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Neoteric aspects, problems and prospects of development of medical tourism in Ukraine

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Abstract

The article focuses on the main issues of the current state of development of medical tourism in Ukraine. It also examines the experience of foreign countries in the field of medical tourism. One has conducted the SWOT analysis, identified the main factors determining the attractiveness of the Ukrainian medical tourism market. The article describes three main models of attracting foreign patients that are used in Ukraine. As well as determines the main aspects, problems, and potential for development.

Medical tourism is another segment of the market of health tourism. Today, travel agencies indicate an increase in the number of orders for medical tourism. For a long time, this kind of tourism has been in demand among Americans and residents of Western Europe. According to Medical Insights International, since 2016, incomes from health tourism have been increasing every year by 20%, with annual market turnover reaching \$40-60 billion. Europeans and Americans go abroad seeking cheap medical care (plastic operations, heart surgery, organ transplantation, and dental services are in demand). Such services are provided at the highest level not only by European clinics but also clinics in Asia, Australia, and Latin America.

Given the increasing demand for passing medical examination abroad, budgets for diagnostic travel are increasing, depending on the cost of the program, which is calculated by the clinic (usually 2.5-5 thousand euros), the choice of place of residence (the diagnosis is usually outpatient), the presence of a medical interpreter, transfer, etc.

Keywords: medical tourism, Ukraine, health tourism

Annotation. The article focuses on the main issues of the current state of development of medical tourism in Ukraine. It also examines the experience of foreign countries in the field of medical tourism. One has conducted the SWOT analysis, identified the main factors determining the attractiveness of the Ukrainian medical tourism market. The article describes three main models of attracting foreign patients that are used in Ukraine. As well as determines the main aspects, problems, and potential for development.

Formulation of the problem. Medical tourism is another segment of the market of health tourism. Today, travel agencies indicate an increase in the number of orders for medical tourism. For a long time, this kind of tourism has been in demand among Americans and residents of Western Europe. According to Medical Insights International, since 2016, incomes from health tourism have been increasing every year by 20%, with annual market turnover reaching \$40-60 billion. Europeans and Americans go abroad seeking cheap medical care (plastic operations, heart surgery, organ transplantation, and dental services are in demand). Such services are provided at the highest level not only by European clinics but also clinics in Asia, Australia, and Latin America.

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Analysis of pieces of scientific research. Among the Ukrainian and foreign researchers of the problems of development of medical tourism and management of social processes in the service industries, one should highlight the pieces of research done by M.P Kliap, F. F. Shandora (Ukraine), V. Antonelli, A. Carbone (Italy), K. Copper (France), F. Roskam (Germany), M. B. Birzhakov and A. P. Durovich (Belarus), J. Kachmarek, A. Stasiak and B. Włodarczyk (Poland) and others. According to their pieces of research, the motivation for purchasing a tour product is

changing. A purchase of an ordinary tour is mostly motivated by emotions. Driven by such factors as trends, ambitions, dreams, new impressions. The motive for purchasing a medical tourism product is rational and associated with the need to improve the psychophysical state and minimize costs [2].

Statement of purpose and tasks of the article. The purpose of this research is to analyze the latest aspects, problems, and potential of medical tourism in Ukraine under modern conditions. The main task set to achieve the goal of the study is to identify aspects, problems, and potential of medical tourism in Ukraine.

Presenting the main material. According to analysts of the tourism industry from Ukraine, the cost of inpatient treatment (including diagnosis, surgery, anesthesia, stay in a single room hospital accommodation with three meals, medicines, and postoperative restoration) amounts from 15 000 to 80 000 euros and more in the case of organ transplantation operations.

One can save on medical care by asking for help from Israel, Turkey, Thailand.

Operations and treatment there are 1.5-2 times cheaper than in European countries. For example, the cost of treating a brain tumor in an Israeli clinic is about 30 000 euros, while the European one would charge twice as much.

According to scientists, the flow of medical tourists from Ukraine to Austria and the Czech Republic, where they treat diseases of the cardiovascular and musculoskeletal systems, as well as Italian clinics specializing in pulmonary diseases and diseases of the musculoskeletal system, will grow.

