution have become increasingly challenging for businesses. Under these circumstances, businesses employ various strategies to differentiate themselves from competitors and must act carefully in their relationships with target audiences, understand them, and monitor changes in their attitudes. Additionally, businesses are influenced by developments and changes in the environment in which they operate. One of the most critical elements of a business environment is its stakeholders. Therefore, businesses must have a deep understanding of their stakeholders and manage their relationships effectively (Hakli & Tunca, 2022). Numerous factors impact both businesses and their stakeholders. These factors can have positive or negative effects on businesses and their relationships with stakeholders in political, economic, social, or technological dimensions. Contingency theory, one of the theories that address the impact of environmental factors on businesses, argues that a company's adaptability to its environment provides a crucial framework for business success (Cancel et al., 1999). Building on this premise, this study examines the contingency approach from a public relations perspective. Accordingly, the study first explores contingency theory, followed by an explanation of the concept of public relations. Finally, public relations is evaluated within the framework of contingency theory.

1. CONTINGENCY THEORY

Theorists recognized that it is impossible to determine a single optimal structure applicable to all businesses and that numerous interdependent environmental variables influence organizations. They acknowledged that each organization faces unique situations within its environment, and these circumstances significantly impact business performance. This realization led theorists to focus on investigating the most suitable organizational structure within the specific conditions of each organization. At this point, contingency theory comes into play, as it is based on the premise of determining the most appropriate structure for businesses by aligning the internal and external factors with the organization's objectives within the context of its environmental conditions (Tompkins, 2004, pp. 251-252). The contingency approach, when organizations are viewed as open systems influenced by both internal and external environments, operates from the premise that there is no universally applicable "best system." In this context, the systems approach argues that there are different "correct" solutions depending on the environment in which the organization exists, rather than a single, universal one. From this perspective, the contingency approach can be defined as the selection of the most suitable method based on the specific situation and conditions at hand (Yelkikalan et al., 2020). Contingency theory, an approach that has influenced organizational theories since the 1950s, (Hanisch & Wald, 2012) stands out as an approach emerging in the modern era (Yelkikalan et al., 2020). The development of the contingency approach can be traced back to the 1960s. The approach, which treats businesses as passive entities, emphasizes the need for businesses to develop and maintain structural characteristics based on the environmental factors they face. It makes generalizations about what types of businesses are best suited to thrive under different environmental conditions (Bilgin, 1991: 213). Donaldson (2015) noted that the optimal structure for each organization depends on the alignment of situational factors. When looking at the situational factors for businesses, the business environment comes into focus. In this context, the environment of an organization holds significant importance in the contingency approach. For instance, when examining the technological environment of a business, it is not

only the technology available to the business that matters, but also the technology possessed by competitors or the new technologies that may assist in meeting customer needs and demands. Any changes or transformations in this area will impact the business. Additionally, the legal, economic, and cultural environments are also key elements of the external environment that affect the business (Salık, 2001). In the literature, theorists approach the organization's alignment with its environment differently, with natural and open systems being treated distinctively. Natural system theorists argue that organizations passively adapt to their environment, while open system theorists assert that businesses actively align with the environment based on their own needs and objectives. At this point, organizations interacting with their environment are goal-oriented. A successful business is one that operates in harmony with its environment and is able to establish a proper balance between its goals and the environment. In this context, change and stability are not in conflict; rather, it is crucial to maintain stability while making necessary adjustments to structure and behavior when required (Tompkins, 2004, pp. 239-240). Contingency theory states that situational factors (see Table 1) are also interrelated. Furthermore, aligning and matching these factors with the business and with each other is expected to lead to higher performance (Ghofar & Islam, 2015). Donaldson (2015) at this point, discusses three key conditions for organizational structure. These are: the size of the business, the business strategy, and the state of uncertainty. The state of uncertainty refers to the condition of "unpredictability" that arises due to variability or lack of information when businesses are moving toward their desired goals. The primary source of uncertainty is the environment. However, uncertainty can also stem from internal assignments within the organization. Business size is primarily related to the number of employees. As the size of the business increases, the hierarchical structure also adapts accordingly. Business managers delegate more decision-making authority, tasks are divided among more people, and the number of departments increases. Business strategy, in this context, is more related to the diversification of the products or services produced by the business and the managerial integration of this diversification. In businesses with low diversification, the manager may be more involved in processes, and a somewhat centralized management approach exists. In highly diversified businesses, however, the manager cannot be fully involved in every process, and autonomy may be granted to subordinate units. Product or service diversification can be achieved through different factors, such as product/service type, target audience, or geographical location.

Table 1. *Contingency Factors and Structural Dimensions* (Tompkins, 2004)

Contingency Factors	**Structural Dimensions**
• Environmental uncertainties • Technology • Size of the organization • Strategy • Resource dependency • Management levels	• Scope of business control • Centralized management • Degree of formalization • Standardization • Specialization • Job design • Conflict resolution methods

According to Salık (2001) there are factors that affect the structure of a business both externally and internally from the perspective of contingency theory. External factors can be considered as customers, government intervention, competitive conditions, market conditions, etc., while internal factors can be viewed as the nature of the work to be done, the technology used,

personnel, etc. Tompkins, (2004) examined the factors influencing the structure of a business from two perspectives: contingency factors and structural dimensions. According to this, contingency factors include environmental uncertainties, technology, the size of the organization, strategy, resource dependency, and management levels, while structural dimensions include the scope of business control, the degree of centralization in management, the status of formalization in the organization, the standardization of the business, specialization, job design, and conflict resolution methods (Table 1). According to Luthans and Stewart (1977), contingency theory is generally concerned with identifying and developing the relationships between environmental, managerial, and business performance variables, and is linked to organizational design, leadership, and quantitative practices.

2. THE CONCEPT OF PUBLIC RELATIONS

The concept of public relations has various definitions in the literature. Aydede (2002), defines public relations as "the art of examining, directing, and managing all aspects of an organization's production, actions, philosophy, and the words and thoughts of others about that organization." In the mid-1970s, Harlow developed a definition of public relations by drawing on the common features of 472 definitions of public relations. According to this (Cited by: Hutton, 1999) *"Public relations is a unique management function that helps establish and maintain mutual communication, understanding, acceptance, and cooperation between an organization and its public. This function involves the management of issues or topics; provides the management with information about public opinion and ensures sensitivity to it; defines and emphasizes the management's responsibility to serve the public interest; acts as an early warning system to anticipate trends, helping the organization adapt to changes and effectively utilize them. Additionally, it uses research and sound, ethical communication techniques as its primary tools."*

The field of public relations is quite broad. Generally, these areas include ensuring internal communication within the organization, facilitating communication with the public on behalf of the organization, developing relationships with the media, protecting and ensuring the continuity of reputation, establishing communication with suppliers and retailers, contributing to the formation and development of corporate social responsibility awareness, supporting the development of organizational, product, and brand image, analyzing issues and providing alternative solutions, monitoring political, social, economic, and technological developments, contributing to change management, managing publications, ensuring crisis communication, relationship management, event management, and impression management. (Geçikli, 2010).

Public relations is essentially a form of communication where the mutual exchange of messages between the public and the organization occurs in a two-way manner. Public relations professionals, who convey the organization's messages to the target audience, also relay the messages coming from the public back to the organization. The public relations departments, tasked with delivering the right messages to the right audience at the right time using the right tools, must do this continuously, systematically, and programmatically. The advantage of this two-way communication for businesses is that it allows them to understand themselves and recognize the points at which they differentiate from their competitors. This situation, which is as important as what the organization does and how it does it, provides the business with an opportunity to see itself from a third-party perspective (Aydede, 2002; Baines et al., 2003).

3. PUBLIC RELATIONS FROM THE PERSPECTIVE OF CONTINGENCY THEORY

When examining public relations from the perspective of contingency theory, it should be stated that the practices to be implemented represent a strategic public relations process, as businesses must adapt to changes in their environment, which requires a strategic management approach. In this context, another important issue is that in response to these changes, the public relations department, specialist, or consultant should continue communication efforts in coordination with the strategic management approach and management processes (Hakli & Tunca, 2022). *"The strategic management model is defined as a rational process that seeks to align the resources and capabilities of the organization with changing environmental conditions, and aims to determine the most suitable strategies and goals for the organization".* (Kahveci, 2008). Güçlü (2003), states that in the strategic management process, businesses must continuously monitor their environments and that organizations should be able to adapt to these changes. The goals determined according to the business environment must be conscious and planned. Furthermore, organizational theorists also refer to public relations as a "boundary role." This role means that public relations acts as a bridge between the business and the large groups in its environment. (Grunig & Hunt, 1984).

When the contingency approach, which explains the impact of the environment in which organizations operate on their structure, is considered from the perspective of public relations, there are certain factors that need to be taken into account. From a public relations perspective, these factors are presented as internal and external variables in Table 2. Moreover, the type of management within the organization also emerges as an important factor at this point, as another key issue in the contingency approach is the management style. Based on research in the literature, two types of management have been developed. The first is the "mechanistic" management style, which operates under stable conditions. In this management style, a vertical communication form is preferred within the organization. Mechanistic management, where specialization is emphasized, features a hierarchical structure. The second type of management is the "organic" structure. In organizations with this structure, less formal processes than in mechanistic organizations are prominent. Unlike mechanistic management, businesses with an organic management style, which emphasizes strong horizontal communication, constantly redefine roles. Researchers indicate that mechanistic management struggles to adapt to rapid changes (Freeman, 1969). According to those who argue that organic organizations are more suitable under dynamic environmental conditions, *"In situations where environmental conditions are variable, the degree of formalization will decrease due to the difficulty and binding nature of operating within predetermined rules and processes. Variable and uncertain environmental conditions will increase the importance of research and development activities and different perspectives on problems. Therefore, a greater number of different areas of expertise will be required, and authority will need to be delegated to where the knowledge exists in order for decisions to be made immediately and accurately. As a result, the tendency toward centralization in the organization will decrease. An organic organizational structure, which is sensitive to intense environmental conditions, will enhance the organization's effectiveness.*" (Bilgin, 1991).

From the perspective of the contingency approach, public relations is important for recognizing and analyzing the business environment. Luthans and Stewart (1977) state that the objectives and goals of an organization should be defined within the framework of its environment. They also emphasize that in order for an organization to adapt to its environment, the system approach

must be implemented in a feasible structure. In other words, for an organization to facilitate interaction with its internal and external environment, it must first define its structure, which consists of interconnected subsystems. To achieve this, the organization must adopt a systems approach. At this point, system variables, which consist of various classifications, must be defined and categorized. Public relations becomes an important issue in this context.

Table 2. *Factors Affecting an Organization's Response* (Pang & Jin, 2024).

Internal variables	External variables
Organisational characteristics • Open or closed culture • Geographically dispersed or centralised organisational structure • Level of technology used by the organisation to produce its product or service • Homogeneity or heterogeneity of relevant authorities • Age of the organisation/value placed on tradition • Growth rate of the level of knowledge used by the organisation • Economic stability of the organisation • Presence or absence of problem management authorities or programmes • Past experiences of the organisation with the public • Distribution of decision-making authority • Number of roles or codes that define and limit the job • Layering/hierarchy of positions • Existence or influence of the legal department • Risks to which the organisation is exposed • Organisational culture **The Characteristics of the Public Relations (PR) Department** • Total number of practitioners • Educational background of practitioners: education in public relations, journalism, marketing, etc. • Position of the Public Relations department in the hierarchy: independent or under the umbrella of Marketing • Representation in management • Level of experience of practitioners in dealing with crises • Overall communication competence of the department Autonomy of the department • Physical location of the department within the building (close to the CEO and other decision-makers or not) • Staff trained in research methods • Amount of funds available for engaging with the external public • Amount of time allowed for engaging with the external public • Gender: Percentage of senior female staff/managers • The department's potential to implement various PR models	**Threats** • Political litigation • Government regulation • Potentially damaging publicity • Tarnishing of the company's reputation in the business world and public opinion • Legitimation of activists' claims **Industrial Environment** • Dynamic (changing) or static • Number of competitors / level of competition • Availability of environmental resources **General Political / Social Environment / External Culture** • Degree of political support for business • Degree of social support for the enterprise **External Public (Group, Individual, etc.)** • Size and/or number of members • Degree of credibility of resources / presence of influential members or connections • Past successes or failures of the groups in initiating change • Extent of advocacy implemented by the organisation • Level of members' commitment/involvement • Whether the group has PR consultants • Public perception of the group: reasonable or radical • Level of media coverage received by the public in the past • Whether public representatives know or like the organisation's representatives • Whether organisation representatives know or like public representatives • Willingness of the public to dilute its cause/demand/claim • Moves and countermoves • Relative power of the organisation • Relative power of the public **Nature of the Issue in Question** • Size • Stake • Complexity

Top Management Characteristics

- Political values: Conservative or liberal / open or closed to change
- Management style: Authoritarian or participative
- General level of sacrifice
- Support and understanding of public relations
- Frequency of external contact with the public
- Departmental perception of the organisation's external environment
- Calculation of potential gains or losses by using different strategies with external audiences
- Degree of involvement of the line manager in external relations

Internal Threats *(Level of danger in the situation)*

- Economic loss or gain resulting from the implementation of various attitudes
- Damage to the organisation's image in the eyes of employees or shareholders
- Damage to the personal reputation of decision-makers

Individual Variables
(PR practitioners, local coalition members, and line managers)

- Education in diplomacy, marketing, journalism, engineering, etc.
- Personal ethics
- Ability or tolerance to cope with uncertainty
- Comfort level with conflict or disagreement
- Comfort level with change
- Ability to recognise potential and current problems
- Degree of openness to innovation
- Ability to understand others' worldviews
- Personality: Dogmatic, authoritarian
- Communication competence
- Cognitive complexity: Ability to handle complex problems
- Tendency to negotiate
- Tendency to make sacrifices
- How individuals receive, process, use, and influence information
- Familiarity with external publics or their representatives
- Acts like or shares traits with external publics or representatives
- Gender: Female and male

Relational Variables

- Level of trust between the organisation and the external public
- Dependency of stakeholders
- Ideological barriers between the organisation and the public

There are key factors to consider when adapting to defense or change in response to changing conditions within the business environment. First, the urgency of the situation must be determined. Then, the attitudes, behaviors, and the impact of stakeholders' actions on the organization should be analyzed. Thirdly, potential or explicit threats to the organization's reputation, resources, or activities must be clearly identified. Finally, the effects of either adapting to the changing conditions or maintaining a defensive stance, along with the potential costs and benefits, should be evaluated. These factors play a critical role in determining the organization's attitude toward its environment (Cancel et al., 1999). From the perspective of contingency theory, managers have important responsibilities. Managers must continuously monitor and analyze the current situation, the differences between the current and previous states, problems, and the potential solutions to those problems (Williams, 2010). From a contingency perspective, the public relations specialists, department, or consultants within the organization bear significant responsibilities. It is their duty to continually inform management about these factors, analyze the current situation, and assess the potential scenarios.

Moreover, policies and strategies should be defined from the outset, and projects should be developed based on these policies and strategies. In this context, from a public relations perspective, the communication policies of an organization should answer the following questions (Aydede, 2002):

o Who is the organization?
o How can the organization be better defined?
o What is the goal?
o Who is the target audience?
o What is the organization's image?
o What are the organization's goals, efforts, and initiatives?
o How has the organization developed?
o Is the organization an international entity?
o What is the organizational structure?
o How are developments in management occurring?
o Are employees provided with adequate training?
o What kind of relationships does the organization have and with whom?
o What is the communication policy, and who is responsible for its implementation?
o What activities are involved in the communication field?
o How are media relations and media monitoring managed?
o How are relationships with partners structured?
o What is the nature of the relationships with public opinion leaders?
o What is the organization's image in marketing?
o What are the relationships with students and universities like?
o How are sponsorship relations managed?
o Is there information sharing?

When examined within the context of the contingency approach, a prominent analytical method that emerges for analyzing the business environment is the PEST analysis.

3.1. PEST Analysis

"PEST or PESTLE, in English, stands for 'Political, Economic, Social, Technological, Legal, Environmental Analysis'; in Turkish, it is referred to as 'Politik, Ekonomik, Sosyal ve Teknolojik Analiz.' It is an analysis conducted to examine the organization and its environment from these perspectives, aiming to identify critical factors that require immediate action and to reveal the positive or negative impacts of these factors." (Arabacı, 2010). PEST analysis is a technique that examines a business from the perspectives of Political, Economic, Social, and Technological (PEST) factors. From a situational standpoint, it is an analysis where both positive and negative situations are identified, and their impacts are revealed. In a PEST analysis, identifying external factors that affect the business, assessing their impact on the company, and determining the company's future are crucial. By conducting a PEST analysis, potential threats to the business can be addressed before they materialize, and opportunities can be leveraged into advantages (Kutlucan & Seferoğlu, 2024).

Undoubtedly, one of the significant responsibilities of public relations within a business is to monitor political, social, economic, and technological developments and contribute to change management (Geçikli, 2010). Using an analysis like the PEST analysis, which can be applied within the context of situational theory in public relations, the political, economic, social, and technological environments, as well as the situational changes and developments occurring within them, can be monitored. These environments constitute the general context of the business and have a more significant impact on long-term activities rather than short-term actions (Eren & Özdemirci, 2018). Particularly, multinational corporations constantly face social, cultural, political, technological, and economic opportunities and threats that can emerge anywhere at any time. This is essentially related to the nature of the products or services produced and the geographical areas in which the activities are carried out (David, 2015, p. 79).

3.1.1. Political Environment Analysis

There are several factors that need to be considered when analyzing a new market politically and legally for businesses. The main issues to be analyzed in this context include competition laws in the new market, immigration laws, regulations related to global warming, special incentives, antitrust regulations, environmental protection laws, foreign trade laws, tax laws, attitudes towards foreign companies, the stability of specific governments, and labor laws (Wheelen & Hunger, 2012). These factors can represent both a threat and an opportunity for a business. Companies must take these factors into account when entering a new market.

1.1.1. Economic Environment Analysis Analysis

Businesses must continuously analyze the economic conditions in their existing or potential new environments (Arabacı, 2010) key factors to be considered within this context include the trend of Gross Domestic Product (GDP) in the economic environment, interest rates, inflation levels, unemployment rates, wage/price control systems, devaluation/revaluation status, energy alternatives, energy accessibility and costs, currency market conditions, the linkage with the global financial system, and the availability of credit. These elements represent the critical factors that need to be continually tracked and analyzed to assess the economic landscape affecting business operations (Wheelen & Hunger, 2012).

1.1.2. Social Environment Analysis

Another critical environment that businesses must carefully analyze and monitor is the social environment. The key factors to track within this context generally include changes in lifestyle, career expectations, consumer activism, marriage rates, population growth rate, age distribution of the population, regional demographic shifts, life expectancy, birth rates, retirement plans, healthcare, education levels, cost of living, and unionization. These aspects are crucial in understanding the social dynamics that can affect business strategies and operations (Wheelen & Hunger, 2012).

1.1.3. Technological Environment Analysis

Finally, the environment that businesses must monitor and adapt to is the technological environment. Key factors in this area include government R&D expenditures, industrial R&D expenditures, the focus of technological efforts, patent protection, new products, advancements in technology transfer from laboratory to market, productivity gains through automation, internet accessibility, telecommunications infrastructure, and activities related to cybersecurity. These factors are crucial in understanding the technological changes that may influence a business's operations and strategic positioning (Wheelen & Hunger, 2012).

CONCLUSION

The contingency approach emerges as an important theory focusing on the changes in the environments that businesses enter, especially when expanding into new markets. As businesses grow, they expand into different markets. When entering markets that are unfamiliar to them, this situation brings both advantages and disadvantages. Some of these advantages are as follows (David, 2015);

Advantages:
- Businesses can acquire new customers for their products or services.
- Excess capacity can be absorbed, thus reducing unit costs and enabling distribution across a larger economic market.
- Access to cheaper labor and raw materials can be achieved.
- Markets with less competition compared to others can be targeted.
- New environments may offer lower taxes and politically favorable conditions.
- New environments allow companies to learn about other countries' technologies, cultures, and business practices, as well as provide opportunities to connect with potential customers, suppliers, creditors, and distributors.
- Larger-scale production and improved efficiency can lead to higher sales volumes.
- A company's strength and prestige in local markets can be significantly enhanced by global competition. Increased prestige can result in better bargaining power with creditors, suppliers, distributors, and other key stakeholders.

Disadvantages:
- Firms, when conducting international business, encounter various social, cultural, demographic, environmental, political, governmental, legal, technological, economic, and competitive forces, which are often complex and not fully understood. These factors can complicate communication for the firm.

- In new environments, the weaknesses of competitors are often exaggerated, while their strengths may be overlooked. Gaining knowledge about the number and nature of competitors can be more difficult when conducting international business.
- Languages, dialects, cultures, and value systems differ across geographical locations; this can create communication barriers and lead to problems.
- Dealing with two or more currencies can make international business operations more complex.

From a public relations perspective, the impact of these advantages and disadvantages on a business must be carefully addressed by public relations specialists, consultants, or departments. One prominent method used for this purpose is the PEST analysis. It is crucial for public relations professionals to conduct a thorough PEST analysis, which examines the political, economic, social, and technological environments, and to identify the potential effects on the business as it enters a new environment or the potential impact it may have on that environment. Furthermore, it is important for these efforts to become routine and for the environment to be continuously monitored.

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CHAPTER 6

MIGRATION, CONSUMPTION, AND BELONGING: THE THEORETICAL FOUNDATIONS OF SOFT CONSUMER ETHNOCENTRISM IN THE MIGRANT CONTEXT

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In contemporary urban contexts, migrants are no longer merely demographic categories represented in population statistics; rather, they have become active and highly visible consumers across a wide range of domains, from supermarket shelves and cafés to digital platforms and housing markets. The preference of an international student living in Berlin for discount grocery chains, the tendency of an expatriate in Dubai to frequent specific supermarkets and restaurants, or the prioritization of mobile phones and internet packages by a refugee residing in Gaziantep illustrate how migrant consumption has evolved into an ordinary and tangible dimension of everyday life. These examples demonstrate that migrants' consumption behaviors are shaped not only by economic constraints but also by lifestyle considerations, security needs, and social ties.

