

Medical and health tourism in Russia: some economic development features

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Abstract. The analysis of the global medical and health tourism development has been conducted and its main centres have been defined in the article. The competitive advantages of Russia in the field of the health resort and recreation development have been exposed. The features of the health resort activities development in the different federal districts of the country have been determined.

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Introduction

Today the international medical and health tourism market has been rapidly developed and is high in demand. Nowadays the resort or beach-related rest in such countries, as Germany, France, England, Spain, Italy, Greece, Israel, the USA, Thailand, Vietnam, etc. has been rapidly developed. Nowadays there is a trend to slight reduction of the number of trips from Russia to the world resorts in order to be treated and have rest what could favourably affect the places occupied in the domestic health resort centres.

Hence, the Russian resorts are to use the opportunity to actively engage the nationals for having rest within the country. For this purpose Russia has whatever is required - the unique natural curative resources (mineral waters, muds, landscape and climatic features, river and maritime spaces), the transport infrastructure has been rapidly developed, the means of accommodation, treatment and food supply on the level of the services correspond to the international standards in many regions of the country. In the number of many natural curative resources Russia precedes the world resort and health potential.

The main competitive advantage of Russia in the international health resort market is the natural resources, which are widely used in treatment and curing [1-6]. The health resort cycle is such as to give the vacationers a full therapeutic effect, what distinguishes our health resort techniques from the Western spa-technologies. For Russia the division of resorts and sanatoriums into balneotherapy (mineral waters of different microcomponent composition and mineralization), mud (silt, sapropelic, peat or knoll), climate (mountain, coastal and lowland) resorts and resort areas is typical, and also the unique landscape and climatic resort areas could be found.

In the rapidly changing world the medical tourism performs one of the most important social functions for the society - improving the

psychosomatic health of the people using the system of rest and treatment through the natural healing factors which are ideally complemented by the active forms of tourism and leisure and educational events. Medical and health tourism for the medical and social purposes and the provided services could be divided into medical and health one.

The medical and health tourism centres in the world are well consistent with 6 tourist macro-regions, which are allocated by the World Tourism Organization (WTO) [7] and refined in the work of S.A. Shcherbakova and A.A. Charykova [8]:

1. European countries, including the CIS and Eastern Mediterranean countries (Turkey, Israel, Cyprus).
2. Asia-Pacific - the countries of East and South-East Asia, Oceania and Australia.
3. America - the states of North, South, Central America and the island territories.
4. Africa (West, East, Central and South).
5. Near and Middle East includes the countries of Western and South-Western Asia and two countries of Northern Africa (Egypt and Libya).
6. South Asia (India, Pakistan, Bangladesh, Nepal, Sri Lanka, Maldives)

Large natural competitive advantages in the market of the world resort and health tourism belong to Russia which are not fully used, reducing the share of the health tourism in the general flow of tourists. According to official statistics [9], we could make a conclusion: each year more than 120 thousand of our citizens visit foreign resorts and spa-centres, what is 1% of the total number of tours to other countries. All this suggests that the demand in the high-quality local health resort is large and is particularly acute during the formation of the population's concern about their health and healthy lifestyle.

Nowadays in Russia there are slightly less than 1300 sanatoriums and resorts in different regions of our country. The greatest number of institutions of

the health resort complex has been historically and naturally formed in the Volga, Central, Southern, Northern Caucasus and Ural federal districts, due to the large number of natural curative resources. Annually in the institutions of the resort sector more than 3% of people (over 4.46 million) have rest, which is significantly less than the maximum total capacity of sanatoriums and the need to provide health resort and healing [10].

The study of changes in the absolute number of collective accommodation facilities is of great interest, in which a large share is occupied by the health resort complex organizations. In descending order in the number of collective accommodation the federal districts of Russia could be arranged as follows: Volga, Central, Southern, Siberian, Ural, North Caucasus, North-West, Far East.

The highest average growth rate, calculated over the past 10 years, is typical for the North-Western and Far Eastern federal districts. These growth rates can be attributed to social and economic and political factors that helped to create favourable investment conditions for the development of the tourist sector in the regions.

