

# COMPETITIVE ADVANTAGES OF THE CZECH REPUBLIC FOR THE DEVELOPMENT OF MEDICAL TOURISM

## Konkurenční výhody České republiky pro rozvoj medicínského cestovního ruchu

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### Annotation

Medical tourism is one of the forms of tourism with dynamic development in recent years. To determine the strategic development of the area, it is necessary to determine the strengths of the destination with regard to trends and opportunities that the market offers. The aim of this paper is to identify the competitive advantages of the Czech Republic in terms of medical tourism and answer the key question whether the Czech Republic has the prerequisites for future development. The evaluation was performed on the basis of a comparison of research reports of the Czech Tourist Board (CzechTourism) with international reports evaluating the competitiveness and position of the Czech Republic, namely the country reports of the International Medical Travel Journal, Euro Health Consumer Index, Travel and Tourism Competitiveness Index. Furthermore, the services offered for foreign tourists were evaluated. A price comparison of selected procedures was also included. Based on the analysis, the competitive advantages of the Czech Republic were determined. The identified competitive advantages show that the Czech Republic has good potential for the development of medical tourism. Based on a comparison of the main final reports of foreign and domestic organizations, it follows that the main competitive advantages of the Czech Republic in the field of medical tourism are almost zero waiting times and low cost of quality medical procedures and quality medical care.

### Key words

medical tourism, tourism, Czech Republic

### Anotace

Medicínský cestovní ruch patří mezi formy cestovního ruchu s dynamickým rozvojem v posledních letech. Pro určení strategického rozvoje dané oblasti je nutné určit silné stránky destinace s ohledem na trendy a příležitosti, které trh nabízí. Cílem předloženého příspěvku je identifikovat konkurenční výhody České republiky z hlediska medicínského cestovního ruchu a zodpovědět klíčovou otázku, zda Česká republika má předpoklady pro rozvoj do budoucna. Hodnocení bylo provedeno na základě komparace výzkumných zpráv české centrály cestovního ruchu se světovými reporty hodnotícími konkurenceschopnost a pozici České republiky, a to konkrétně country reporty International Medical Travel Journal, Euro Health Consumer Index, index konkurenceschopnosti cestovního ruchu. Dále došlo ke zhodnocení nabízených služeb pro zahraniční turisty. Zařazeno bylo i cenové srovnání vybraných zákroků. Na základě analýzy byly určeny konkurenční výhody České republiky. Z identifikovaných konkurenčních výhod vyplývá, že Česká republika má dobrý potenciál pro rozvoj medicínského cestovního ruchu. Na základě komparace hlavních závěrečných zpráv zahraničních i tuzemských organizací vyplývá, že hlavními

*konkurenčními výhodami České republiky v oblasti medicínského cestovního ruchu jsou téměř nulové čekací doby a nízká cena kvalitních lékařských zákroků a kvalitní lékařské péče.*

**Klíčová slova**

*medicínský cestovní ruch, cestovní ruch, Česká republika*

**JEL classification:** Z32, L83

## 1. Introduction

Medical tourism is one of the lesser-known forms of health-oriented tourism, which involves traveling abroad for medical procedures. The motives of participants in medical tourism are different and may represent, for example, lower costs of medical procedures in a foreign country, long waiting times, low quality of health care or even the illegality of some health procedures in the home country. However, medical tourism brings significant economic revenues to recipient countries, and as patients often combine their journey with interventions with holidays, it also has a significant multiplier effect. Therefore, individual countries are trying to develop and support medical tourism. These countries include the Czech Republic, which through the Czech Tourist Board CzechTourism seeks to promote medical tourism in the Czech Republic on foreign markets, and thus attract foreign patients.

The aim of the paper is to identify the competitive advantages of the Czech Republic for the development of medical tourism. The evaluation was performed on the basis of a comparison of research reports of the Czech Tourist Board with international reports assessing the competitiveness and position of the Czech Republic, namely the country reports of the International Medical Travel Journal, Euro Health Consumer Index and the Tourism Competitiveness Index. Furthermore, the services offered for foreign tourists were evaluated. A price comparison of selected procedures was also included. Based on the analysis, the competitive advantages of the Czech Republic were determined.

