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### **Marketing research of the medical services market in the region**

#### **Abstract**

*Main problem:* One of the most complicated types of marketing is marketing of medical services or organizations. This can be attributed to many reasons. First of all, person's life and health is the most important value. One more reason is that budget funds are limited, this forces us to look for extra-budgetary financing sources. At the same time, it follows that the population of the Republic of Kazakhstan, receiving free assistance for a long time, refuse paid medicine, the solvency of a large percentage of the population.

Thus, marketing research of the services market is designed to identify the real market share of trade and paid medicine, to fill the need of the qualified medical care, to identify the particularity of demand in various segments and the demographic and psychographic characteristics of the population groups.

*Purpose:* to identify current trends and develop marketing strategies in the regional market of medical services, allowing to identify and strengthen the economic foundations of the functioning of non-profit organizations in the national market.

*Methods:* The research was conducted using traditional methods of marketing research: qualitative: in-depth interview, focus groups; quantitative: survey, as well as methods of economic analysis: comparative, graphical and scenario planning.

*Results and their significance:* the essence of marketing in healthcare is considered, the features of marketing research are taken into account; the medical services market of Pavlodar region is analyzed and evaluated and ways of its improvement are proposed. The results of the study may be useful for the development of measures to further improve the activities of medical organizations in the Republic of Kazakhstan.

*Keywords:* medical services; marketing research; regional aspect; features of the survey; factors of influence on the development of the market of services in the field of medicine.

#### **Introduction**

Research in medicine in the field of marketing (including in the field of medical services) is based on an analysis of the full range of positive and negative factors that affect the function of the medical market.

Negative factors important for medical marketing research may be political (tense atmosphere in the regulation of modern international trade, including trade in medical equipment, medicines necessary for the provision of medical services), economic (the impact of the consequences of the introduction of economic bans by the European Union, the growth of the exchange rate and the high price for the purchase of medicines and equipment for the provision of services, high inflation), social (falling purchasing power of the population, an increase in the "social gap" between the poor and the rich, low qualifications of medical workers due to the low level of the labor market, reduced social mobility of the population, social immobility).

The main problem: One of the most complicated types of marketing is marketing of medical services or organizations. This can be attributed to many reasons. First of all, person's life and health is the most important value. One more reason is that budget funds are limited, this forces us to look for extra-budgetary financing sources. At the same time, it follows that the population of the Republic of Kazakhstan, receiving free assistance for a long time, refuse paid medicine, the solvency of a large percentage of the population.

Thus, marketing research of the services market is designed to identify the real market share of trade and paid medicine, to fill the need of the qualified medical care, to identify the particularity of demand in various segments and the demographic and psychographic characteristics of the population groups.

Objective - to identify current trends and develop marketing strategies in the regional market of medical services, allowing to identify and strengthen the economic foundations of the functioning of non-profit organizations in the national market.

#### **Materials and methods**

The research was conducted using traditional methods of marketing research: qualitative: in-depth interviews, focus groups; quantitative: survey, as well as methods of economic analysis: comparative, graphical and scenario planning.

#### **Results**

The essence of marketing in healthcare is considered, the features of marketing research are taken into account; the medical services market of the Pavlodar region is analyzed and evaluated and ways of its

improvement are proposed. The results of the study may be useful for the development of measures to further improve the activities of medical organizations in the Republic of Kazakhstan.

### Discussion

In the economic sciences, there are several important areas regulating social processes, one of them is in marketing research [1]. Marketing is a good instrument for producing and selling and commercial areas as well as for non-profit organization like healthcare, upbringing, education, social security, etc. [2; 102].

The special features of the medical services marketing research results from the essence of the medical service. It is a common fact that a service is a certain form of production activity that leads to the formation of not material benefits, but a specific generally accepted useful effect represented by a material object (material service) or focused on the person directly (pure service). In a point of fact, the pure service includes the doctor's activity, that results in the effect of preserving and promoting health [3; 96].

The marketing information analysis system is a set of methods and models of statistical information processing used to solve certain marketing tasks (consumer assessment, price calculation, selection of medical services promotion systems, advertising budgets, etc.). The structural block of the system is shown in Figure 1.

