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PROSPECTS OF HEALTH AND MEDICAL TOURISM CLUSTERIZATION IN UKRAINE

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Ukrainian health and medical tourism needs a change in strategic planning approaches due, firstly, to the outdated post-Soviet organization of mass rehabilitation and sanatorium-resort treatment, and, secondly, in connection with the expected changes in the structure of consumers and their advantages, both as a result of the full-scale invasion of the Russian Federation. The subject of the study is the clustering processes in the field of health and medical tourism of Ukraine. The purpose of the study is to substantiate the methodical approach to the clustering of health and medical tourism based on spatial modeling of the relevant resource and material base. The task of the research: substantiating the main directions of health and medical tourism development; generalization of statistical data on the resource and material base based on the method of cartographic visualization; development of proposals for the activation of cluster processes based on statistical groupings of regions. The following methods were used: abstract (theoretical generalizations, formulation of conclusions), systematic approach, method of structural generalization, statistical grouping, graphic method. The following results were obtained: on the basis of statistical analysis, it was proposed to divide the regions of Ukraine into the following groups: the first - seaside regions, specialization – family and children’s recreational and health tourism; the second – Volyn and Carpathian region, specialization - sanatorium-resort and rehabilitation vacation with an emphasis on inbound tourism; the third – capital and central-eastern regions, specialization – medical tourism; the fourth – regions without a pronounced potential for health and medical tourism, in total make up 46.47% of the area. The stages for the clustering policy implementation of health and medical tourism in Ukraine have been developed. Conclusions: to improve the management of health and medical tourism, a clustering tool is proposed. The regions of Ukraine are divided into four groups according to the level of resource and material base development, each of which has a clear specialization and target tourist groups, as well as the direction of strategic development. This improves the strategic promotion of domestic health and medical tourist destinations at the inbound and outbound directions.

Keywords: *health tourism, medical tourism, rehabilitation, recreation, health resort complex, cluster, strategy*

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Problem setting. Both processes of globalization and urbanization and strengthening of economic competition are characterized by the weakening of the human body functional capabilities, an increase in stress loads, and the accumulation of physical and mental fatigue.

The awareness of a healthy lifestyle importance, the reorientation of consumer trends towards eco-products, and the demand for high-quality services oriented towards the observance of the sustainable development paradigm have become an effective response of balanced societies to the mentioned challenges [14]. Health care, all-round consumers' conscious development, and the desire to maintain good physical shape create positive prerequisites for the development of the health and medical segment of tourism. The annual turnover of tourism services in this area exceeds 100 billion dollars [10]. The fact that the world has changed its attitude to treatment and prevention of health after the pandemic is also obvious.

Separating from the definition of general tourism those types of activities, the main motivation of which is to improve physical, mental, and spiritual health with the help of medical and health measures that increase people's ability to meet their needs, led to the formulation of the concept of health and medical tourism. In connection with the differences based on geographical and linguistic features, with a wide variety of related health traditions and aesthetic approaches, the basic concept of health tourism is being formed, which is often replaced by the concept of medical tourism, therefore. Nevertheless, the concept of health tourism is still not clearly defined and is debatable. In 2018, the World Tourism Organization and European Travel Commission [10] published a study in which they proposed terms and definitions in the field of health tourism, as well as identified the main vectors of its strategic development. Today, health and medical tourism is considered a global, complex and changing segment that needs to be understood to a greater extent in order to solve the problems of the globalized world.

The role of health and medical tourism in the post-war reconstruction of Ukraine is extremely relevant. According to the "Concept of the Post-War Recovery and Development Strategy of Ukraine" published by the National Institute of Strategic Studies (NISS) [25], one of the sectoral goals is the restoration and maximizing the human potential on the basis of economic productivity, social justice and responsibility. The problem of physical and psychological rehabilitation of Ukrainian civilians and military can be solved within the framework of medical and health tourism activities.

