CLUSTERING AS A METHOD OF RUSSIA REPOSITIONING IN THE STRUCTURE OF GLOBAL HEALTH TOURISM

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Current global socio-economic trends associated with scientific and technological progress increase, accelerated transnationalization, aggravation of the global problems of mankind, including the consequences of the COVID-19 pandemic, on the one hand, provide Russia with additional strategic advantages to ensure the prospects for the formation of competitive clusters in the field of health-improving services provision. On the other hand, the global situation requires the implementation of measures to modernize the existing medical and healthcare tourism (MHT) system in Russia, associated with the digitalization processes inevitability, services’ individualization, dynamics of consumer preferences and age structure, and high guarantees for the tourists’ safety. Based on the secondary data analysis, the paper identifies Russia prospective regions in terms of the potential for health tourism clusters formation and development, evaluates sectoral clustering as a method of effective public-private partnership in the field of national health tourism.

Keywords: health tourism, cluster, medical tourism, tourism product
Introduction and problem statement

Today, there are a number of factors hindering the development of health tourism both in Russia as a whole and in its regions:
- Russia is not perceived in the world as a country where medical and health-improving services that meet international quality and safety standards can be provided;
- Russia’s underdeveloped tourist infrastructure characterized by a low level of comfort and service;
- High depreciation and mostly poor conditions of the material base of health-improving institutions;
- Lack of practice of creating favorable conditions for investment in medical and recreational and tourism infrastructure;
- Insufficient measures of state support that allows the global competitiveness growth even in Russian regions rich in medical, health and tourism resources.

The purpose of the study is to determine, based on an analysis of the potential for the medical and health tourism in the regions of Russia development, the prospects for the formation of globally competitive clusters, integrated into the world flows of consumers of a health and wellness product, industry investments, technologies and highly qualified personnel.

Literature review

Until now, there is no clear understanding of the essence of clustering, as well as the cluster, which is based on health tourism as its main phenomenon.

M. Porter is recognized as the founder of the cluster approach in economics. In his research, he defines a cluster as "a group of geographically adjacent interconnected companies and related organizations operating in a certain area and characterized by a common activity and complementary to each other" (Porter, 1985).

Porter’s basic principles of clustering - sectoral and geographical - do not meet modern requirements for the tourism industry development. This clustering model overlooks the innovative and organizational and economic aspects of this process.

In turn, M. Enright (2000) singled out the types of cluster approach implementation, the classification feature of which is the level of state participation.

A. Rodrigues (2003), who studies the relations between enterprises in the tourism cluster, singled out their relationships’ classification:
- horizontal (creation of strategic alliances that unite virtually homogeneous tourism enterprises);
- vertical (built on the principle of long-term strategic relationships and based on one-way supplier-consumer relationships).

In our opinion, the position of A. Rodriguez on clustering process involves the implementation of vertical movement, based on the implementation of directive instructions from above, without taking into account the regional socio-economic characteristics and innovative potential.

Levchenko et al. (2012) defined the tourism and health cluster as “a group of health and wellness attractions in a limited geographic area, provided with a high level of infrastructure and service development and with well-established socio-political ties”.
However, within the framework of this approach, clustering is perceived exclusively from the production side.

In our opinion, the consumer should be at the heart of any tourism cluster. In this regard, it is extremely important that the cluster structure is focused on the formation of internal competitiveness and, accordingly, is aimed at domestic tourism development.

Thus, we propose the definition of a medical and healthcare tourism cluster as a system of commercial and non-commercial economic agents concentrated in a territory with recreational potential and united by functional dependence, as well as using innovative scientific developments in their activities necessary to provide competitive emergency and planned medical care.

It is also worth noting that actively developing medical and health tourism can become a channel that provides inflows of (Markov et al, 2016):
- economic resources (funds of foreign tourists);
- innovative resources (associated with development of new and improvement of existing health-improving services and tourism products);
- labor resources (growth of demand for young, highly qualified, innovatively thinking specialists).

**Research Methodology**

The problem of analyzing the tourism development in Russia regions is exacerbated by the lack of statistical data reflecting the potential for the medical and recreational regions development in terms of their attractiveness among various categories of tourists.

In this regard, it was decided to analyze the trends in demand for health-improving services by studying the statistics of search queries on the Internet.

To do this, during 11/15/2021 a procedure of the same type of requests was carried out through the Google search engine, which is the most popular search tool in countries from which Russia experienced the most active influx of foreign tourists in 2021.