As international migration flows have intensified, migrant populations have assumed an increasingly heterogeneous structure comprising expatriates, international students, asylum seekers, refugees, and long-established migrant communities residing in host countries (United Nations, 2020). This heterogeneity renders it analytically problematic to conceptualize migrant consumers as a homogeneous group and highlights the need for group-based and context-sensitive analyses of consumption behavior. OECD data indicate that international students and highly skilled migrants constitute a significant source of demand for host-country economies in areas such as housing, food, transportation, and digital services (OECD, 2022).

Expatriates represent one of the most visible segments of migrant consumption, characterized by relatively high purchasing power. Typically relocating through multinational corporations or international organizations, this group tends to prioritize the maintenance of specific living standards and engages in intensive consumption in domains such as housing, health insurance, private education, and dining services. Empirical research suggests that expatriates display a stronger orientation toward global brands and standardized international service offerings than local consumers (McNulty & Brewster, 2017).

International students constitute another rapidly expanding dimension of migrant consumption. Operating under constrained budgets, they tend to exhibit high price sensitivity in everyday consumption, favoring discount supermarkets, second-hand goods, and shared housing arrangements. Despite these budgetary limitations, the aggregate expenditure of international students represents a substantial contribution to local economies, particularly in university cities (Brooks & Waters, 2011).

For asylum seekers and refugees, consumption is predominantly organized around basic needs. Nevertheless, UNHCR reports emphasize that refugees should not be viewed as passive aid recipients; rather, they actively engage with host-country markets through consumption related to food, transportation, and, most notably, communication services. Access to smartphones and internet connectivity has become a central consumption priority in refugee households, facilitating both the maintenance of transnational family ties and the management of everyday life in conditions of uncertainty (UNHCR, 2019).

Migrant consumers are not limited to newly arrived individuals. First-, second-, and third-generation migrants who have resided in host countries over extended periods exhibit substantial differences in consumption behavior. First-generation migrants tend to maintain stronger attachments to products from their country of origin, ethnic retail outlets, and traditional consumption practices. In contrast, second- and third-generation migrants display a higher degree of alignment with host-country consumption norms. Importantly, however, this adaptation does not imply the complete disappearance of symbolic consumption linked to ethnic origin. Findings from the Pew Research Center indicate that while later generations largely resemble the host society in everyday consumption patterns, they continue to preserve ethnic-

origin preferences in specific domains such as food and cultural consumption (Pew Research Center, 2021).

This intergenerational differentiation suggests that migrant consumption is not static but is continuously reshaped through ongoing interactions with the host society. World Bank data further demonstrate that, over time, migrants develop deeper connections with local markets and that economic and social integration is reinforced through consumption practices (World Bank, 2020). Accordingly, migrant consumers should be understood not as temporary actors but as enduring and transformative components of host-country economies.

Overall, although expatriates, international students, refugees, and long-established migrants across different generations differ markedly in their consumption practices, they share a common reliance on consumption as a fundamental means of constructing a new life and sustaining everyday routines. The multi-layered nature of migrant consumption thus underscores the growing importance of studying migrant consumers within the fields of marketing, urban economics, and social policy.

The population of Turkish origin in Germany constitutes a well-established migrant community rooted in the voluntary labor migration (Gastarbeiter) process initiated in the 1960s and gradually consolidated over subsequent decades. Current official and institutional data indicate that, as of 2024, approximately three million individuals of Turkish origin reside in Germany, a substantial proportion of whom belong to second- and third-generation cohorts born in the country (United Nations, 2020; Destatis). This prolonged settlement trajectory has positioned Turkish-origin migrants as a permanent element of Germany's economic, social, and consumption structures.

Within this community, first-generation migrants largely consist of individuals who were employed in industrial and service sectors and who strongly preserved consumption practices associated with their country of origin. By contrast, second- and third-generation Turkish Germans exhibit higher levels of integration in terms of education and occupational attainment. Nevertheless, even among later generations, symbolic preferences rooted in the culture of origin persist, particularly in domains such as food, cultural goods, and family-oriented consumption (Pew Research Center, 2021). This pattern indicates that intergenerational adaptation does not entail the complete erosion of ethnic references but rather their selective and context-dependent reproduction.

In addition to the long-established Turkish-origin population, Germany has witnessed a growing influx of Turkish citizens in recent years through educational mobility and skilled labor migration. OECD data identify Germany as one of the most preferred destinations for Turkish students, who demonstrate active consumer profiles in areas such as accommodation, retail, transportation, and digital services (OECD, 2022). Similarly, Turkish expatriates relocating through international corporations and academic institutions exert a noticeable influence on service and housing markets in major German cities due to their relatively high-income levels and consumption patterns oriented toward specific living standards.

Taken together, these diverse groups illustrate that consumption behaviors among individuals of Turkish origin in Germany are far from uniform; rather, they vary according to the historical context of migration, generational position, and migration motives. What began as a process of voluntary labor migration has evolved into a complex social structure that now constitutes a permanent and transformative component of Germany's economy and consumer markets. In this respect, Turkish-origin migrants should be conceptualized not as a temporary diaspora but as settled consumers who have established durable economic and social ties with the host society.

Migrant Consumption and Transnational Consumption Spaces

Migrant consumption practices extend well beyond individual preferences or processes of adaptation to host-country markets; they actively contribute to the formation of transnational social and spatial fields. Migration scholarship has consistently demonstrated that migrants establish simultaneous ties to both their country of origin and the host society, thereby constructing multilayered life worlds that transcend national boundaries (Levitt & Glick Schiller, 2004). Within this framework, consumption emerges not merely as an economic activity but as a central mechanism through which cultural continuity, belonging, and everyday life are reproduced.

Consumption-oriented spaces such as ethnic grocery stores, restaurants, cafés, digital shopping platforms, and cross-border remittance systems enable migrants to sustain social relations and practices that extend beyond physical borders, thus fostering transnational social spaces (Faist, 2010). These sites function simultaneously as anchors of origin-related cultural practices and as arenas of interaction with the host society, rendering them inherently hybrid in nature. Appadurai's (1996) conceptualization of global cultural flows underscores that, in migration contexts, consumption is not confined to the circulation of goods and services alone; rather, images, tastes, practices, and lifestyles also move across borders, reshaping everyday life in transnational settings.

As a result, migrant consumption spaces cannot be understood as belonging exclusively either to the country of origin or to the host society. Instead, they constitute hybrid consumption environments in which cultural meanings are continuously negotiated and reconfigured (Hannerz, 1996). Vertovec (2009) conceptualizes these spaces as everyday sites in which migrants' multiple affiliations become tangible, identifying them as among the most visible manifestations of transnational ways of life. From this perspective, transnational consumption spaces are not merely locations where economic transactions take place; they are social arenas in which identities are negotiated, social relations are maintained, and cultural boundaries are constantly redrawn.

Accordingly, migrant consumption highlights the need to conceptualize migration not solely in terms of mobility and spatial relocation, but also through the reconstruction of space, culture, and everyday practices. Consumption, in this sense, provides a critical analytical lens for understanding how migrants actively produce and inhabit transnational social worlds that connect origin and destination societies in enduring and dynamic ways.

Transnational Consumption Spaces in the Context of Turkish Migrants: The Case of Germany

In the context of Turkish migrants, transnational consumption spaces are not confined solely to religious sites; rather, they constitute multilayered and increasingly institutionalized formations that permeate various dimensions of everyday life. Migration scholarship demonstrates that Turkish migrants establish simultaneous and enduring ties between their country of origin and the host society, thereby constructing cross-border social and spatial fields through consumption practices (Levitt & Glick Schiller, 2004). In the German context, these spaces are primarily organized around ethnic grocery stores, restaurants, associations, digital platforms, and religious institutions, all of which together form a durable infrastructure shaping migrants' everyday lives.

Within this framework, ethnic grocery stores and retail spaces represent the most prevalent and enduring examples of transnational consumption spaces for Turkish migrants. Concentrated in major cities and industrial regions such as Berlin, Cologne, Frankfurt, Hamburg, and North Rhine–Westphalia, Turkish grocery stores offer food products, beverages, and everyday

consumer goods imported from Türkiye, thereby enabling the continuation of origin-related tastes, cooking practices, and consumption routines. In neighborhoods such as Berlin-Kreuzberg, Cologne-Ehrenfeld, or Duisburg-Marxloh, these stores have evolved beyond mere sites of exchange to become integral components of an established everyday life order.

Products commonly found in these retail spaces—such as white cheese, olives, sucuk, legumes, and traditional baked goods—do more than satisfy nutritional needs. They facilitate the reproduction of family-based food practices and cultural rituals within the German context. In this sense, consumption operates as a symbolic bridge to the past and as a mechanism of cultural continuity for migrants. Urban and neighborhood-level migration studies conducted in Germany indicate that ethnic grocery stores are widely perceived by first- and second-generation Turkish migrants as "familiar" and "safe" spaces, reinforcing feelings of belonging and ontological security (Schiffauer, 2004; Vertovec, 2009).

At the same time, Turkish grocery stores function as semi-public social spaces. Everyday interactions within these settings often include informal conversations, the exchange of local news, and the circulation of information related to employment and housing. Hiebert, Rath, and Vertovec (2015) emphasize that across many European cities, including those in Germany, the social role of ethnic retail spaces is critical for migrants' attachment to urban space and for the production of social capital. From this perspective, ethnic markets emerge as sites where migrant entrepreneurship intersects with community-based solidarity networks.

The transnational character of these retail spaces is also evident in their supply chains and economic circulation. Through Turkish grocery stores, continuous economic relationships are maintained with producers, wholesalers, and logistics firms in Türkiye, embedding migrant consumption within cross-border supply networks. Research on migrant entrepreneurship suggests that such retail activities not only facilitate integration into the host-country economy but also sustain economic and symbolic ties with the country of origin (Rath & Kloosterman, 2000; Kloosterman, 2021).

Recent studies further indicate that migrant-owned retail businesses in European cities contribute not only to cultural continuity but also to the resilience of local urban economies. In countries with substantial migrant populations such as Germany, ethnic grocery stores and small-scale migrant enterprises are increasingly integrated into both host-country markets and origin-country economies through transnational supply chains (OECD, 2023). Contemporary scholarship thus argues that these retail spaces should no longer be viewed merely as "niche" consumption sites, but rather as hybrid economic arenas that increasingly intersect with mainstream consumption practices (Kloosterman, 2021).

Over time, Turkish grocery stores in Germany have also evolved from inward-oriented spaces serving primarily migrant communities into hybrid consumption environments characterized by everyday intercultural interaction. The growing preference for Turkish food products among German consumers has contributed to the positioning of these spaces as active and transformative components of multicultural urban life (Warde, 2016; Vertovec, 2009). Supporting this view, recent World Bank reports highlight that small-scale migrant-owned retail businesses enhance the economic sustainability of transnational consumption spaces by facilitating cross-border flows of goods and services (World Bank, 2023).

From this perspective, Turkish ethnic grocery stores in Germany should not be conceptualized as closed spaces devoted solely to maintaining ties with the country of origin. Rather, they should be understood as dynamic transnational arenas in which economic, social, and cultural boundaries are continuously negotiated through interaction with the host society. Within these spaces, consumption functions as a core practice through which everyday life is sustained and migrants' multiple belongings are rendered visible.

More broadly, migrants' everyday consumption practices underscore that consumption is not merely an individual, preference-driven economic activity. It plays a central role in maintaining belonging, strengthening group ties, and reproducing collective identities in everyday life. Through consumption practices spanning ethnic retail, clothing, entertainment, financial services, and digital platforms, migrants simultaneously sustain ties with their country of origin and engage with the host society, thereby constructing transnational life spaces. This pattern reveals that migrant consumption is not a unidirectional process of adaptation but rather a simultaneous and multilayered configuration (Levitt & Glick Schiller, 2004; Vertovec, 2009).

Post-2024 migration literature further suggests that these multilayered consumption patterns have become increasingly visible in large urban contexts through spatial concentration and sectoral diversification. The United Nations Department of Economic and Social Affairs' *International Migration 2024 Highlights* report emphasizes that migrant populations are not merely demographic categories but also key actors shaping urban consumption, service demand, and entrepreneurship. According to the report, migrant-related consumption and service activities in European cities are particularly concentrated in food retail, personal services, entertainment, and financial intermediation (UN DESA, 2024).

This trend is clearly observable in Germany. The OECD's *International Migration Outlook 2024* indicates that small-scale retail and service enterprises established by migrants increasingly cater not only to ethnic communities but also to mainstream consumer groups. This development suggests that migrant consumption constitutes a hybrid economic field embedded within the broader fabric of the host society, rather than an inward-looking or isolated market segment.

Migrants' consumption preferences are often shaped by a logic of "turning toward one's own." The deliberate preference of Turkish migrants in Germany for food and clothing products originating from Türkiye, as well as for music, entertainment, and social venues associated with the country of origin, illustrates the close relationship between consumption and group belonging. Recent analyses by the Pew Research Center (2024) demonstrate that such preferences extend beyond individual habits and reflect normative orientations aimed at preserving collective identity.

Financial consumption practices further constitute a critical domain through which migrants' transnational ties become tangible. The World Bank's *Migration and Development Brief 39* (2024) shows that migrants maintain simultaneous economic relations with host and origin countries through remittances, digital payment systems, and banking services. These financial practices function not only as economic transactions but also as institutionalized expressions of familial responsibility and intra-group solidarity.

Taken together, these consumption patterns position consumer ethnocentrism as a theoretically central concept for understanding migrant consumer behavior. Consumer ethnocentrism refers to the tendency of individuals to perceive products associated with their own national or ethnic group as morally, economically, and socially more legitimate (Shimp & Sharma, 1987). Contemporary research indicates that this tendency increasingly manifests in selective and context-dependent forms rather than as absolute hostility toward foreign products. Aguilar-Rodríguez et al. (2025) demonstrate that "soft" consumer ethnocentrism strengthens positive orientations toward in-group products without necessarily implying categorical rejection of out-group offerings.

Accordingly, migrants' everyday consumption practices call for reconceptualizing consumer ethnocentrism not as a static attitude operating solely within national boundaries, but as a dynamic orientation shaped by transnational ties, group belonging, and moral evaluations. Migrants' preferences in food, clothing, entertainment, and financial consumption illustrate

how ethnocentric tendencies become visible and measurable in everyday life, thereby providing a crucial foundation for the theoretical discussion of consumer ethnocentrism in migrant contexts.

Theoretical Framework of Consumer Ethnocentrism

Ethnocentrism is defined as the tendency of individuals to position their own ethnic group at the center of social life and to evaluate other groups through the values, norms, and perspectives of this central reference point. Within this framework, individuals tend to perceive their own culture as natural, correct, and superior, while viewing other ethnic or cultural groups as inferior, threatening, or less legitimate. The concept was first systematically articulated by Sumner (1906), who described ethnocentrism as the inclination to regard one's in-group as the center of the universe, to glorify in-group norms, and to reject or devalue out-groups. Importantly, Sumner conceptualized ethnocentrism not merely as a cognitive bias, but as a psychosocial structure that serves functions of identity protection, belonging maintenance, and uncertainty reduction.

This foundational conceptualization was subsequently deepened within social psychology through social identity theory. According to social identity theory, individuals seek to enhance their self-esteem by maintaining the status and value of the groups to which they belong, a process that fosters in-group favoritism and out-group derogation (Tajfel & Turner, 1979). In the context of consumption, this mechanism leads consumers to evaluate products not only on functional or economic criteria, but also on symbolic and national meanings. Consumption thus becomes a domain in which identity is reproduced and social positioning is reaffirmed.

For this reason, within marketing and consumer behavior scholarship, ethnocentrism has been approached not merely as an abstract social attitude, but as a core cognitive orientation that systematically shapes product and brand preferences. The concept of consumer ethnocentrism was developed to capture consumers' tendencies to perceive the purchase of foreign products as economically, socially, or morally inappropriate, while viewing the consumption of domestic products as a form of responsibility or obligation. Shimp and Sharma (1987) define consumer ethnocentrism as a normative and attitudinal structure that precedes purchasing decisions, emphasizing that it explains not what consumers buy, but what they believe they ought to buy.

This perspective moves beyond classical consumer models based on rational cost–benefit calculations. Ethnocentric consumers may refrain from purchasing foreign products even when these products are perceived as superior in terms of quality or price, instead framing the preference for domestic products as a social duty rather than an economic choice. The development and cross-national validation of the CETSCALE by Netemeyer et al. (1991) demonstrated that consumer ethnocentrism possesses cross-cultural validity and reflects a structured attitudinal pattern rather than idiosyncratic individual preferences.

Consumers with strong ethnocentric orientations tend to believe that purchasing foreign products harms domestic employment and the national economy, while supporting domestic products is associated with protecting national welfare (Shimp & Sharma, 1987; Netemeyer et al., 1991). Balabanis et al. (2001) further showed that consumer ethnocentrism is closely linked to ideological orientations such as nationalism and patriotism. In this respect, consumer ethnocentrism represents a multidimensional structure that reflects not only consumer identity, but also broader notions of citizenship, national belonging, and collective responsibility.

Consumer ethnocentrism is also closely associated with the country-of-origin effect. Product origin functions not merely as technical information, but as a symbolic cue conveying meanings related to quality, trustworthiness, and moral appropriateness (Steenkamp, 1990). For

ethnocentric consumers, domestic origin signals "belongingness" and serves to reinforce national identity through consumption practices.

This theoretical structure is clearly observable in contemporary consumption practices. Consumer ethnocentrism does not remain confined to individual attitudes, but frequently translates into collective consumption behaviors, most notably through boycott tendencies. Empirical studies conducted in emerging markets demonstrate that ethnocentric orientations significantly increase deliberate avoidance of foreign products and boycott intentions. A study conducted in Indonesia revealed that consumer ethnocentrism, together with national and moral attachment, significantly strengthens consumers' intentions to boycott foreign brands. The findings highlight that among younger consumers in particular, ethnocentrism operates in conjunction with group pressure and national identity to trigger boycott behavior (Kusmayadi, 2024).

Similarly, research conducted in the Vietnamese context indicates that consumer ethnocentrism negatively affects purchase intentions toward foreign products. Using structural equation modeling with a sample of 448 consumers, Nguyen (2023) demonstrates that ethnocentric attitudes exert a strong and negative influence on perceptions and purchase intentions toward Chinese-origin products. This evidence underscores how consumer ethnocentrism, in interaction with country-of-origin perceptions, shapes behavioral decisions and reinforces deliberate avoidance of foreign offerings.

The relationship between consumer ethnocentrism and boycott behavior is not limited to ethnic or national belonging alone, but is also reinforced by consumer animosity and moral evaluations. Studies conducted in the Turkish context show that both ethnocentrism and consumer animosity significantly increase boycott tendencies toward foreign products, with substantial effects on perceived price fairness, quality evaluations, and purchase intentions (Yağcı, 2010). These findings indicate that ethnocentric consumers may engage not only in preferential support of domestic products, but also in active counter-consumption directed at foreign brands.

Taken together, these empirical findings demonstrate that consumer ethnocentrism produces observable and measurable behavioral outcomes in contemporary consumption practices, rather than remaining an abstract attitudinal construct. Particularly in periods characterized by intensified global competition and heightened national identity discourse, ethnocentric orientations emerge as a central mechanism shaping both purchasing preferences and boycott behaviors.

Despite increasing globalization, consumer ethnocentrism has not disappeared; instead, it persists in more contextualized and selective forms. Cleveland, Laroche, and Papadopoulos (2009) show that consumer ethnocentrism can coexist with cosmopolitan consumption tendencies, suggesting that global and national identities operate as overlapping rather than mutually exclusive identity layers. More recent studies further indicate that consumer ethnocentrism is not a uniform phenomenon, but manifests in distinct "hard" and "soft" forms. Aguilar-Rodríguez et al. (2025) demonstrate that soft ethnocentrism strengthens positive attitudes toward domestic products, whereas hard ethnocentrism is associated with more exclusionary and threat-based orientations toward foreign products.

In conclusion, consumer ethnocentrism represents a multidimensional attitudinal structure that extends beyond individual consumption preferences and is deeply intertwined with national identity, moral reasoning, and collective responsibility. Particularly in multicultural societies and among migrant consumer groups, it provides a robust and still highly relevant theoretical foundation for understanding consumption behaviors shaped through ongoing interactions with acculturation and identity processes.

Soft Consumer Ethnocentrism in the Migrant Context and Its Behavioral Dimensions

The behavioral dimensions of soft consumer ethnocentrism are not limited to the question of *which* products are purchased; they also encompass decision-making processes related to *how*, *when*, *from whom*, and *under what contextual conditions* purchases are made. In this respect, soft ethnocentrism generates stable patterns of behavior through recurring practices in the everyday lives of migrant consumers. These behaviors are often shaped less by explicit ideological choices than by habit, symbolic meaning, and community norms (Warde, 2016).

At the behavioral level, a critical distinction can be drawn between highly visible and low-visibility forms of consumption. Migrant consumers tend to align more closely with the mainstream norms of the host society in consumption practices that carry high public visibility, whereas they maintain stronger preferences oriented toward the origin group in low-visibility, private-domain consumption. For example, household food consumption, digital media subscriptions, or remittances directed toward the country of origin constitute domains in which soft ethnocentrism manifests more intensely (Pew Research Center, 2024).

This behavioral distinction is also clearly observable in digital consumption practices. Migrant consumers' regular engagement with digital media content originating from their country of origin—such as television platforms, music streaming services, and news websites—produces a form of consumption loyalty that extends beyond physical borders. Such digital preferences do not necessarily imply a rejection of foreign content; rather, they give rise to a dual consumption pattern in which host-country and origin-country content are consumed simultaneously. This dynamic illustrates how soft ethnocentrism is reproduced within technologically mediated environments as well (Vertovec, 2009).