Analysis of the latest studies and publications. Well-known Ukrainian and international scientists were engaged in the study of modern trends in the development of the medical tourism market. The study by Haponenko et al. [6] is devoted to the problems of health tourism

development in Ukraine. Meanwhile, Ford explores the growing popularity of medical tourism in terms of challenges and opportunities for healthcare organizations [4]. Significant practical results were obtained by Majeed and Gon Kim [7] regarding consumer trends in health tourism. The results of this study show that tourists expect to combine wellness treatments with visits to tourist attractions, seeing it as part of improving their health and well-being. The authors proposed a matrix of health tourism that can help providers of related services to understand the expectations of tourists regarding health procedures and tourist attractions [7]. One more research [1] is devoted to a similar topic, but here consumer trends in spa and wellness tourism are analyzed through the prism of perceived value. The development of medical tourism and the management of consumer behavior after the COVID-19 pandemic were studied in [8]. The issue of clustering various areas of tourist activity was also considered in the scientific literature. In particular, in the paper [6], the authors investigated the potential of tourist and recreational clusters in the European space, while the study [2] is devoted to cluster processes in the field of medical tourism in Eastern India. Such domestic scientists as Tkachuk and Saychuk [11], as well as Zhelyuk and Matsyk [19] also conducted their research on the prospects of clustering medical tourism in the regions of Ukraine.

Problem definition. However, despite the rather substantial development of finding strategic ways to develop domestic health and medical tourism issues, the cluster processes of this area based on the possibilities of spatial modeling of territories are still insufficiently researched.

The aim of the study, the results of which are presented in this paper, is to justify a methodical approach to the health and medical tourism clustering in Ukraine based on spatial modeling of their resource and material base.

Presentation of the basic material. The results of the UNWTO survey show that a large part of EU citizens, about 49 percent, are willing to travel for healthcare issues [10]. Prerequisites for the global spread of health tourism are:

- urbanization process;
- growing demands for improving the quality of life;
- increase in life expectancy;
- technological innovations in the medical field;
- cross-border mobility in the field of healthcare;
- legislative international legal framework for the development of medical tourism and easily accessible information;
- off-season medical and wellness tourism.

Modern medical tourism is classified according to the level of receiving medical services into diagnostic, rehabilitation, invasive, alternative, etc. In diagnostic medical tourism, a person goes to another country to consult with qualified specialists in order to identify and

determine the nature of the disease, if desired, to confirm or refute diagnosis or to be able to use more modern medical technologies and equipment. In invasive tourism, planned treatment is carried out with the help of surgical interventions to treat an already detected disease. The rehabilitation direction of tourism is aimed at restoring lost body functions due to trauma, stroke, paralysis, and other pathological processes. Medical tourists also travel to improve their appearance (dental care, plastic surgery, bariatrics, cosmetology procedures, etc.).

Medical tourists spend on average 5-10 times more than regular tourists, stay in the host country for 2-3 weeks in the case of inbound tourism, and are more likely to travel with partners or family, making the field of medical tourism extremely liquid and attractive for representatives of both private business and state institutions [3; 9]. Information on the costs of medical services for several-day and one-day visitors is given in the table 1.

The relevance of health and medical tourism development is also explained by the specifics of market laws in the field of health care. Since health is a rather specific category that has no exchange value, it cannot be the subject of monetary relations, however, the market of medical services and goods in the field of health care has the following specifics:

- services in the field of health care have a high level of risk – the result of market relations are consequences for life and health;
- there are significant difficulties with forecasting the demand for various medical services;
- the cost of medical services is high and has a tendency to constantly increase (due to scientific progress, rising living standards, the latest threats and challenges to public health);
- the need for medical services is also high and has a tendency to constantly increase (due to the aging of the population and the increase in the prevalence of chronic diseases);

– there is high liquidity of services and low elasticity of demand (a 10% increase in value is accompanied by a 1% decrease in demand);

– asymmetry of information (the service provider has a medical education, and the consumer does not) in combination with the fee method of calculations (based on the fact of services received: diagnostic, treatment, etc.) stimulates the tendency among medical personnel to prescribe and provide unnecessary and often expensive invasions;

– necessary state regulation of the market: licensing of medical practice, guaranteed minimum medical care at the expense of public funds, etc.;

– consideration of ethical factors: the basic right of a person to receive medical assistance in critical situations, regardless of the ability to pay, is guaranteed not only by law, but also by a doctor's oath.

