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CURRENT STATE OF MEDICAL TOURISM DEVELOPMENT IN THE WORLD AND ITS PROSPECTS IN UKRAINE

The article is devoted to studying the dynamics of medical tourism as a global phenomenon and its prospects in Ukraine. The multidimensionality of medical travel is revealed; the main reasons that stimulate the demand for treatment abroad are identified; leading international practices are analysed and the barriers and opportunities of the Ukrainian market are outlined. Structural directions for modernising public policy in the sphere of medical services and tourism are proposed. Key technological and organisational factors that shape competitiveness are identified. The study takes into account spatial, economic and regulatory preconditions for the development of medical tourism in the national context, and conducts a comparative analysis of the international experience of leading countries. Special attention is paid to the creation of medical clusters, digital innovations, international certification of healthcare institutions and the need for consistent formation of a positive image of Ukraine as a reliable medical destination. The material is based on modern statistical sources and synthesis of scientific approaches, which makes it possible to substantiate strategic vectors for integration into the global market of medical services.

Keywords: health and wellness tourism, medical services, Ukraine, socio-geographical aspects, regional development, competitiveness, region, spatial analysis.

INTRODUCTION

At the end of the 20th century, at the intersection of medicine and tourism, a new phenomenon emerged – medical tourism, which today is spreading rapidly around the world. Modern medical tourism is not just travelling for treatment, but an entire socio-economic phenomenon that encompasses aspects of mobility, trust, technology and accessibility of services. People from different parts of the world go on trips not only for leisure, but also to improve their health – from basic medical check-ups to complex surgical interventions.

The reasons for the intensive development of medical tourism are diverse. In developed countries, healthcare is often too expensive or “overloaded”, which leads to long waiting times for medical services. At the same time, less developed but

investment-active countries offer high-quality services at significantly lower prices. Such uneven provision of medical services in different countries forms a global flow of patients seeking a balance between the cost, quality and timeliness of treatment.

In the medical tourism market, not only clinical indicators are becoming increasingly important, but also aspects such as service quality, digitalisation, cultural adaptation, safety and logistics. Today's patient is an active consumer who carefully analyses reviews, compares service packages and chooses the best conditions.

Ukraine is gradually entering the market of medical services, using its own advantages, among which the following can be distinguished: qualified personnel, competitive prices, natural resources and a convenient geographical location. However, in order to position itself as a full-fledged player, the country needs to systematically develop infrastructure, promote relevant medical services on the global market and obtain international accreditation.

The article examines the current directions of medical tourism development in the world and analyses the potential of Ukraine in terms of the possibilities and prospects for the development of medical tourism. Identifying key barriers and opportunities should become the basis for forming an effective national strategy for entering the global medical services market.

Ukraine, having a strong scientific and medical potential, highly qualified specialists and relatively low prices for medical services, can become an attractive destination for foreign patients (Malska & Bordun, 2013). However, this potential is currently realised only partially. There are problems related to the insufficient level of international accreditation, the absence of a clear strategy for the development of medical tourism, weak marketing support and limited digital capacities (Sysoienko, 2023; Pankiv & Krupina, 2023).

In this context, it is relevant to study the current state of medical tourism both in the world and in Ukraine, to identify its main trends, analyse the advantages and barriers to the development of this sector in Ukraine, as well as to formulate practical recommendations for integration into the global market of medical services. The article is aimed at a comprehensive analysis of the topic using up-to-date statistical data, scientific sources and analytical tools. *The aim of the study* is to identify key factors in the development of medical tourism in the world and in Ukraine, analyse the advantages and problems of the Ukrainian medical system in attracting international patients, and provide recommendations for enhancing the competitiveness of medical tourism in Ukraine. *The object of the study* is processes of medical tourism development in the world and in Ukraine; *the subject of the study* is specific features, formation factors and current trends of medical tourism in the world and its development prospects in Ukraine.

The analysis of recent publications indicates a growing interest in medical tourism on the part of researchers, public authorities and the business community. This is reflected in the works of a number of Ukrainian and foreign authors. In the works of M. Malska and O. Bordun (Malska & Bordun, 2013), O. Polova and Ya. Didukh

(Polova & Didukh, 2023), as well as in reports by Deloitte (2022) and Allied Market Research (2024), global market trends, demand-forming factors and models of medical clusters' functioning are examined. Studies by V. Baiev (Baiev, 2015) and E. Haponova (Haponova, 2017; Haponova, 2019) point to the key reasons for the growing demand for medical tourism.