We also note that among the CIS countries, Chinese popular search engines are not in demand due to intrusive extensions for translation, which are perceived by browsers as malware.

It is also worth noting that in 2021 Yandex ceased to be the most popular search engine in Russia, giving way to Google (What are the most popular search engines on the Internet: comparison of regions, 2021).

This proceeded from the fact that the main flow of patients in 2021 was observed from Asian countries: Uzbekistan, Tajikistan, Azerbaijan, Kyrgyzstan, Kazakhstan and some European countries: Ukraine, Armenia, Moldova, Belarus and Latvia (More than 6 million foreigners were treated in Russia in 2021, 2022).

TOP-20 Russia regions by demand for sanatorium resorts (Soviet analogue of spa-resort hotels, located in recreational areas, offering accommodation, meal and daily medical and wellness procedures) in 2021, (according to Sanatorium-resort rest - results of 2021, 2022) are: Krasnodar region, Republic of Crimea, Stavropol region, Altai region, Republic of Bashkortostan, Republic of Tatarstan, Moscow, St. Petersburg, Tyumen region, Moscow region, Kaliningrad region, Ulyanovsk region, Republic of Karelia, Chuvash Republic, Kabardino-Balkarian Republic, Republic of Altai, Leningrad region, Sverdlovsk region, Samara region, Chelyabinsk region.
Table 1 - Analysis of the share of Russian regions among foreign tourists
(compiled by the authors)

<table>
<thead>
<tr>
<th>Region</th>
<th>Average share of a region among domestic tourists</th>
<th>Region</th>
<th>Average share of a region among domestic tourists</th>
</tr>
</thead>
<tbody>
<tr>
<td>Krasnodar region</td>
<td>4,39</td>
<td>Kaliningrad region</td>
<td>0,69</td>
</tr>
<tr>
<td>Republic of Crimea</td>
<td>0,57</td>
<td>Ulyanovsk region</td>
<td>6,93</td>
</tr>
<tr>
<td>Stavropol region</td>
<td>0,71</td>
<td>Republic of Karelia</td>
<td>4,21</td>
</tr>
<tr>
<td>Altai region</td>
<td>9,37</td>
<td>Chuvash Republic</td>
<td>0,35</td>
</tr>
<tr>
<td>Republic of Bashkortostan</td>
<td>16,73</td>
<td>Republic of Kabardino-Balkaria</td>
<td>0,43</td>
</tr>
<tr>
<td>Republic of Tatarstan</td>
<td>61,17</td>
<td>Republic of Altai</td>
<td>2,89</td>
</tr>
<tr>
<td>Moscow</td>
<td>45,18</td>
<td>Leningrad region</td>
<td>4,21</td>
</tr>
<tr>
<td>St. Petersburg</td>
<td>3,12</td>
<td>Sverdlovsk region</td>
<td>4,64</td>
</tr>
<tr>
<td>Tyumen region</td>
<td>40,36</td>
<td>Samara region</td>
<td>1,57</td>
</tr>
<tr>
<td>Moscow region</td>
<td>0,95</td>
<td>Chelyabinsk region</td>
<td>3,65</td>
</tr>
</tbody>
</table>

Table 2 - Comparative analysis of the share of regions of the Russian Federation among domestic and foreign tourists
(compiled by the authors)

<table>
<thead>
<tr>
<th>Region</th>
<th>Average share of a region among foreign tourists</th>
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<th>Average share of a region among foreign tourists</th>
<th>Average share of a region among domestic tourists</th>
</tr>
</thead>
<tbody>
<tr>
<td>Krasnodar region</td>
<td>2,52</td>
<td>3,65</td>
<td>Kaliningrad region</td>
<td>0,79</td>
<td>0,95</td>
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<tr>
<td>Republic of Crimea</td>
<td>7,54</td>
<td>4,39</td>
<td>Ulyanovsk region</td>
<td>0,27</td>
<td>0,69</td>
</tr>
<tr>
<td>Stavropol region</td>
<td>0,34</td>
<td>0,57</td>
<td>Karelia</td>
<td>0,78</td>
<td>6,93</td>
</tr>
<tr>
<td>Altai region</td>
<td>2,17</td>
<td>0,71</td>
<td>Chuvash Republic</td>
<td>0,18</td>
<td>4,21</td>
</tr>
<tr>
<td>Bashkortostan</td>
<td>0,30</td>
<td>9,37</td>
<td>Republic of Kabardino-Balkaria</td>
<td>0,08</td>
<td>0,35</td>
</tr>
<tr>
<td>Tatarstan</td>
<td>1,18</td>
<td>16,73</td>
<td>Republic of Altai</td>
<td>2,97</td>
<td>0,43</td>
</tr>
<tr>
<td>Moscow</td>
<td>50,95</td>
<td>61,17</td>
<td>Leningrad region</td>
<td>4,15</td>
<td>2,89</td>
</tr>
<tr>
<td>St. Petersburg</td>
<td>10,64</td>
<td>45,18</td>
<td>Sverdlovsk region</td>
<td>0,97</td>
<td>4,21</td>
</tr>
<tr>
<td>Tyumen region</td>
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<td>3,12</td>
<td>Samara region</td>
<td>5,93</td>
<td>4,64</td>
</tr>
<tr>
<td>Moscow region</td>
<td>42,23</td>
<td>40,36</td>
<td>Chelyabinsk region</td>
<td>1,15</td>
<td>1,57</td>
</tr>
</tbody>
</table>