Therefore, experts note the high cost of services in this area as one of the barriers for the development of medical and health tourism. On the other hand, high prices can serve as drivers of the development of outbound medical tourism. High prices sometimes make qualified medical care inaccessible to citizens of developed countries. For example, in the United States, a recognized leader in medical tourism, the number of people whose insurance does not cover the treatment of chronic serious diseases is approaching 110 million, and part of the population, due to the economic crisis and a drop in the standard of living, prefers to give up health insurance in order to receive treatment in other countries. Savings on medical services in developing countries can reach from 30% to 85%, so coronary surgery in Turkey costs about 10 times cheaper than in the USA [9].

Currently, the global market of medical services has already formed. However, the analysis of statistical data shows that it is a dynamic system in which the focus changes relatively quickly from one country to another.

Table 1*

Expenditures of visitors by types of activities

Several-day visitors, expenditures by type	Expenditures, euros per day		
	Wellness	Spa	Medical
Total	149	63	292
Accommodation	82	34	31
Food and beverage	30	6	16
Goods	12	4	16
Medical and health services	11	16	221
Other (entertainment, sports, events, etc.)	15	3	8
One-day visitors, expenditures by type	Expenditures, euros per day		
	Wellness	Spa	Medical
Total	48	82	450
Accommodation	19	11	12
Food and beverage	4	2	13
Medical and health services	22	63	423
Other (entertainment, sports, events, etc.)	4	5	2

*formed on the basis of [3]

Fierce competition in the market of medical tourism forces the participating countries to rapidly develop medicine at the expense of modern technologies and increase investments in this industry. Without support and assistance from the state, significant investments by both the state and private investors in the development of medical science, specialized education, technical base, medical infrastructure, and development of medical tourism are impossible. We must not forget about the economic component of medical tourism – the formation of a competitive price in the context of the price-quality ratio. For most patients, the main factor in favor of going abroad is the cost of treatment [6]. The price policy currently observed in Ukraine actively attracts medical tourists to our country; it is desirable to preserve this trend.

It is quite natural that in connection with the full-scale military invasion of the Russian Federation in Ukraine, the entire inbound tourism market, including the market of health and medical tourism, almost completely ceased its activities. Today, Ukraine is dominated by outbound flows of medical tourists, including wounded military personnel who require complex surgical interventions, prosthetics, and various types of rehabilitation [13]. Most of such tourists are financed by budget funds. Among the positive trends that allow us to expect a certain intensification of the inbound tourist flow, it should be noted that according to the information of the State Agency for Tourism Development [12], the Government has made changes to the resolution regulating the issue of currency settlements in martial law conditions in the appendix to the resolution of the Cabinet of Ministers of Ukraine dated February 24, 2022 No. 153 “On certain issues regarding ensuring the implementation of imports”. This will enable tour operators and travel agents to make payments with foreign partners for the tourist services provided by them. The document expands the list of services for import operations, which the National Bank is recommended to ensure the implementation of transfers.

In order to intensify the development of medical tourism in Ukraine, the Ukrainian Association of Medical Tourism (UAMT) was founded [27]. It is a non-profit organization that cooperates with leading health care facilities and medical clinics, the Ministry of Health, medical staff, health care operators, travel companies, insurance companies and other affiliated companies that work together to ensure patient safety by promoting quality medical services, assistance to patients in a global environment. In 2021, the 5th International Congress of Medical and Health Tourism was held in Kyiv with the assistance of UAMT. The event brought together 110 participants – professionals of the medical and health tourism market from 18 countries all over the world.

However, despite the efforts made by the UAMT, the structure of current costs for health care in Ukraine

as of 2020 indicates the need for the development of rehabilitation services on the basis of sanatorium-resort and rehabilitation complexes, which will help relieve the burden on inpatient clinics and will allow to redistribute costs more effectively. After all, according to data [33], inpatient medical and rehabilitation care accounts for 34.19% of the total structure of current health care costs. Outpatient medical and rehabilitation care takes second place and accounts for 19.74% of current costs. Other medical and rehabilitation assistance amounts to 4.23%, day medical and rehabilitation care accounts for 1.45% of current health care costs.

In 2021, changes in the geography of inbound medical tourism were observed in Ukraine. Previously they were mainly tourists from the post-soviet countries or representatives of the Ukrainian diaspora abroad, now they make up 45% of the total number of medical tourists who visited our country, and 55% of tourists are from Europe, Israel, Spain, Italy, Bahrain, Saudi Arabia, Iraq, UAE [28]. Despite the full-scale military invasion of the Russian Federation, more and more foreigners consider Ukraine to be a provider of medical services with an excellent price-quality ratio, as Ukrainian doctors have proven themselves as highly qualified specialists. The level of our private medicine is not inferior to the world. The absence of queues to highly specialized doctors and the possibility of receiving high-quality treatment from the first days of consulting a specialist are also indicated. Treatment in Ukraine is 30-70% cheaper than world prices, while the quality of the services provided remains at a high level.