In the Czech Republic, medical tourism has gained special demand; in this country, many tourists operate, most often in the field of plastic surgery.

The Forbes Traveler agency included the Czech Republic to the top ten of the world's best destinations for medical tourism, along with Singapore, South Africa, and Hungary. According to the agency, the Czech surgeons offer an ideal combination of high-quality service and low prices. People from Canada, the United States, Germany, France, and the United Kingdom come to countries such as Ukraine, Belorussia with medical purposes.[1].

They are mostly interested in dentistry because the price is usually 4-7 times cheaper which is very significant. They also come to get plastic surgery, sanatorium treatment, children's cardiac surgery, which in some directions has already outstripped the achievements of Western colleagues, both American and Western European. This is explained by the fact that in the

countries of the former USSR the legal field is milder than in the United States, where this direction is strictly regulated by both insurance companies and legislation. [2]

Tours to SPA-resorts (hotels with spa-centers are equipped with health-improving complexes with swimming pools and therapeutic baths, massage rooms). Customers who regularly visit health resorts choose a new holiday destination every year. Those tired of Hungary and the Czech Republic, book travels to more expensive countries like Austria, Switzerland, and Germany. Almost all resort hotels here are located near healing sources, which help with diseases of the locomotory system, blood circulation disorders, problems with the digestive system, liver, etc. Recreation in these places is usually combined with excursions.

Taking into account the global tendency towards better quality and profile tourism, together with our partners, we can join the project of medical tourism, unique in its kind, which along with traditional rest provides services in the medical sphere. This means that tourists can combine leisure with health improvement and treatment, visits to balneological centers and hospitals known worldwide since prehistoric times, special sports and fitness programs [1].

Today, "Turinform Zakarpathia" conducts bespoke research on the prospects of tourism development and Carpathian logistics. Specialists develop concepts for hotels and restaurants, strategies for positioning and marketing, as well as discover new opportunities for sanatorium and spa establishments.

After all, the main goal of any business profit. Studies show that Austrian and Swiss resorts are in the more expensive price segment. In Austria (the resorts of Bad Gastein, Bad Ischl) hotels have special pools with natural water and radon sources, which have a beneficial effect on the locomotory system. For centuries, Switzerland has been specializing in the treatment of pulmonary diseases. Many medical tourists are treated in Israel and Turkey - the Dead Sea resorts and Kangal specialize in treating skin diseases [1].

Choosing medical tourism a client can rest, treat and improve the appearance at the same time. Medical spa and wellness centers offering health and rejuvenating programs to clients, fitness centers, swimming pools, comfortable accommodation and healthy eating, a unique combination of herbal infusions, phyto-baths, yoga and meditation, plus excursions, entertainment, sports holidays, festivals, gastronomy and enoterapia, thalassotherapy and medical therapy, and this is not yet a complete list of services for those who want to be a tourist using the services of "medical tourism" [3].

Having conducted the SWOT analysis, one can name the main factors that determine the attractiveness of the Ukrainian market of medical tourism:

Table 1

The attractiveness of the Ukrainian market of medical tourism

Strengths	Weaknesses
Large market Top Clinics and Hospitals Favorable natural conditions Proper legislation in selected industries Good country location Citizens' desire to travel to other countries	Unfavorable political and economic situation Inappropriately developed tourist infrastructure Lack of patients' trust The need for significant investment Low-quality service High competition
Opportunities	Threats
Expansion of the regional and world markets for medical tourism Investments in private medicine Accreditation and Certification of Clinics (ISO 9001, QHA Trent, etc.) Development of individual branches of medicine	The deterioration of the political and economic situation Increasing competition among countries Recruitment by competitors Increased competition at the clinic level Legislative changes Exhaustion of natural resources

One of the unique advantages of our country is the systematic clinical thinking of doctors, while the major disadvantages are the lack of a long-term state development strategy and the difficulties with opening visas to citizens of Arab countries.