In the Far East, a significant increase in the number of collective accommodation facilities has been observed during the preparation to the international political and economic forum of the APEC leaders in 2007-2008. This increase occurred due to the construction of new and reconstruction of old hotels, sports centres, catering facilities, curing and medical centers, as well as due to the improvement of the coastal and beach area. In the North-West federal district the growth of the collective accommodation facilities was due to the restoration and construction of hotel complexes of the suburban type, as well as creating small healing centres of the health resort type. This area is characterized by a wide variety of recreational resources: natural, historical, cultural, educational facilities, etc. All this creates favourable conditions for the development of not only the resort, but also medical tourism, which in recent years could include a large variety of other recreational activities.

The lowest growth rates of the collective accommodation enterprises are observed in the Southern federal district. It could be due to the fact that the southern and coastal areas of Russia have been long-used as the centres of tourist recreation, treatment and healing and have a fully formed network of tourist and recreational and health resort facilities, the capacity of which is able to cope with the ever increasing tourist flow. Tourists come to the southern regions of Russia in order to rest, healing and treatment. The large and unique health resort complex of the country is Caucasian Mineral Waters

(CMW), which include Zheleznovodsk, Kislovodsk, Pyatigorsk and Yessentuki resorts. Besides, it is necessary to create favourable conditions for the stable and sustainable development of the resort business in the region, which is implemented through the regional programs in the health resort and tourism fields.

The number of the health resort facilities is a key state indicator of accounting in the system of health resort services. However, the data on the number of the health resort institutions do not represent the scope of the market, since it does not indicate the scope and value of the committed commercial transactions. The health resort organizations are heterogeneous in types, the number of personnel and customers being served. The account unit could be both the small pension for 100 rooms and a huge multi-profile resort (eg, CMW or Ust-Kachka), consisting of several sanatoriums and having a turnover of hundreds of million rubles a year.

During the period from 2002 to 2012 the development of the Russian health resort network is characterized by the multidirectional changes in the number of the health resort and health and healing organizations, and the number of accommodation places, depending on the geographical location, social and economic development and demand for the health resort services.

Table 2. Changes in the Health Resort Organizations as per the Russian Federal Districts*

Federal District	2002	2005	2008	2011	2012	Average Accession Rate, %
Far Eastern	128	107	98	81	79	-17.55
Volga	540	492	512	447	445	-12.70
North Caucasus	-	-	-	166	172	-
Siberian	332	308	291	267	260	-8.25
Ural	248	213	201	176	167	-12.44
Central	458	420	398	376	368	-5.53
Southern	442	462	487	288	295	-40.86
Northwest	199	171	153	157	160	2.61

* prepared and calculated according to the UISS data [11,12]

The distribution of the health resort organizations over the past 10 years by the federal districts of Russia is characterized by the negative dynamics of development: reduction of the absolute number and relative growth rates. In 2002, the total number of sanatoriums and resorts in the country was 2347, and in 2012 was reduced to 1958, which amounted to about 20%. This could be due to reduced demand for the health resort treatment and high pricing policy compared with the similar health resort centres in Central and Eastern Europe. Until 2010, the maximum absolute number of the health

resort complex institutions was observed in the Southern federal district (487), and since its release from the North Caucasus federal district, it lost its first place for the Volga (445) and Central (368) federal districts.

The smallest number of the health resort complex organizations is observed in the Northwest (160) and Far East (79) federal districts. While the average growth rates of the collective accommodation facilities in the Northwest federal district is 2.5 times higher than the similar index characterizing the dynamics of increasing the resorts and sanatoriums.

According to official data [1,2,5], the number of the specialized accommodation facilities, which includes health resort and recreation organizations in Russia declined from 4876 to 4131 units, or 15.3%, while the number of one-time beds decreased from 754,461 to 714,796, or 5.3%. The number of sanatoriums and boarding houses with treatment during the same period, on the contrary, increased from 1192 to 1390 units, or 16.6%, and the number of beds from 278 518 to 385 489, or 34.1%. The number of child sanatoriums increased during this period from 528 to 565 units, or 7.0%, and the number of beds - by 68.1%. The number of health and recreation resorts and rest houses decreased by 41.6 and 54.5%, respectively.

In the last decade the state social policy has been aimed at the preferential children healing. The health care of all the countries focuses on the child health, which in the modern society is considered as the increase in the health capital of the future generations. In this respect, the experience of the former Soviet Union is very important, where the costs on the children, adolescents healing and the economically active population, despite the enormous costs on the military production and the low performance level were very high. The need for using this experience in organizing the mass recreation and healing of children in modern Russia is determined by the environmental degradation in the country, the demographic crisis and demand for the rapid social and economic growth.

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