

**Specificity of development of
medical tourism in Russia.**

SPECIFICITY OF DEVELOPMENT OF MEDICAL TOURISM IN RUSSIA

ESPECIFICIDAD DEL DESARROLLO DEL TURISMO MÉDICO EN RUSIA

ABSTRACT

The development of the world and national Russian markets of medical tourism is directly associated with the improvement of the population quality of life. The article clarifies the concept of medical tourism, and classifies its main types. The place and prospects of development of Russian medical tourism in the world are shown, including the export of medical services. The article summarizes the main directions and factors of the dynamics of domestic, inbound and outbound medical tourism of Russians. The need for certification of Russian medical institutions for compliance with national and international standards in the quality management system was defined. The strengthening of influence of self-regulating medical organizations on the processes of improving the professional qualification level of doctors and medical personnel, and ensuring the visibility of pricing for medical services were indicated. The measures for increasing the competitiveness of Russian medical tourism have been identified. They include the certification of medical institutions and quality of services, overcoming of information asymmetry, the formation of package services, subsequent remote supervision of patients, the implementation of projects for the promotion of domestic medical tourism facilities on the world market, the application of loyalty programs and co-branding.

KEYWORDS: medical tourism, diagnostics, treatment, rehabilitation, health improvement, information asymmetry.

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RESUMEN

El desarrollo de los mercados mundiales y nacionales rusos de turismo médico está directamente relacionado con el mejoramiento de la calidad de vida de la población. El artículo aclara el concepto de turismo médico y clasifica sus principales tipos. Se muestran el lugar y las perspectivas de desarrollo del turismo médico ruso en el mundo, incluida la exportación de servicios médicos. El artículo resume las principales direcciones y factores de la dinámica del turismo médico nacional, entrante y saliente de los rusos. Se definió la necesidad de certificación de las instituciones médicas rusas para el cumplimiento de las normas nacionales e internacionales en el sistema de gestión de la calidad. Se indicó el fortalecimiento de la influencia de las organizaciones médicas autorreguladoras en los procesos para mejorar el nivel de calificación profesional de los médicos y el personal médico, y garantizar la visibilidad de los precios de los servicios médicos. Se han identificado las medidas para aumentar la competitividad del turismo médico ruso. Incluyen la certificación de instituciones médicas y la calidad de los servicios, la superación de la asimetría de la información, la formación de paquetes de servicios, la posterior supervisión remota de pacientes, la implementación de proyectos para la promoción de instalaciones de turismo médico nacional en el mercado mundial, la aplicación de la lealtad. Programas y co-branding.

PALABRAS CLAVE: turismo médico, diagnóstico, tratamiento, rehabilitación, mejora de la salud, asimetría de la información.

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INTRODUCTION

In modern conditions, the quality of people's lives is largely predetermined by the state of national and world health system, timeliness and quality of medical care. Medical tourism plays a significant role in the implementation of the principles of availability and universal coverage of the population with high-quality medical services. Medical centres, specializing in particular areas of medicine, and which can provide the most effective measures for diagnosis, treatment, rehabilitation, and health improvement have been formed in different countries and regions. The development of domestic, inbound and outbound tourism in Russia should be based on reliable information on the possibilities, quality, and cost of receiving of medical care, both on the national and world market of medical services. This defines the goal of the research - to analyse the state and factors of dynamics of the Russian market of medical tourism services, to determine the directions and measures for its further development.

METHODS

The study was based on the interdisciplinary approach, allowing to expand the problem field, and to cover the related fields of scientific research, both in the health economics and in tourism; to show the interaction and mutual multiplicative influence of medicine and tourism activity; to define new directions in their coordinated development. The methods of comparative and country analysis, grouping method, and the index method were used in the process of research.