Ukraine's presence in the international arena of medical tourism in the world is already known, but for the further strengthening of the positions, it's necessary to choose the most effective model of benchmarking. Let's consider the experience of Turkey, which demonstrated a rapid rise of medical tourism. Active government support (clear development strategy, promotion refinancing, stimulation of private sector, etc.), constant brand work, tangible financial infusions (more than \$ 30 billion in private investment over 10 years), attraction of skilled foreign specialists, establishment of regional offices and clinics in many countries of the world. Turkey's largest air carrier, Turkish Airlines, for example, even compensates 50% of the cost of tickets for all those wishing to undergo treatment in Turkish clinics.

As opposed, the model of Hungary demonstrates weak state support for medical tourism. However, thanks to a clear focus on selected areas and positioning as an expert in them, Hungary has created the brand of "thermal capital" and "dental office" in Europe (more than 100,000 patients annually visit this country exclusively for dental care services). The model of India focuses on the minimum cost of health services ("We have the cheapest!"); the market of this state does not have an ongoing promotion but remains one of the most competitive.

In Ukraine, medical tourism services have gained popularity in the last 10 years.

Currently, travel agencies develop three types of medical tourism: diagnostic, wellness and therapeutic, each of which is invariably in high demand. Travel companies explain the unwillingness of clients to be treated in Ukraine by the fact that equipment in domestic clinics is not modern enough, and treatment abroad is not so expensive. The number of tourists leaving for treatment and rehabilitation increases annually by a half or two times; the market is rapidly developing.

Today we can talk about the structuring of the Ukrainian market of outpatient treatment. According to market participants, almost all Ukrainian travel companies provide medical treatment abroad, but only a small number of them specialize in this type of business.

Among Ukrainians, there are desperate ones, ready to go to another city for a visit, for example, to a dentist. According to statistics, there are not many people ready to do this, but they do exist. They have traditional reasons for this: no alternatives the desire to save money and the intention to get a high-quality medical service.

Therefore, financially secure patients who prefer treatment abroad will not reorient themselves to the internal market of medical services - they have the choice and the opportunity to pay for quality medical care. Although such patients have also been affected by the crisis. Outbound medical tourism for many remains a symbol of their status, which to also provides the patient with complete anonymity. In addition, there will always be a category of patients who have to travel abroad because they can not get the necessary medical care in Ukraine. As doctors themselves admit, there are no conditions for the development of internal medical tourism in Ukraine, therefore, it has not become a mass phenomenon.

This is hard to believe, but the desire to save money is not the main reason why Ukrainians search for doctors in neighboring cities. The difference in the cost of treatment at home and in another city should justify the relocation. Thus, it makes sense for a resident of the

United Kingdom to fly to Ukraine for treatment, because in Great Britain the prices, for example, for dental services are 2-10 times higher. At the same time, there is no radical difference in prices within Ukraine. Therefore, the cost of services is usually not the main argument for a person who has decided to undergo a course of treatment outside his native settlement. Only residents of the capital or some eastern Ukrainian cities may feel the economic effect of treatment in the regions.

Services of provincial medical institutions are estimated to cost thirty or more percent cheaper. However, the economic benefits of treatment in the regions are not always obvious. Given all the "charitable contributions", the purchase of medicines and consumables for diagnostic equipment, calculating the cost of the course of treatment in the medical institutions in advance is impossible. One should also add transportation and accommodation expenses. And if the patient is seriously ill, also add expenses for relocating relatives who could provide constant care or hiring medical staff. Lastly, there are cities where any treatment will be expensive. For example, Odessa is considered to be the center of elite medical institutions. The treatment in Kharkiv is not cheaper than in Kiev.

Nevertheless, the main argument is that for the most part, the patient goes for consultation to a recommended doctor or clinic that provides a unique service that can not be obtained at the place of residence. For example, laser technology is used in many dental offices, but mostly for therapeutic purposes, but only one private clinic in Kharkov deals with soft tissue surgery.