Another important extension of the behavioral dimension concerns how country-of-origin information is utilized by migrant consumers. As emphasized by Verlegh (2021), country-of-origin cues in contemporary consumption function less as simple indicators of quality and more as symbols imbued with emotional and affective meanings. In the migrant context, this dynamic leads products from the country of origin to be perceived as "familiar," "trustworthy," and "ours," perceptions that are directly translated into behavioral preferences. At this point, soft ethnocentrism employs country-of-origin information not as an exclusionary filter, but as a positive signal guiding choice.

Behavioral outcomes are also closely associated with price sensitivity. Migrant consumers exhibiting soft ethnocentric tendencies may, under certain conditions, be willing to pay higher prices for products associated with their origin group. This behavior is explained less by rational price comparisons than by motivations related to symbolic support and solidarity. NielsenIQ's (2024) global report on "buy local" trends indicates that consumers may display price flexibility in order to support local or in-group products. This finding is particularly important in demonstrating that soft ethnocentrism may entail economic sacrifice at the behavioral level.

The behavioral dimensions of soft ethnocentrism are further shaped through brand relationships. Migrant consumers establish relationships with origin-group brands that are not merely functional, but also emotional and identity-based. Such brands serve functions such as maintaining connections with the past, fostering a sense of belonging, and achieving recognition within the community. As highlighted by Baber et al. (2024), these relationships differ from conventional brand loyalty by producing a normative and symbolic form of attachment.

Another noteworthy behavioral domain is intra-community recommendation and word-of-mouth communication. Migrant consumers with soft ethnocentric orientations not only prefer origin-group products and services themselves, but also actively recommend and disseminate

them within their communities. This process demonstrates that soft ethnocentrism can evolve from an individual attitude into collective behavioral patterns (Kloosterman, 2021).

Finally, soft consumer ethnocentrism can be understood as a behavioral pattern characterized by continuity over time. Although migrants' consumption preferences may change across different stages of the life course—such as initial settlement, family formation, childrearing, and aging—certain symbolic and behavioral attachments to the origin group tend to persist. This continuity indicates that soft ethnocentrism is not a temporary reaction, but rather a structural component of migrant consumer behavior (Aguilar-Rodríguez et al., 2025).

Taken together, these behavioral dimensions suggest that soft consumer ethnocentrism in the migrant context constitutes a comprehensive model that extends well beyond purchase intention. It encompasses a wide range of behavioral outcomes, including loyalty, price flexibility, brand relationships, digital consumption practices, and intra-community diffusion. As such, soft consumer ethnocentrism offers a robust and analytically rich framework for understanding migrant consumer behavior at both theoretical and empirical levels.

The Theoretical Necessity of Soft Consumer Ethnocentrism in the Migrant Context

One of the primary reasons that necessitates a rethinking of consumer ethnocentrism in the migrant context lies in the contemporary migration literature's departure from viewing migration as a one-directional process of relocation. Instead, migration is increasingly conceptualized in terms of continuity, simultaneity, and multi-sitedness. In particular, post-transnationalism scholarship demonstrates that migrants conduct their lives in ways that cannot be reduced entirely to either the country of origin or the host society. This reality renders theoretical explanations of consumption practices based on fixed and singular forms of belonging conceptually problematic (Faist et al., 2021).

Faist and colleagues (2021) emphasize that transnational social spaces are not confined solely to economic or political relations, but are continuously reproduced through everyday practices, symbolic attachments, and cultural routines. Within this framework, consumption emerges as a central arena through which migrants' multiple belongings become visible and materially enacted. However, classical theories of consumer ethnocentrism largely fail to account for such multi-sitedness, instead anchoring the consumer within a single national frame of reference.

This theoretical limitation clearly illustrates why ethnocentrism must be reconceptualized from a migrant perspective. While migrants actively participate in the economic systems of host societies, they simultaneously sustain symbolic and normative attachments to their origin groups. As a result, ethnocentrism in the migrant context does not primarily operate as hostility toward the foreign, but rather as a preferential orientation toward what is perceived as "ours." The concept of soft consumer ethnocentrism is specifically designed to capture this in-between position at a theoretical level.

Recent developments in the sociology of consumption further reinforce this argument by highlighting the increasingly moral, normative, and relational dimensions of consumption. Warde's (2016) practice-theoretical approach demonstrates that consumption behaviors are shaped less by isolated individual choices and more by recurring social practices. In the migrant context, these practices often transform preferences for origin-group products into habitual, familiarity-based, and trust-oriented orientations rather than explicit ideological stances. This pattern stands in contrast to the conflict-driven logic assumed by models of hard or exclusionary ethnocentrism.

At this point, soft ethnocentrism allows consumer ethnocentrism to be conceptualized as an orientation that varies in both intensity and form. As noted by Balabanis and Diamantopoulos (2004), ethnocentric tendencies do not invariably generate exclusionary outcomes; in some

cases, they manifest simply as positive inclinations toward in-group products. In the migrant context, this inclination indicates that consumption functions not as a moral rejection of the external, but as a practice of symbolic proximity and continuity.

Contemporary synthesis studies in migration and consumption literature further suggest that such conceptual approaches are becoming increasingly necessary. Baber et al. (2024), in their systematic review of the consumer ethnocentrism literature, argue that the concept can no longer be adequately explained solely through reflexes of national economic protectionism. Instead, it must be reconsidered within broader frameworks of identity, belonging, and normative values. This assessment directly supports the claim that soft ethnocentrism fills a significant theoretical gap in the migrant context.

Similarly, Vertovec's (2009) discussions of "super-diversity" demonstrate that identities and forms of belonging in contemporary societies are neither singular nor static, but overlapping, layered, and highly contextual. For migrant consumers, this implies that ethnocentrism should not be treated as a fixed attitude, but rather as an orientation that manifests with varying intensity across different domains of everyday life. Soft consumer ethnocentrism possesses theoretical capacity to account for this contextual variability.

Finally, the growing emphasis on relational consumption within consumer culture further strengthens the theoretical relevance of soft ethnocentrism. From this perspective, consumption is understood as a domain in which individuals construct their identities relationally, through interactions with others (Arnould & Thompson, 2005). For migrants, these relations are often concentrated within origin-group networks, making consumption a central mechanism for sustaining community ties. This dynamic underscores why ethnocentrism in the migrant context should be conceptualized not as exclusionary, but as fundamentally relational.

Within this framework, soft consumer ethnocentrism offers a theoretically necessary expansion that moves beyond the nation-centered assumptions of classical ethnocentrism theories. It provides a conceptual lens capable of explaining migrants' multiple belongings, transnational life practices, and symbolic consumption orientations. Independent of empirical claims, this concept establishes an integrative bridge between the literatures on migration, consumption, and ethnocentrism, thereby aligning consumer ethnocentrism with contemporary social realities.

Conclusion

This book chapter has examined the consumer ethnocentrism literature through the lens of migrant consumers and has demonstrated that its traditional, nation-centered assumptions are theoretically insufficient in light of contemporary migration realities. In particular, the fact that migrants conduct their everyday lives beyond a single national context and operate as actors characterized by transnational practices and multiple forms of belonging renders classical explanations of consumer ethnocentrism based on a rigid "domestic–foreign" dichotomy increasingly problematic. This situation makes it necessary to reconsider ethnocentrism in the migration context not merely as an empirical requirement, but as a fundamental theoretical imperative.

The transnational perspective advanced by migration studies shows that migrants sustain their economic, social, and cultural relations not through a linear process of integration, but within simultaneous and multi-layered networks of ties (Levitt & Glick Schiller, 2004; Vertovec, 2009). When this perspective is applied to the domain of consumption, it becomes evident that migrants' consumption practices are likewise shaped by multiple reference frames. Migrant consumers participate in the mainstream markets of host societies while simultaneously maintaining symbolic and normative relationships with products and services associated with

their origin groups. This dual structure renders the conceptualization of consumer ethnocentrism as a fixed, homogeneous, and exclusionary attitude theoretically problematic.

The conceptualization of soft consumer ethnocentrism proposed in this chapter offers a pathway to overcome these theoretical limitations. Rather than assuming an absolute rejection of foreign products, soft ethnocentrism foregrounds a positive, supportive, and symbolic orientation toward in-group products (Balabanis & Diamantopoulos, 2004). This approach enables ethnocentrism to be understood not as an ideological opposition, but as a relational and context-dependent orientation.

The theoretical relevance of this concept is particularly pronounced in the migrant context. Migrant consumers are neither fully assimilated into host societies nor exclusively confined within origin-group boundaries. This in-between position is reflected in their consumption practices, where different forms of belonging become visible across different consumption domains. Soft consumer ethnocentrism captures this "both–and" condition, allowing migrant consumers' multiple identities and symbolic attachments to be conceptualized beyond one-dimensional models.

This theoretical framework also necessitates a reassessment of the normative assumptions embedded in the consumer ethnocentrism literature. Reducing ethnocentrism solely to economic protectionism, anti-foreign sentiment, or nationalist reflexes narrows the concept's social and cultural dimensions. In the migrant context, ethnocentric orientations are often not exclusionary but rather solidaristic, protective, and symbolic in nature. This requires ethnocentrism to be reconsidered not only through the lens of opposition, but also through proximity, support, and moral affiliation.

One of the core theoretical contributions of this chapter lies in its treatment of consumer ethnocentrism as a dynamic and graded orientation in the migration context. By assuming that ethnocentric tendencies vary in intensity, form, and visibility depending on context, soft ethnocentrism challenges rigid and universalist models of ethnocentrism. This approach repositions consumer ethnocentrism as an orientation that is continuously reproduced within social positions and structures of belonging, rather than as a static attitude.

Moreover, this theoretical synthesis functions as an integrative bridge between the literatures on migration, consumption, and identity. By translating the transnational perspective of migration studies into the field of consumption, the chapter emphasizes that consumer behavior cannot be understood solely through individual choice or market logic, but must be analyzed in relation to social relations, symbolic meanings, and collective forms of belonging. In this sense, soft consumer ethnocentrism offers an explicitly interdisciplinary conceptual contribution.

Overall, this book chapter presents a comprehensive and critical theoretical framework that invites a reconceptualization of consumer ethnocentrism in the migrant context. It has been argued that the traditional consumer ethnocentrism literature positions consumers within a singular, nationally defined framework of belonging and is therefore limited in its ability to explain migrant experiences characterized by transnational life practices, multiple attachments, and spatial discontinuities (Shimp & Sharma, 1987; Vertovec, 2009). This limitation necessitates a re-theorization of ethnocentrism in migration contexts.

Within this framework, the proposed concept of soft consumer ethnocentrism serves as an analytical tool that explains migrants' consumption practices not through an exclusionary and conflict-driven "domestic–foreign" binary, but through symbolic proximity, normative orientation, and in-group solidarity. Migrants' capacity to maintain simultaneous ties with both origin and host societies demonstrates that consumption acquires meaning within multiple reference systems (Levitt & Glick Schiller, 2004; Faist et al., 2021). By explicitly accounting

for this simultaneity, soft consumer ethnocentrism conceptualizes ethnocentrism as a context-sensitive and graduated orientation rather than a rigid ideological stance.

This theoretical expansion moves beyond narrow approaches that equate consumer ethnocentrism exclusively with economic protectionism or nationalist sentiment. In the migrant context, ethnocentric orientations often manifest not as hostility toward the foreign, but as a preference for "what is ours" and as practices of community support. Consumption thus functions not as a moral rejection, but as a symbolic expression of belonging and collective responsibility (Balabanis & Diamantopoulos, 2004; Arnould & Thompson, 2005). In doing so, soft consumer ethnocentrism renders visible the normative and relational dimensions of ethnocentrism that have been under-theorized in existing literature.

Furthermore, the framework advanced in this chapter establishes a coherent link between migration and consumption studies. By integrating the notion of transnational social spaces into consumer research, it argues that consumption behavior must be examined alongside social relations, symbolic meanings, and layered structures of belonging (Portes, 2010; Vertovec, 2009). This integrative perspective aligns consumer ethnocentrism with contemporary migration realities.

Finally, this conceptualization responds directly to recent calls for theoretical renewal within the consumer ethnocentrism literature. Contemporary synthesis studies emphasize that one-dimensional, nation-centered definitions of ethnocentrism are inadequate in globalized and migration-intensive societies (Baber et al., 2024; Aguilar-Rodríguez et al., 2025). By transforming these critiques into a systematic theoretical proposal grounded in the migrant context, soft consumer ethnocentrism offers an original contribution to the literature.

In conclusion, this book chapter repositions consumer ethnocentrism within the context of migration, expanding the concept's analytical scope and deepening its theoretical foundations. Soft consumer ethnocentrism provides a robust framework for explaining migrants' multiple belongings, transnational life practices, and symbolic consumption orientations. Independent of empirical claims, this conceptualization contributes to transcending the nation-centered boundaries of the consumer ethnocentrism literature and offers a distinctive, sustainable, and extensible theoretical contribution at the intersection of migration, consumption, and identity studies. As such, it establishes a solid theoretical foundation for future theoretical debates and empirical investigations.

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CHAPTER 7

ARTIFICIAL INTELLIGENCE ANXIETY AMONG SOFTWARE DEVELOPERS IN TÜRKIYE

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Introduction

The swift integration of artificial intelligence (AI) across numerous industries globally has been deeply impacting traditional work patterns and, as a result, radically reshaping labor markets and the nature of the workforce. The technologies realize huge efficiencies and new opportunities and raise huge questions over job security and the possibility of future employment. The discipline of computer programming, being characterized by its inherent dynamism and technology dependence, offers a sound foundation upon which to examine such fears, especially considering the paradigmatic relationship it shares with developments in innovations in artificial intelligence.

This study investigates the imminent problem of work-related anxiety instigated by artificial intelligence among Turkish software developers, an emerging technological hub in Eurasia. With the Turkish software industry having grown exponentially, concerns were raised about the future impact of AI on job security, skill adaptability, and career progression for software professionals. It is thus necessary to venture into the psychological aspects of these anxieties and how they translate into occupational behavior and attitudes.

AI is hailed as an enabler of enhanced productivity at lower costs, but it has also created widespread fears of job displacement in fields that are intensely dependent on digital labor. Among the major professional groups affected by these trends are software developers, who are engaged in creating artificial intelligence software while also being subject to a growing tendency to be substituted by these technologies in certain tasks, including code generation, debugging, and algorithm optimization.

World Economic Forum, also informs in 2023 that automation and AI would displace 83 million jobs globally and generate another 69 million new jobs by 2027, and the net effect would be losing 14 million jobs. Turkish local surveys carried out have revealed that 84% of the employees are concerned that they would lose their jobs due to AI technologies. The fear is particularly rife among information technology (IT) professionals, such as software developers, due to the growing application of AI-powered development tools such as GitHub Copilot and ChatGPT, which erodes the traditional view of employment security in the industry.

The primary objective of this study is to quantify and analyze levels of anxiety regarding unemployment brought on by artificial intelligence among Turkish software developers. Although the concept of artificial intelligence anxiety (AIA) covers a broad range of emotional and cognitive responses to AI technologies, the present study is more specifically concerned with the anxiety of job replacement, i.e., the anxiety of unemployment due to the advancing capabilities of AI. Other elements of AIA will be discussed in a supporting role, allowing for the contextualization of the general psychological model without detracting from the primary emphasis. Theoretically, the research adds to the limited literature that has only just begun to investigate artificial intelligence's psychological impact.

Artificial Intelligence Anxiety (AIA) is a special form of technology-related psychological disturbance that individuals may experience when they encounter the utilization or implementation of artificial intelligence technology in their professional and personal lives. Individuals develop this anxiety due to the fear of losing human abilities, job loss, or reduced relevance of existing skill sets. In contrast to the more blanket concepts of technostress or computer anxiety, AIA is specifically related to the concept of intelligent systems—those capable of learning, reasoning, or making decisions on their own—thus replacing or surpassing human beings in most tasks.

Wang and Wang have initially constructed a validated scale to measure AIA in 2019, and their framework was translated into Turkish by Akkaya et al in 2021. The scale breaks down AIA into four interrelated subdimensions: learning anxiety, job displacement anxiety, socio-technical blindness, and AI configuration anxiety. The four subdimensions of AIA are relevant in delineating the different

ways individuals experience upset in reaction to AI technologies. Together, these subdimensions provide a holistic view of AIA:

- **Learning Anxiety:** This deals with the unease that accompanies people having to learn the competencies that will enable them to use or engage with AI technologies. Individuals with high learning anxiety are typically described as having low self-efficacy in terms of their ability to adapt. Yet, according to Piniel (2013), learning anxiety can also act as a driving factor encouraging individuals to pursue skill enhancement and professional development in order to mitigate perceived threats.

- **Job Replacement Anxiety:** At the center of this study's focus is the concern regarding potential replacement by artificial intelligence systems. Software developers are now confronted with AI frameworks capable of performing tasks that were previously thought safe in the technology industry. This fear can have a detrimental influence on motivation, job satisfaction, and career development. However, in a rather paradoxical manner, it can also foster the development of learning routines to sustain competitiveness (Frey & Osborne, 2017).

- **Socio-Technical Blindness:** It is a phenomenon whereby one is unable or unwilling to acknowledge artificial intelligence as belonging to an overall socio-technical system the individuals concerned may neglect to think about how the AI system fits into organizational systems, human decision-making, and institutional values. Johnson and Verdicchio (2017) add that this narrow view results in biased interpretation and increased fear, as the individuals perceive AI as an autonomous entity instead of a machine that is under human objectives.

- **AI Configuration Anxiety:** It refers to a description of anxiety in the interaction with artificial intelligence systems with human-like characteristics or that function in human-like environments. Though this aspect is less directly related to job security, embodiment anxiety is part of creating more general emotional reactions to AI. Furthermore, the way individuals perceive and emotionally react to AI design and implementation has significant bearing on their general degree of anxiety, including issues of agency, control, and ethics (Huang & Rust, 2018).

Wang and Wang's work in 2019 represents a valuable addition to the academic discussion regarding artificial intelligence (AI) and its psychological effects. As AI continues to infiltrate the various industries and fields, individuals are experiencing a wide array of cognitive and emotional reactions. To address this increasing issue, the researchers developed the Artificial Intelligence Anxiety Scale (AIAS) for assessing levels of anxiety in relation to using AI technologies. The scale has four primary dimensions: (1) Learning Anxiety, referring to the stress caused by learning how to use AI systems; (2) Job Replacement Anxiety, relating to fears of being displaced by AI technologies; (3) Sociotechnical Blindness, representing a lack of awareness about the broader societal impacts of AI decisions; and (4) AI Configuration Anxiety, which deals with discomfort or fear of physically embodied AI agents such as humanoid robots.

The scale development included exploratory and confirmatory factor analysis with a sample comprising 301 working professionals and university students. The results corroborated the validity and reliability of the scale, as indicated by Cronbach's alpha of 0.84 to 0.93. Furthermore, the authors tested the construct validity of the scale by nomological testing, in which AI anxiety was positively correlated with motivated learning behavior. The findings revealed that individuals with greater anxiety towards AI would be more inclined to seek skill enhancement, perhaps considering AI as a twin challenge and threat to be braved.

Wang and Wang maintain that anxiety related to artificial intelligence cannot be simply viewed as an adverse effect. Rather, it can, under some circumstances, promote good behavior and facilitate personal development. For example, anxiety might compel individuals to enhance their computer literacy, pursue technical training, or get additional certifications. This duality, wherein

anxiety is both deterrent and motivator, enhances my conceptualization of psychological responses to revolutionary technologies.

Akkaya et al, carried out in 2021 a crucial adaptation of the Artificial Intelligence Anxiety Scale (AIAS) originally developed by (Wang & Wang, 2019), tailoring it for use in Turkish-speaking contexts based on cultural sensitivity principles and linguistic equivalence principles. With the rise of artificial intelligence in both global and local labor markets, this research provides a culturally and linguistically valid tool for assessing psychological reactions to AI in Turkey. The research is a necessary step in facilitating the valid, standardized assessment of AI anxiety among Turkish professionals and especially technology-intensive professionals.

Adaptation was carried out with strict methodological processes. Forward-backward translation and semantic equivalence were initially achieved from bilingual experts. Pilot testing was also carried out in 110 subjects for item clearness and relevance. The finalized scale was then applied to 163 subjects after preliminary validation, and exploratory and confirmatory factor analysis was carried out. These analyses confirmed that the Turkish version also maintained the original four-factor model of learning anxiety, job replacement anxiety, socio-technical blindness, and AI embodiment anxiety. Internal consistency reliabilities (Cronbach's alpha) were very high, 0.937 to 0.950. Construct validity was also evidenced through substantive correlations with theoretically similar technostress and job insecurity instruments. The study also revealed unique cultural patterns, Turkish respondents reported more job replacement anxiety than learning anxiety, possibly because national anxieties regarding unemployment, digital inadequacy, and economic volatility are more pronounced in that country (Akkaya et al, 2021).

Among the strengths of the study is the cultural sensitivity in scale adaptation. Although the conceptual underpinning of AI anxiety is universally applicable, its manifestation and degree are culturally relative. AI anxiety in Turkish professionals, for instance, tends to happen in a situation of economic instability and unavailability of reskilling opportunities. Effective scale adaptation enables valid cross-cultural comparison and assessment of the varied expression of AI anxiety in the context of the national labor market situation (Akkaya et al, 2021).

In the scope of this research, Turkish version of AIAS yields accurate, locally valid assessment of anxiety in software developers with diagnostic and strategic implications. Use of the scale guarantees empirical results echo genuine concerns of the Turkish technology workforce instead of using imported, potentially biased instruments. Finally, the research closes the gap between universal psychological theories and local realities and is an essential reference book to any workforce research concerned with AI in Turkey.

Methodology

The main instrument that was utilized for data collection in this study was called the Artificial Intelligence Anxiety Scale, which is more commonly referred to using its acronym, AIAS. This particular instrument was initially conceived and carefully created by the researchers (Wang & Wang, 2019). Later, a year on, it was translated into Turkish by researchers (Akkaya et al, 2021). The Turkish form of this measurement instrument consists of a total of 16 items, each of which was carefully formulated to evaluate levels of anxiety experienced by an individual relating to technologies based on artificial intelligence. Each item is scored on a 5-point Likert measurement that ranges from 1, "Strongly Disagree" to 5, "Strongly Agree". The scale includes four subdimensions, each addressing a specific aspect of AI-related anxiety:

- Learning Anxiety (5 items): Evaluates how much perceived difficulties with understanding, working with, or interacting with AI technology are consistent with feelings of anxiety.
- Job Replacement Anxiety (4 items): Refers mainly to fears about whether artificial intelligence technologies or human-shaped robots have an ability to replace human employees for different job categories, thereby leading to job losses.