In this regard, in the national language of each country of most of tourists visited Russia origin, we carried out 2 groups of requests for the phrase "treatment in Russia", and then - "healthcare in ... (the region from TOP-20 popular destinations in Russia)".

A similar procedure was carried out to analyze the immediate attractiveness of the respective regions, and on the territories of Russia.
Next, the average value of the share of each region of the Russian Federation among foreign tourists was determined (Tab. 1).

Next, a comparative analysis of the obtained values was carried out with the share of each individual region in the structure of the internal MHT (Tab. 2).

Based on the data above, we concluded that the regions of the Russian Federation can be segmented as (Tab. 3):
- medical and health-improving territories, attractive for domestic and foreign tourists;
- health-improving areas, attractive for domestic, but not attractive for foreign tourists;
- medical and health-improving territories, not attractive for domestic, but attractive for foreign tourists;
- health-improving areas that are not attractive for any categories of tourists.

Table 3 – Classification of health-improving regions of the Russian Federation based on the level of their tourists attractiveness (compiled by the authors)

<table>
<thead>
<tr>
<th>Regions of the Russian Federation</th>
<th>Regions attractive to foreign tourists (hereinafter, five regions in each group are arranged in descending order of their popularity among tourists)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Moscow, St. Petersburg, Tyumen region, Moscow region, Crimea</td>
</tr>
<tr>
<td>Regions attractive from domestic tourists</td>
<td>Moscow, St. Petersburg, Moscow region, Tatarstan, Bashkortostan</td>
</tr>
<tr>
<td>Regions attractive from domestic and foreign tourists</td>
<td>Moscow, St. Petersburg, Moscow region, Krasnodar region, Leningrad region</td>
</tr>
<tr>
<td>Regions unattractive for domestic and foreign tourists</td>
<td>Kaliningrad region, Chuvash Republic, Kabardino-Balkaria, Ulyanovsk region, Karelia</td>
</tr>
</tbody>
</table>

So we can conclude that the leading regions showing high rates of development of medical and health tourism both on the part of Russians and on the part of foreigners are Moscow, St. Petersburg, Moscow, Krasnodar and Leningrad region.

However, regions with medium and low values of attractiveness are also quite differentiated, which allows us to say that the pace of international health tourism development there is not uniform and stable.

The above classification allows us to conclude that many regions of the Russian Federation have heterogeneous recreational potential and different levels of tourist attractiveness.

Moreover, not a single health-improving space, except for health-improving areas that are attractive to domestic and foreign tourists, in our opinion, does not bring such a significant synergistic effect.

The interest shown by foreign tourists in the sanatorium and resort tourist regions of the Russian Federation allows us to conclude that the development of the medical and recreational industry in Russia has become more dynamic, which indicates their global tourism potential.

In this regard, it is necessary to search mechanisms aimed at the effective spatial organization of health tourism infrastructure in Russia.

The presence of homogeneous, and sometimes unique resources located in nearby, but not similar in terms of socio-economic development areas, predetermines the development of
cluster structures as the most effective economic and territorial mechanism for the functioning of health tourism, bringing the greatest synergistic effect (Tab. 4).