RESULTS AND DISCUSSION

The active development of medical tourism in the world and in Russia needs, first of all, clarification of terminology. Maintaining the generally accepted signs of tourism, such as temporary travel outside the permanent residence for the consumer purposes, it is necessary to highlight the specific features of me-

dical tourism: obtaining of medical services (treatment) outside the region of residence, rehabilitation, combining of rest with treatment or health improvement (Voskolovich, 2008). In addition, medical tourism is divided into internal, inbound and outbound, according to the sphere of distribution (or the place of receiving services). Gradually, the differentiation of medical tourism is updated and formed, and as a result, the dental, transplantation, orthopaedic and other types are distinguished (Scheme 1). The development of medical tourism, as well as tourism as a whole, seems to be in need of a theoretical rethinking, on the basis of interdisciplinary approach, which allows to form a problem field, covering the related fields of scientific research in health care and tourism, to show the multiplicative impact of medical tourism on other interrelated types and branches of activity, to study the constituent elements and qualities of the complex of offered services (Voskolovich, 2016). Medical branch of tourism consisted of two main directions: in the form of medical services, provided to tourists during the travel, as well as the independent specific type of medical tourism, offering various complexes of services for diagnosis, treatment, rehabilitation, health improvement, etc., combining with recreation services.

The development of world market of medical tourism has created prerequisites for the specialization of particular countries, tour operators, clinics, resorts. So, Israel receives medical tourists with oncological diagnoses; maternity tourism is offered in Germany, Austria, the USA, Spain; plastic tourism at affordable prices - in Taiwan, South Korea, the Czech Republic, Hungary; dental tourism is popular in Switzerland, Germany, Latvia, Hungary, Turkey, Thailand, etc.

In the world market of medical tourism Russia occupies a modest place - it accounts for less than 1% of the volume of this market. As evidenced by the Medical Tourism Index for 2016, Russia ranks 34th out of 41 with a score of 59.94 points, 31st for quality of services with a score of 61.15 points, and 34th for the environment with a score of 49.96 points (Medical Tourism Index, 2016).

For comparison, the Medical Tourism Index is equal in the following countries (according to the place in rating): Canada (the first place) - 76.62, the United Kingdom - 74.87,

Israel - 73.91, Singapore - 73.56, India - 72.10. Canada is considered as the most attractive country for medical tourism for Americans. Israel ranks first in terms of service. While choosing the places for treatment, medical tourists take into account the professionalism and reputation of doctors and staff, the quality and comfort of facilities, cultural environment, and the cost of tour (Table 1).

Nevertheless, the experts argue that the treatment of foreigners in Russia can make a significant contribution to non-resource exports, since there are all the prerequisites for this (Radchenko, 2016). According to the Ministry of Health in 2016, 66.4 thousand foreigners received medical care in Russian medical institutions, including three quarters of them outpatient. In general, consumers are the citizens of the CIS countries, for whom dental, urology, gynaecological (IVF) services, plastic surgery, orthopaedics, traumatology, cardiovascular surgery, ophthalmology treatment are attractive. As therapeutic and diagnostic centres, foreign tourists choose the capital and large cities of Russia. The acceptable price performance ratio of medical tourism services is noted among the benefits. Problems are caused by a long, strictly regulated procedure for obtaining a visa. It should be noted that the system of special medical visa is used in a foreign practice for up to 6 months. This solves many problems, especially in situations where emergency medical care is needed.

Another important problem is due to the fact, that there is a so-called "information asymmetry" in the market of medical tourism services, as well as in the general market of medical services, because of the uneven distribution of information between the doctor and the patient (consumer), affecting their relationships. The patient (the consumer) is not always able to assess the state of his health objectively, and the scope of medical services, necessary for his recovery. Due to this, the situation of irrational consumer choice is possible. On the part of doctors, there may be a situation of tendentious selection of patients with high medical risks, and subsequent denial of necessary assistance ("defensive medicine") or, conversely, the appointment of unnecessary procedures to solvent consumers.

A certain contribution to minimizing the problems, arising as a result of information

asymmetry, is made by Temos – neutral and independent body for the certification of medical institutions (headquartered in Germany, with regional representations in different countries). Since 2015, the Russian representative office of Temos is available in Moscow. Certification of medical institutions for compliance with national and international quality criteria and Quality Management System (QMS) allows the consumers to make reliable choice. However, official statistics on Russian medical institutions, having such a certificate, are not yet available.

Another approach to risk minimization is conditioned by the asymmetry of information. It can be realized in modern Russian conditions. This is the acquisition of package services, including voluntary health insurance, along with a medical tour. This approach will allow to reduce the risks, as it becomes possible not only to assess objectively the medical problems of the consumer with the recovery of health, rehabilitation, health improvement, but also to make a more correct choice of the place, clinic, resort, sanatorium and the tour.