There are 34 specialized reproductive health clinics in Ukraine that treat all forms of infertility according to the standards of the World Health Organization (WHO) and the European Association of Human Reproduction and Embryology. Today dental care remains the most in demand, as the common practice among Ukrainian doctors is preserving teeth even in neglected cases. There is also significant experience in the field of orthoprosthetics. For example, well-known Swedish-Ukrainian Angelholm Medical Center in Chernivtsi specializes in endoprosthesis of joints, treatment of backs and injuries. This center receives patients from Ukraine and all over the world.

The new paradigm of the development of modern society, which appeared in connection with the increase in life expectancy, aimed at “active longevity without diseases”, provides an impetus for the further development of health and medical tourism [15]. The total number of health and recreational areas of Ukraine is 12.1 million hectares, which is 20% of the territory of our country. At the same time, the capacity of Ukraine’s landscapes, subject to compliance with all environmental standards, is about 40 million people [22].

Health tourism in Ukraine could compete with foreign one, as our country has many thermal springs,

mud, ozokerite deposits and other unique natural resources. The diversity of Ukraine's potential for the development of health and medical tourism makes it necessary to develop a unified approach that would allow to fully identify and realize the potential of our country as a destination on the world tourism market. Clustering of health and medical tourism based on a spatial approach with a clear specialization of the Ukrainian regions can become a tool for strategic planning of the indicated sphere of tourism activity in the process of post-war reconstruction of our country.

It should be noted that Ukraine already has a certain theoretical, methodological and practical experience of organizing clusters in the field of medical tourism. At a time when industrial clusters are mainly created according to the territorial principle, "... tourist clusters of health tourism include groups of enterprises that jointly use tourist resources, specialized tourist infrastructure, local labor markets, and carry out joint marketing, advertising and information activities" [31].

I. Kyrylyuk [21] notes that clustering in the tourism industry contributes to the strengthening of entrepreneurial processes through the concentration of business activity and the integration of intellectual, natural, and recreational, labor and other resources. It is noted in [30] that "the cluster model of organizing the development of the tourism industry, based on recreational and tourist resources, determines the growth of the region's economy through the creation of new working towns, the development of infrastructure and the cooperation of enterprises with local authorities". At the same time, the author concentrates maximum attention precisely on the properties of a certain territory as the basis of the cluster, without taking into account the production-technological and organizational-economic capabilities of the enterprises and organizations that are part of the cluster.

In [22], it is noted that the clustering of the tourism sphere should be based not only on the mechanisms of public-private partnership, but also take into account the broad participation of public organizations. In addition, T. Herasymenko et al. in [15] note that the clustering of the tourism sphere consists in the synchronization of the actions of the subjects of the tourism industry within the framework of individual regions of the country. This approach can be developed on the basis of emphasizing the need to develop an appropriate policy of clustering, which will allow creating general "game rules" for representatives of the field of medical and health tourism.

In order to assess the prospects of clustering of health and medical tourism in Ukraine based on spatial modeling, it is important to assess the concentration of health resorts, wellness and health complexes in the regions of Ukraine (Fig. 1). It should be noted that, in accordance with the limitations of this study, health care institutions (hospitals, health care centers, diagnostic centers) were not considered).

It should be noted that statistical data indicate a particularly dense concentration of such organizations in the regions with access to the seas (part of them is currently under occupation) – these are Odesa (320), Mykolaiv (192), Kherson (168) and Zaporizhzhia (243) regions, which also have significant reserves of natural medical and health resources.

Odesa Center for Post-Burn Eye Pathology has no analogues in the world. 13 km from Odesa, there is a unique natural facility – the Kuyalnyk resort with healing springs, mineralized pus, and mud. It is one of the oldest mud spa resorts in Ukraine, specializing in the treatment of the nervous and musculoskeletal system, skin diseases and infertility [26]. The mentioned regions also specialize in health recreation, including for children, mainly in the warm period of the year.