Table 4 - Resource potential of territories, which determines the development of cluster structures
(Compiled by the authors)

<table>
<thead>
<tr>
<th>Cluster resources</th>
<th>Description</th>
</tr>
</thead>
</table>
| Natural           | - homogeneous climatic, landscape conditions of the territory or several territories included in the cluster;  
- a favorable ecological situation. |
| Cultural and historical | - cultural identity of the territories;  
- presence of cultural objects located in the same and / or adjacent territories. |
| Infrastructural   | - availability of tourism infrastructure (accommodation and food, household and other services);  
- availability of a common transport infrastructure and transport accessibility of adjacent territories;  
- general scientific and technological infrastructure necessary for the implementation of better medical and health-improving and medical procedures |
| Labor (personnel) | - presence of highly qualified specialists involved in the medical and health-improving fields;  
- availability of trained management personnel with the appropriate knowledge, skills and abilities necessary for the effective management of cluster structures |
| Social            | - availability of additional jobs and social guarantees for specialists staying for further employment. |
| Marketing         | - concept of the project (brand, legend, image), capable of rapidly promoting the tourist product to the market;  
- higher level of positioning and quality of services provided;  
- uniform level of domestic demand. |

Moreover, there are a number of prerequisites for the cluster of health-improving type formation:
- presence of enterprises interacting within the framework of business processes and using the competitive advantages of the territory and focused on dynamically developing market segments (for example, the hotel segment, medical, medical, health and sanatorium organizations, organizations responsible for cultural and leisure segments);
- operation of a significant number of small and medium-sized enterprises using different, but common features of technology and / or specializing in the production of one or more types of tourism products and services;
- presence of various research institutes and highly qualified personnel who simultaneously have a high entrepreneurial culture as a result of interaction with various business structures (business incubators, information technology centers, etc.);
- similar corporate culture, general economic climate and policies developed by regional authorities, which are a consequence of the presence of some mutual advantages enjoyed by enterprises located in the same territory;
It is worth noting that the development of cluster tourism structures of the medical and health-improving type as the most effective economic and territorial mechanism is directly related to the main driving forces for the functioning of the sphere of provision and implementation of health-improving services.

So, for example, demographic processes (for example, aging of the population + the need for active longevity), and the associated changes in consumer preferences, predetermined the need to receive not only better, but also comprehensive medical and health services.

Accordingly, it can be assumed that interest in obtaining them will increase directly within the cluster, which has a variety of resource factors (natural, infrastructural, personnel, etc.), which, in turn, will become the center of attraction for tourist interest.

The development of globalization processes and, as a result, the introduction of modern IT technologies, has led to the desire of participants in the market of medical and recreational services to interact, which implies their coordinated interaction (for example, joint online consultations and the development of a single trajectory for the provision of medical care: diagnosis, treatment, rehabilitation process, etc.).

The presence of an appropriate favorable business environment suggests that, in conditions of high competition, medical and health-improving and medical clusters located in the region also tend to cooperate with other industry clusters, which will allow them to carry out joint complementary activities. In addition, partnership with other industry clusters (biological, manufacturing, industrial, etc.) is also very obvious.

However, due to the presence of systemic problems in the tourism industry in Russia, as well as its geographical features, clustering as a trend in the development of the domestic market for medical and health-improving services is still in its infancy.

Conclusions

Thus, it is the clustering process that will allow the regions to solve the previously identified range of problems, giving them advantages in the global health tourism market in the following areas (Kiseleva & Tramova, 2017):

1) external economic priorities in the context of global health (improving the image and quality of the healthcare system of the region (country) both in the foreign market and in the domestic market; formation of a positive attitude towards the region as a global brand region that combines the dynamic development of innovative technologies, a high culture in terms of providing tourist services and established traditions of the quality of medical services (high-tech, specialized, rehabilitation, sanatorium and resort, etc., positioning the region as a center of international health tourism; attraction of investments in national and regional healthcare systems and, as a result, the formation of a healthcare brand in the region; increasing the attractiveness of the national market of medical and health-improving services and, as a result, increasing the level of recognition of national medical specialists and health-improving institutions in regions and countries);

2) creation of additional opportunities to increase the demand for services, taking into account the unstable epidemiological situation (accelerated implementation of "unscheduled" innovations in healthcare; standardization of the processes of rendering health-improving and tourist services due to the influence of international quality and safety standards);
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3) economic benefits (increase in the receipt of financial flows due to an increase in the provision of paid medical and health-improving services to foreign citizens and high-tech assistance to residents of other regions; increase in income from medical and health-improving services, accompanied by an increase in tax revenues; increase in revenues of related enterprises and organizations with a corresponding increase in tax revenues (hotels, which are populated, for example, accompanying the patient, catering establishments, transport companies, museums, etc.);

4) social benefits, including for domestic tourists (increasing the level of access to health care for citizens living in the region where the cluster is based; increase in employment of the population in various spheres; reduction of socio-economic and political tension through the constant exchange of patient flows).

References:


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