## 2. Theoretical background

In connection with globalization and the dynamic development of tourism, a multilateral demand shift is emerging, which is caused by changes in society and the emergence of new consumer segments. There is pressure to adapt and create innovative products and offers of alternative forms of tourism that are more responsive to the specific needs, lifestyles, experiences and creativity of consumers. This pressure requires greater flexibility on the part of service providers, the use of technology, the improvement of business strategies and the need for planning (Novotná, Grajciarová, Polehňa, 2019). Scholz (2015) states that 80 % of human health is long-term dependent on lifestyle (diet, exercise, rest, etc.) and the remaining 20 % is for heredity, the environment and health care. Medical tourism is a relatively new concept that began to appear on a larger scale only at the beginning of the 21st century (Cohen, 2008). Although there are many definitions of medical tourism in the literature, all authors agree in principle that the essence of medical tourism is to travel abroad for planned medical procedures. Most authors also state that the journey to medical treatment in medical tourism is often associated with a holiday, either before the procedure itself or after post-recovery (Adams et al., 2013; Cohen, 2008; Johnston et al., 2010; Rab-Przybyłowicz, 2016; Sharma, 2013).

Some authors emphasize that travel abroad for medical treatment must be voluntary, and although medical treatment may not be the primary reason for traveling abroad, it must not be related to the patient's immediate medical condition, which appeared during his trip or vacation (Adams et al., 2013; Cohen, 2008; Rab-Przybyłowicz, 2016). Thus, a person who has been treated unplanned in a foreign medical facility during his holiday as a result of an injury or a sudden illness is not considered as a medical tourist. Foreigners who use medical services in the country where they live, study or work for a long time and people who commute to cross-border healthcare facilities because they are closest to them are also excluded from the definition of medical tourists (Kotíková, 2013; Rab-Przybyłowicz, 2016).

There are a number of reasons why people choose to undergo medical treatment abroad rather than in their home country. One of the main reasons is the several times lower price of the procedure. Especially in Asian countries and Latin American countries with generally lower price levels, the prices of medical procedures are more affordable for people from more advanced economies such as the USA, Canada, Australia, New Zealand or Western Europe (Johnston et al., 2010; Kotíková, 2013; Rab-Przybyłowicz, 2016).

Johnston et al. (2010), Kotíková (2013) and Rab-Przybyłowicz (2016) also point out that in some countries long waiting times for a certain type of medical procedure, such as transplantation of vital organs, can be a big problem. In these cases, patients do not want to and sometimes cannot even wait, so they decide to undergo this operation

abroad, where they do not have to wait for months or years for the operation. Some types of medical procedures are not available to patients at all in some countries. This may be due not only to the technological sophistication of hospitals, but also, for example, to the illegality of certain medical procedures in the home country, such as abortion, euthanasia or the choice of the child's sex, which are legal abroad (Kotíková, 2013; Rab-Przybyłowicz, 2016). The low technological maturity of hospitals in some countries is associated with lower quality of medical care. In these cases, patients prefer to seek medical treatment abroad, where, thanks to more technologically advanced methods and quality experts, they will receive better quality care with a higher probability of the expected result (Kotíková, 2013). Another motive for undergoing the procedure abroad is the possibility of combining a visit to a medical facility with a holiday. Johnston et al. (2010) state that patients often choose clinics for medical procedures abroad according to the destination in which they will feel like on holiday, which will make their subsequent recovery more pleasant. In addition, many patients take their family members with them on a trip abroad, who consider the trip primarily as their holiday (Kotíková, 2013). Conversely, some patients living abroad for a long time may choose to return to their country of origin, which is closer to them linguistically, culturally or religiously, due to a medical procedure (Smith and Puczkó, 2014). According to Kotíková (2013), for some patients, the fact that no one knows them in a given place also plays an important role in choosing a foreign clinic, and so they can undergo a medical procedure with a certain anonymity.

Given that medical tourism brings economic benefits to countries that offer this form, identifying competitive advantages is key to fostering competitiveness in the area. It is obvious that in order to strengthen the competitive position of a tourism destination, the application of stakeholder administration activities (Luštický, Musil, 2019) must follow, both at the national and regional level (Pelantová, Kouřilová, 2016).