- Sociotechnical Blindness (4 items): Evaluates users' concern for potential lack of oversight of substantive social and ethical hazards and malfunctions inherent with artificial intelligence systems due to a lack of understanding of human and organizational factors supporting such systems' operation.
- AI Configuration Anxiety (3 items): Evaluates unease with physically embodied AI systems (e.g., humanoid robots), reflecting deeper fears of dehumanization and loss of agency.

The study sample consisted of 186 subjects either employed as software developers or attending training programs in Turkey. Google Forms were distributed on various online forums and social networking sites, such as LinkedIn and Telegram. First, the participants were greeted by an informed consent message and were later presented with a set of demographic questions and the 16 questions of the AIAS. To ensure collection of complete data, all questions were made compulsory. Data collection continued for around three weeks, and within this period, complete responses were submitted by 186 participants. All analyses were conducted with the help of the Python programming language and libraries like pandas, numpy, scipy, statsmodels, seaborn, matplotlib, and sklearn.

Previous validity studies have shown significant internal consistency, reflected in Cronbach's alpha coefficients greater than 0.90 for both the overall scale and its respective subdimensions. This version was culturally adapted and validated for semantic consistency regarding Turkish language and sociocultural standards. In addition to the AIAS items, the survey included demographic measures to allow for subgroup modeling and analyses. The analysis process was structured as follows:

- Each response was carefully inspected to detect any missing data and outliers.
- The Google Form structure forced respondents to fill out all questions, hence eliminating imputation.
- Dependability of reverse-coded items, where appropriate, was evaluated.
- Likert scale responses of "Strongly Disagree" to "Strongly Agree" were each given a numerical equivalent from 1 to 5.
- Composite scores were created for each subdimension (**Learning Anxiety** (5 items), **Job Replacement Anxiety** (4 items), **Sociotechnical Blindness** (4 items), and **AI Configuration Anxiety** (3 items)).

The dataset used in this study consists of responses from 186 participants who are either professional or amateur software developers residing in Turkey. These individuals participated in the study via a structured online survey distributed through professional networks, social media, and developer communities. All participants confirmed their current or recent employment in software development roles and since all questions were mandatory, all 186 participants have complete answers.

Demographic characteristics of participants are summarized in Table 1. The sample was drawn from a wide range of age groups, which were predominantly represented within the 18–24 interval. Gender distribution was skewed slightly, having a higher proportion of male respondents, a phenomenon often seen among populations working within technology industries. The largest number of participants identified themselves as either Junior or AI/ML Engineers, and their professional years ranged from more than 2 years. In addition, the educational background of the participants varied, with nearly half holding a bachelor's degree (47.8%), followed by those with a master's degree (31.2%). With respect to sectoral distribution, the sample was mainly concentrated in Technology (15.59%), AI/ML (14.52%), and Telecommunication (13.98%). Regarding employment status, the majority of participants were either full-time employees (41.40%) or freelancers (32.80%).

Table 1 - Sample Demographics

Variable	Values	N	%	Variable	Values	N	%
Age	18 - 24	61	32,80	Level of Education	High School	6	3,23
	25 - 34	57	30,65		Associate Degree	20	10,75
	35 - 44	48	25,81		Bachelor's Degree	89	47,85
	45+	20	10,75		Master's Degree	58	31,18
Gender	Male	106	56,99		Doctorate (PhD)	13	7,00
	Female	80	43,01	Sector	Consulting	12	6,45
					E-Commerce	8	4,30
Experience	0-1 year	37	19,89		Finance / Banking	15	8,06
	2-5 years	58	31,18		Fast-Moving Consumer Goods	17	9,14
	6-10 years	47	25,27		Logistics	16	8,60
	10+ years	44	23,66		Game / Entertainment	16	8,60
Current Job Position	AI / ML Engineer	42	22,58		Student	2	1,08
	Junior Developer	50	26,88		Retail	1	0,54
	Mid-Level Developer	30	16,13		Health	17	9,14
	Student	1	0,54		Technology	29	15,59
	Senior Developer	31	16,67		Telecommunication	26	13,98
	Software Developer Intern	1	0,54		AI / ML	27	14,52
	Student	1	0,54	Employment Status	Freelancer	61	32,80
	Tech Lead / Architect	30	16,13		Unemployed	13	6,99
					Intern	13	6,99
					Full-time employee	77	41,40
					Part-time employee	22	11,83

Descriptive statistical analyses were performed for all four subdimensions of the Artificial Intelligence Anxiety Scale (AIAS) and for Total AI Anxiety Score. Specific subdimensions investigated included Learning Anxiety, Job Replacement Anxiety, Sociotechnical Blindness, and AI Configuration Anxiety. The findings indicate that software developers in Turkey report generally low levels of anxiety toward artificial intelligence. As shown in

Table 2, job replacement anxiety (M = 2.51, SD = 1.21), AI configuration anxiety (M = 2.51, SD = 1.22), and sociotechnical blindness (M = 2.53, SD = 1.22) displayed slightly higher mean values compared to learning anxiety (M = 2.39, SD = 1.11), yet all subdimensions remained within the lower range of the five-point Likert scale. The overall AI anxiety score further supports this interpretation (M = 2.48, SD = 1.10).

Table 2 – Subdimensions of AI Anxiety

Subdimension	Mean	Std. Dev.	Min	Max
Learning Anxiety	2.39	1.11	1.00	4.80
Job Replacement Anxiety	2.51	1.21	1.00	5.00
Sociotechnical Blindness	2.53	1.22	1.00	5.00
AI Configuration Anxiety	2.51	1.22	1.00	5.00
Total AI Anxiety	2.48	1.10	1.25	4.75

To assess the internal consistency of the scale, Cronbach's alpha coefficients were calculated for the overall scale and for each of the four subdimensions of the Artificial Intelligence Anxiety Scale (AIAS). Internal consistency is an essential component of scale validity, demonstrating the extent to which items within a given subscale measure the same construct. A Cronbach's alpha coefficient above 0.70 is generally accepted within social science research, with values above 0.80 and 0.90 considered good and excellent, respectively (Nunnally & Bernstein, 1994). The results are given in Table 3.

Table 3 - Cronbach Alpha Values

Subdimension	Cronbach's Alpha
Learning Anxiety	0.892
Job Replacement Anxiety	0.874
Sociotechnical Blindness	0.885
AI Configuration Anxiety	0.837
Total AI Anxiety	0.960

Subsequently, a correlation analysis was conducted among the anxiety-related subdimensions—Learning Anxiety, Job Replacement Anxiety, Sociotechnical Blindness, and AI Configuration Anxiety—and the results can be seen in Table 4. The findings reveal strong, positive, and statistically significant correlations among all subdimensions ($p < 0.01$), with correlation coefficients ranging from approximately 0.790 to 0.845 (Kiran & Süzük, 2025). This indicates that different forms of AI-related anxiety tend to co-occur and mutually reinforce one another. Overall, the pattern points to a highly interconnected structure of AI anxiety, suggesting that individuals who experience heightened anxiety in one domain (such as job replacement) are also likely to report elevated anxiety across other dimensions, rather than perceiving these concerns as isolated phenomena.

Table 4 - Correlation Analysis for Subdimensions of AI Anxiety

	Learning Anxiety	Job Replacement Anxiety	Sociotechnical Blindness	AI Configuration Anxiety
Learning Anxiety	1	0.806	0.790	0.796
Job Replacement Anxiety	0.806	1	0.845	0.806
Sociotechnical Blindness	0.790	0.845	1	0.815
AI Configuration Anxiety	0.796	0.806	0.815	1

To conduct independent-samples t-tests, the categorical variables were recoded into binary groupings. Gender was naturally binary in the dataset and thus did not require further recoding. Educational attainment was dichotomized by grouping high school, associate degree, and bachelor's degree as "L. Edu." (Low level of education), while master's and doctoral degrees were coded as "H. Edu." (High level of education), representing higher education. Similarly, software development experience was recoded by combining 0–1 year and 2–5 years of experience as "L. Exp." (Low level of experience), and 6–10 years and more than 10 years of experience as "H. Exp." (High level of experience), representing higher levels of professional experience. The results indicated that no statistically significant differences were found between gender and any of the study dimensions. In contrast, educational level and software development experience were both found to be significantly associated with all dimensions, indicating that participants with higher education levels and greater professional experience differed systematically across all measured constructs. T-test results are listed in Table 5.

Table 5 - t-Test Results

Subdimension	Value	N	Avg.	St. Dev.	p	Status
Learning Anxiety	Male	106	2.36	1.14	0.62	Rejected
	Female	80	2.44	1.16		
Job Replacement Anxiety	Male	106	2.50	1.21	0.92	Rejected
	Female	80	2.52	1.21		
Sociotechnical Blindness	Male	106	2.50	1.19	0.76	Rejected
	Female	80	2.56	1.23		
AI Configuration Anxiety	Male	106	2.48	1.22	0.71	Rejected
	Female	80	2.55	1.22		
Learning Anxiety	L. Edu.	115	2.80	1.22	0.00	Accepted
	H. Edu.	71	1.74	0.59		
Job Replacement Anxiety	L. Edu.	115	2.94	1.25	0.00	Accepted
	H. Edu.	71	1.80	0.69		
Sociotechnical Blindness	L. Edu.	115	3.00	1.18	0.00	Accepted
	H. Edu.	71	1.75	0.75		
AI Configuration Anxiety	L. Edu.	115	2.93	1.26	0.00	Accepted
	H. Edu.	71	1.83	0.76		
Learning Anxiety	L. Exp.	115	2.80	1.22	0.00	Accepted
	H. Exp.	71	1.74	0.59		
Job Replacement Anxiety	L. Exp.	115	2.94	1.25	0.00	Accepted
	H. Exp.	71	1.80	0.69		
Sociotechnical Blindness	L. Exp.	115	3.00	1.18	0.00	Accepted
	H. Exp.	71	1.75	0.75		
AI Configuration Anxiety	L. Exp.	115	2.93	1.26	0.00	Accepted
	H. Exp.	71	1.83	0.76		

As shown in Table 5, the independent-samples t-test results indicate that gender did not lead to statistically significant differences in any of the anxiety dimensions, namely Learning Anxiety, Job Replacement Anxiety, Sociotechnical Blindness, and AI Configuration Anxiety, as male and female participants reported very similar mean scores across all dimensions. In contrast, education level produced statistically significant differences in all four dimensions: participants with lower education levels reported higher levels of Learning Anxiety, Job Replacement Anxiety, Sociotechnical Blindness, and AI Configuration Anxiety, whereas those with higher education levels consistently exhibited lower mean scores across these anxiety-related dimensions.

Similarly, software development experience was found to be significantly associated with all dimensions. Participants with lower experience levels reported higher Learning Anxiety, higher Job Replacement Anxiety, greater Sociotechnical Blindness, and higher AI Configuration Anxiety compared to their more experienced counterparts. Participants with higher levels of software development experience consistently demonstrated lower anxiety scores across all four dimensions, indicating that increased professional experience is associated with reduced anxiety and more confident perceptions regarding artificial intelligence.

Conclusion

The findings of this study offer a comprehensive view of how software developers in Turkey emotionally respond to artificial intelligence technologies. Although participants reported a range of affective reactions, job-related anxieties clearly emerged as the most prominent dimension of AI-related concern. This pattern is consistent with prior research emphasizing job insecurity as a key psychological consequence of automation in technology-intensive labor markets. In this regard, AI is perceived not only as a productivity-enhancing innovation but also as a potential source of uncertainty regarding professional stability and long-term career trajectories.

Overall, the findings indicate that AI anxiety constitutes a multi-dimensional phenomenon affecting various psychological and career-related outcomes among software developers. Specifically, AI-related anxiety was found to influence cognitive attitudes, emotional responses, and professional intentions in the context of rapid technological change. Younger and less experienced developers exhibited significantly higher levels of anxiety regarding potential job displacement compared to their more experienced counterparts. This pattern highlights the buffering role of professional experience, self-efficacy, and accumulated skills in mitigating stress associated with technological transformation.

The relatively lower mean scores observed for generalized AI anxiety and sociotechnical blind spots suggest that software developers may approach AI from a more pragmatic and informed perspective. Owing to their technical expertise and continuous exposure to AI-driven systems, developers are likely to possess a clearer understanding of the actual capabilities and limitations of these technologies. Such familiarity may reduce speculative or exaggerated fears, contributing to a normalization of AI within professional communities and mitigating concerns that are detached from everyday work practices.

Contrary to initial predictions, job replacement anxiety was found to be moderate rather than high, indicating a more nuanced and differentiated structure of concern. This outcome may reflect developers' stronger beliefs in their ability to reskill and adapt to technological change, as well as greater confidence in the complementary role of AI rather than its function as a direct substitute for human expertise. In addition, younger and less experienced developers were found to exhibit significantly higher levels of anxiety regarding potential job displacement compared to their more experienced counterparts, suggesting that professional age, accumulated self-efficacy, and experiential learning may serve as buffering mechanisms against AI-related stress. Furthermore,

prolonged engagement with automation may foster a degree of normalization of technology-related stress, leading individuals to reinterpret AI-related risks as manageable rather than threatening.

Taken together, these findings strengthen the evidence regarding the psychological effects of artificial intelligence on workers and highlight important implications for organizations and theory alike. While technical upskilling remains essential, it is insufficient on its own to address broader forms of AI-related anxiety. Organizations must also invest in psychological support networks, structured career guidance, and transparent communication strategies that clarify how automation will be integrated into work processes. From a theoretical standpoint, the results underscore the importance of distinguishing between specific job replacement concerns and more diffuse forms of global AI anxiety when examining employee attitudes and behavioral intentions in AI-driven work environments.

Organizations should implement proactive and continuous mechanisms to monitor and address employees' attitudes and fears regarding AI implementation, such as periodic surveys and open forums that allow employees to openly express concerns and receive informed guidance. Such practices can help dispel unfounded fears, foster a supportive organizational climate, and reduce the adverse psychological effects associated with AI-related anxiety, while also contributing to employee commitment and turnover stability. More broadly, AI-induced anxiety among software developers represents a complex psychological process with significant implications for career decisions, emotional well-being, and working life. Understanding the multidimensional nature and underlying dynamics of this anxiety is therefore central to designing effective organizational responses. Accordingly, organizations must prioritize not only ongoing professional development but also psychological support structures that enable developers to navigate technological transformation with confidence and resilience, thereby supporting sustained individual performance and long-term organizational success in increasingly AI-driven environments.

Future research would benefit from longitudinal designs examining how AI-related anxiety evolves over time and shapes developers' career trajectories. In addition, cross-cultural comparative studies represent a critical avenue for future inquiry. Comparing software developers in Turkey with those operating in different economic, cultural, and institutional contexts would allow researchers to disentangle the roles of cultural norms, educational systems, and labor market structures in shaping AI-related anxiety. Complementing quantitative approaches with qualitative methods, such as in-depth interviews or focus groups, would further enrich this line of research by uncovering developers' subjective experiences, emotional interpretations, and coping strategies that may remain hidden in survey-based analyses. Such mixed-method designs would provide a more comprehensive understanding of AI anxiety and support the development of context-sensitive organizational and policy interventions.

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CHAPTER 8

MOBILE SHOPPING AND SUSTAINABLE MARKETING IN THE DIGITAL CONSUMPTION ERA: NEW PARADIGMS AND STRATEGIC IMPERATIVES

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1. Introduction

In the 21st century, accelerated digitalization has profoundly transformed consumer behavior. Traditional shopping habits have been replaced by digital platforms, and with the widespread use of mobile devices, mobile commerce (m-commerce) has become one of the most significant components of global e-commerce. Mobile shopping is not merely a technological innovation; it is also a phenomenon that reshapes consumers' lifestyles, decision-making processes, and marketing strategies (Laudon & Traver, 2022).

The rise of mobile shopping has simultaneously brought sustainability debates to the forefront. Today, sustainability is no longer limited to environmental concerns but has also become central to the social and economic dimensions of marketing strategies. Businesses are compelled to align their digital offerings with principles of environmental sensitivity, ethical production, and social responsibility. In this context, mobile shopping emerges as a domain that encompasses both opportunities and risks for sustainable marketing.

As of 2024, more than 3.5 billion users worldwide shop via mobile devices, and mobile commerce accounts for 70% of total e-commerce volume (Statista, 2024). These figures demonstrate that mobile shopping is rapidly expanding not only in developed countries but also in digitalizing emerging economies. Consequently, how mobile shopping can be integrated with sustainable consumption practices has become one of the most critical questions shaping global marketing strategies.

The aim of this study is to evaluate the interaction between mobile shopping and sustainable marketing at a global level. The analysis explores the impact of mobile shopping on consumer behavior, sustainable marketing approaches, global examples, and emerging technologies, offering a holistic perspective across environmental, social, and economic dimensions. In doing so, it seeks to provide a comprehensive outlook on how mobile shopping can align with sustainable development goals in the future (McKinsey & Company, 2021; UNCTAD, 2024).

2. Definition and Importance of Sustainable Marketing

Sustainable marketing is defined as an approach in which businesses integrate environmental, social, and economic factors into their marketing activities. This perspective aims not only to meet the needs of current customers but also to safeguard the needs of future generations (Belz & Peattie, 2009). While traditional marketing primarily focuses on consumer demand and profit maximization, sustainable marketing offers a more holistic outlook and embraces the "triple bottom line" approach. This framework seeks to create value across three dimensions: economic success, environmental responsibility, and social equity (Elkington, 1999).

Kotler and Armstrong (2020) describe sustainable marketing as "providing long-term value to consumers without harming the environment and while promoting social welfare." Within this framework, sustainable marketing strategies encompass all elements of the marketing mix—from product development to distribution, communication, and pricing. Thus, sustainable marketing is not merely a marketing approach but an inseparable part of corporate strategy.

In the 21st century, consumer sensitivity to environmental and ethical issues has significantly increased. Research shows that brands adhering to sustainability principles are more likely to be preferred by consumers (Niinimäki, 2010). Particularly, members of Generations Y and Z tend to support eco-friendly products and companies. According to Deloitte's 2023 Global Consumer Trends Report, 65% of Generation Z consumers are willing to pay more for environmentally friendly products. This finding underscores the inevitability of businesses developing sustainability-oriented strategies.

Sustainable marketing practices provide competitive advantages for brands. Green marketing, ethical production, and corporate social responsibility initiatives contribute to differentiation and foster loyal customer bases (Porter & Kramer, 2011). Moreover, such approaches strengthen brand reputation and reinforce trust during times of crisis. McKinsey & Company's 2024 report indicates that sustainability-oriented brands are able to maintain customer loyalty 30% more effectively during crises. This demonstrates that sustainable marketing is not only an environmental benefit but also a strategic trust factor for businesses.

Globally and in Turkey, increasing regulatory frameworks compel companies to fulfill their environmental and social responsibilities. International initiatives such as the European Green Deal have made sustainable marketing not merely a choice but a necessity (Schouten, 2012). In Turkey, the 2023 Green Deal Action Plan has directed businesses toward reducing carbon emissions and adopting sustainable production processes. These developments highlight that sustainable marketing will become an indispensable strategic tool for businesses in the future.

Sustainable marketing promotes environmentally conscious production and consumption, ensuring more efficient use of resources. In the long run, this creates cost advantages for businesses. For example, reducing packaging waste or adopting energy-efficient production techniques benefits both the environment and corporate budgets. PwC's 2024 report shows that companies adopting sustainable production techniques achieve up to 20% savings in energy costs. Therefore, sustainable marketing is not merely an ecological trend but a strategic imperative for long-term success (Kramer, 2011).

Today, sustainable marketing is shaped by diverse global trends. Ethical consumption and digital minimalism dominate in Europe (Bask et al., 2013), while speed and convenience characterize mobile shopping behaviors in Asia. In North America, second-hand markets and circular economy practices strengthen sustainability. In Africa, mobile payment systems enhance financial inclusion and contribute to social sustainability, whereas in Latin America, mobile platforms highlight locally produced sustainable goods, supporting economic sustainability (GSMA, 2024; UNCTAD, 2024). These differences demonstrate that while sustainable marketing is a universal concept, it must be adapted to cultural contexts.

In conclusion, sustainable marketing is not only an environmentally friendly approach but also a strategic necessity for long-term success. Addressing environmental, social, and economic dimensions holistically enables businesses to gain competitive advantages while empowering consumers to make conscious and ethical choices. Therefore, sustainable marketing is considered a critical element shaping the future of marketing in alignment with global development goals (UNCTAD, 2024; GSMA, 2024; McKinsey, 2024).

3. Dimensions of Sustainable Marketing

Sustainable marketing is not only an environmentally conscious approach but also a holistic strategy that encompasses social and economic dimensions. These three dimensions are critical for businesses to achieve long-term success and align with global development goals.

3.1. Environmental Dimension

Environmental sustainability is one of the most visible aspects of marketing strategies. Companies fulfill their environmental responsibilities by reducing carbon footprints, adopting energy-efficient production techniques, and using recyclable packaging. Mobile shopping platforms contribute to conscious consumer choices by displaying product carbon footprint labels and offering green filtering systems (Alibaba Sustainability News, 2023).

According to PwC's 2024 report, companies that adopt sustainable production techniques achieve up to 20% savings in energy costs. This demonstrates that the environmental dimension

not only protects nature but also provides economic advantages for businesses. Furthermore, the European Green Deal directs companies toward carbon-neutral targets, making environmental sustainability a global necessity (European Commission, 2023).

In Turkey, brands such as Migros and Getir optimize logistics resource use by employing electric vehicles for delivery. These practices show that the environmental dimension provides competitive advantages not only globally but also locally.