The specifics of medical tourism development in Ukraine are analysed in detail in the works of D. Tyshko (Tyshko, 2024), O. Hladkyi et al. (Hladkyi et al., 2022), and V. Yavorska and O. Liashkova (Yavorska & Liashkova, 2025). O. Polova and Ya. Didukh (Polova & Didukh, 2023) note that such factors as high quality of medical services, competitive prices, access to advanced technologies and professionalism of medical staff, as well as natural resources of the Carpathians and the Black Sea coastal region, influence the attractiveness of medical tourism. According to O. Bordun (Bordun, 2020), the proximity of Ukraine to EU countries – Poland, Slovakia, Hungary and Romania – provides significant potential for the development of cross-border medical tourism.

At the same time, as noted by I. Sysoienko (Sysoienko, 2023), negative features of the tourism sphere in Ukraine include outdated and weak tourist infrastructure, unsatisfactory service, and poor road quality. In addition to these problems, there is no state policy in the field, legal regulation is fragmented, and official statistics are lacking. Thus, I. Sysoienko (Sysoienko, 2023), as well as T. Yamnenko and A. Zmiievska (Yamnenko & Zmiievska, 2022), emphasise the need for a special law on medical tourism and harmonization with international standards.

For more active development of the medical tourism system in Ukraine, as noted by N. Pankiv and A. Krupina (Pankiv & Krupina, 2023), it is necessary to create "an effective model of marketing policy in healthcare, improve the material base and introduce modern medical technologies, change the legislation, undergo international certification, establish service and raise the quality of services to a higher level" (Pankiv p. & Krupina, 2023, s. 25).

Recent interdisciplinary research has established medical tourism as an independent field combining economics, healthcare, tourism, management and geography (Liashkova & Yavorska, 2024). Reports by Global Healthcare Resources (2023) and OECD Health Reports (2023) systematically analyse demand for medical services. They show that dental, plastic, orthopaedic and reproductive procedures are in greatest demand. Not only quality of medical interventions matters, but also support services: transfer, interpreter, comfortable accommodation and personalized consulting.

Thus, the systematisation of recent scientific contributions demonstrates increasing interest in medical tourism as a promising segment globally and in Ukraine. However, development under current Ukrainian conditions requires deeper analysis, which determines the need for further research in this area, taking into account both international experience and the specifics of the national medical services market.

MATERIALS AND METHODS

The methodological basis of the study includes general scientific and specialized methods: analysis and synthesis, comparative analysis, systems approach, statistical generalisation, content analysis of scientific and sectoral sources, and graphic representation of results. The main sources of information are scientific works on the research topic and reports by Deloitte (2022), Global Healthcare Resources (2023) and OECD Health Reports (2023). For analyzing these materials, a comparative (analytical) approach was used, which makes it possible to assess current trends in the development of medical tourism both in the world and in Ukraine.

RESEARCH RESULTS AND DISCUSSION

The analysis of scientific publications and company reports made it possible to systematise current directions of medical tourism and outline key trends in the development of this segment in global and national contexts. Countries such as India, Thailand, Turkey and Singapore actively use marketing strategies, international accreditations and digital technologies to attract foreign patients (Global Healthcare Resources, 2023; Deloitte, 2022). Their experience proves the importance of a systemic approach to organising medical services in a tourism format.

According to industry organisations, global medical tourism has shown steady growth over the past two decades. At the same time, the OECD and other institutions note that accurate annual global data on medical tourism are not publicly available. Figure 1 summarises open data that illustrate the global dynamics of medical tourism.