To some extent, the improvement of information support, as well as the advancement of Russian medical tourism, is promoted by self-regulating medical organizations. The Association of Medical Tourism in Russia defines the main goal of its activities as the promotion of study of advanced foreign experience, and the development of Russian medical tourism, as well as the improvement of the professional level of doctors, ensuring visibility of prices and quality for treatment and rehabilitation (Association of Medical Tourism of Russia, 2015).

In the development of domestic medical tourism, certain areas of diagnostic, therapeutic, rehabilitation, health-improving profile were formed. As in inbound tourism, domestic tourists, who need medical services, have to overcome a number of problems of information character.

The national tourist portal Russia Travel in the section "Health tourism" offers the tours of balneotherapy (mineral water treatment), pelotherapy (mud treatment), climatotherapy, recreational tourism, and children's sanatoriums. In Russia there are about 45 thousand health resorts, most of which are year-round.

The huge variety of offered services creates certain problems of choice, which can be softened, as it seems, by the package provision of services, in combination with voluntary medical insurance.

In 2017, the number of domestic medical tourists in Russia amounted to 9 million people. This is 35% more than in 2016. However, the factor of price raise is important for Russians, and as a result, 6% of them cut costs on treatment due to trips to the regions. Mainly, these are the residents of capitals and large cities who, due to price differences, go to dental clinics in Tver, Ryazan, are looking for cheaper services for ophthalmology, gynaecology, orthopaedics, prosthetics, etc. in regional medical institutions (Medical tourism in Russia, 2018). When selecting the places of treatment in the regions, the possibilities of treatment in the place of residence are taken into account (queues, quality, prices). The savings in the payment of regional medical tourism can be considerable. On the one hand, this trend reflects an improvement in the quality and availability of regional medical services. But, at the same time, the experts note, that according to data for 2016, the number of visits to polyclinics in Russia decreased by 47 million. This indicates a decrease in the availability of medical assistance at place of residence (Temyakova and Cherevichenko, 2015).

Rehabilitation tourism as a continuation of medical treatment and recovery of the body is associated with the problems of neurology (recovery after a stroke, spinal cord and brain injuries, multiple sclerosis, etc.), treatment of alcohol, drug dependencies, etc.

In accordance with the state program "Accessible Environment" in the sphere of tourism, a barrier-free environment is created for equal opportunities of using the tourist and medical facilities for both healthy people and persons with disabilities. Inclusive tourism as an independent direction of development is possible, using specialized routes and facilities. So, in the Saratov region, in the Republic of Tatarstan, there are dialysis centres for replacement renal therapy, where along with medical services for tourists, cultural and educational events and excursions are organized (Temyakova and Cherevichenko, 2015). In the Russian Federation there are about 12 million of disabled people of different age and sex and medical diagnosis, and their inclusion

in a full-fledged life, along with recovery, is an important task of medical tourism. This is especially important in connection with the fact, that disabled people have the right to social benefits, periodically provided by social protection services.

The most solvent Russians go abroad for treatment. Outbound tourism was formed in particular areas and countries. Priority country is Israel, where about 40 thousand of Russians come every year. Here they can see a good quality of medical services and patient care, supplemented by the received impressions from the country at relatively affordable prices. All this creates the attractiveness of medical tourism (Gankin, 2017). Guarantees of quality of medical services in Israel are provided by the Medical Tourism Association, which unites the best clinics of the country and allows to protect patients from unscrupulous intermediaries.

The next place in the rating of medical tourism of Russians is occupied by Germany, where also several thousand people arrive every year. German clinics use advanced methods of treatment in the fields of haematology, oncology, orthopaedics, etc. In many cases after the treatment, German doctors continue to supervise patients. But the registration of a call for treatment is a rather bureaucratic and long process (Gankin, 2017).

The third place in outbound medical tourism is occupied by Finland, whose transport accessibility, relatively simple visa procedures, the presence of Russian-speaking personnel, and the use of unique treatment methods attract Russians (Gankin, 2017).