3.2. Social Dimension

Social sustainability involves raising consumer awareness, making ethical production processes visible, and supporting social welfare. Mobile shopping applications highlight Fairtrade-certified products, enabling consumers to make ethical choices (UNCTAD, 2024). Additionally, social media integration allows consumers to directly participate in brands' sustainability campaigns, fostering social awareness.

Oxfam's second-hand mobile application in the UK supports the circular economy while strengthening social responsibility awareness (Oxfam Digital Impact Report, 2022). In Turkey, Trendyol's "Dolap" application facilitates the circulation of second-hand products in mobile environments, providing economic benefits to consumers and supporting social sustainability.

According to Deloitte's 2023 report, 65% of Generation Z consumers are willing to pay more for eco-friendly products. This finding shows that the social dimension is critical not only for social welfare but also for influencing consumer behavior. Social sustainability enables brands to build trust with society, fostering long-term loyalty.

3.3. Economic Dimension

Economic sustainability is directly related to businesses gaining long-term competitive advantages. Highlighting sustainable products in the market encourages consumers to choose eco-friendly options and increases the economic value of brands. Circular economy practices, such as the growth of second-hand markets, optimize resource use and provide businesses with new revenue models (Becker, 2025).

McKinsey & Company's 2024 report indicates that sustainability-oriented brands maintain customer loyalty 30% more effectively during crises. This finding demonstrates that the economic dimension is critical not only for profit maximization but also for long-term brand reliability.

The economic dimension also reveals the cost-saving potential of sustainable marketing. Energy-efficient production techniques, waste reduction, and circular economy practices provide businesses with long-term savings. PwC's 2024 report shows that companies adopting sustainable production techniques achieve up to 20% savings in energy costs. This demonstrates that the economic dimension is directly connected to environmental and social dimensions.

4. The Relationship Between Mobile Shopping and Sustainable Marketing

The global rise of mobile commerce (m-commerce) has brought new debates directly related to sustainable marketing. While shopping via mobile devices provides consumers with speed and convenience, it simultaneously creates both opportunities and risks in terms of environmental, social, and economic sustainability. The UNCTAD Digital Economy Report (2024) emphasizes that mobile commerce is a critical tool for inclusive growth in developing countries, but also highlights that it increases carbon emissions in logistics processes, requiring careful management from an environmental sustainability perspective (UNCTAD, 2024). At this point, sustainable marketing provides a strategic framework to align mobile shopping with eco-friendly practices.

The relationship between mobile shopping and sustainable marketing becomes more evident with the transformation of consumer behavior. Deloitte's 2023 Global Consumer Trends Report revealed that 65% of Generation Z consumers are willing to pay more for eco-friendly products (Deloitte, 2023). This finding demonstrates that mobile shopping platforms can enhance consumer awareness by highlighting sustainable products. At the same time, social media integration facilitates the merging of mobile shopping with sustainability campaigns, fostering social awareness. For example, Oxfam's second-hand mobile application in the UK supports the circular economy, strengthens social responsibility awareness, and provides consumers with economic benefits (Oxfam, 2022).

From an economic perspective, the relationship between mobile shopping and sustainable marketing offers businesses long-term competitive advantages. McKinsey & Company's 2024 report shows that sustainability-oriented brands maintain customer loyalty 30% more effectively during crises (McKinsey, 2024). This finding indicates that integrating mobile shopping with sustainable marketing is critical not only for environmental benefits but also for creating economic value. Moreover, circular economy practices enable the growth of second-hand markets through mobile platforms, optimizing resource use and providing businesses with new revenue models (Becker, 2025).

Technological advancements further strengthen the relationship between mobile shopping and sustainable marketing. GSMA's 2024 Mobile Industry Impact Report highlights the mobile sector's influence on the United Nations Sustainable Development Goals and underscores the critical role of mobile commerce in environmental responsibility (GSMA, 2024). Artificial intelligence and big data analytics provide consumers with personalized green product recommendations, reducing unnecessary consumption; blockchain-based supply chain solutions make product origins transparent, facilitating conscious choices (Patterson, 2024). Augmented reality (AR) applications reduce return rates, optimize logistics resource use, and minimize carbon emissions (Štofejová et al., 2023). These technologies make the integration of mobile shopping and sustainable marketing not merely a trend but a paradigm of the future.

In conclusion, the relationship between mobile shopping and sustainable marketing is strengthened by addressing environmental, social, and economic dimensions holistically. Mobile shopping is not only a sales channel but also a strategic tool supporting sustainable development goals. Current research demonstrates that integrating mobile shopping with sustainable marketing provides businesses with competitive advantages, enhances consumer awareness, and plays a critical role in reducing environmental impacts (UNCTAD, 2024; Deloitte, 2023; McKinsey, 2024; GSMA, 2024; Becker, 2025).

5. Fundamental Approaches of Mobile Shopping in Sustainable Marketing

With the increasing pace of digitalization globally, mobile shopping has become one of the most important channels transforming consumer behavior. Shopping via mobile devices provides businesses with opportunities to reach consumers more quickly, personalize offerings, and integrate sustainable practices. In this context, the integration of sustainable marketing strategies with mobile shopping represents a significant step toward creating value in line with environmental and social responsibility principles (Kotler & Keller, 2016).

- **Personalized and Hyper-Targeted Content:** Mobile marketing applications analyze user data to provide individualized product recommendations. This strategy contributes to sustainability by reducing unnecessary consumption. In Turkey, Trendyol analyzes users' past shopping data to offer more conscious product suggestions, thereby preventing overproduction and excess inventory (Okay, 2023).
- **Augmented Reality (AR) Digital Experiences:** AR applications allow customers to experience products without physically trying them. This reduces return rates, lowers

logistics resource use, and minimizes carbon emissions. Hepsiburada employs AR technology in furniture and home décor categories to help consumers make more informed decisions (Sarıkaya, 2023).

- **Green Loyalty Programs:** Loyalty programs offered through mobile shopping applications encourage consumers to choose eco-friendly products, promoting sustainable consumption. These programs are supported by mechanisms such as rewards or discounts. For example, Migros' mobile application grants extra points for purchases of organic and environmentally friendly products, rewarding sustainable consumption behaviors (Yolcu, 2023).
- **Data Security and Digital Ethics:** Sustainable marketing encompasses not only environmental but also social sustainability. Secure management of consumer data and adherence to transparency principles strengthen the ethical dimension of digital marketing (Kumar, Dixit, Javalgi, & Dass, 2020). In Turkey, e-commerce platforms enhance consumer trust by reinforcing data security policies under the Personal Data Protection Law (KVKK).
- **Circular Economy Integration:** Mobile shopping platforms can support the circular economy through campaigns focused on recycling and reuse. Trendyol's second-hand sales platform "Dolap" enables consumers to recirculate unused products, contributing to efficient resource utilization (Okay, 2023).
- **Carbon Footprint Tracking:** Some mobile shopping applications display the carbon footprint of purchased products, enabling consumers to make conscious choices. Getir aims to reduce carbon emissions by using electric vehicles for deliveries, placing sustainability at the core of its strategy (Sarıkaya, 2023).

When examining the fundamental approaches of mobile shopping in sustainable marketing, it becomes evident that these practices are not only technological innovations but also strategic tools in terms of environmental and social responsibility (Kotler & Keller, 2016). Personalized content reduces unnecessary consumption (Okay, 2023); augmented reality alleviates logistical burdens (Sarıkaya, 2023); green loyalty programs guide consumers toward eco-friendly choices (Yolcu, 2023); and data security strengthens the ethical dimension of digital marketing (Kumar, Dixit, Javalgi, & Dass, 2020). Circular economy integration (Okay, 2023) and carbon footprint tracking (Sarıkaya, 2023) further solidify businesses' sustainability performance, creating long-term competitive advantages. Therefore, mobile commerce is not merely a sales channel but a critical element shaping a culture of responsible consumption in the future of sustainable marketing (Schouten, 2012).

6. Consumer Behavior and Sustainability in Mobile Shopping

Mobile shopping, rapidly expanding under the influence of digitalization, has transformed consumer purchasing behavior and played a significant role in shaping sustainable marketing strategies. Mobile shopping platforms provide personalized recommendations based on users' past behaviors, encouraging consumers to make more conscious and sustainable choices. In particular, big data and artificial intelligence technologies increase the visibility of green products, guiding consumers toward eco-friendly options. Such personalized marketing strategies reduce overconsumption and support sustainable consumption habits (Çelikkaya, 2020; Štofejová et al., 2023).

The impact of mobile shopping on consumer behavior is multidimensional. The easy accessibility of mobile devices allows consumers to shop anytime and anywhere, increasing spontaneous and unplanned purchasing behavior, especially among young, tech-savvy users (isarder.org). Mobile notifications directly influence consumer decisions; dimensions such as information, entertainment, and trust shape consumer attitudes (isarder.org). Social media

enhances product visibility, directs consumption behavior, and supports a culture of sustainable consumption (Çelikkaya, 2020; Hael et al., 2024).

In the context of sustainability, mobile shopping increases consumer orientation toward eco-friendly and ethical products. Platforms highlight sustainable products to meet this demand and facilitate conscious decision-making (Kuula, 2013; Alkış, 2024). AI-driven personalized recommendations encourage consumers to prefer eco-friendly products (Armağan & Dal, 2021; Patterson, 2024). Moreover, sustainable marketing campaigns demonstrate corporate social responsibility, enhancing consumer trust and strengthening brand reputation (Çelikkaya, 2020). Circular economy practices also support the sustainability dimension of mobile shopping. International platforms such as Depop, Vinted, and Patagonia Worn Wear enable the circulation of second-hand products in mobile environments, optimizing resource use (TIME, 2021; Becker, 2025). In Turkey, Trendyol's "Dolap" application serves as a significant example in this regard. Additionally, digital minimalism and conscious consumption trends are increasingly prevalent among younger generations, promoting simpler, need-oriented consumption behaviors (Bask et al., 2013; Jain et al., 2024; Deveci & Yıldız, 2025).

Nevertheless, mobile shopping also brings certain challenges and risks in terms of sustainability. Easy access and promotional notifications can lead to unconscious spending, increasing the risk of overconsumption. Frequent ordering and demands for fast delivery raise carbon emissions in the logistics sector, threatening environmental sustainability. At this point, developing green logistics solutions is a critical necessity to mitigate the environmental impacts of mobile shopping (Alibaba, 2023; McKinsey, 2024).

Several strategies are proposed to strengthen the sustainability of mobile shopping. These include expanding green filtering and product labeling, utilizing augmented reality and virtual reality solutions to reduce return rates, increasing mobile accessibility of second-hand and circular platforms, and developing notifications and campaigns aimed at raising consumer awareness. Such steps will not only ensure that companies fulfill their environmental responsibilities but also empower consumers to adopt conscious and ethical consumption behaviors (Gao & Liu, 2022).

7. Global Evaluation of Mobile Shopping within the Scope of Sustainable Marketing

In today's world, lifestyles shaped by technology have directed consumer behavior toward digital platforms. Mobile shopping (m-commerce), in particular, has reshaped consumer habits and become a fundamental component of e-commerce. At the same time, sustainability has moved to the center of marketing strategies, encompassing not only environmental but also social and economic dimensions (Laudon & Traver, 2022). While the convenience and accessibility of mobile shopping encourage rapid decision-making and purchasing, they also carry the potential to conflict with sustainability principles.

As of 2024, more than 3.5 billion users worldwide shop via mobile devices, and mobile commerce accounts for 70% of total e-commerce volume (Statista, 2024). This trend raises important questions about how mobile shopping can be integrated with sustainable consumption practices not only in developed countries but also in digitalizing emerging economies. While mobile shopping reshapes global marketing strategies, it embodies dynamics that are both aligned with and contradictory to sustainability goals. Businesses that organize their digital offerings in accordance with environmental, economic, and social sustainability principles will not only enhance brand value but also contribute to global sustainable development objectives (McKinsey & Company, 2021).

7.1. Global Examples and Applications

In the 21st century, accelerated digitalization has fundamentally transformed consumer shopping habits. This transformation is not only technological but also environmental, social, and economic in nature (Designveloper, 2023). Global examples illustrate how mobile shopping integrates with sustainable marketing practices:

- **Sweden – H&M Conscious Collection:** H&M integrates sustainability into its mobile app by highlighting products under the "Conscious" label. These items are made from organic cotton, recycled polyester, and other eco-friendly materials. The initiative not only raises consumer awareness but also positions H&M as a brand committed to reducing environmental impact. By embedding sustainability directly into mobile shopping experiences, H&M strengthens consumer trust and aligns fashion consumption with global sustainability goals (H&M Sustainability Report, 2022).
- **USA – Patagonia WornWear Program:** Patagonia's "WornWear" program promotes second-hand sales and repair services through its digital platforms. By encouraging consumers to buy used items or repair existing ones, the brand reduces textile waste and extends product lifecycles. This initiative exemplifies circular economy principles, showing how mobile commerce can support resource efficiency while reinforcing Patagonia's reputation as a pioneer in ethical and sustainable business practices (Patagonia, 2023).
- **China – Alibaba Green Logistics:** Alibaba's "Green Logistics" initiative focuses on reducing the environmental footprint of its massive delivery network. Through recyclable packaging, eco-friendly delivery options, and smart logistics systems, Alibaba minimizes carbon emissions associated with millions of shipments. This demonstrates how large-scale mobile commerce platforms can integrate sustainability into logistics, turning operational efficiency into an environmental advantage (Alibaba Sustainability News, 2023).
- **UK – Oxfam Second Hand App:** Oxfam's mobile application enables consumers to buy and sell second-hand products, directly supporting the circular economy. Beyond reducing waste, the app fosters social responsibility by channeling revenues into charitable projects. It illustrates how mobile shopping can simultaneously promote sustainability and social impact, making ethical consumption more accessible to everyday users (Oxfam Digital Impact Report, 2022).
- **Australia – THE ICONIC Considered Filtering System:** THE ICONIC enhances consumer choice by adding a "Considered" filter to its mobile app. This feature allows users to easily identify vegan, recycled, and ethically sourced products. By embedding sustainability into the shopping journey, THE ICONIC empowers consumers to make informed decisions and strengthens its competitive edge in the fashion industry (THE ICONIC Sustainability Report, 2023).
- **India – TataCLiQ Eco-Friendly Store:** TataCLiQ promotes sustainable consumption by dedicating a section of its mobile app to eco-friendly products. Featuring items made from organic cotton, bamboo, and other natural materials, the initiative supports local producers while encouraging consumers to adopt environmentally responsible habits. This approach highlights how mobile commerce can simultaneously drive sustainability and support local economies (Tata Group Retail Circular, 2023).

7.2. Emerging Technologies and Global Trends

The integration of mobile shopping with sustainable marketing is not limited to current practices. Today, technologies such as artificial intelligence, blockchain, augmented reality (AR), virtual reality (VR), voice commerce, and big data analytics are among the most

important factors shaping the future of mobile commerce. These technologies transform consumer experiences while enabling the development of new solutions aligned with sustainability goals.

- **Artificial Intelligence and Big Data Analytics:** These tools analyze consumer behavior in depth, offering personalized recommendations and reducing unnecessary consumption. AI-based algorithms display only products relevant to consumer needs, thereby reducing overproduction and excess inventory, contributing to environmental sustainability (Armağan & Dal, 2021; Patterson, 2024).

- **Blockchain Technology:** Blockchain enhances transparency in supply chains, making product origins and production processes verifiable. Consumers can easily learn whether products were produced under ethical and eco-friendly conditions via mobile applications. Blockchain solutions are particularly critical in food and textile sectors for sustainable production and consumption (UNCTAD, 2024).

- **Augmented Reality (AR) and Virtual Reality (VR):** AR and VR allow consumers to experience products without physically trying them, reducing return rates and logistics resource use. This minimizes carbon emissions and strengthens sustainable consumption behaviors (Štofejová et al., 2023). Brands such as IKEA and Hepsiburada use AR-based applications to help consumers make more informed decisions.

- **Voice Commerce:** Voice-activated shopping is another emerging trend. Smart assistants and voice commands provide consumers with quick and practical solutions while increasing the visibility of sustainable products. For example, voice commerce systems can directly suggest "eco-friendly products," supporting conscious consumption behaviors (Jain et al., 2024).

- **Global Trends:** The integration of mobile shopping and sustainable marketing varies across regions. In Europe, digital minimalism and ethical consumption dominate (Bask et al., 2013); in Asia, speed, convenience, and promotion-driven shopping behaviors prevail. In North America, second-hand markets and circular economy practices strengthen sustainability (Becker, 2025). In Africa, mobile payment systems enhance financial inclusion and contribute to social sustainability, while in Latin America, mobile platforms highlight locally produced sustainable goods, supporting economic sustainability (GSMA, 2024).

In conclusion, emerging technologies and global trends accelerate the integration of mobile shopping with sustainable marketing, transforming this field from a mere sales channel into a strategic tool for environmental, social, and economic sustainability. While green logistics practices reduce carbon emissions, the transparency of ethical production processes strengthens social responsibility awareness, and circular economy platforms optimize resource use, thereby spreading a culture of sustainable consumption. Thus, mobile shopping is not only a commercial channel but also a critical element supporting sustainable development goals in the future of global marketing (UNCTAD, 2024; GSMA, 2024; Becker, 2025; Patterson, 2024; Jain et al., 2024).

8. Conclusion and Discussion

The rise of mobile shopping demonstrates that the digital economy has profoundly transformed not only consumption habits but also corporate marketing strategies. When combined with sustainable marketing, this transformation introduces a new paradigm in which businesses fulfill environmental responsibilities, generate social value, and ensure long-term economic benefits. Mobile shopping, as a powerful channel that directly connects sustainability principles with consumers, exerts a decisive influence on both individual choices and corporate strategies.

In this context, the integration of mobile shopping with sustainable marketing is not limited to making eco-friendly products visible. It also provides a structure that raises consumer awareness, enhances transparency in ethical production processes, and supports the circular economy. The tendency of younger generations to support environmentally conscious brands accelerates this integration and shapes the future of marketing. This indicates that sustainable marketing is not merely an option for businesses but a strategic necessity.

The relationship between mobile shopping and sustainable marketing plays a critical role in achieving long-term business success. Marketing activities conducted through digital channels contribute to more efficient resource use, stronger customer loyalty, and enhanced brand reputation. Moreover, mobile shopping enables businesses to develop new business models. The circulation of second-hand products through mobile platforms supports the circular economy while providing economic benefits to consumers. This strengthens the economic dimension of sustainable marketing and helps businesses gain long-term competitive advantages.

From a discussion perspective, the integration of mobile shopping with sustainable marketing is deepened by technological advancements. Artificial intelligence and big data analytics provide personalized recommendations, reducing unnecessary consumption; blockchain-based solutions increase transparency in product origins, facilitating conscious choices; and augmented reality applications lower return rates, improve logistics efficiency, and reduce environmental impacts. These technologies make the integration of mobile shopping and sustainable marketing an indispensable component of future marketing practices.

In conclusion, the relationship between mobile shopping and sustainable marketing is not merely a choice in today's digital economy but a necessity aligned with global development goals. Mobile shopping is a powerful tool that directly delivers the values of sustainable marketing to consumers. Businesses that adopt this integration will enhance brand value while contributing to social and environmental responsibilities. In the future, mobile shopping will remain one of the most important application areas of sustainable marketing, serving as a fundamental factor shaping the direction of the digital economy.

The most significant outcome of this discussion is that the integration of mobile shopping with sustainable marketing requires not only short-term strategies but also a long-term vision. Adopting this vision is critical for businesses to meet consumer expectations and contribute to global sustainability goals. Therefore, mobile shopping should be regarded as a central element in shaping the future of sustainable marketing and driving the sustainable transformation of the digital economy.

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CHAPTER 9

HEALTH TOURISM IN THE WORLD AND IN TURKEY: A THEORETICAL REVIEW

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Introduction

The acceleration of globalization, the widespread adoption of technological innovations in the field of healthcare, and the advancement of transportation opportunities have significantly facilitated individuals' access to health services. Because of these developments, the concept of *health tourism* has gained increasing importance at the international level and has rapidly emerged as a growing sector in recent years.

Health tourism refers to the practice of individuals traveling beyond their home countries to obtain medical treatment or healthcare services abroad. Within this scope, several subcategories are recognized, including medical tourism (treatment-oriented services), thermal tourism (spa and rehabilitation services), and elderly and disabled tourism. Factors such as rising health awareness, the aging of populations, and the high cost or limited availability of healthcare services in certain countries have driven individuals to seek alternative healthcare opportunities, thereby fostering the growth of health tourism. In this context, health tourism is regarded as a strategic domain, not only for addressing individual health needs but also for providing economic and social opportunities for nations.

At the global level, the health tourism sector has been expanding with growing momentum, reaching a market volume worth billions of dollars. In developed countries, where healthcare services are substantially costly, individuals residing in nations such as the United States, Canada, and the United Kingdom increasingly seek more affordable yet high-quality medical services abroad. In this regard, countries including India, Thailand, Malaysia, South Korea, and Turkey have become prominent destinations for health tourists, owing to their advanced medical infrastructure and competitive pricing policies. Moreover, health tourism extends beyond treatment-focused services, encompassing vacation, wellness, rehabilitation, and healthy living programs. The World Health Organization (WHO) and other international institutions predict that health tourism will continue to expand in the coming years, forming a major arena of global competition.

Turkey is among the leading countries in the field of health tourism due to its geographical location, advanced healthcare infrastructure, and the presence of experienced and qualified medical professionals. Its accessibility to regions such as Europe, the Middle East, the Balkans, and Central Asia further enhances Turkey's attractiveness as a destination. The country possesses considerable potential in areas such as medical tourism, thermal tourism, and geriatric tourism. In recent years, healthcare investments carried out through public–private partnerships—including the construction of city hospitals and the establishment of technologically advanced private hospital chains—have significantly strengthened Turkey's competitiveness in this sector. Particularly in fields such as hair transplantation, aesthetic surgery, ophthalmology, and dental treatments, Turkey has become a preferred destination for health tourists, especially from Europe and the Middle East, by offering high-quality services at competitive prices.