### 3. The position of the Czech Republic on the medical tourism market

The Czech Republic does not keep official statistics on medical tourism, so the exact official numbers of incoming medical tourists by country are not currently available. According to the yearbooks of the countries in the section of medical tourism published by the International Medical Travel Journal (2011; 2014; 2016), the most important source countries of the Czech Republic are Germany, Great Britain, Austria, Russia, Switzerland, Slovakia, Poland and the United States. Czech clinics also accept patients from, for example, Italy, Canada or Ireland. According to a 2012 CzechTourism survey involving 11 Czech clinics and 15 Czech public hospitals, 10 % of foreigners treated in these facilities come from Germany, 8 % from Russia, Slovakia and the United Kingdom of Great Britain and Northern Ireland, 6 % from Ukraine and Poland, 5% from Vietnam and Austria, 4 % from the United States, the Netherlands and Switzerland, 3 % from Belgium, Denmark, France, Italy, Spain and the Arab countries, 2 % from China, Australia and Kazakhstan and the remaining percentages people in the Middle East, Africa, Japan, Libya, Ireland and other EU countries. However, these statistics do not distinguish between medical tourists, treated tourists and treated foreigners living in the Czech Republic for a long time (CzechTourism, 2013).

The Czech Republic is not one of the countries with the highest numbers of medical tourists in the world, however, their number more than tripled between 2008 and 2018. In 2008, approximately 6,000 medical tourists visited the Czech Republic, in 2010 9,000 and in 2018 almost 20,000 went to the Czech Republic (International Medical Travel Journal, 2011a; International Medical Travel Journal, 2019b). In addition, the World Tourism & Travel Council (2019) ranks the Czech Republic among the 25 countries with the highest revenues from medical tourism, specifically 13th out of 115 countries analyzed. According to the World Tourism & Travel Council (2019), revenues from medical tourism account for 3.8 % of total tourism revenues in the Czech Republic.

The number of medical tourists in the Czech Republic is growing at a rate of 10 - 15 % per year (International Medical Travel Journal 2016). Revenues of medical facilities from medical tourism amount to about half a billion CZK per year, ie about 22 million USD (International Medical Travel Journal, 2016). However, these revenues do not include other expenses of medical tourists coming to the Czech Republic, including, inter alia, expenses for transport, accommodation, meals and entertainment, which are included in the overall statistics on tourism participants in the Czech Republic.

In most cases, medical tourists also do not travel to the Czech Republic alone, but have one or more accompanying persons with them. In addition, medical tourists stay in the Czech Republic for an average of one week longer and spend two to three times more than ordinary tourists, thus making a significant contribution to the state budget (International Medical Travel Journal 2016). According to data from the World Travel & Tourism Council (2019), in 2017 the total revenues of the Czech Republic from medical tourism amounted to USD 265 million, ie approximately CZK 6 billion. Medical tourists in the Czech Republic receive both private and public medical facilities and hospitals (CzechTourism, 2020a), so revenues from medical interventions of foreign paying customers go not only to the private but also to the public sphere of healthcare. On the one hand, this brings benefits

to Czech patients in the form of improving the quality of public hospitals, but on the other hand, due to the demand of foreign patients, the waiting time for the required procedures may be extended.

#### 4. Competitive advantages of the Czech Republic

The main advantage for medical tourists heading to the Czech Republic is the ratio of the price of medical procedures and their quality. The good reputation of the Czech healthcare in the Euro Health Consumer Index, which compares healthcare systems in European countries, contributes to the good reputation of the Czech healthcare system. In 2018, the Czech Republic ranked 14th out of 35 countries under comparison and 1st in the Central and Eastern Europe region (Heath Consumer Powerhouse, 2019). The fact that the Czech Republic has a good reputation in the field of health-oriented tourism is also evidenced by its placement in the first place in the Best Medical Stay category in the National Geographic Traveler Awards 2019, organized by the Russian travel magazine National Geographic Traveler (Vejvodová, 2019). The Czech Republic is perceived among medical tourists as a destination suitable especially for dental care, plastic and cosmetic surgery, obesity treatment, infertility treatment and eye surgery (International Medical Travel Journal, 2019b; Kotíková, 2013).

According to CzechTourism, 60 % of medical tourists seek out the Czech Republic for cosmetic surgery (Kotíková 2013). The Czech Republic was the first country to set aside plastic surgery as an independent branch of medicine, and can thus guarantee patients many years of experience and high quality of its services. The Czech Republic offers a number of cosmetic and plastic surgery procedures, the most common is the breast augmentation, abdominal plastic surgery, eyelid plastic surgery, face and neck lifting or liposuction or non-invasive cryolipolysis to remove excess fat (CzechTourism, 2015h; Kotíková, 2013).