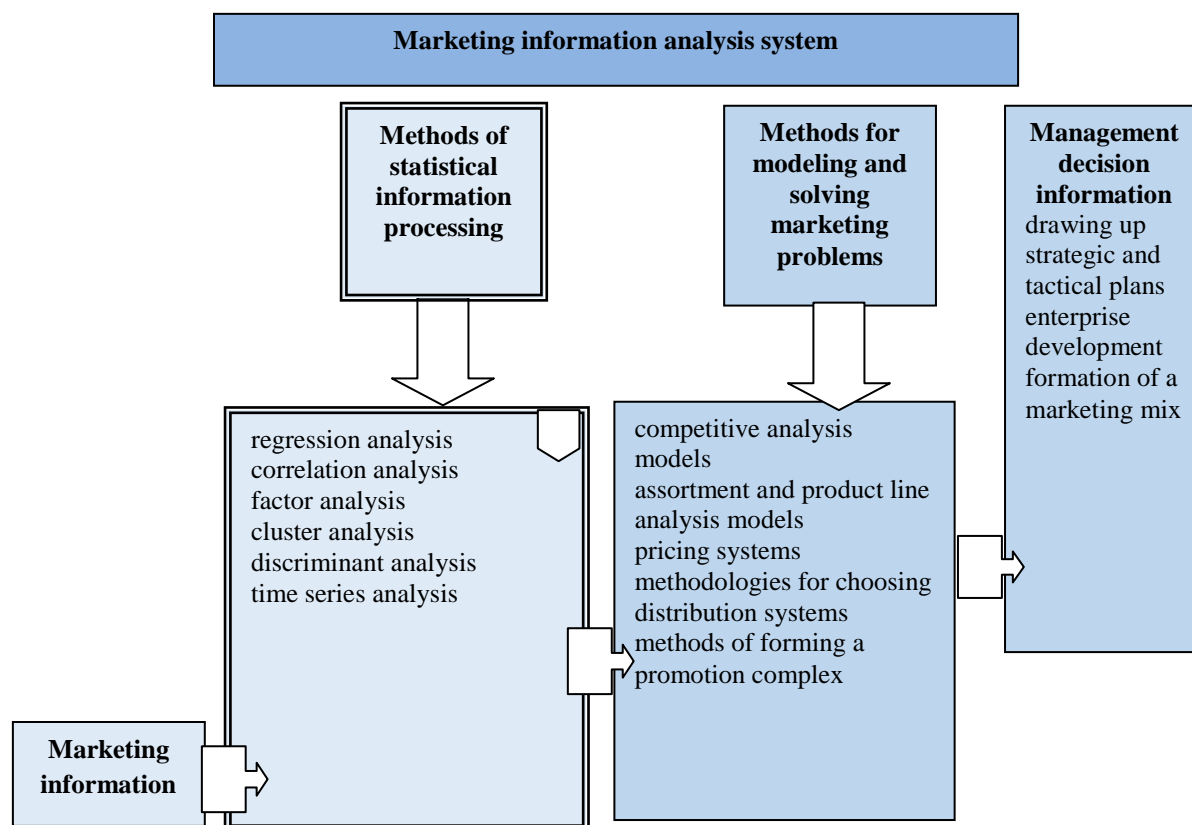


Figure 1 – Marketing information analysis system

When developing marketing programmes the number of medical services characteristics should be taken into account:

- non substantial: this type of service cannot be tried, seen, tasted until the moment of purchase. It's impossible for a patient at the appointment to know the result of the visit beforehand. The patient has to accept the doctor's word for it;

- inherency from the source, whether it is a doctor, nurse, or medical equipment. Consider the case of a visit to a famous psychiatrist. The service is not going to be the same if it would be replaced by a less known specialist or even a debutant;

- inconstancy of quality, which depends on suppliers and the place where the service is provided. A well-known specialist will provide more qualified assistance than a young doctor. But the same specialist can provide services in different ways, depending on the mood and his physical condition. Therefore, the service provider must constantly monitor the degree of customer satisfaction through a system of surveys and inspections;

- unserviceability: not coincidentally that patients who didn't come to the appointment pay fee in the United States, as the service value was just at the time of the patient's absence. In conditions of stable demand, non-preservation of the service is not a problem. If the demand ranges, the managing of the level of demand should be applied by introducing a system of pre-orders, a special schedule of work during peak load;

- inability to demonstrate;
- the absence of intermediaries, because all medical services are provided directly: the patient must visit a medical and preventive institution;
- limitation of transportation of most services..