The services of some medical centers are unique not only to Ukraine. In 2009, in the Kyiv region, a clinic for cancer patients of Dr. Spizhenko was opened, where cyberneft was used during oncological operations. The device allows high-precision irradiation of tumors in any part of the body. At the same time, the operation lasts from 30 to 90 minutes. On average, the operation costs from \$12 000-17 000. However, such medical equipment is not available in any of the medical institutions of Eastern Europe.

Mykola Kasyan, a well-known chiropractor, possessed a unique technique. After the death of a well-known doctor, his son, Jan Kasyan, headed the manual therapy clinic called "Dr. Kasian". The rehabilitation centers of professor Volodymyr Kozyavkin, who developed his own system of intensive neurophysiological rehabilitation, located in Lviv and Truskavets accepts patients with chronic neuralgic pathologies (in particular, with the diagnosis of cerebral palsy), not only from Ukraine. European insurance companies sign contracts with the center and

therefore provide an inflow of foreign patients. The reason being is that companies save a considerable amount of money on clients' treatment.

Every year, the number of foreign patients in some private clinics in Ukraine, focused on incoming medical tourism, increases by 3-5%. Often, foreigners use the services of Ukrainian dental and ophthalmologic clinics, the cost of treatment in which can be two to three times cheaper than in Western Europe. In addition, foreign patients are turning to reproductive clinics.

The clinic, working under the program of inbound medical tourism, is a specialized medical institution, 80% of patients of which are citizens of other countries. Such centers are required to have English-speaking staff. Often, clinics offer additional services. These include a patient's transfer, excursions, spa-salon, etc. In some cases such clinics have hotels. However, one of the most important prerequisites for the development of inbound tourism is convenient transportation infrastructure. Therefore, this kind of tourism is often developed in border areas.

Large specialized medical institutions form the main patient streams at the level of regional centers. However, they do not always provide equivalent assistance. Many high-tech medical services are monopolized by metropolitan state institutes and scientific centers belonging to the Academy of Medical Sciences or the Ministry of Health of Ukraine. 80% of such medical institutions are located in Kiev.

Insurance and consulting companies that arrange clients' visits for treatment to other cities are also involved in the formation of patient flows. Interclinical tourism is a very common phenomenon. Different medical centers often exchange patients. For example, clinics specializing in plastic surgery, cooperate with cosmetology, dermatology and venereology centers, etc.

In general, private business does not affect the patient flow, except for those medical specialties in which private clinics crowd out state-owned clinics: plastic surgery, dentistry, gynecology, new reproductive technologies, and diagnostics. To some extent, the provision of abortion services has passed to private businesses. After mass advertising campaigns that have attracted attention to cancer, new oncological clinics emerged, including mammalogy clinics. For a long time, there has been a private ambulance as an alternative to the state one. The market for other services in private medicine is almost non-existent. Private medical centers prefer providing simple services with a relatively cheap entry into the market and significant profitability. For example, a very small percentage of private dental clinics are engaged in surgery. The rest are focused on therapeutic dentistry and orthopedics. Surgery is a big responsibility for the minimum

income. Private clinics are not yet able to compete with state hospitals in providing comprehensive services of a wide range, emergency services, and urgent operations.

And yet, one becomes the internal medical tourist forcedly from the indisputable choice. Unless we are talking about some unique natural things (air, water, mud, caves, etc.), the patient does not need medical tourism at all. As soon as the quality and price levels even out throughout Ukraine, traveling will become meaningless. So far, domestic medical tourism in Ukraine is an indicator of the scarcity of regional medicine.