The potential of the Western Ukraine regions – Volyn (73), Lviv (60), Zakarpattia (42), Ivano-Frankivsk (30) also differs with significant natural healing resources, a better ecological state of the environment, and a favorable geographical position (closeness to European borders). This region is famous for its health resorts due to its unique natural features, thermal springs, and mud. These are Transcarpathia, Truskavets, Morshyn. In terms of ozokerite reserves, Ukraine ranks first in the world, and they are all concentrated in the Carpathian region. Up to 85% of the world's reserves of this mineral are concentrated in the Boryslavskyi deposit in the Lviv region, and its quality has no equal, because only here in the veins is found pure ozokerite. The rehabilitation clinic by Dr. Kozyavkin in Truskavets, where doctors help patients with cerebral palsy and autism using a unique method, is well-known and in demand. It has been accepting patients for more than 20 years, including from abroad [20]. All these resources can be used for inbound medical and rehabilitation tourism.

A group of regions with an average capacity of the resource and material base of health and medical tourism – Dnipro (108), Kyiv (70) and Kharkiv (59). Nevertheless, these regions have the most noticeable potential for the development of modern medical technologies, qualified personnel, high-quality medical equipment, which allows us to distinguish their specialization in the field of medical tourism – both domestic and inbound. The National Institute of Cardiovascular Surgery named after Amosov, "Clinic of New Technologies", Cardiac Surgery Center in Kyiv, where highly qualified cardiologists and cardiac surgeons provide assistance using innovative technologies, perform diagnostic studies and surgical operations with the most modern equipment of the world's leading manufacturers. Ukrainian doctors take on even the most hopeless cases and in 90% of cases these operations are successful, although the cost of treatment is much lower than in foreign clinics.

Regarding the practical experience of clustering, we should note that in the Dnipro region, medical and

tourist routes have already been created in the following directions [17]:

- consultation of highly professional doctors, for example, programme “Legend Doctors”;
- specialized camps, for example, “TRIO Weight Loss Academy” (on the territory of GOOD ZONE resort), “Sensory Aut Camp” (a children’s camp for the recovery

and recreation of children with special educational needs); “Hematological Center: School of Superheroes” (educational services for children undergoing long-term treatment);

- services according to the type of disease, for example, the “NEO INCLUSIVE” dental route; “Neurosurgery” (helping children with cerebral

