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PROSPECTS FOR THE ENTRY OF UKRAINE'S MEDICAL AND HEALTH TOURISM INTO THE GLOBAL INBOUND TOURISM MARKET¹

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Abstract. *The article discusses the current state and prospects of medical and health tourism in Ukraine. The aim of the study is to develop theoretical aspects of determining the potential of medical and health tourism in Ukraine as a competitive advantage in the global tourism market. Key competitive advantages have been identified, including the availability of unique natural recreational resources (mineral waters, therapeutic mud), highly qualified medical personnel, a unique modern experience gained through military operations in the field of disaster medicine, and a relatively low cost of services. A SWOT analysis was conducted to identify the strengths and weaknesses, as well as opportunities and threats for the industry. Based on global experience and analysis of the competitive environment, strategic directions were proposed to increase the competitiveness of Ukrainian medical and health tourism in the international arena.*

Problem statement and analysis of research and publications. Medical and health tourism is one of the most dynamic and financially attractive segments of the global tourism industry. According to research [2], the global medical tourism market in 2022 was estimated to be in the range of \$97.3 billion to \$115.5 billion, and is projected to reach \$273.7-346.1 billion by 2032. This indicates the enormous potential of the industry. The World Health Organization (WHO) defines health as

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"a state of complete physical, mental, and social well-being, not merely the absence of disease," which broadens the concept of health tourism from purely medical procedures to comprehensive restoration of the body.

Official government statistics on the volume of the medical tourism market in Ukraine are still fragmentary. Approximate data for 2018 from the State Statistics Service of Ukraine showed that the number of tourists served by tour operators for treatment purposes exceeded 80,000 people (including domestic tourists) [9]. According to estimates by the Ukrainian Association of Medical Tourism (UAMT), before the full-scale invasion, Ukraine was visited by about 60,000 foreign patients annually [4]. The annual volume of the medical tourism market was estimated at \$250 million. This was made possible by price attractiveness: the cost of procedures in Ukraine is 30-70% lower than in Western Europe or the United States [13, 14]. The relevance of the study lies in the need to develop effective strategies for utilizing this potential, taking into account fierce international competition.

The goal of the article is to develop theoretical aspects of determining the potential of medical and health tourism in Ukraine as a competitive advantage in the global tourism market.

Presentation of the main material. Ukraine has significant but underutilized potential in the field of health, medical, and medical tourism. The country has key competitive advantages, such as

- the presence of unique natural recreational resources (mineral waters, therapeutic mud);
- highly qualified medical personnel, unique modern experience gained during military operations in the field of disaster medicine;
- relatively low cost of services.

Ukrainian resorts have deep historical roots. For example, the resort of Truskavets was known as a therapeutic area as early as the 18th century. The first water treatment facility was opened there in 1827. The fame of "Naftusia" — a unique mineral water with a high content of organic substances — spread throughout the Austro-Hungarian Empire. The resorts of Morshyn and Myrhorod also have more than a century of history of successful use of balneological treatment methods. These resorts were accredited and recognized by world balneological associations long before Ukraine gained independence [5].

Currently, Ukraine has an extensive network of sanatoriums and resorts that use various natural healing factors, such as mineral waters, therapeutic mud and ozokerite, and climatic conditions. As of January 1, 2019, Ukraine's mineral water reserves amounted to 94.1 thousand m³ in 335 explored sources, of which only 167 are being developed, indicating enormous untapped potential [6, p. 34]. The most famous are the Naftusia, Maria, and Sofia springs in Truskavets, as well as the waters of Morshyn, Myrhorod, and Svalyava. Significant deposits of therapeutic mud are

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concentrated in Crimea (Sivash), Odessa region (Kuyalnik), and other regions. The favorable climatic conditions of the Carpathians and the Black and Azov Sea coasts are also an important recreational resource. Ukraine has significant deposits of therapeutic mud, especially on the Black and Azov Sea coasts (Kuyalnik Estuary) and in Transcarpathia (Borislav ozokerite).

Ukraine has historically had a strong medical education system. Ukrainian doctors, especially in narrow specializations such as reproductive medicine, ophthalmology, dentistry, and cardiology, are highly qualified, as confirmed by international certificates and successful operations

Right now, Ukraine is forced to gain unique experience in disaster medicine and military field medicine. Russia's full-scale war against Ukraine since 2022, despite all its terrible consequences, has created a unique "living laboratory" for the development of emergency medicine and rehabilitation. This experience is unprecedented in the world since World War II and could become a key competitive advantage for Ukraine in the global medical services market in the future [10]. Ukrainian medics and military doctors have gained invaluable experience in providing emergency care in conditions of a mass influx of wounded people. Effective systems for triaging the wounded have been developed and implemented, allowing critical patients to receive assistance as quickly as possible [1]. Ukrainian surgeons perform thousands of complex operations in field hospitals every month. Their experience in treating mine-blast injuries, multiple traumas, and burns is unique [4]. Telemedicine systems are actively used, with surgeons from leading clinics in Kyiv or Lviv consulting with colleagues on the front lines during operations in real time [12]. When it comes to rehabilitation and prosthetics, Ukraine has the potential to become a world leader in this field.

The current need for rehabilitation of hundreds of thousands of Ukrainian citizens is driving the accelerated development of the relevant infrastructure and the introduction of modern methods and approaches to treatment and rehabilitation.

Ukrainian specialists are cooperating with leading global prosthesis manufacturers, mastering the most modern technologies, including bionic prosthetics. Innovative approaches and methods for treating post-traumatic stress disorder (PTSD) and other physical and psychological consequences of war are also being developed [10]. With the support of international partners, modern rehabilitation centers are being created. This creates an infrastructure base for attracting foreign patients in the post-war period. This experience should be commercialized and offered on the global market as a unique service [3, 7]. Ukraine can position itself as a global center for post-traumatic rehabilitation and military medicine [11].