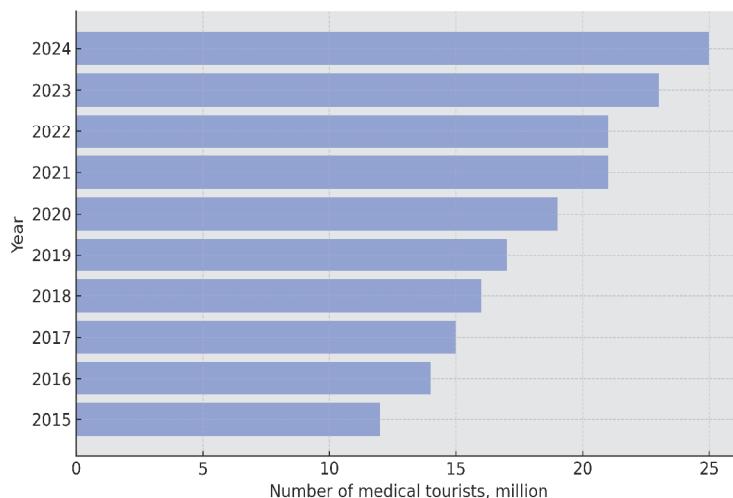


Figure 1. Dynamics of the increase in the number of medical tourists in the world (2015–2024) (compiled by the author based on Allied Market Research, 2024).

As can be seen from Figure 1, there is a significant increase in the number of people travelling annually to receive medical services. From 2015 to 2024, the number of medical tourists increased from 12 to 25 million. The maximum number was recorded in 2019 – 17 million. A slight decline occurred in 2020 due to the COVID-19 pandemic. However, since 2022, the demand for medical services abroad has been recovering and growing.

The leading countries in terms of patient inflows are India, Thailand, Mexico and Turkey. Patients (tourists) from the USA, Canada, the United Kingdom and Saudi Arabia most often travel to these countries for medical services. The main reasons for such tourism are lower cost of services, speed of access and quality. In 2023, more than 65% of patients indicated that saving money was the main motive. There is also seasonality of demand – summer and autumn are the most active periods for medical trips (Allied Market Research, 2024).

This study considers only patients who travel across borders. Domestic medical tourism, which is also typical within each country, is not taken into account. The main age group using medical services through tourism is 30–55 years. The average length of trips is 7–10 days (Allied Market Research, 2024).

The most popular directions of modern medical tourism are presented in Fig. 2. As can be seen from Fig. 2, dental care has the highest demand – about 30%, which is explained by the high cost of dental procedures in Western countries and the relative simplicity of procedures with short stays. The next “most popular” direction is plastic surgery – 25%, with leading countries being Brazil, South Korea and Thailand. Orthopaedics (joint replacement, arthroscopy) accounts for 20% (mainly in India). Among other common directions of medical tourism are: cardiology – 15% (Israel and Germany); reproductive medicine – 10% (Georgia, Czech Republic, Ukraine) (Global Healthcare Resources, 2023).

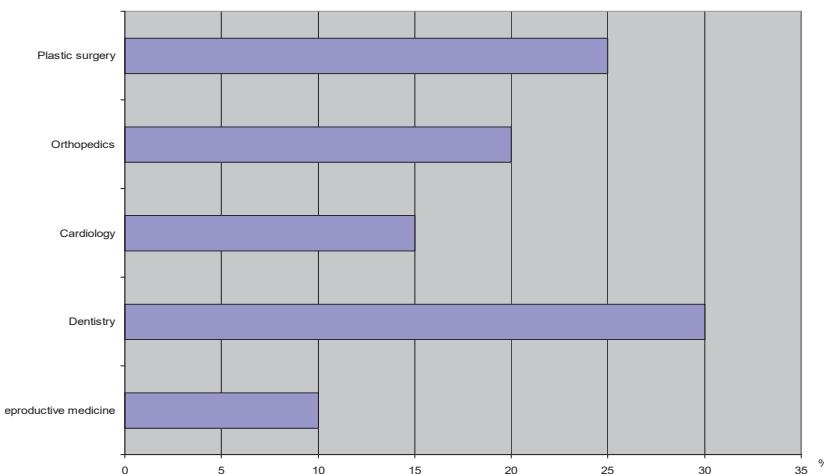


Figure 2. Distribution of medical tourism directions by type of medical services (compiled by the author based on Global Healthcare Resources Survey, 2023).

Analysing the data from the Global Healthcare Resources Survey, it can be noted that patients primarily choose countries with a high level of trust in medical personnel. Climatic “comfort” is also taken into account, especially during rehabilitation.

The distribution of medical tourism directions by type of medical services has somewhat changed after the pandemic. In 2020–2021, orthopaedic services prevailed globally, whereas now dental services dominate. Interest in transplantation is also growing. Many clinics create “all-inclusive” packages, which are attractive to potential patients. Plastic surgery is often combined with SPA holidays (Global Healthcare Resources, 2023). A significant place in the development of medical services belongs to the availability of comprehensive service packages such as transfer, interpreter services, psychological support and patient reviews (Global Healthcare Resources, 2023).