The contribution of health tourism to the Turkish economy has been steadily increasing. Foreign currency revenues generated from health tourism help reduce the current account deficit, while simultaneously fostering the development of healthcare infrastructure and stimulating additional investments in the sector. Strategic plans and incentive mechanisms coordinated by the Ministry of Health, the Ministry of Trade, and the Ministry of Culture and Tourism aim to place Turkey's objectives in this area on a stronger and more sustainable foundation. According to 2023 data, Turkey hosted approximately 1.5 million health tourists and generated nearly 2.5 billion USD in revenue from health tourism activities. Considering the rapid growth of the sector, these figures are expected to rise further in the coming years.

However, for health tourism to develop sustainably, certain structural challenges must be addressed. Issues such as international accreditation processes, language and communication barriers, patient safety, ethical principles, and service quality remain critical factors directly affecting the growth of the sector. To strengthen its long-term position and competitiveness, Turkey must ensure

compliance with international standards in healthcare delivery and continuously enhance the quality of its services.

In conclusion, health tourism constitutes a strategic domain not only by facilitating individuals' access to high-quality healthcare but also by contributing to economic development and enhancing international recognition for countries. Turkey's geographical advantages, technological infrastructure, and human capital collectively support its progress in this sector and reinforce its position as a strong actor in the global health tourism market. Accordingly, examining the theoretical framework of health tourism along with both global and Turkey-specific development dynamics is essential for shaping the future of the sector. This study aims to explore the conceptual dimension of health tourism and to evaluate its status both worldwide and in Turkey.

The Quality of Health Tourism

Since the 1990s, the tourism sector has become one of the priority areas for countries aiming to generate economic revenue. During this period, to secure a greater share of the economic benefits of tourism, countries increasingly turned to alternative forms of tourism; among these, *health tourism* has gained remarkable importance (Özkan, 2020:1). In the twenty-first century, factors such as rising work intensity, technological advancements, increasing stress levels, environmental degradation, longer life expectancy, the prevalence of certain diseases, and improvements in the quality of healthcare services have all contributed to a growing tendency for individuals to travel abroad to obtain medical services (Daşlı, 2019:18). Accordingly, investments in healthcare infrastructure—including hospitals, thermal facilities, and tourist centers designed for the elderly and disabled—have supported the expansion of health tourism.

Health tourism is as old as human history itself. Archaeological findings reveal that the Sumerians constructed health facilities around hot springs as early as 4000 BC. Evidence from the Bronze Age (ca. 2000 BC) indicates that mineral-rich springs in the area now known as St. Moritz, Switzerland, were used for bathing. Ancient Greek civilization is generally regarded as the first to lay the systematic foundations of health tourism. In this context, the Asklepios Temples built in the vicinity of Izmir in Anatolia are considered among the earliest health centers in world history. At the same time, the rise of yoga and Ayurvedic medicine in India suggests that as early as 5000 years ago, individuals traveled for therapeutic purposes as part of alternative healing practices (shgmturizmdb.saglik.gov.tr).

The Ministry of Culture and Tourism defines health tourism as *"a form of tourism that, by attracting international patients, enables the development of healthcare institutions through the provision of services such as spa treatments or visits to other health centers for therapeutic purposes, or through the fulfillment of needs such as aesthetic surgery, dental treatment, organ transplantation, or physical therapy"* (Ministry of Culture and Tourism, 2021). Similarly, health tourism can be described as travel lasting at least 24 hours, undertaken either to receive treatment-oriented health services or to benefit from preventive, restorative, or wellness therapies. Within this framework, health tourism—through its subcategories such as thermal tourism, SPA and wellness tourism, senior (third age) tourism, and disabled tourism—has gained significant international relevance in the twenty-first century. With its high economic returns, health tourism has become a focal point of competition, shaped by the comparative advantages and disadvantages of different countries.

The Department of Health Tourism under the Ministry of Health defines health tourism as *"the travel of individuals to countries other than their own in order to treat illnesses, strengthen the body to prevent diseases, and rehabilitate existing health conditions"* (SATURK, 2021). Based on these definitions, health tourism can be expressed as a comprehensive form of tourism that involves traveling abroad for more than 24 hours to receive medical treatment, benefit from preventive and restorative practices such as thermal and SPA-wellness services, and access services directed toward the elderly and disabled.

Today, types of tourism are diversifying and increasing depending on individuals' purposes, demands, and areas of interest. Health tourism caters to individuals who embrace healthy living as a lifestyle and who place importance on both physical and mental well-being. Research shows that the expectations and services received by individuals participating in health tourism differ in terms of health-oriented travel. While patients primarily travel to receive medical interventions and therapeutic treatments, healthy individuals tend to utilize spa, hot spring, and thermal facilities offering preventive health services during their holidays (Yücel & Daşlı, 2022:233). In this regard, the target group of health tourism consists not only of individuals with health problems but also of those who consciously seek to maintain and improve their health (Aydın, 2012:91). Thus, participants in health tourism are not limited to patients; they also include those who aim to preserve and enhance their health while simultaneously fulfilling recreational and holiday needs through therapeutic and wellness-oriented practices (Temizkan, 2015:22).

With the global and national developments in the tourism sector, individuals' motivations for travel have diversified, giving rise to different forms of tourism. Recently, health has emerged as one of the key reasons for travel. The high cost of healthcare services in certain countries and inadequacies in social security systems are among the major factors accelerating the growth of health tourism (Şahin & Tuzlukaya, 2020:60). Health tourism is thus regarded as an economic activity that links the health and tourism sectors through the provision of services. For this reason, the concept has been defined at the ministerial level in both sectors (Temizkan, 2015:17). In this context, the Ministry of Culture and Tourism defines health tourism as *"a form of tourism that enables the development of healthcare institutions by utilizing the potential of international patients, through travel to spas, thermal facilities, or other healthcare centers either for the purpose of improving physical well-being or to receive curative treatments such as organ transplantation, aesthetic surgical procedures, physiotherapy, and dental care"* (yigm.ktb.gov.tr). Similarly, the Ministry of Health defines health tourism as *"traveling to a destination other than one's place of residence for the purposes of treating illnesses, protecting and improving health, and benefiting from healthcare and tourism facilities by staying at least 24 hours at the destination"* (shgmturizmdb.saglik.gov.tr).

Health tourism is a form of tourism in which individuals travel to and stay in a location different from their place of residence with the aim of preserving or restoring their health (Kiremit, 2008:23). In its broadest sense, health tourism is defined as *"the tourism created by individuals traveling to destinations other than their place of residence for health-related purposes"* (İçöz, 2009:2260). This type of tourism also encompasses the fulfillment of nutrition, accommodation, recreation, and leisure needs in destinations visited for treatment or therapeutic purposes. The fact that treatment and therapeutic applications can be carried out throughout the year, with such processes often lasting for at least three weeks, grants health tourism a distinctive appeal within the wider tourism sector (Tunç & Saç, 1998:21).

As a specialized form of tourism, the fundamental characteristics of health tourism can be summarized as follows (Yalçın, 2006:37):

- Health tourism is a sector that requires advanced technical equipment and a qualified workforce.
- It is essential that healthcare institutions providing services operate in compliance with international standards.
- Healthcare facilities must employ staff capable of communicating in certain foreign languages.
- Health tourism creates an area that supports the development of other forms of tourism for patients and their companions.
- State-supported multilingual promotion and marketing activities targeting international markets should be implemented, with insurance institutions identified as primary stakeholders in this process.

In this context, the sustainable development of health tourism requires coordinated collaboration between both the healthcare and tourism sectors. Furthermore, the provision of services in line with international standards, coupled with the implementation of effective marketing strategies, is vital for ensuring the sector's continued growth and competitiveness.

Historical Development of Health Tourism

Countries around the world develop strategies aimed at increasing their national income by discovering sectors that stimulate multiple industries and create added value. One such sector is tourism. Tourism has become a priority area of interest for both developed and developing countries. The primary reason for this is that growth in the tourism sector positively affects numerous industries and generates wide-ranging economic benefits. When the tourism sector is examined, it is observed that travelers are increasingly shifting from traditional "sea-sand-sun (3S)" tourism toward alternative forms of tourism, and this diversification of tourism options provides significant advantages for national economies.

In countries heavily dependent on tourism (such as Turkey), the diversification of the sector and its extension across the entire year has become a necessity. Tourism is one of the most preferred industries for countries due to its potential to generate employment. Among the alternative forms of tourism, health tourism occupies a strategic commercial position and contributes significantly to national economies. In terms of the number of international patients, the top five countries worldwide are the United States, Germany, Thailand, India, and Turkey (Health Tourism Department, 2019). Although the roots of health tourism extend deep into history, its increasing importance since the 1990s has made it more prominent than ever today.

Research on ancient cultures reveals that strong connections between religion and healthcare existed thousands of years ago. Most early civilizations recognized the therapeutic benefits of mineral springs and sacred temple baths and integrated them into their health practices. For example, as early as 4000 BC, the Sumerians built what are considered the world's first health complexes around hot springs. These facilities resembled tall temples with flowing pools. During the Bronze Age (around 2000 BC), communities in the area now known as St. Moritz, Switzerland, discovered the health benefits of bathing in and drinking water from iron-rich mineral springs. Bronze cups from the same era have been found in hot spring sites in France and Germany, serving as historical evidence of health-related travel. The civilization credited with systematically laying the foundations of health tourism is Ancient Greece. The Greeks built the Asklepion Temples in Anatolia, near modern-day Izmir, in honor of the god of medicine, Asclepius. These temples are regarded as some of the world's first health centers and served as destinations where individuals with various ailments sought treatment (Medical Travel, 2021).

By 300 BC, different healing temples had developed under Greek rule, the most famous of which was the Epidaurus complex. This health facility offered multifaceted services, including a gymnasium, a serpent sanctuary, a dream temple, and thermal baths. Other significant centers included the Temple of Zeus at Olympia and the Temple of Apollo at Delphi.

In India, health tourism was shaped by the popularity of yoga and Ayurvedic medicine. As early as 5000 years ago, medical travelers and spiritual seekers showed great interest in alternative healing practices. With the rise of the Roman Empire as a global power, *thermae*—public hot springs and bath complexes—emerged and gained immense popularity among the elite. These facilities not only provided healthcare services but also functioned as centers for commerce and social networking (Özkan, 2020:431–455).

Following the collapse of the Roman Empire, Asia continued to serve as a significant destination for health tourism. Temples were transformed into hospitals that provided clinical services to travelers seeking medical care, leaving a legacy in the history of health tourism. In medieval Japan, the *onsen* (hot mineral springs) became widespread across the country due to their healing properties.

Warrior clans used these springs to alleviate pain and heal wounds, while healthcare systems open to foreigners were also established. The Mansuri Hospital, built in Cairo in 1248, stood as the largest and most advanced medical institution of its time, providing healthcare services to foreigners regardless of race or religion (Öksüz & Altıntaş, 2017:59–75).

Between the 14th and 17th centuries, during the Renaissance period in Europe, iron-rich hot springs were discovered, and their popularity increased with the visits of renowned figures such as Victor Hugo. The term *spa* is derived from the Roman concept *salus per aquam* ("health through water"). In the 16th century, the wealthy and elite classes of Europe rediscovered Roman baths, flocking to spa towns such as St. Moritz, Villed'Eaux, Baden, Aachen, and Bath in England. By the late Renaissance, aristocrats continued to frequent Bath for healing and therapeutic cleansing. The discovery of the New World also introduced new destinations for medical travelers. In the 1600s, English and Dutch colonists-built log cabins near mineral springs believed to have therapeutic properties. During this period, Native Americans' knowledge of herbal medicine was considered extraordinary and reached a level that could rival the expertise of healers from Europe, Asia, and Africa. In the 18th and 19th centuries, many Europeans and Americans continued to travel to spas and health centers, particularly in search of treatment for diseases such as tuberculosis (Aksu & Bayrak, 2019:134–154).

From the 18th century onwards, wealthier individuals were known to travel to spas located along the Nile River. By the 21st century, there has been a growing trend toward treatment centers offering cost advantages (Aydemir & Kılıç, 2017:18–28). Since the 20th century, health tourism has entered a period of rapid growth, largely driven by developments in international transportation, insurance, communication, and technology. During this period, the economic impact of health tourism grew significantly. In its report on the history of health tourism, SATURK summarized the developments between 1900 and 2008 as follows (Uslu, 2020:48):

In 1933, the establishment of the American Board of Medical Specialties introduced modern educational and professional standards, which strengthened the United States' position as a key destination in health tourism (Uysal & Şahin, 2020:287–300).

In the 1960s, India emerged as a prominent destination in health tourism, distinguished by its unique culture. Today, with numerous healthcare institutions, India occupies a central position in the global health tourism market. Toward the end of the 20th century, economic liberalization enabled the import of medical equipment and technology, leading to the modernization of its healthcare system. Institutions such as Fortis Hospitals and Apollo Hospitals became leading centers in terms of both technology and accommodation. With its cost advantages, India has secured its place as a significant player in global health tourism (Yıldız et al., 2017:61–80).

In 1994, the Joint Commission International (JCI) Accreditation Organization was established with the aim of improving the quality and safety of healthcare services and ensuring the implementation of established standards across all member hospitals and institutions.

Following the 1997 Asian financial crisis, the depreciation of Asian currencies created a cost advantage in many sectors, including health tourism. With additional incentives and increased promotional activities, Asian countries—particularly Thailand—emerged as preferred destinations for health tourism. The successful completion of accreditation processes by healthcare institutions in these countries further enhanced international patient confidence.

In the 21st century, technological advancements, competitive and affordable pricing, the growing number of healthcare institutions, and the widespread adoption of patient-centered, high-quality treatment services have significantly accelerated the demand for health tourism (Bozkurt, 2020:277–373).

In 2008, U.S. insurance companies were authorized to allow patients to receive medical treatment abroad, a development that paved the way for the globalization of health tourism. During

the 2010s, with the effects of globalization, countries such as Israel, India, South Korea, Singapore, Thailand, Japan, and Malaysia rose to prominence as global leaders in health tourism (Binay, 2020:195–208).

On December 31, 2019, an outbreak of a novel coronavirus (COVID-19) in Wuhan, Hubei Province, China, brought both tourism and health tourism to a near standstill as international flights were suspended (Ministry of Health, 2020). However, it is anticipated that in the post-pandemic era, countries with advanced healthcare infrastructures will generate substantial revenue from health tourism. Investments in healthcare systems as well as in the pharmaceutical and medical sectors are expected to contribute significantly to the future development of health tourism (Buzcu & Birdir, 2019:311–317).

Types of Health Tourism

Although the Department of Health Tourism classifies health tourism under three main categories, in line with the sources and scope of this study, it is examined under five distinct subcategories. In this context, the expectations of health tourists from their travels vary and include benefiting from preventive healthcare services, receiving curative treatments, participating in rehabilitation processes, and accessing services aimed at improving their overall health conditions. While the primary purpose of most health tourists is treatment, some individuals also prefer practices such as SPA and wellness programs due to their relaxing effects, which fall under the scope of preventive health tourism. This diversity has led to variations in the classifications of health tourism.

In general, when the concept of health tourism is mentioned, the first notion that comes to mind is *medical tourism*, and it is observed that more scientific studies have been conducted in this field compared to other subcategories. However, individuals also travel within the scope of SPA-wellness, thermal tourism, senior tourism (third-age tourism), and disabled tourism, and these types of travel are likewise considered part of health tourism (Çakır, 2018:171–190). For this reason, the present study discusses the subcategories of health tourism in detail, namely: Thermal Tourism, SPA-Wellness, Senior Tourism, and Disabled Tourism.

Health Tourism

In the literature, the concepts of *health tourism* and *medical tourism* are sometimes used interchangeably, leading to conceptual confusion. However, health tourism encompasses a broader framework that includes not only medical treatments but also rehabilitative and health-enhancing services. In contrast, medical tourism refers specifically to travel undertaken for the purpose of receiving direct medical treatment (Uysal & Şahin, 2019:287–300).

According to Wikipedia (2020), health tourism is defined as *"traveling abroad for the purpose of receiving medical treatment."* This definition also implies that health tourists benefit not only from medical services but also from the social and cultural advantages of the destination country. Medical applications cover not only basic treatments but also more complex medical processes. For instance, in the case of an orthopedic patient, the entire process may include diagnosis, surgical intervention, and post-operative rehabilitation support.

Health tourists typically travel with companions; while patients stay in healthcare facilities, their companions often stay in hotels and participate in other touristic activities (Değer, 2020:308–324). Although tourism elements in such travel may be limited, the dominant component is healthcare, and thus such trips are mostly considered *health-related travel*.

Health tourists can be categorized according to their purpose of travel as follows (Demir et al., 2020:80–107):

1. **Those seeking high technology and quality treatment services:** A patient profile that disregards factors such as cost and distance, often choosing destinations like the United States.
2. **Those seeking qualified but cost-effective treatment:** Patient groups, often from developing countries, travel abroad to access the best treatment for serious conditions such as cardiovascular diseases.
3. **Those experiencing long waiting times in their own healthcare systems:** Individuals facing delays in accessing healthcare in their home countries, seeking prompt interventions particularly in orthopedics, cardiology, and general surgery.
4. **Those seeking lower-cost treatments:** Health tourists traveling abroad in pursuit of affordable healthcare services.

In this study, the concept of health tourism is addressed exclusively in relation to individuals traveling for medical purposes, while subcategories such as rehabilitative services, thermal spa treatments, and wellness-oriented preventive healthcare have been evaluated separately (Dündar & Bahar, 2020:151–177).

With the increasing importance individuals place on their health, health tourism has gained recognition as a sector of high economic value for countries. In this context, nations such as Singapore, the Philippines, the United Arab Emirates, and India have emerged as leading actors in the field of health tourism (Ertürk, 2019:16).

In the Middle East, countries such as Israel, Turkey, and the United Arab Emirates have pursued various policies to develop their healthcare systems to attract patients both from neighboring countries and from Europe. For instance, in 2014 the government of Dubai announced its plan to construct 22 new hospitals as part of its strategy to promote health tourism, with the goal of boosting the economy by 2.6 billion dirhams (approximately 708 million USD) by 2020. Additionally, Dubai aimed to attract 500,000 health tourists annually (Genç, 2020:1–15).

Similarly, Latin American countries such as Mexico, Brazil, and Colombia have made substantial investments in their healthcare infrastructure with the objective of attracting patients primarily from North America. In Eastern Europe, countries including Hungary, the Czech Republic, and Poland have positioned themselves as regional medical destinations targeting patients from Western Europe (Beladi et al., 2017:121–135).

Table 1. Comparison of Treatment Costs (in USD) Covered by Medical Tourism by Country (2021)

Procedures	USA	Costa Rica	India	Korea	Mexico	Thailand	Turkey	Malaysia
Heart Bypass	144.000	25.000	5.200	28.900	27.000	15.121	13.900	11.430
Angioplasty	57.000	13.000	3.300	15.200	12.500	3.788	4800	5.430
Heart Valve Replacement	170.000	30.000	5.500	43.500	18.000	21.212	17.000	10.580
Hip Replacement	50.000	12.500	7.000	14.120	13.000	7.879	13.900	7.500
Hip Resurfacing	50.000	12.500	7.000	15.600	15.000	15.152	10.100	12.350
Knee Replacement	50.000	11.500	6.200	19.800	12.000	12.297	10.400	7.000
Spinal Fusion	100.000	11.500	6.500	15.400	12.000	9.091	-	6.000
Dental Implant	2.800	900	1000	4.200	1.800	3.636	1.100	345
Knee Arthroscopy	30.000	8.500	3.000	-	6.500	11.515	-	-
Breast Implants	10.000	3.800	3.500	12.500	3.500	2.727	4.500	-
Rhinoplasty	8.000	4.500	4.000	5.000	3.500	3.901	3.100	1.293
Facelift	15.000	6.000	4.000	15.300	4.900	3.697	6.700	3.440
Hysterectomy	15.000	5.700	2.500	11.000	5.800	2.727	7.000	5.250
Gastric Sleeve	28.700	10.500	5.000	-	9.995	13.636	12.900	-
Gastric Bypass	32.972	12.500	5.000	-	10.950	16.667	13.800	9.450
Liposuction	9.000	3.900	2.800	-	2.800	2.303	3.000	2.299
LASIK (Laser Eye Surgery)	4.400	1.800	500	6.000	1.995	1.818	1.700	477
Corneal Surgery	17.500	4.200	-	7.000	-	1.800	7.000	-
Retinal Surgery	-	4.500	850	10.200	3.500	4.245	-	3.000
In Vitro Fertilization (IVF)	12.400	2.800	3.250	2.180	3.950	9.091	5.200	3.819

Source: (www.indiaprofile.com)

The comparison of treatment costs within the scope of medical tourism for the year 2021 reveals significant cost differences between developed and developing countries. According to the table, the United States has the highest costs in almost every procedure. For instance, while a heart bypass surgery costs $144,000 in the U.S., the same procedure can be performed in India for only $5,200 and in Turkey for $13,900. Similarly, heart valve replacement costs $170,000 in the U.S., whereas in Turkey this procedure can be carried out for $17,000. Such striking differences lead patients, particularly those requiring high-cost procedures, to seek medical tourism opportunities in developing countries.

In this context, Turkey stands out as one of the countries offering affordable prices. With its capacity to provide high-quality healthcare, advantageous geographical location, advancements in healthcare infrastructure, and specialized medical staff, Turkey has become a significant destination attracting patients not only from Europe but also from the Middle East and North Africa. For example, in aesthetic procedures (rhinoplasty, facelift, breast implants), Turkey offers more affordable prices compared to some of its competitors such as Thailand and India, while also maintaining a competitive position in complex procedures such as cardiac and orthopedic surgeries. Turkey's most distinct advantage lies in its ability to deliver Western-standard healthcare services at considerably lower costs.

In conclusion, this cost comparison in medical tourism clearly demonstrates the decisive role of economic factors in patients' healthcare travel preferences. Turkey emerges as a strong alternative in terms of both cost advantage and service quality, yet to attract more patients, it should continue to strengthen its global marketing strategies and develop supportive legal frameworks.