Gradually, the clinics in other countries are appeared, which accept Russian tourists for treatment (Gabdrakhmanov et al, 2016). This creates a certain competition between outbound and domestic medical tourism (Table 2). New countries enter in the world market of medical services, able to provide competition with the optimal combination of quality and prices (

Lovtsova, 2018; Gabdrakhmanov et al, 2016).

In March 2017, the Ministry of Health established a special project office for the development of medical tourism in Russia. It is

planned to create several regional medical clusters (Gabdrakhmanov et al, 2016). An increase in the number of foreign medical tourists to Russia is expected up to 500,000 a year (The Ministry of Health spoke about the prospects for medical tourism in Russia, 2017).

SUMMARY

Thus, the study allowed to identify the main problems of development of medical tourism in Russia, to show its importance in ensuring the accessibility of medical services both within the country and for foreign tourists. The obtained results can be used both for specification of state and regional target programs of development of public health services, for organization of regional medical clusters and medical centres, and also for extension of export of medical services.

CONCLUSIONS

Growing competition in the world market of medical tourism poses a number of tasks: the creation of a reliable information base about the objects and routes of various types of Russian tourism; the selection of "core" institutions with certified services, and the implementation of projects for their promotion; the development of integrated tourism products with a broad medical, health-improving and cultural-orientation program, which includes services for further remote support; preparation of loyalty programs and co-branding for various social groups of tourists.

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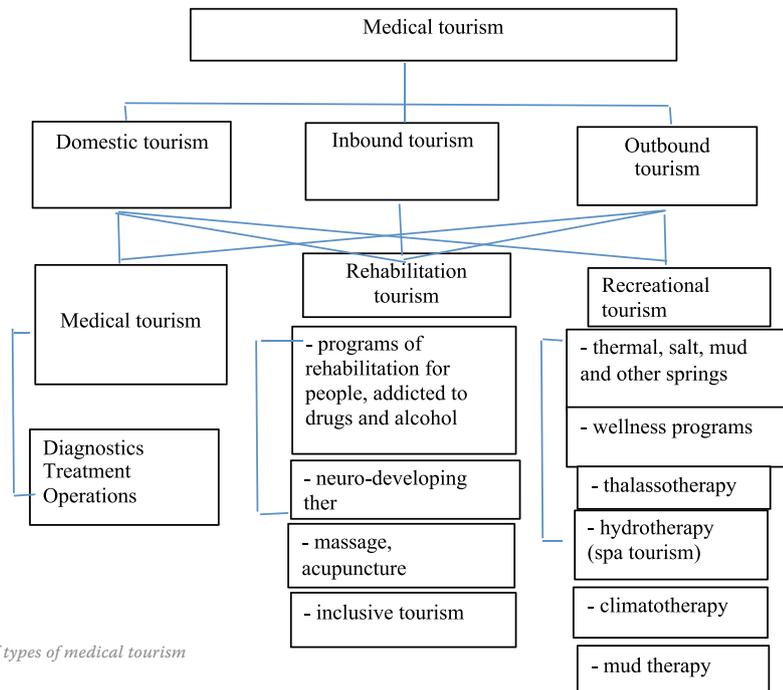
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ANNEXES



Scheme 1. Classification of types of medical tourism

Rating position	Country	MTI in general	Environment	Medical tourism industry	Services
1	Canada	76.62	78.69	71.14	77.01
2	The United Kingdom	74.87	77.3	70.38	76.94
3	Israel	73.91	67.56	72.58	81.6
4	Singapore	73.56	73.26	70.79	76.63
5	India	72.10	63.26	75.94	77.1
34	Russia	57.01	49.96	59.94	61.15

Table 1. Rating of countries by the Medical Tourism Index *) Source: Medical Tourism Index.

Countries	Cost savings in comparison with the same services in the USA
1 Panama	40-70% medical services
2 Hungary	40-50% dentistry, cosmetology
3 Costa Rica	30-40% dentistry, cosmetology
4 Brazil	40-50% cosmetology
5 India	20% medical procedures and surgeries
6 Thailand	30% medical services
7 Singapore	35% medical services
8 Malaysia	25% plastic surgery

Table 2. Possible savings on medical tourism services in different countries. According to the data: [health-tourism./http://www.health-tourism.com/medical-tourism/statistics](http://www.health-tourism.com/medical-tourism/statistics).