Medical services differ significantly from each other and according to type. They can be grouped by various criteria, which include the sources of the service. For example, a psychiatrist doesn't need equipment, but a cardiologist does. Some services, where a source is a person, require whether qualified specialists (doctors, nurses) or general laborers (nurses, etc.). Other services, where a source is a machine, divide into services that require low-skilled operators to control devices (electrophoresis, UFOs, etc.), or equipment operated by highly qualified specialists (computers, etc.). It should be noted that medical services requires the mandatory presence of the client at the time of its provision [4;141].

Recently, marketing services have begun to appear and firms and organizations have begun to turn to marketing agencies for help. Previously, clinics did not need marketing, as they were already popular and in demand. But in the modern world it is no longer possible to work without market research data, like other medical institutions.

Marketing research includes collecting information about customers, findings, information about competitors and other offers, performing an assessment on the market.

According to F. Kotler [5], marketing research is a systematic determination of the range of data required in connection with the marketing situation facing the company, their collection, analysis and report on the results.

You can analyze the market according to certain different parameters. The specific parameters depend on the purpose and source of the information - both primary (information collected for the first time for a specific purpose) and secondary (earlier information collected for other purposes). Among all the exploitable methods of collecting primary data relating to the service quality and the cost of services offered, the most promising marketing objectives are observation and a survey allowing to receive information about people's beliefs and preferences, their level of satisfaction, etc. A questionnaire was developed for this purpose.

Market research includes an analysis of all the conditions that are crucial for the success of service provision and sales efficiency, as well as an analysis of consumer motivation, analysis of seasonal fluctuations in demand, advertising opportunities, and competitor activity.

The following factors may affect the sale of a service:

- reliance on the equipment necessary;
- price for the service, including when the price of the service differs from that of a competitor; It is necessary to notice that medical and preventive institutions prices of the same organizational and legal form differ not so much;
- replaceability of services;
- the purchasing power for the service [6; 85].

At the moment, due to the low solvency of residents, the demand for paid medicine is limited, so medical institutions are not able to set an objective price.

Moreover, the factors listed below is influential for the sale of services:

- the position of organisation in the medical services market;

for the modern regional market, this is the priority position of the manufacturer in relation to the consumer (the “seller's market”), which manifests itself in the dictate from the manufacturer (for example, the state health system), in the reduction of freedom of choice for the consumer or in general shortage. The “seller's market” has become the main obstacle to the renewal of the financing system, the introduction of new medical technologies and the emergence of new services;

- competitive pressure;

By now, the competition of medical services in the regional market is not so high: the dominant position still belongs to city polyclinics, and newcomers often have issues with registration, and provision of medical services is not always advantageous in modern conditions

- prestige of the institution;

Although, most often, patients visit the same clinic all their lives, so they do not have the opportunity to compare the quality of the services provided. But the reputation of field-specific clinics is quite high;

- partitioning of the market;
- spectrum of services; total capacity of the market;
- the balance of forces of a medical and preventive institution and its competitors;
- inelasticity of demand for medical services;

In practice, due to the territorial attachment of patients to polyclinics, there is a clear separation. Moreover, many polyclinics protect their segment not only from representatives, but also from "foreign" patients..

Market relations in the field of healthcare have their own characteristics:

1. It is very difficult for the buyer to determine the use value of a medical service;
2. There are no uniform criteria for determining the quality of medical services yet;
3. The cost of medical services in different medical institutions is determined by different methods;

4. State ownership in the field of healthcare significantly restricts the operation of the law of supply and demand and competition, although the issue of transition to a variety of forms of ownership in this area, and the introduction of payment for health services is overdue.

Based on the foregoing, most researches in the field of marketing of medical activities are aimed at identifying actual trends and the ratio of free and paid medical services provided, how satisfied consumers are with the speed, quality, cost of medical care, the characteristics of supply and demand trends in the study region, as well as various aspects of demographic and psychographic nature of the attitude to medical services of different segments of the population [7; 24].

Figure 2 shows the dynamics of medical institutions in the healthcare system of Pavlodar region from 2018 to 2021.