However, the main driver of medical tourism remains “price policy”. The reduction of expenses for patients who use medical tourism compared to treatment in their own countries is substantial. As an example, let us consider the cost of surgical operations in five countries that currently hold leading positions in receiving patients from abroad (Fig. 3).

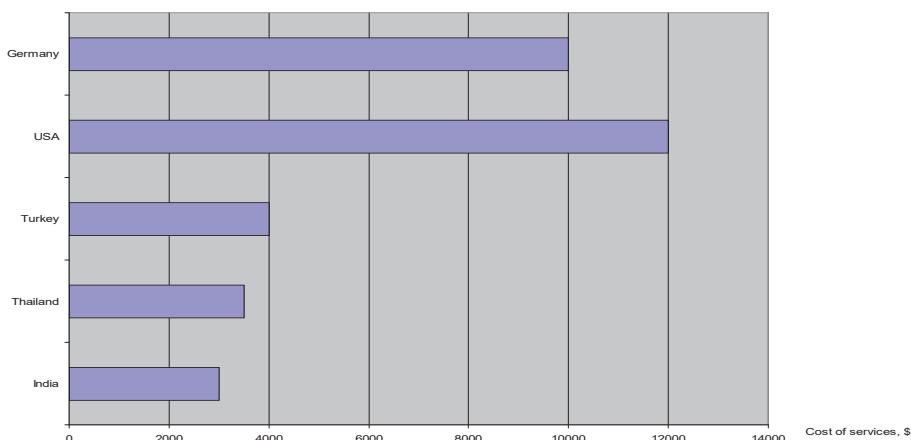


Figure 3. Comparison of the cost of surgical operations in different countries (compiled by the author based on Deloitte, 2022; OECD, 2023).

As can be seen from Fig. 3, the average cost of surgery in the USA exceeds 12,000 USD, in Germany it is about 10,000 USD, in India – 3,000 USD, in Thailand – 3,500 USD, and in Turkey – 4,000 USD. Surgical operations include joint replacement, cardiac surgery and laparoscopic interventions. The cost of medical procedures includes physicians' work, medical materials and hospitalisation. Differences in the cost of surgical services are associated with the level of medical insurance expenses, doctors' salaries and other costs. In the USA, up to 40% of the amount is administrative fees; in Turkey these expenses do not exceed 8%. India

is currently the leader in terms of price/quality ratio. Europeans actively choose Turkey due to its proximity; Americans choose India because of significant savings. Thus, the cost of medical services is the most important factor, but patients also pay attention to quality. Some countries (for example, Singapore) offer high prices but also exceptional quality. Thailand attracts patients in the field of plastic surgery due to high quality treatment and competitive prices (Deloitte, 2022; OECD, 2023).

For Ukraine, a combination of high qualifications of medical staff and affordable prices is typical, which creates a competitive advantage, especially within the European region (Malska, Bordun, 2013). At the same time, there are a number of obstacles: fragmented information for patients, low level of digitalisation of clinics, absence of a national brand and weak integration with the tourism sector (Ukrainian Association, 2023).

The most demanded directions of medical tourism in Ukraine are dental, plastic, reproductive and rehabilitation services. At the same time, the development of service, logistics, medical insurance, language support and adaptation to the needs of patients from different countries is extremely important – these aspects remain weak points in Ukraine.

Geographical factors also play a key role in shaping the medical tourism market, influencing both the territorial organisation of supply and patterns of consumption of medical services. Distance, transport accessibility, climatic conditions, natural therapeutic resources, regional specialisation and border location – all these components determine the attractiveness of a country or individual regions for international patients.

Ukraine has a favourable geographical position and proximity to EU countries, particularly Poland, Slovakia, Hungary and Romania, which opens up potential for the development of cross-border medical tourism, especially in the western regions – Lviv, Zakarpattia and Ivano-Frankivsk oblasts.

In the southern region (Odesa oblast) and the central region (Kyiv), narrow-specialised clinics with a high level of service and international potential have been created. At the same time, the eastern and northern regions of Ukraine have prospects for medical tourism development based on rehabilitation sanatoriums and infrastructure of health resorts (Myrhorod, Truskavets, Sloviansk, Khmilnyk).