Despite its rich resource base, Ukraine's share of the global inbound medical tourism market remains insignificant. Several years ago, foreign patients mainly

came to receive specific medical services where Ukrainian specialists were highly qualified and prices were competitive (reproductive medicine, dentistry, ophthalmology, cosmetic surgery).

The leaders in medical tourism on the global market are countries such as Thailand, India, Malaysia, and Turkey, and in Europe there are Germany, Hungary, and the Czech Republic. These countries have successfully integrated their services by developing national medical tourism brands, obtaining international accreditations such as Joint Commission International (JCI), and providing modern logistics, transport accessibility, and a high level of service.

Competition with Central European countries is particularly relevant for Ukraine. They offer similar balneological resources, but with a higher level of integration with European standards and better infrastructure. Some countries, such as Turkey, Thailand, Israel, and others, attract patients with a comprehensive approach that combines high-tech treatment (cardiac surgery, hair transplants, dentistry) with tourist recreation at competitive prices.

In order to develop a strategy for actively entering the global medical and health tourism market, it is necessary to adequately assess one's weaknesses and potential opportunities in the competitive struggle. Let us use a SWOT analysis of the prospects for medical and health tourism in Ukraine. The SWOT analysis is presented in Tab.1.

Table 1

SWOT analysis of the prospects for medical and health tourism in Ukraine

Category	Factors
S (Strengths) Strengths	<p>1. Unique natural resources: Large reserves of mineral waters and therapeutic mud.</p> <p>2. Qualified personnel: High level of training of doctors and medical specialists, especially in narrow specializations (reproductive medicine, dentistry).</p> <p>3. Price competitiveness: Significantly lower cost of services compared to clinics in Western Europe [13] and the US.</p> <p>4. Geographic location: Proximity to European markets.</p> <p>5. Unique experience in military and emergency medicine: Creation of a basis for global leadership in the field of rehabilitation and treatment of complex injuries [1].</p>
W (Weaknesses)	<p>1. Outdated infrastructure: Many sanatoriums need modernization and investment [8].</p> <p>2. Insufficient marketing: Lack of a unified national strategy for promotion on the global market.</p> <p>3. Unstable political and security situation: Military actions and general risks deter foreign tourists.</p> <p>4. Problems with service and logistics: The quality of service often does not meet international standards.</p>



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Continuation of tab. 1

Category	Factors
O (Opportunities) Opportunities	<p>1. Growing global demand: There is a trend toward an increase in the number of people traveling for health and rehabilitation purposes [7]. Positioning Ukraine as a global center for post-traumatic rehabilitation and military medicine [3]</p> <p>2. Development of specialized niches: Reproductive medicine, dentistry, rehabilitation, where Ukraine has already achieved success</p> <p>3. State support: Opportunity to develop targeted programs and investment projects for infrastructure restoration and development as part of post-war reconstruction.</p>
T (Threats) Threats	<p>1. Fierce competition: Active promotion of services by competing countries</p> <p>2. Regulatory barriers: Complex visa procedures (for some countries)</p> <p>3. Negative image of the country: The current situation in the country may deter potential tourists, despite the unique medical experience.</p> <p>4. Possible outflow of qualified medical personnel: Risk of migration of doctors with unique and invaluable experience.</p>

Based on the results of the SWOT analysis, certain conclusions can be drawn regarding the paths and prospects for development and integration into the international medical and health tourism market.

A comprehensive approach is needed for Ukraine to successfully enter the global market for inbound medical and health tourism. It should include:

1. Modernization of infrastructure; attracting investment in the reconstruction of sanatoriums and clinics; creation of modern medical centers that meet international standards.

2. State support and branding; development and promotion of a single national brand of medical tourism in Ukraine on international markets.

3. International accreditation; facilitating the acquisition of prestigious international certificates (JCI, MTQUA, and others) by Ukrainian institutions to increase the confidence of foreign patients.

4. Simplification of procedures; improvement of visa policy and accompanying logistics services for medical tourists.

The implementation of these areas creates the conditions for the formation of a comprehensive and competitive system of inbound medical and health tourism. The coordinated implementation of infrastructural, institutional, and organizational changes will increase Ukraine's attractiveness to foreign patients and tourists. This, in turn, necessitates the generalization of the results obtained and the formulation of relevant research conclusions.

Conclusions: The results of the study show that Ukraine has significant potential for integration into the global medical and health tourism market and for the formation of a competitive offer in this segment. The presence of unique natural medical resources, combined with a high level of professional training of medical personnel, accumulated experience in the field of disaster medicine, as well as a relatively affordable pricing policy, creates objective prerequisites for the development of inbound medical and health tourism.

At the same time, the realization of this potential is hampered by a number of systemic problems, in particular, the insufficient level of development and wear and tear of infrastructure, uneven quality of service, fragmentation of regulatory and legal regulation, and Ukraine's limited presence in the international tourism information space. As the results of the study show, overcoming these barriers requires a comprehensive and coordinated approach to the development of the industry.

The prospects for strengthening Ukraine's position in the global medical and health tourism market are linked to the modernization of the material and technical base of sanatoriums, resorts, and medical institutions, the activation of investment processes, the formation of an effective system of state support, and the introduction of modern tools for international positioning. It is also important to harmonize national standards with international requirements, in particular through mechanisms for the accreditation of medical institutions, as well as simplifying organizational and logistical procedures for foreign patients.

Thus, the application of a systematic approach, taking into account global experience and the results of the study, creates the conditions for the formation of a sustainable model of medical and health tourism development and ensures Ukraine a worthy place in the global space of inbound tourism.

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