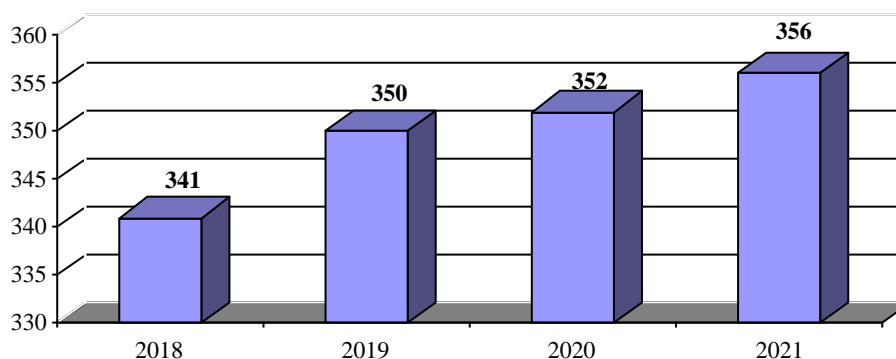


Figure 2 - Dynamics of medical facilities of the health care system of Pavlodar region for 2018-2021, number of units

As of August 31 2020 years 356 medical facilities of the Ministry of Health and Social Development of the Republic of Kazakhstan are functioning on the territory of the Pavlodar region, including 48 legal entities, 23 hospital organizations, 5 dispensaries, 13 outpatient polyclinic organizations and 7 other medical organizations. In addition, the central district hospitals and polyclinics include the following units: rural hospitals – 1, outpatient clinics - 67, paramedic and obstetric centers - 24 and medical centers - 230 [8].

In 2020, there are 190 medical institutions in the Pavlodar region, excluding the cities of the region, 130 of them are medical posts, 30 are paramedic-obstetric stations, 20 are outpatient clinics and 10 hospitals. It follows from the presented data that 68 percent of the total structure of medical institutions in the districts of Pavlodar region is occupied by medical centers, the proportion of outpatient clinics is 11 percent, FAP is 16 percent.

The provision of the population of rural districts of Pavlodar region with doctors of all specialties on average in 2020 years is 15,7 percent per 10 thousand population. The analysis of the provision of the population of rural districts of Pavlodar region with doctors of all specialties and hospital beds showed that the situation in the region is relatively good.

The largest volume of services was formed due to the activities of hospital institutions, they provided services for 7340,9 million tenge (58,4 %). Organizations engaged in medical practice provided services for 3433,5 million tenge (27,3 %), organizations engaged in human health protection activities for 759,1 million tenge (6 %), organizations providing social services with accommodation for 627,2 million tenge (5 %).

In 2020, there were 4 organizations of rehabilitation treatment and medical rehabilitation in the Pavlodar region, including 2 sanatoriums, 1 specialized sanatorium and a rehabilitation center [9].

The number of sanatorium beds at the end of the year amounted to 860 units, including the number of sanatorium beds for children – 210 units.

As of January 1, according to the Health Department of the Pavlodar region, there are 7 rehabilitation centers in the region: Center, Lermontova, 91; Pavlodar, Lermontova, 59; OOI Rehabilitation Center “Samal”, Nursultan Nazarbayev Avenue, 42/2; Votonia, children's rehabilitation Center, Academician Bekturov, 62/2; KID, rehabilitation center, Aimanova, 41; Ardagerler uyi, regional rehabilitation center for the disabled and elderly, Green Grove, 4; Regional, Nursultan Nazarbayev Avenue, 42/1; Center, Usolka, 62.

At the present stage of development of domestic healthcare, its preventive orientation remains a priority, the purpose of which is to establish risk factors and early detection of various diseases. In solving these tasks in the system of medical care, an important role is assigned to the diagnostic service, which is a key link at the pre-hospital stage [10].

On average, about 21 million laboratory tests are performed annually by the clinical and diagnostic laboratories of the Pavlodar region.

The total number of laboratory tests per inhabitant of Pavlodar region has increased by 14,5 percent in five years (from 26,81 in 2015 years to 30,13 in 2020 years). The smallest number of studies were conducted in 2015 years (26,81), which could be due to the impact of the global financial and economic crisis that began, the

largest – in 2018 years (31,58), when measures for the implementation of the State Program “Salamatty Kazakhstan” intensified.