Formally, the patient is given the opportunity to choose the appropriate medical institution. However, in order to move from one area to another for treatment, one needs well-grounded reasons. "Until now, the place of citizen's registration is important for medical care. Undergoing a treatment in a state clinic outside of a regular place of residence is a matter of price. Therefore, it would be wrong to say that Ukrainian citizens have absolutely free access to all medical facilities in the country. But the hospitals themselves are not interested in attracting patients from other regions, because the "unregistered" patient brings money personally to a doctor - the state will not pay to the medical institution for the treatment of such client. However, medical institutions could be interested financially

The lack of clear criteria for quality of care provided by medical centers is another problem that impedes the development of internal medical tourism. How to choose a health facility? Usually, a patient takes friends' recommendations or advice from the doctor who diagnosed the disease. One can trust branded institutes with a long history and established reputation. At the same time, the patient does not usually have any objective information about the medical center. Until any patient can have access to data on the outcomes of treatment in one or another clinic (for example, the number of surgeries performed per year, the percentage of relapses, mortality rate, etc.), internal medical tourism will remain fragmentary. It is worth mentioning that the city is more likely to turn into a center of medical tourism if it has a medical university [3].

Patients from France, England, Italy, Germany, the USA and Israel often come to Ukraine to receive medical services.

The main criterion for choosing Ukraine for medical tourism is the low level of prices, compared with foreign clinics. Specialized clinics that provide treatment with high results are in high demand.

Ukrainian clinics use 3 main models for attracting foreign patients:

1. The clinic directly invites patients and independently deals with their attraction.
2. Agencies, working in the market of international tourism, deal with attracting patients to a clinic for a fee.
3. Local doctors of foreign patients send them for treatment in Ukrainian clinics. It is worth noting that in this case the majority of doctors do not expect any reward, and act solely in the interests of the patient, thus increasing the satisfaction and loyalty of their patients.

The following factors can help increase the flow of foreign patients to the clinic:

- experience in the treatment of certain diseases (patients typically trust experience);
- positive examples in the treatment history (high outcomes) spread information about the medical center, including measures of treatment outcomes;
- discoverability of the above-mentioned information and organization of interaction with potential patients, including their attraction, the organization of the treatment process and the issue of stay in the country.

Medical care of foreign patients requires additional elements in the way the medical center organizes its work:

- the presence of a manager (managers) responsible for working with foreign patients.
- the presence of medical and service personnel that speaks a foreign language. In some cases, if the staff does not speak a foreign language at the required level, an interpreter accompanies the patient during all procedures.

The promotion of the clinic's services to foreign patients requires additional expenses.

Special attention should be paid to the transportation and accommodation of patients. In some medical centers, dedicated managers and third-party companies handle these questions. In order to avoid conflicts when servicing foreign patients, one should provide complete information about the treatment format, services/procedures included in the cost, additional services that may be needed, who's responsible for the accommodation of the patient, etc. The most convenient way of reaching an agreement between the medical center and the patient is signing the applicable contract.

The methods of attracting foreign patients, hardly differ from those used to attract Ukrainian patients. Important elements in the process of attracting foreign patients are the following:

- "Word of the mouth" - patients' recommendations. Creating clinics web page, translated to a number of foreign languages, placing as much information about doctors and the results of treatment. Placing information about the clinic on international portals (quite expensive).
- Establishing partnerships with international agencies working in the field of medical tourism.
- Conduction of scientific research and the introduction of innovative technologies (confirms the active position of the clinic in terms of development). Informing the potential audience about the results of such activity.

Conclusions. Medical tourism in Ukraine has a huge potential for growth. Firstly, it can create healthy competition among clinics. To get patients' attention and gain their trust, clinics will have to work on improving the quality and expanding the list of their services, and the material base.

Secondly, the optimum offer in the ratio of price and quality will be formed, which will allow to successfully compete with foreign clinics. The needs of Ukrainians, as well as residents of foreign countries, in high-quality and cheap services, have all the chances to become the basis for the strategic development of the medical system, oriented towards the market of medical tourism. Ukraine can compete on price offers with many foreign countries. But, unfortunately, the country does not have a solid material base, appropriate legislative support, a large list of services and a well-established image, like Germany, Israel and Turkey have. And it is exactly why the country loses its solvent patients in the internal market for medical services, which are forced to go abroad for treatment. Those are some of our weaknesses. However, we have many talented professionals who need support. Ukrainian doctors need help integrating into the European med community, improve their knowledge of foreign languages and have their own representatives at international conferences.

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