When comparing the treatment costs within the scope of medical tourism, it is evident that India offers the lowest costs, while the United States has the highest. Therefore, it is natural for individuals living in the U.S. to travel to countries where medical services are more affordable. Although the healthcare sector in developing countries has rapidly advanced in recent years, the prices of healthcare services remain considerably lower than in developed countries. This price difference constitutes a major factor driving patients toward medical tourism destinations. Recent developments and changes in the healthcare sector have further expanded the cost spectrum of healthcare services across countries (Özkan, 2019: 50–64).

Thermal Health Tourism

In today's world, unfavorable living conditions have increased individuals' need for relaxation and their obligation to pay attention to physical health. In addition, the rise in the elderly population, the growing burden on healthcare systems, delays in accessing medical services, the loss of cost advantages in healthcare, and the development of international transportation opportunities have driven individuals to seek alternative solutions to stay healthy and fit. In this context, individuals' evaluation of healthcare opportunities in the countries they travel to has significantly contributed to the development of thermal tourism and SPA–wellness tourism, which are sub-branches of health tourism.

Thermal tourism has become increasingly popular due to its advantages, particularly in rehabilitation, body relaxation (massage, sauna, mud baths, etc.), and enhancing vitality. According to the Ministry of Culture and Tourism (2020), thermal tourism is defined as a form of tourism that combines thermo-mineral water baths, drinking cures, inhalation, and mud baths with complementary treatments such as climate therapy, physiotherapy, rehabilitation, exercise, psychotherapy, and diet. At the same time, it also includes recreational and leisure activities.

The origins of thermal tourism date back to the Roman period, and the therapeutic properties of water were utilized during both the European and Ottoman eras. Particularly in Anatolia, the long-standing presence of baths and hot springs highlights the historical heritage in this field. Since the 20th century, the chemical composition and temperature levels of thermal waters have been

scientifically determined in relation to the illnesses they benefit, leading to the construction of facilities with suitable infrastructure and further progress in the sector (Bozkurt, 2020: 277–373).

Thermal springs are in areas where hot and mineral-rich waters emerge near fault lines. Since ancient times, they have been used in the treatment of various diseases, particularly musculoskeletal disorders, as well as for relaxation purposes. Thermal tourism has gained importance not only for its relaxing effects but also for its role as a complementary element to medical treatments (Çeti & Ünlüören, 2019: 109–128).

According to Dedeoğlu (2018: 86–93), thermal waters are utilized in the treatment of the following health problems:

- Rheumatic diseases
- Skin diseases
- Eye diseases
- Bone and joint disorders
- Post-surgical symptoms
- Post-stroke rehabilitation
- Digestive system and intestinal disorders
- Gynecological conditions
- Pulmonary and respiratory diseases
- Neurological disorders
- Cardiological problems
- Urinary tract and reproductive system diseases

In addition to these health issues, individuals without any medical condition also benefit from thermal springs to maintain vitality and enhance their quality of life. Furthermore, athletes and individuals over the age of 65 regularly use thermal facilities and gain significant benefits (Ercan, 2019: 130–134).

The legal framework for thermal tourism in Turkey was established with the Tourism Incentive Law enacted in 1982, which facilitated the establishment of spa facilities by investors. These legal regulations have been reinforced by various laws and regulations, including (Ertürk, 2019: 16):

- Regulation on Thermal Springs
- Tourism Incentive Law
- Mining Law
- Regulation on the Utilization and Operation Procedures of Thermal Waters
- Regulation on the Certification and Qualifications of Tourism Facilities (SATURK, 2021)

Institutions seeking to invest in thermal tourism are required to obtain a "Tourism Operation Certificate" from the Ministry of Culture and Tourism, as well as a "Thermal Facility Operation Permit" from the Ministry of Health. In addition, they must secure the necessary permits from the governorship, and complete analysis and inspection procedures. These processes are carried out within the framework of the relevant legislation.

Within the scope of the Thermal Tourism Master Plan prepared by the Ministry of Culture and Tourism, Turkey was divided into four regions, which were evaluated as pilot areas (Ministry of Culture and Tourism, 2013). In the second phase of the plan, these regions were intended to be declared "Tourism Centers" and 1/25,000 scale environmental plans were to be prepared. Thus, the thermal tourism potential across the country was assessed with the aim of enhancing quality and standards.

In addition, the "Turkey Thermal Springs Search Portal" has been developed to examine the geographical distribution and characteristics of thermal facilities in Turkey. This portal provides detailed information such as the facility name, address, available treatment options, the chemical properties of the water, licensing information, and indication details (Ministry of Health). Provincial

Directorates of Culture and Tourism also promote the thermal facilities of their respective provinces on their official websites.

Table 2. Top 20 Thermal Markets Worldwide

Ranking	Country	Number of Facilities	Ranking	Country	Number of Facilities
1	**China**	3.900	11	**Turkey**	295
2	**Japan**	2.972	12	**USA (United States of America)**	285
3	**Germany**	1.265	13	**Czech Republic**	131
4	**Russia**	838	14	**France**	175
5	**Italy**	768	15	**Switzerland**	73
6	**Austria**	181	16	**Slovenia**	86
7	**Hungary**	546	17	**Slovakia**	116
8	**Brazil**	207	18	**Taiwan**	251
9	**Spain**	293	19	**Iceland**	154
10	**Poland**	203	20	**South Korea**	108

Source:(globalwellnessinstitute.org)

Looking at the table above, it shows the ranking of the world's top 20 thermal markets by the number of facilities, and this data provides significant insights into the geographical distribution and development levels of thermal tourism on a global scale. China ranks first with 3,900 facilities, reflecting not only its vast land area and abundance of thermal resources but also its investments in the thermal tourism sector. China is followed by Japan (2,972) and Germany (1,265). These countries stand out as nations that have long-integrated thermal health tourism systems, combining modern treatment methods with thermal resources.

Turkey ranks 11th with 295 facilities, and despite its rich thermal resources, it has not yet entered the top 10. This suggests that Turkey's natural resources are not being utilized effectively or that there are shortcomings in infrastructure and promotion within the thermal tourism sector. Following Turkey, countries such as the USA (285), Taiwan (251), and Iceland (154), although having fewer facilities, stand out with their high-quality service provision in this sector. In addition, the prevalence of European countries in the list highlights the continent's traditional role in thermal tourism and its emphasis on health tourism. In conclusion, while this table illustrates how thermal tourism is shaped globally, it also reveals that the number of facilities is not the sole indicator of a sector's size; service quality, integration into healthcare systems, and marketing strategies also play a crucial role. For countries like Turkey, which hold a natural advantage in thermal resources, this table indicates that with strategic planning, the sector can be elevated to higher positions in the global ranking.

SPA and Wellness Tourism

The term SPA, derived from the Latin expression *Salus Per Aquam* meaning "health and well-being through water," emerged in the early 19th century when the curative effects of water were observed through drinking or applying it in hot, cold, and various forms. It is defined as an integrative therapeutic approach that emphasizes the healing quality of water along with water-based relaxation and rejuvenation experiences (Siner & Torun, 2020: 517–533). Within the scope of health tourism, SPA tourism stands out as a field characterized by longer lengths of stay compared to other types of tourism and is directly associated with the quality of accommodation. Recognizing the growing importance of health-oriented travel, both national and international tourism enterprises have made investments and adopted strategic positioning in this area.

Today, although SPA does not directly involve medical treatments, it represents a comprehensive service package including hotel wet areas, beauty centers, cosmetic units, and personal care facilities. Applications may involve tap water, mineral water, or aromatic substances. Unlike thermal tourism, SPA has the flexibility to be practiced independently of thermal resources, making it applicable in any geography. For this reason, tour operators and accommodation facilities have expanded SPA investments across diverse environments, ranging from cruise ships to airports (Uslu, 2020: 48).

The concept of **wellness**, while often described as an artificial construct formed by combining *well-being* and *fitness*, has historical roots dating back to 1654, when the term "wealnesse" (meaning good health condition) was used in English (Değer, 2020: 20). According to the Global Wellness Institute (2021), wellness tourism refers to travel undertaken by individuals with the aim of improving or maintaining their well-being. Wellness tourism is positioned at the intersection of the $2.6 trillion global tourism industry and the $4.2 trillion wellness economy. In today's world, holistic health and preventive approaches have become central in decision-making processes, with individuals increasingly seeking to maintain their healthy living practices even while away from home.

Wellness tourism adopts an approach that excludes surgical interventions and instead aims to foster individuals' mental and physical self-improvement. In this context, wellness tourism encompasses treatments and practices designed to enhance a person's sense of well-being. The concepts of SPA and wellness have been defined in various ways across different studies. While wellness represents a more holistic health approach that includes not only relaxation and vitality but also nutrition, physical exercise programs, and mental activities, SPA is more often positioned as a relaxing and restorative environment. However, in contemporary tourism facilities, SPA and wellness services are frequently offered together, becoming an indispensable feature particularly in luxury hotel chains. The availability of SPA–Wellness services has become an important factor influencing hotel selection, thereby intensifying competition in terms of service quality within this sector (Dedeoğlu, 2018: 86–93).

The concept of wellness is increasingly regarded as a complementary element to medical treatments, encompassing aspects such as stress reduction, anti-aging practices, healthy nutrition, weight control, and the attainment of physical and spiritual balance.

Within the scope of SPA–Wellness tourism, several new trends and methods have emerged. Examples include forest bathing, Islamic wellness, wellness programs for blue-collar workers, and the development of wellness villages, cities, and homes. The adoption of such practices in Turkey is expected to generate diverse impacts within the tourism industry (Değer, 2020: 308–324).

The outbreak of the COVID-19 pandemic in 2020, which restricted international travel opportunities and disrupted vacation options, adversely affected SPA–Wellness tourism. Nevertheless, the high levels of stress experienced during periods of quarantine and isolation have led to forecasts that demand in this sector will increase in the future. By integrating SPA–Wellness services into its traditional tourism resources, Turkey has the potential to develop a higher value-added tourism model and thereby enhance its attractiveness as an international destination.

Senior Tourism

Today, because of advancements in health, technology, and other fields, the average human life expectancy has increased significantly. As suggested by Malthus in his *Essay on the Principle of Population*, if population growth is left uncontrolled, it tends to increase geometrically, while subsistence resources grow only arithmetically. With a basic familiarity with numerical reasoning, it becomes clear that any disruption of the balance between these two propositions would yield severe consequences. However, in the 20th century, due to technological progress and increased productivity, the misery and crisis predicted by Malthus did not materialize (Değer, 2020: 308–324).

Nonetheless, improvements in infrastructure, healthcare systems, and general welfare have contributed to a global rise in the elderly population.

In this regard, projections by the United Nations estimate that by 2050, two out of every ten individuals will be aged 60 or above (Baka, 2013: 1180–1198). Definitions of old age vary across institutions. While the World Health Organization (WHO) classifies individuals aged 65 and older as "elderly," United Nations documents set this threshold at 60 years. Yet, considering that human life expectancy has extended to unprecedented levels in history, these age groups may still be regarded as relatively "young" in developed countries; in developing nations, however, the proportion of individuals reaching such ages is steadily increasing (Ministry of Development, 2018).

According to data from the Statistical Office of the European Union (EUROSTAT), individuals aged 65 and above travel more frequently and spend more than other age groups. For instance, in 2011, 19% of holidays were undertaken by this demographic, accounting for 20% of total tourism expenditures. In the same year, the average spending of a tourist aged 65 and above was €1,344, compared to an average of €1,203 for other age groups.

The increasing health, care, treatment, and rehabilitation needs of an aging population constitute a significant economic burden for national healthcare systems. In this context, individuals' pursuit of more affordable access to anti-aging treatments, rehabilitation, and other medical services has given rise to the phenomenon of senior tourism. Within this type of tourism, individuals consider not only healthcare services but also the quality of life and economic conditions of the destination.

People aged 65 and above possess considerable purchasing power in terms of health tourism. In developed countries, the growing elderly population has led to an increase in healthcare expenditures, prompting diversification in health insurance policies to alleviate the public burden. The widespread use of private health insurance has expanded individuals' search for more affordable and higher-quality healthcare services, thereby fueling the demand for health tourism.

An examination of elderly tourists' travel preferences reveals a particular interest in social, cultural, faith-based, and health-oriented types of tourism. In countries like Turkey, where tourism revenues fluctuate seasonally and many businesses are unable to operate year-round, this situation leads to challenges in sustainability and employment (Tufan et al., 2017: 29–36).

At this point, the concept of "Age-Friendly Cities" (AFC), introduced by the World Health Organization, refers to urban spaces that promote active aging. As of 2019, three locations in Turkey hold this designation: Mersin, Muratpaşa (Antalya), and Kadıköy (Istanbul) (Akoğlan, 2019: 99–104). For geriatric tourists, such destinations contribute to the development of senior tourism, yet it is crucial that each destination evaluates and capitalizes on its own unique attractions (Küçük & Kırılmaz, 2021: 33–36).

However, one of the main constraints limiting Turkey's potential in senior tourism is the inadequacy of the physical environment in terms of accessibility and comfort for elderly and disabled individuals. When choosing a travel destination, older people consider criteria such as safety, ease of mobility, and accessibility. Therefore, environmental arrangements (ergonomic infrastructures, age-friendly practices) should be prioritized. As in the broader field of health tourism, one of the key factors enhancing a country's international credibility is the presence of accredited healthcare institutions. Increasing both the number and quality of accredited facilities will strengthen the country's position in global health tourism (Macit & Macit, 2021: 160–173).

Turkey holds significant advantages in terms of senior tourism. Hospitals in the country have made progress in quality, accreditation, and technology; its climate, cultural richness, and strategic location in terms of accessibility render Turkey an attractive destination. On the other hand, legal infrastructure gaps, shortages of specialized healthcare professionals, language barriers, weak cooperation among public, private, and civil society actors, as well as deficiencies in promotion, remain notable disadvantages (MÜSİAD, 2012).

The travel motivations of elderly tourists visiting Turkey demonstrate that leisure and cultural activities are primary, followed by visits to relatives and friends, and health-related reasons. This indicates that elderly tourists travel not only with health-related expectations but also with multidimensional demands. Consequently, there is a growing interest in services that integrate different forms of tourism, such as package tours (Kılıçlar et al., 2017: 80–100; Kaygısız, 2021: 152–163).

Disabled Tourism

A disabled individual is defined as "a person who, due to congenital or subsequent illness or accident, has partially lost physical, mental, spiritual, emotional, or social abilities to varying degrees, is unable to adapt to the requirements of normal life, and therefore requires protection, care, rehabilitation, counseling, and support services" (SHK, 1983/3).

Today, various social, structural, and legal arrangements are made to ensure that disabled individuals can participate in social life and improve their quality of life. Alongside the treatment and rehabilitation of health problems, enabling these individuals to move independently and freely in daily life is among the primary objectives. In both developed and developing countries, practices targeting disabled individuals aim to improve living standards (Ercan, 2019: 130–134).

With the rise of the elderly population globally, coupled with accidents and chronic illnesses, the number of disabled individuals has increased. According to OECD, the European Union, and Turkey's data, approximately 15% of the world's population consists of disabled individuals (EY-DER, 2021). In Turkey, as of February 2021, there were 2,511,950 registered disabled individuals in the National Disability Database (Ministry of Family and Labor, 2021: 3).

To facilitate the participation of disabled individuals in tourism activities, the field known as "disabled tourism" (or "accessible tourism") has been developed. In the literature, the tourism experiences of elderly and disabled individuals are often addressed together. According to Darcy and Dickson, accessible tourism refers to "a set of tourism services, products, and environments created in line with universal design principles, enabling individuals with disabilities to act with dignity, equality, and independence" (Yıldız et al., 2017: 61–80).

However, numerous structural, physical, and social barriers must be overcome for disabled individuals to participate fully in tourism activities. At present, it cannot be stated that disabled people have full access to tourism services. Although legal frameworks exist, practical implementation remains insufficient, and the services and infrastructure necessary to realize the potential of accessible tourism are still lacking. Improvements in key areas such as accommodation, transportation, and environmental arrangements can facilitate the participation of disabled individuals in tourism (Ercan, 2019: 130–134).

In Turkey, one such regulation is the "Regulation on the Certification and Qualifications of Tourism Facilities" prepared by the Ministry of Culture and Tourism. According to this regulation, hotels and holiday villages with a capacity of 80 rooms or more are required to provide at least one disabled-friendly room, amounting to 1% of the total room count. Moreover, entrances, public restrooms, dining areas, and rest spaces must be designed for disabled access. Theme parks and entertainment centers are also required to be arranged in accordance with disabled individuals' accessibility needs (Ministry of Culture and Tourism, 2021).

Due to high costs and insufficient infrastructure in their own countries, disabled individuals often seek access to healthcare services abroad, which directs them towards health tourism. Participation in tourism with companions or professional caregivers further increases the sector's potential. Particularly for individuals with orthopedic disabilities, the lengthy treatment and rehabilitation processes extend accommodation periods, creating significant opportunities for the tourism industry. Nevertheless, studies on the satisfaction levels of disabled individuals in Turkey indicate that this group has not been adequately considered within health tourism.

The lack of reliable statistical data on the number of disabled tourists visiting Turkey and their length of stay makes it difficult to evaluate the economic contribution of this sector. However, according to Yıldız et al. (2017), the accessible tourism market reached a size of €150 billion in 2012. Considering that Turkey's total tourism revenue in 2016 was $34 billion, this figure reveals the significant potential of accessible tourism (Yıldız et al., 2017: 61–80).

Accordingly, the widespread adoption of architectural, ergonomic, and environmental arrangements for disabled individuals, as well as raising public awareness about disability, is of great importance. Additionally, improving access to healthcare services and infrastructure will allow disabled individuals to combine treatment and tourism experiences. This will not only benefit disabled tourists but also contribute to solving accessibility problems faced by health tourists in general, thus enhancing the overall tourism sector (Yiğit et al., 2019: 917–936).

Globally, many countries are implementing regulations to enhance the travel freedom of disabled individuals. Within the European Union, the European Network for Accessible Tourism (ENAT), headquartered in Belgium, was established to ensure access to tourism services for disabled people. From Turkey, TÜRSAB participates as a full member of this network (ENAT, 2021).

The promotion of accessible technologies in the tourism sector, the implementation of environmental arrangements, and the adoption of universal design principles will enable more effective participation of disabled individuals in tourism activities. The tourism mobility created by disabled individuals seeking healthcare in other countries due to inadequacies in their national health systems could generate significant economic returns if accessibility challenges are addressed. Therefore, adopting the necessary structural and legal measures is crucial to maximizing the potential of disabled tourism.

The Development and Characteristics of Health Tourism

Throughout the 20th century, individuals from high-income groups in less developed regions of the world traveled to developed countries to access advanced healthcare facilities and qualified medical personnel. However, the transformation observed in health tourism in the 21st century differs both quantitatively and qualitatively from the health-oriented travels of previous periods. The main features of this transformation include the shift of patient mobility from developed countries to less developed ones, the increasing regionalization of travel, and the emergence of healthcare services as a global market (OECD, 2021).

The key elements characterizing health tourism in the 21st century can be summarized as follows (OECD, 2021):

- A visible increase in the number of individuals traveling internationally to access healthcare services;
- Growth in patient mobility from developed to less developed countries, driven by low-cost healthcare services, affordable transportation options, and access to information sources such as the internet;
- Advancements in healthcare infrastructure, expansion of transportation opportunities, and easier access to digital information;
- Strategic support of health tourism by both the private sector and public authorities, recognizing its economic potential.

Significant economic, social, and political transformations shaping health policies have laid the groundwork for the restructuring of healthcare services at both national and international levels. In this context, the mobility of people, goods, capital, and ideas has generated both opportunities and challenges for the delivery and regulation of healthcare services (OECD, 2021).

The main factors supporting the growth of health tourism include:
- Normative frameworks regulating global trade in services (e.g., the General Agreement on Trade in Services [GATS] and World Trade Organization [WTO] agreements);

- Recognition of cross-border disease patterns;
- Low-cost air transportation, advancements in information and communication technologies, and shifting cultural perspectives toward overseas destinations;
- The structural development of the health tourism industry.

Today, individuals turn to health tourism both to receive treatment under favorable medical conditions and to enjoy a touristic experience. Long waiting periods, high treatment costs, and insufficient health insurance coverage compel individuals to seek alternative treatment options. Accordingly, health tourism has evolved into a service sector in which travel, and accommodation services are offered together with integrated medical and non-medical services.

The main factors driving the demand for health tourism include: the inadequacy of advanced technological healthcare services and qualified medical professionals in some countries; the desire to combine treatment with leisure activities; high healthcare costs; the need for access to quality medical care; concerns over privacy; geographical and climatic constraints; demand for thermal facilities; the tendency of elderly, chronically ill, and disabled individuals to seek treatment abroad; and the need for a change of environment in cases such as addiction and other specific health conditions (TÜSİAD, 2021).

Three key elements stand out in shaping the development of health tourism (Şengül & Çora, 2020: 56–86):

1. The increase in the number of students receiving medical education abroad, the dissemination of modern medical technologies, and the growth of the healthcare workforce in developing countries,
2. The realization by individuals from various nationalities living in developed countries that they can access lower-cost yet high-quality healthcare services in their home countries,
3. The insufficiency of health insurance coverage and the economic unsustainability of healthcare systems in developed countries.

In the 1980s, many countries implemented structural transformations in their healthcare systems. Rising costs, income inequalities, long waiting times, and the limited scope of health insurance prevented individuals from achieving equal access to healthcare services. This situation pushed patients toward countries offering alternative and more affordable healthcare, thereby increasing the demand for health tourism (Temizkan & Temizkan, 2020: 284–298).

Health tourism represents an integrated structure in which healthcare services are provided together with other tourism-related services such as transportation and accommodation. Factors such as accessibility to health facilities and the pricing of services are also evaluated within this scope. At the micro level, health tourism constitutes a market structure based on supply-demand dynamics, making it an economically attractive sector. At the macro level, there exists a strong positive correlation between health tourism and other service sectors such as accommodation and food and beverage. In this context, health tourism directly and indirectly supports multiple industries and contributes significantly to economic development (Uygun & Ekiz, 2018: 18–26).