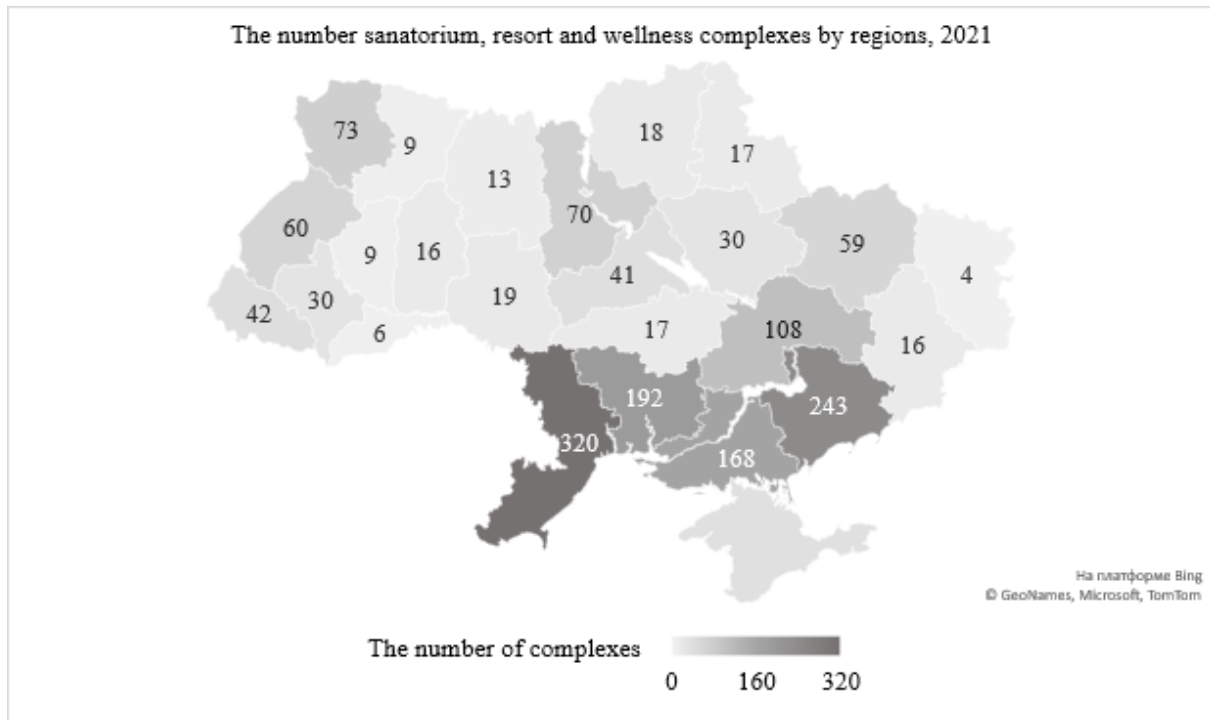


Fig. 1*. Concentration of health and sanatorium-resort facilities by region, 2021
 *formed by the author based on [24; 28; 29; 32]

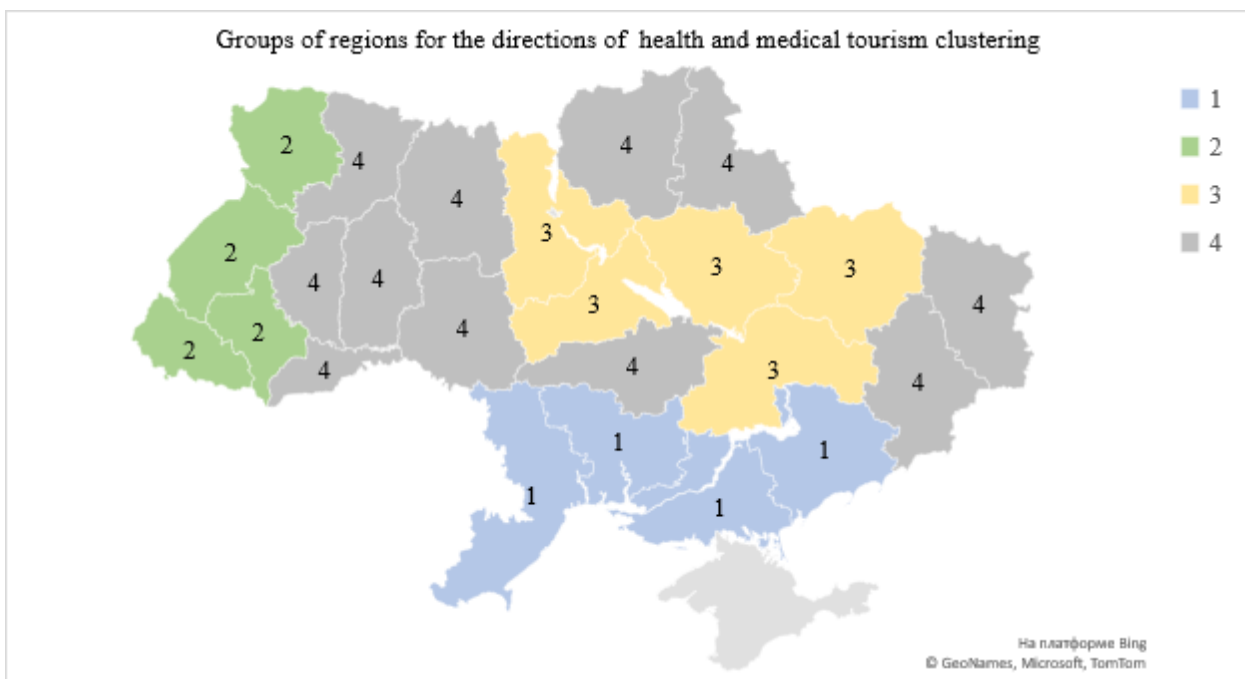


Fig. 2*. Grouping of regions by the specialization of health and medical tourism
 *formed by the author

Table 2*

Stages of implementation clustering policy of health and medical tourism in Ukraine