The second most common reason for medical tourists visiting the Czech Republic is the treatment of obesity (Kotíková, 2013). The Czech Republic is the world leader in performing laparoscopic gastric banding, which was directly developed here. In addition, Czech physicians in the field of bariatric surgery perform gastric tubulation, gastric plication, gastric bypass, intragastric balloon insertion or biliopancreatic diversion, which limit the required amount of food and thus help reduce weight (CzechToursim, 2015a).

Up to 15 % of medical tourists go to the Czech Republic for infertility treatment (Kotíková, 2013). Assisted reproduction is at a very high level in the Czech Republic and in the case of donated eggs it has a success rate of up to 70 %. In addition, anonymous donation of eggs and sperm is legal in the Czech Republic and allows recipients to choose the physical characteristics of the donated egg or sperm (CzechTourism, 2015g; International Medical Travel Journal, 2016). The Czech Republic also excels in neurology and neurosurgery, especially thanks to modern technologies and techniques that allow brain surgery to be performed with minimal damage to surrounding tissues. These technologies and techniques include, for example, gamma knife, stereotactic, endoscopic or robotic surgery (CzechTourism, 2015c). The Czech Republic is also a popular destination for orthopedic procedures, which include, for example, hip, shoulder or elbow replacement, laser eye surgery, dentistry, cardiology and cardiac surgery, pediatrics, diagnostics and comprehensive examinations, oncology, which offers one of five proton cancer treatment centers in Europe, but also other branches of medicine such as gynecology, urology, gastroenterology, hepatology and endokrinology (CzechTourism, 2015d; CzechTourism, 2015e; CzechTourism, 2015f; CzechTourism, 2020b).

The main competitive advantages of the Czech Republic in the field of medical tourism are almost zero waiting times and the low price of quality medical procedures and medical care. Compared to other, especially Western European destinations, the prices of medical procedures in the Czech Republic are several times lower. According to research by the CzechTourism agency, medical tourists will save more than EUR 2,500, ie approximately USD 2,750, on average by performing a medical procedure in the Czech Republic compared to their home country (Kotíková, 2013). A comparison of the prices of the most common medical procedures in the Czech Republic, the United Kingdom of Great Britain and Northern Ireland (UK) and the United States of America (USA) is given in Tab. 1.

The low price of medical procedures is related to the relatively low price level in the Czech Republic and certainly does not signal the low quality of medical care. All medical staff is highly qualified. After studying at university, Czech doctors must complete many years of experience and obtain an attestation before they can perform operations themselves or open their own surgery (Medicaltourism.cz, 2016e). In addition, Czech physicians are world-renowned and, thanks to their continuous education and top equipment of Czech medical facilities, they master the latest treatment methods that are not yet available in many countries (CzechTourism, 2015b; Kotíková, 2013; Medicaltourism.cz, 2016b; Medicaltourism.cz, 2016e).

**Tab. 1: Price comparison of the most common medical procedures in USA, UK, CZ (in USD)**

Medical procedure	USA	UK	CZ
Dental implant	4 497	3 441	1 320
Eye laser operation	3 620	3 214	1 210
Assisted reproduction/ivf	28 800	24 331	6 050
Knee joint replacement	20 119	12 210	8 459
Medium to large liposuction	7 370	5 082	1 430
Abdominal liposuction	10 670	7 810	1 980
Vasectomy	2 376	2 343	858
Stomach tubulization	21 890	23 980	6 072

Source: authors' own processing based on data *Medicaltourism.cz* (2016c)

The quality of medical facilities is also proven by their accreditation. At present, there are 116 medical facilities accredited by the Joint Accreditation Commission (Joint Accreditation Commission, 2020) in the Czech Republic, and a total of three Czech hospitals also hold JCI international accreditation. In addition, the CzechTourism agency presents a list of 47 recommended medical facilities that meet the requirements of foreign clients, ie especially the language skills of the staff and the ability to offer basic and additional services of the highest quality (CzechTourism, 2020a).