Within the scope of health tourism, the demands of tourists have been classified into five main categories by the Turkish Ministry of Health (2021):

1. **Tourists only**: Individuals who travel solely for tourism purposes.
2. **Tourists treated during holidays**: Individuals who become ill during their trip and are obliged to seek healthcare services.
3. **Tourists for both holiday and treatment**: Visitors who primarily travel for leisure but also receive medical services at their destination.

4. **Patients on holiday**: Individuals whose primary purpose is medical treatment but who integrate leisure activities into the process.

5. **Patients only**: Individuals who travel exclusively for the purpose of receiving healthcare services.

Among these groups, all visitor types except "tourists only" are considered within the scope of health tourism services.

The process of patients traveling abroad for medical purposes generally involves several defined steps. This begins with the patient applying to an intermediary institution in their home country. Subsequently, medical documents are collected, adapted to the requirements of the destination country, and reviewed by a specialist physician for preliminary evaluation. Following this, a budget is prepared, the patient is informed, and the necessary approvals are obtained before issuing a "medical treatment travel form." Visa procedures and travel planning are managed by the intermediary agency, while the patient remains in contact with the relevant healthcare institutions during the treatment period.

In the post-treatment phase, the case manager oversees the patient's return to their home country, informs the family physician and insurance company, and collects feedback to assess patient satisfaction (Tontuş, 2019: 67–88).

Health Tourism in the World and in Turkey

Today, at least 28 countries are competing in the global health tourism market. Among these are South Africa, Thailand, Singapore, Malaysia, South Korea, Dubai, India, Israel, Jordan, the United Arab Emirates, the Czech Republic, Hungary, Poland, Argentina, Brazil, Costa Rica, Mexico, and Panama.

In relation to the growing market size and the increasing demand for health tourism services, Oyewole emphasizes the economic dimension of this demand, noting that rising disposable incomes in developed countries and easier access to competitively priced services in developing countries act as major drivers. The size of the international health tourism market is expected to grow by an average annual rate of 20%, reaching 131.35 billion USD by 2025 (Kim et al., 2019: 24).

North America, the Middle East, and Western Europe stand out as regions where demand for health tourism is most concentrated. India, Thailand, and Malaysia are particularly preferred by European health tourists. In Malaysia, Islamic references play a key role in attracting the Middle Eastern market. Among Japanese health tourists, Singapore emerges as a preferred destination, while Cuba is drawing attention as a health tourism destination in Central America (Tengilimoğlu, 2017: 51).

Asian countries dominate the health tourism sector. The Asian region hosts approximately 1.3 million health tourists annually, with Thailand, India, South Korea, and Singapore serving as major destinations. India holds a significant share of the sector due to its cost advantages in healthcare services. Furthermore, India has increased its technological investments, improved the quality of medical services, and reached the standards of Western hospitals, thereby establishing itself as a global hub in health tourism. Thailand's rise in popularity within the sector is closely linked to its success in gender reassignment surgeries, which has positioned the country as a leading destination for aesthetic surgery (Ministry of Health, 2021).

From an economic investment perspective, Singapore and Malaysia stand out. While India, Thailand, and the Philippines entered the health tourism sector in the late 1900s, South Korea became an important player in the early 2000s. According to OECD data, in 2009 healthcare expenditures in OECD countries accounted for 9.5% of their gross domestic product (Tengilimoğlu & Işık, 2021: 34).

Health tourism destinations are generally classified within the following regions:

- **Asia** (India, Malaysia, Singapore, Thailand),
- **South Africa, South and Central America** (including Brazil, Costa Rica, Cuba, Mexico),
- **The Middle East** (especially Dubai), and
- **Various parts of Europe** (Western, Scandinavian, Central and Southern Europe, the Mediterranean).

Some destinations position themselves as health cities or biomedical cities. For instance, since 2001 Singapore has promoted itself as a center for biomedical and biotechnological activities. Similarly, Dubai Healthcare City was established to prevent its citizens from traveling to Asian countries for medical services and to encourage them to remain within the Middle East (OECD, 2021).

There is intense competition among health tourism destinations and service providers. To manage this competition and develop the sector, multiple factors must interact effectively. According to the 2020–2021 Health Tourism Index, the key determinants of a country's attractiveness in health tourism are its economic structure, public image, healthcare costs, and the quality of healthcare services provided.

The 2020–2021 Health Tourism Index identified the world's top 10 health tourism destinations based on these criteria. The ranking is as follows: Canada, Singapore, Japan, Spain, the United Kingdom, Dubai, Costa Rica, Israel, Abu Dhabi, and India (Stephano, 2021).

Canada ranks first in this index primarily because it is the world's second-largest country and attracts more than 14 million American tourists annually, supported by a strong tourism industry. Singapore ranks second overall, while holding the first position in terms of healthcare facilities and service quality. According to 2019 data, more than 500,000 foreign tourists visited Singapore to receive affordable and high-quality healthcare. Japan stands out with its advanced healthcare system and technological innovation, offering high-quality services particularly to patients from China and other international visitors (medicaltourism.com).

Spain is recognized as one of the world's most visited tourist destinations, and due to its healthcare services combined with the travel experience offered to foreign patients, it is ranked among the leading medical tourism centers in Europe. The United Kingdom holds fifth place among health tourism destinations, hosting reputable healthcare institutions such as the London Orthopaedic Clinic, Birmingham Children's Hospital, and the Cambridge Complex Orthopaedic Trauma Centre. The country also welcomes more than 31 million international tourists annually and stands as a major cultural and tourism hub (Şengül & Çora, 2019: 56–86).

Dubai is known for its modern architecture, skyscrapers, and luxury shopping opportunities, and is identified in the Health Tourism Index as the leading medical destination of the Arab region. The presence of world-class hospitals and international doctors across various specialties reinforces this position (Şengül & Çora, 2019: 56–86).

Costa Rica is renowned for its natural beauty and competitive healthcare costs, attracting numerous health tourists from surrounding countries, including the United States and Canada.

Israel has become an important center for health tourists seeking fertility treatments. Leading institutions such as Sheba Medical Center provide services to thousands of international patients from countries including Russia, Cyprus, Georgia, and the United States.

Abu Dhabi launched the Abu Dhabi Health Tourism e-portal in 2019 to provide detailed information about the city's medical offerings and healthcare facilities for international patients.

India is considered one of the most significant players in the Asian health tourism industry and ranks first in the index for health tourism. The country's expanded visa policy facilitates medical travel by allowing patients to stay for up to 60 days and enabling accompanying relatives to obtain a medical attendant visa (medicaltourism.com).

The ranking of cities in the 2020–2021 Health Tourism Index is presented in the following table:

Table 3. Ranking of Cities in the Health Tourism Index

Rank	Country	Rank	Country	Rank	Country	Rank	Country
1	Canada	13	Oman	25	Colombia	37	Panama
2	Singapore	14	South Korea	26	Egypt	38	Tunisia
3	Japan	15	Czechia	27	Malta	39	Qatar
4	Spain	16	Taiwan	28	Brazil	40	Jamaica
5	United Kingdom	17	Thailand	29	Poland	41	Russia
6	Dubai	17	Italy	30	Türkiye	42	Mexico
7	Costa Rica	19	Dominican Republic	31	Morocco	43	Lebanon
8	Israel	20	Argentina	32	Bahrain	44	Guatemala
9	Abu Dhabi	21	Portugal	33	China	45	Kuwait
10	India	22	South Africa	34	Greece	46	Iran
11	France	23	Hungary	35	Saudi Arabia		
12	Germany	24	Philippines	36	Jordan		

Source: (medicaltourism.com/destinations/turkey)

In Table 3, the ranking of countries according to the Medical Tourism Index is presented, and this ranking is based on various indicators such as the quality of healthcare services, accessibility, cost-effectiveness, patient satisfaction, and infrastructure. At the top of the list, Canada occupies the leading global position in medical tourism due to the quality, safety, and patient-centered structure of its healthcare services. It is followed by countries such as Singapore, Japan, and Spain, which stand out with their high-tech medical infrastructure, well-trained health personnel, and effective management systems. Meanwhile, countries such as the United Kingdom, Dubai, Israel, and India have become regional hubs and have achieved significant shares in international patient flows.

Turkey is ranked 30th in the list, and although this position does not fully reflect the country's potential in medical tourism, it indicates significant opportunities as a developing market. Turkey's highly qualified health professionals, affordable treatment options, and geographical advantages support its potential to rise in the index rankings. However, to move up to higher positions, improvements are needed in areas such as quality accreditation, international marketing strategies, and patient experience management.

At the lower end of the ranking, countries such as Iran, Kuwait, Guatemala, and Lebanon lag in terms of infrastructure, service quality, or international trust perception, and therefore possess limited attractiveness in the field of medical tourism. Overall, the table reveals that competition in medical tourism is intensifying globally, and countries' success in this area is directly related not only to medical competence but also to service delivery, patient rights, accessibility, and global promotion policies.

The share of healthcare expenditures within Turkey's tourism revenues increased from around 1% in 2002 to 4.5% in 2020. In terms of medical tourism demand, the most sought-after specialties in Turkey include obstetrics and gynecology, internal medicine, ophthalmology, medical biochemistry, general surgery, dentistry, orthopedics and traumatology, infectious diseases, and otorhinolaryngology (www.ushas.com.tr). According to the *Turkey International Patient Report* published by the Ministry of Health in 2017, the main countries of origin of patients receiving healthcare services in Turkey are Iraq, Azerbaijan, Germany, Russia, and Libya (Sevim, 2019: 89). This demonstrates that Turkey is particularly preferred by patients from neighboring countries as well as those from countries with large Turkish diaspora communities.

Turkey holds significant advantages in terms of climate, cost, security, and transportation opportunities. In line with these advantages, the country has high potential in areas such as health tourism, spa and wellness tourism, luxury tourism, and sports tourism. With this diversity, Turkey is capable of appealing to individuals of all age groups. Moreover, considering geographical proximity, natural and climatic conditions, and cultural similarities, Turkey is seen as an important health and thermal tourism destination, particularly for Middle Eastern countries (Şengül & Çora, 2019: 56–86).

The quality of healthcare services in Turkey has made notable progress over the past decade, thanks to infrastructure investments and advances in medical education. This progress has contributed to Turkey's prominence at the regional level, leading to increased investments in the healthcare sector. Since the 1990s, private sector investments in healthcare, alongside public services, have further supported this development. According to World Trade Organization (2014) data, the top five healthcare services most frequently chosen in Turkey are internal medicine, ophthalmology, orthopedics, gynecology and obstetrics, and otorhinolaryngology.

Figure 1 below examines the annual changes in the number of health tourists visiting Turkey between 2015 and 2025. According to the data, the number of health tourists, which was 428,894 in 2015, rose to 756,926 in 2019, marking an increase of approximately 76%. This growth can be attributed to Turkey's infrastructure investments in medical tourism, improvements in service quality, and international promotional activities. However, the decline to 435,691 in 2020 reflects the negative impact of the global COVID-19 pandemic on international patient flows. Despite this downturn, the sector entered a rapid recovery phase starting in 2021.

The number of health tourists reached 1,381,807 in 2022 and peaked at 1,538,643 in 2023. In 2024, the figure was 1,506,442, showing relative stabilization, which suggests that the sector may have reached a saturation point or experienced slower growth. However, the projected number of 733,798 for 2025 indicates a significant decline compared to the previous year, reflecting a trend that must be carefully analyzed by the sector. This decrease may stem from political, economic, regional competition, or healthcare quality-related factors. When the entire period is evaluated, it becomes clear that despite cyclical fluctuations, the medical tourism sector demonstrates an overall upward trend, though strategic planning and risk management are required to ensure sustainable growth.

Figure 1. Number of Health Tourists Visiting Turkey

Source: (https://www.ushas.com.tr/saglik-turizmi-verileri)
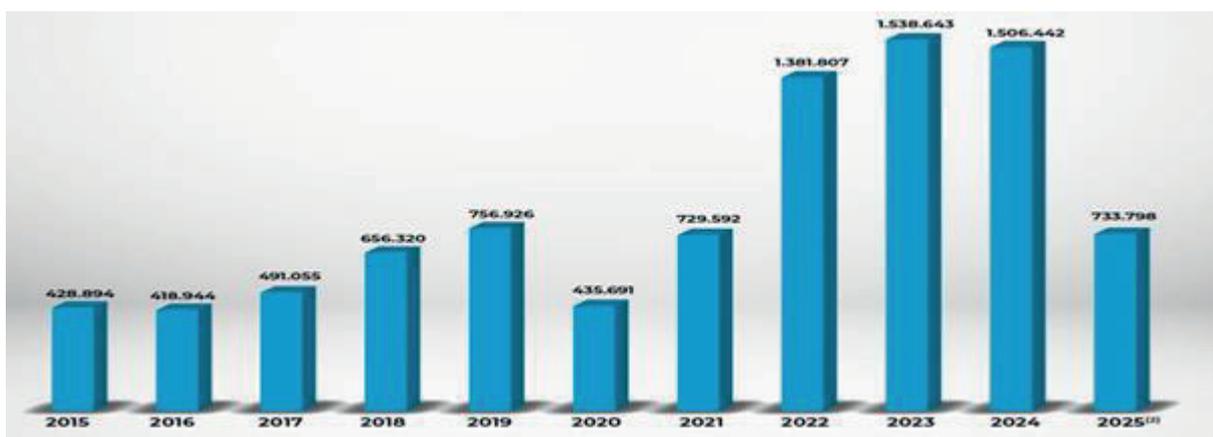
Below, Figure 2 illustrates the annual changes in Turkey's health tourism revenues (in thousand US dollars) between 2015 and 2025. According to the data, health tourism revenue, which was 745,916 thousand dollars in 2015, showed a steady upward trend over the years and reached 1,459,132 thousand dollars in 2019. This increase is directly related to Turkey's investments in health infrastructure, improvements in service quality, and the growing recognition of the country in the

international patient market. Although revenues declined to 1,371,189 thousand dollars in 2020 due to the impact of the pandemic, the decrease remained limited, and an upward trend began again as of 2021.

In 2021, revenues exceeded the 2-billion-dollar threshold, peaking at 3,006,092 thousand dollars in 2023; in 2024, this level was maintained at 3,022,957 thousand dollars. This indicates that Turkey has not only increased its health service exports but also gained a competitive position on a global scale. However, the projected revenue of 1,392,762 thousand dollars for 2025 reflects a significant decline compared to the previous two years. This estimated decrease may stem from various factors such as geopolitical developments, economic fluctuations, healthcare pricing policies, or intensifying international competition. Overall, the figure demonstrates that Turkey has exhibited a steady growth performance in health tourism, but emphasizes that strategic planning, quality standardization, and market diversification are essential for ensuring the sustainability of this growth.

Figure 2. Turkey's Health Tourism Revenue (Thousand USD)

Source: (https://www.ushas.com.tr/saglik-turizmi-verileri)
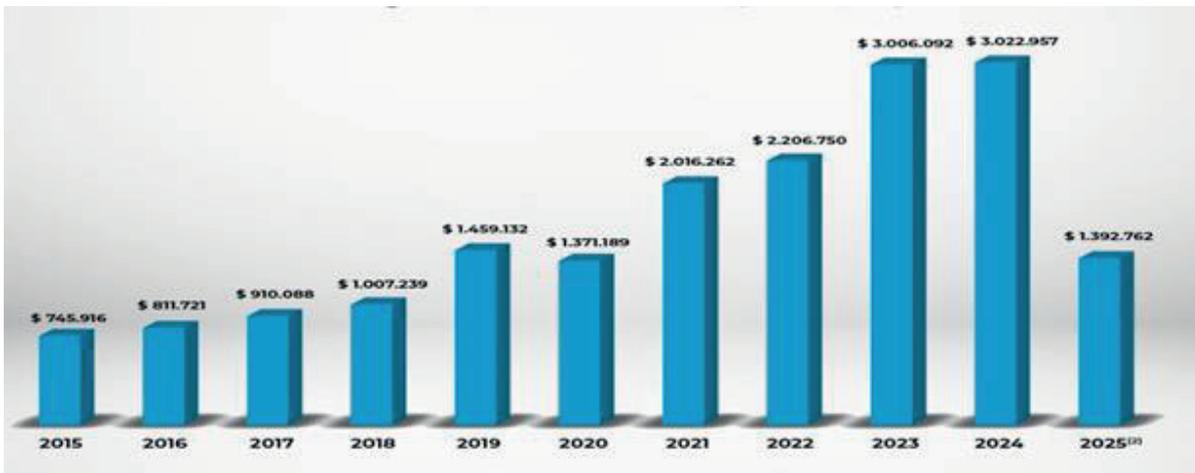
Turkey's geographical proximity to Europe provides a significant advantage, particularly in the context of senior tourism. In addition, factors such as the country's climatic characteristics, vegetation, transportation infrastructure, and settlement patterns are among the key elements that support its tourism potential. The Mediterranean and Aegean regions are considered prominent destinations in terms of senior tourism.

Among Turkey's opportunities in the field of senior tourism are the increasing availability of high-tech and high-quality healthcare services provided by city hospitals, the expansion of intensive care and palliative care capacities, as well as the growing number of specialized healthcare professionals in geriatrics and gerontology. Furthermore, Turkey's rich thermal resources, cost-effective healthcare services, and complementary treatment methods such as balneotherapy, thalassotherapy, and spa therapies provide significant advantages in the sector.

Moreover, Turkey's historical and cultural heritage, strategic geographical location, advanced air transport networks, favorable climate conditions across all four seasons, and its golf tourism potential further enhance the country's appeal in the field of senior tourism (Tengilimoğlu & Tosun, 2020: 149–152).

According to tourism statistics, more than 60% of tourists visiting Turkey come from European Union countries. Considering the aging population in Europe, this demographic shift is expected to have positive effects on the Turkish tourism sector. In this context, Turkey needs to develop suitable tourism products for the senior tourism market and establish effective marketing strategies.

According to data from the Ministry of Tourism, approximately 15% of tourists visiting Turkey are individuals over the age of 55. Nevertheless, it is stated that Turkey has not yet attracted enough senior tourists from Europe. To fully utilize this potential, Turkey should not only meet the travel needs of the older age group but also diversify its tourism product portfolio with nature-based tourism, health tourism, and golf tourism; in addition, it should carry out effective marketing and promotional activities targeted at this market.

Furthermore, to meet the expectations of senior tourists who demand fitness and health-oriented vacations, services offered in resorts should be diversified, and in coastal regions where the tourism season is at its peak, the season should be extended. Thanks to its climatic advantages, Turkey continues to be an attractive destination for elderly tourists. With its religious centers, folkloric values, historical and archaeological sites, natural beauty, and thermal resources, the country stands out as a health and senior tourism destination that offers affordable holiday options (Avcıkurt, 2003: 152–153).

Conclusion

Health tourism today is not merely a field that facilitates individuals' access to healthcare services; it has also become a multidimensional sector of strategic importance that contributes to the economic development of countries. For both developed and developing nations, health tourism offers significant opportunities in terms of foreign currency inflows as well as the global promotion of their healthcare systems. Rising healthcare costs worldwide, aging populations, the increase in chronic diseases, and individuals' search for higher quality, faster, and more cost-effective healthcare services are among the key dynamics supporting the rapid growth of this sector. Within this framework, subfields such as medical tourism, thermal tourism, spa and wellness, senior (geriatric) tourism, and disabled tourism are gaining increasing importance.

Within this overall development, Turkey stands out as one of the leading countries thanks to its geographical location, natural resources, cultural proximity advantages, advanced healthcare infrastructure, and highly qualified healthcare workforce. With cost-effective treatment options, high patient satisfaction, short waiting times, and modern healthcare facilities, Turkey has become an attractive destination for health tourism across a wide geography, particularly in Europe, the Middle East, the Balkans, and Central Asia. Especially over the past decade, significant investments made by both the public and private sectors have substantially improved the quality of healthcare services in the country. Furthermore, Turkey's historical, cultural, and touristic richness provides value-added experiences that can be integrated into health tourism.

However, when examining the data from the 2020–2025 period, it becomes evident that, alongside these positive developments, there are also various vulnerabilities and threats. For instance, in 2020, the impact of the COVID-19 pandemic led to a significant decline in both the number of health tourists visiting Turkey and the revenues obtained. In the subsequent years, a rapid recovery process was observed, with record highs in both tourist numbers and revenues reached in 2023 and 2024. Nevertheless, projections for 2025 indicate a remarkable decrease in both the number of health tourists and revenues. This situation demonstrates that, for the sustainability of growth in the sector, it is essential to address certain structural challenges, the intensification of international competition, geopolitical tensions, economic factors such as exchange rate fluctuations and pricing policies, as well as some perceptions regarding service quality.

In this context, it is inevitable for Turkey to take certain fundamental strategic steps to maintain and enhance its competitiveness in the field of health tourism. These steps include improving quality standards, ensuring compliance with international accreditation systems, training healthcare personnel in foreign languages and cultural awareness, developing patient experience management, and adopting transparent pricing policies. Moreover, adopting an integrated approach that expands beyond medical tourism to encompass subfields such as thermal tourism, elderly and disabled

tourism, spa-wellness, and rehabilitation tourism will enable Turkey to utilize its potential much more effectively.

In addition, to attract elderly and disabled individuals within the scope of health tourism, comprehensive measures must be taken in areas such as accessibility, environmental regulations, legal frameworks, care services, and accommodation; and an integrated structure between social services and healthcare services must be established. For Turkey to become a true global player in health tourism, it is not only necessary to improve its existing infrastructure but also to focus on correct target market selection, effective promotional strategies, digital marketing activities, and state-supported incentive mechanisms.

In conclusion, Turkey is a strong country with significant potential for global growth in health tourism. However, for this potential to be transformed into sustainable and stable development, multidimensional, holistic, and long-term strategies are required. Health tourism is not only a field of service export but also a strategic area of development that will strengthen Turkey's international image and increase its economic diversity. Therefore, strong cooperation among the public sector, private sector, and academic institutions must be ensured to achieve the goal of establishing Turkey as a brand country in health tourism.

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