No	Content	Main characteristics
1	Formulation of goals and objectives of clustering policy	Goal: formation of conditions for the growth of competitiveness of health and medical tourism sphere on the basis of stimulating the development of clusters. Tasks: formation and implementation of clustering programs according to the group of regions; infrastructural development of regional tourist clusters; implementation of measures to attract financial resources for the implementation of the clustering policy from the state, regional and local budgets, various extra-budgetary funds, through the issuance of domestic state loan bonds; providing support for investment projects in the field of health and medical tourism, aimed at increasing the international competitiveness of cluster participants.
2	Development of the main principles of clustering policy	Basic principles: comprehensiveness; expediency; hierarchy; alternative; consistency; coordination; systematicity; stimulation; support; interdependence.
3	Legislative initiatives that should regulate the activities of the cluster	The clustering policy is formed at the state, regional and local levels. It is necessary to adopt special legislation, on the basis of which regional and municipal legal acts aimed at stimulating the development of medical and health tourism will be adopted. At the cluster level, it is necessary to adopt its own strategy of formation and development in accordance with specialization.
4	Formation of clustering policy implementation mechanisms	A set of measures aimed at support and development of the cluster: support of investment projects of clusters; creation of cluster economic development centers; provision of investment and tax preferences and benefits; provision of appropriate grants; allocation of budget funds within the framework of target programs and projects; partial financing of costs for the development of cluster products; reimbursement of part of the costs of paying interest on the loans received.

**formed by the author on the basis of [15; 16; 18; 23]*

palsy and other spastic syndromes); “Combustiology. Children’s plastic surgery”.

Though, spatial modeling based on the assessment of the material, technical and resource base of health and medical tourism made it possible to distinguish four main groups of the corresponding sphere of tourism activity in Ukraine. In general, all regions of Ukraine can be divided into 4 groups.

The first group (1) – seaside regions with a significant resource and material base – Odesa, Zaporizhzhya, Mykolaiv and Kherson regions (in total, they make up 18.79% of the area). The specialization of this group is family and children’s recreational tourism, mainly in the warm period of the year.

The second group (2) – Volyn and Carpathian region with a sufficiently developed material and technical base, significant natural resources and geographically close to the EU countries – these are Lviv, Volyn, Ivano-Frankivsk, and Transcarpathian regions (in total, they make up 11.37% of the area). The specialization of this group is sanatorium-resort and rehabilitation vacation with an emphasis on inbound tourism.

The third group (3) is the capital and central-eastern regions, with significant highly qualified personnel and access to advanced medical technologies, sufficient resource and material base – these are Kyiv, Cherkasy, Poltava, Dnipro and Kharkiv regions (in total, they make up 23.37% of the area).

The fourth group (4) – regions without a bright potential for health and medical tourism (in total, they make up 46.47% of the area of Ukraine).

Generalizing the above, the proposed grouping is visualized in Fig. 2. Thus, the clustering of health and

medical tourism in Ukraine based on the spatial analysis of the material, technical and resource base allows us to identify four main areas of regional specialization, while only less than half of the territory of Ukraine (46.47%) falls on territories without a pronounced potential for the specified types of tourism.

For each of the groups, a specific marketing strategy for the promotion of destinations, coordinated with the specialization of the regions, must be developed. However, even despite the lack of attractiveness in the field of health and medical tourism, each region can deepen its specialization and move to another group.

It is important to develop close cooperation with providers of medical services, who organize the selection of clinics and specialists, prepare and translate medical and financial documentation, resolve issues of accommodation and relocation, and organize transfers. It is necessary to strengthen the overall image of the country on the world stage since travel safety is a critical component when choosing a destination.

Summarizing the scientific research of domestic and international scientists, it is possible to form the main stages of the development and implementation of the state policy, which aims to implement and further develop the process of clustering of health and medical tourism (Table 2).

In order for Ukraine to reach the international level and attract foreign patients, the issue of obtaining a certificate of compliance with international standards, e.g. Joint Commission International (JCI), QHR, etc., is extremely sharp [27]. To date, JCI has accreditation in 39 countries. more than 300 public and private healthcare organizations, which dramatically increases

their prestige. It acts as a guarantor of the highest quality of medical care, patient safety, and the use of correct treatment methods. The first steps in this direction have already been taken, the National Heart Institute (2015), the private clinic “Isida” (2018), the chain of clinics “Doctor Sam” (2019), “Leleka” maternity hospital (2020) have already received international JCI certificate. International certificates allow active cooperation with global insurance companies that pay patients abroad and are ready to cooperate with domestic clinics if they have a certificate.