Geographical analysis shows that most private clinics oriented towards foreign patients are concentrated in large million-plus cities and have clear specialisation, for example: in Kyiv – cardiac surgery, in Kharkiv – reproductive medicine, in Odesa – dentistry, in Lviv – plastic surgery. It is here that the infrastructure of high-tech medicine as well as the logistics and service capacities necessary for receiving medical tourists are concentrated.

The formation of medical tourist flows is directly related to the accessibility of the region. The presence of international airports, railway connections and border crossing points plays an important role. Unfortunately, with the start of the full-scale war, these opportunities have become severely limited.

One of Ukraine's unique advantages is the availability of natural resources with a healing effect: mineral waters (Truskavets, Morshyn, Svaliava), therapeutic muds (Kuyalnyk, Syvash), salt mines (Solotvyno), and clean air of the mountainous Carpathian regions.

Thus, within the territory of Ukraine, three geo-spatial zones of medical tourism potential can be conditionally distinguished:

1. Western zone – cross-border clusters (Lviv, Uzhhorod, Truskavets): dentistry, plastic surgery, sanatorium treatment and rehabilitation.

2. Central zone – high-tech medicine (Kyiv, Vinnytsia): cardiac surgery, oncology, transplantology.

3. Southern zone – treatment and recreation (Odesa, Kherson, Mykolaiv): rehabilitation, ophthalmology, dentistry, spa medicine.

CONCLUSIONS

Currently, medical tourism is not only a segment of the tourism industry, but also an important component of the innovative transformation of the global healthcare system. Changes in healthcare approaches, increasing patient mobility and the spread of digital medical solutions form a new format of interaction between countries – at the level of exporting medical services.

The development of medical tourism has a significant multiplier effect: it stimulates investment in medical infrastructure, creates jobs and raises treatment standards. Countries with well-developed medical tourism not only gain economic profit but also enhance their global image.

Ukraine has the potential to compete in the international market; however, this requires coordinated public policy and consolidation of efforts by government, business, academia and the medical community. The main obstacles today are the war, fragmented regulatory framework, the absence of a unified promotion platform and underdeveloped patient support infrastructure.

Key directions for the development of medical tourism in Ukraine include: creation of specialized medical clusters; full digitalisation of patient services (from the first inquiry to postoperative care); international accreditation of institutions and certification of medical staff; strengthening partnerships with the tourism and aviation sectors; and forming an integrated “Medical Ukraine” brand.

Cooperation between public authorities, medical institutions, travel agencies and other stakeholders is a key element for the development of medical tourism in Ukraine. Thus, medical tourism can become a growth driver both for the healthcare sector and for the economy as a whole. However, this requires a clear strategic vision, systematic coordination of efforts and readiness to meet global quality and service standards.

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СУЧАСНИЙ СТАН РОЗВИТКУ МЕДИЧНОГО ТУРИЗМУ У СВІТІ ТА ЙОГО ПЕРСПЕКТИВИ РОЗВИТКУ В УКРАЇНІ

Стаття присвячена вивченням динаміки розвитку медичного туризму як глобального явища та його перспектив в Україні. Розкрито багатовекторність напрямів медичних подорожей; визначено основні причини, що стимулюють попит на лікування за кордоном; проаналізовано провідні міжнародні практики та окреслено бар'єри можливості українського ринку. Запропоновано структурні напрями модернізації державної політики у сфері медичних послуг і туризму. Визначено ключові технологічні та організаційні чинники, що формують конкурентоспроможність. Дослідження враховує просторові, економічні та нормативні передумови розвитку медичного туризму в національному контексті, а також здійснює порівняльний аналіз міжнародного досвіду провідних країн. Акцент зроблено на створенні медичних кластерів, цифрових інноваціях, процесах міжнародної сертифікації закладів охорони здоров'я та необхідності послідовного формування позитивного іміджу України як надійної медичної дестинації. Матеріал ґрунтуються на сучасних статистичних джерелах і узагальненні наукових підходів, що дозволяє обґрунтувати стратегічні вектори інтеграції у глобальний ринок медичних послуг.

Ключові слова: лікувально-оздоровчий туризм, медичні послуги, Україна, суспільно-географічні аспекти, регіональний розвиток, конкурентоспроможність, регіон, просторовий аналіз.