Very important factors for choosing a medical tourism destination are also the location, the safety of the country, the quality offer of accommodation and hygienic standards, which are very favorable for the Czech Republic. The Czech Republic is located in the heart of Europe and is easily accessible by all modes of transport (Kotíková, 2013; Scholz, Voráček, 2016). The Czech Republic is considered the 10th safest country in the world (Institute for Economics and Peace, 2019) and in the field of health and hygiene was evaluated by the World Economic Forum (2019a) 6.9 points out of 7, ranking 4th out of 140 countries evaluated. One of the reasons for the Czech Republic's position among the countries with the best hygiene is the strict standards, which are enshrined in Czech law, and apply not only to hygiene, but also to drugs or medical staff requirements that ensure patient safety and minimize health risks (Medicaltourism.cz, 2016a).

The Czech Republic provides a comprehensive range of services and a range of medical procedures that solve the problems of almost all patients. The Czech Republic can also offer medical tourists convalescence or various combined treatment programs in spa facilities that have a long tradition and a good reputation in the world. In addition, there are world-class tourist attractions in the Czech Republic, which can diversify the stay not only for patients, but also for their possible accompaniment (CzechTourism, 2015a; CzechTourism, 2015b; Kotíková, 2013).

#### 4.1. Summary of results

**Tab. 2: General competitive advantages for the development of tourism**

convenient location in the middle of Europe, good transport accessibility
free movement of persons and services, no visa requirement for citizens of the Schengen States
the 10 <sup>th</sup> safest country in the world according to the World Peace Index
suitable transport infrastructure and serviceability within the Czech Republic
environmental sustainability
attractiveness of world tourism (especially Prague, which is also known in more distant markets)
rich culture
Czech number of tourists from distant markets (eg China, USA, Russia, Republic of Korea)
organizing regular events of international importance
a high number of UNESCO monuments, relatively evenly distributed throughout the Czech Republic
low unemployment rate
international openness
favorable business environment
high level and prevalence of information and communication technologies
almost 100 % coverage of fixed broadband and 4G networks
capacity of accommodation facilities

Source: authors' own processing

**Tab. 3: Specific competitive advantages for the development of medical tourism**

4th place in the field of health and hygiene in the ranking of TTCI 2019
strict hygiene standards
strict standards in the field of medicines
strict monitoring and control of compliance with all hospital procedures, ensuring patient safety
high quality healthcare
high number of hospital beds (above the OECD average)
world-renowned doctors
price competitiveness compared to developed western countries
cutting-edge technologies and techniques that are not available in many countries (eg gamma knife, proton center, robotic surgery)
highly developed pharmaceutical industry
a large number of offered medical procedures
short waiting times for medical procedures
good name of Czech healthcare in the world
historically excellent level of medicine
high success rate of assisted reproduction
one of the lowest infant mortality rates in the world
less stringent legislation on egg and sperm donation than in other EU countries, but still regulated by the state to ensure maximum patient safety
Reimbursement of part of medical procedures to patients from other EU countries by their health insurance company on the basis of Directive 2011/24 / EU of the European Parliament and of the Council on the application of patients' rights in cross-border healthcare
Strict protection of sensitive patient data (GDPR)
the possibility of combined treatment and recovery programs in the spa
good name of the Czech spa in the awareness of potential medical tourists
a large number of spas
a sufficient number of medical tourism intermediaries targeting different markets
quality promotion of medical tourism on websites

Source: authors' own processing

## 5. Conclusion

Today, medical tourism is a world phenomenon whose importance is constantly growing. In recent years, health services have become a commodity that is now part of international trade, in which the laws of supply and demand apply. The identified competitive advantages show that the Czech Republic has good potential for the development of medical tourism. However, it would be appropriate to reconsider the target markets of the Czech Republic and focus its promotion on the current major world source countries for medical tourists, as patients from these countries are ready to travel abroad for procedures and it will therefore be easier to reach them. Due to the higher price competitiveness of Asian medical tourism destinations, the Czech Republic should focus its promotion on its other competitive advantages, which are primarily the safety of the country, strict hygiene standards and high quality medical care at an affordable price. The Czech Republic should also consider sales promotion tools as part of its marketing strategy, which can work very well, as can be seen in other destinations. Based on a comparison of the main final reports of foreign and domestic organizations, it follows that the main competitive advantages of the Czech Republic in the field of medical tourism are almost zero waiting times and low cost of quality medical procedures and quality medical care. Compared to other, especially Western European destinations, the prices of medical procedures in the Czech Republic are several times lower.

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