For successful communication with clients, it is necessary to minimize the language barrier between the patient, his attending physician and the service staff, creating conditions for staff motivation to learn foreign languages. It is extremely important to work with medical personnel, for whom the norm of behavior should be a respectful, friendly attitude towards the patient and a high culture of communication and comfort in the ward, which contributes to the creation of conditions for psychological and physical comfort. Therefore, the need to introduce a high international standard of service into medical practice remains relevant [14].

Conclusions. Based on the results of the study, the following characteristics of medical and health tourism in Ukraine were identified, namely:

- better price-quality ratio, because compared to European centers, medical services in Ukraine are cheaper but of the proper quality;
- availability of rehabilitation centers and sanatoriums where physical and psychological rehabilitation is carried out;
- innovative cellular technologies and advanced reproductive medicine;
- a significant resource and material and technical base, which, nevertheless, needs significant updating.

The potential of Ukraine in the provision of high-quality health care and medical services is significant. There are a lot of prerequisites for becoming an active player at the international level. To improve the management of health and medical tourism, a clustering tool is proposed. The regions of Ukraine are divided into four groups according to the level of the resource and material base development in the field of health and medical tourism. Each of these groups has a clear specialization and target tourists. This grouping will improve the strategic promotion of domestic tourist destinations at the international level and allow more effective cooperation with online platforms and aggregators of the relevant tourist destinations.

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ПЕРСПЕКТИВИ КЛАСТЕРИЗАЦІЇ ЛІКУВАЛЬНО-ОЗДОРОВЧОГО ТА МЕДИЧНОГО ТУРИЗМУ В УКРАЇНІ

Визначено, що лікувально-оздоровчий та медичний напрям туризму потребує зміни підходів у стратегічному плануванні через, по-перше, застарілу пострадянську організацію масового оздоровлення та санаторно-курортного лікування населення, а, по-друге, у зв'язку із очікуваними змінами в структурі споживачів та їхніх переваг, в тому числі і внаслідок повномасштабного вторгнення РФ в Україну. Предметом дослідження є кластеризаційні процеси у сфері лікувально-оздоровчого та медичного туризму України. Метою дослідження є обґрунтування методичного підходу до кластеризації лікувально-оздоровчого та медичного туризму в Україні на основі просторового моделювання відповідної ресурсної та матеріально-технічної бази. Завдання дослідження: обґрунтування основних напрямів розвитку лікувально-оздоровчого та медичного туризму в Україні; узагальнення статистичних даних щодо ресурсної та матеріально-технічної бази лікувально-оздоровчого туризму на основі їхньої картографічної візуалізації; розробка пропозицій щодо активізації кластерних процесів зазначеного напрямку туризму на підставі статистичних групувань регіонів. У дослідженні використано такі методи: абстрактно-логічний (теоретичні узагальнення, формулювання висновків), системний підхід, метод структурно-логічного узагальнення, статистичних групувань, графічний метод. Отримано такі результати: на підставі статистичного аналізу регіони України запропоновано розподілити на такі групи: перша – приморські регіони, сумарно складають 18,79% площі України, спеціалізація – сімейний та дитячий рекреаційно-оздоровчий туризм; друга – Волинсько-Карпатський регіон, спеціалізація – санаторно-курортний та реабілітаційний відпочинок із акцентом на в'їзний туризм; третя – столичний та центрально-східні регіони, спеціалізація – організація медичного туризму; четверта – регіони без вираженого потенціалу лікувально-оздоровчого та медичного туризму, сумарно складають 46,47% площі України. Розроблено етапи реалізації політики кластеризації лікувально-оздоровчого та медичного туризму в Україні. Висновки: для покращення управління розвитком лікувально-оздоровчого та медичного туризму, запропоновано інструмент кластеризації. Регіони України за рівнем розвитку ресурсної та матеріально-технічної бази поділено на чотири групи, кожна із яких має чітку спеціалізацію та цільову групу туристів, а також напрям стратегічного розвитку. Це поліпшує стратегічне просування вітчизняних туристичних дестинацій на внутрішньому та міжнародному рівнях.

Ключові слова: лікувально-оздоровчий туризм, медичний туризм, реабілітація, рекреація, санаторно-курортний комплекс, кластер, стратегія

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