### **Conclusion**

Regional marketing research conducted in the Pavlodar region covers the following areas of provision of paid medical services: the offer of services for the preservation of life, the offer of services for the preservation and restoration of health, the offer of services for the treatment of acute and chronic diseases, cosmetic services, consulting services, low-operative services, expert, organizational, therapeutic and diagnostic, hygienic, sanitary, inpatient, polyclinic, etc. Infrastructure development, which is aimed at digitalization of all sectors of the economy, contributes to these areas at the level of the EAEU countries [11].

In general, such branches of medicine as gynecology, ophthalmology, dentistry and cosmetology are leaders in the market of paid medical services.

The strengths of paid medical services identified during the regional marketing research of paid medical services of the Pavlodar region can be called a fairly balanced ratio of price and quality, the complexity of services, guarantees, the use of modern technologies, the availability of a training system for medical personnel, built partnerships with wholesale companies, work on compulsory health insurance.

Marketing research, especially in the regions, is necessary to develop programs for paid medical institutions in the aspect of providing high-quality, full-range medical services in highly competitive conditions [12; 53].

In the competitive struggle, medical service providers actively use various marketing programs, advertising moves, study the client base, the market in order to provide quality assistance and update the list of services that would enhance competitive advantages and improve the health of residents.

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### Өңірдің медициналық қызметтер нарығын маркетингтік зерттеу

Медициналық қызмет көрсету маркетингі немесе медициналық ұйымдардың маркетингі - маркетингтің ең күрделі түрлерінің бірі. Бұл бірқатар себептерге байланысты. Ең алдымен, медициналық қызметтер адамның ең басты құндылығы - оның өмірі мен денсаулығын сақтаумен байланысты. Тағы бір себеп – бюджеттен тыс қаржыландыру көздерін іздеуге мәжбүр ететін бюджет қаражатының шектеулі болуы. Бұл ретте ұзақ уақыт бойы тегін медициналық көмек алатын Қазақстан халқының ақылы медицинаны қабылдамайтынын және халықтың негізгі бөлігінің төлем қабілеттілігі төмен екенін ескеру қажет.

Осылайша, медициналық қызметтер нарығын маркетингтік зерттеу ақысыз және ақылы медицинаның арақатынасының нақты тенденциясын, тұтынушылардың медициналық қызмет көрсету сапасына қанағаттануын, әртүрлі аймақтардағы сұраныстың ерекшеліктерін және демографиялық және психо-графикалық сипаттамалары бойынша әр түрлі топтарды анықтауға арналған.

Авторлардың анықтағаны – қазіргі заманғы үрдістерді анықтау және ұлттық нарықта коммерциялық емес ұйымдардың жұмыс істеуінің экономикалық негіздерін анықтауға және нығайтуға мүмкіндік беретін медициналық қызметтердің өңірлік нарығында маркетингті дамыту стратегияларын қалыптастыру.

Зерттеу маркетингтік зерттеудің дәстүрлі әдістерін қолдана отырып жүргізілді: сапалық: терең сұхбат, фокус-топтар; сандық: сауалнама, сондай-ақ экономикалық талдау әдістері: салыстырмалы, графикалық және сценарийлік жоспарлау.

Денсаулық сақтаудағы маркетингтің мәні қаралды, маркетингтік зерттеудің ерекшеліктері ескерілді; Павлодар облысының медициналық қызметтер нарығы талданды және бағаланды және оны жетілдіру жолдары ұсынылды. Зерттеу нәтижелері Қазақстан Республикасындағы медициналық ұйымдардың қызметін одан әрі жетілдіру мақсатында іс-шараларды әзірлеу үшін пайдалы болуы мүмкін.

Түйін сөздер: медициналық қызметтер; маркетингтік зерттеулер; өңірлік аспект; сауалнама ерекшеліктері; медицина саласындағы қызметтер нарығының дамуына ықпал ету факторлары.

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### **Маркетинговые исследования рынка медицинских услуг региона**

Маркетинг медицинских услуг, или маркетинг медицинских организаций - один из наиболее сложных видов маркетинга. Это обусловлено рядом причин. Прежде всего, медицинские услуги связаны с сохранением главной ценности человека - его жизни и здоровья. Другая причина - ограниченность бюджетных средств, что заставляет искать внебюджетные источники финансирования. При этом надо учитывать, что население Казахстана, получающее долгое время медицинскую помощь бесплатно, не приемлет платной медицины, а платежеспособность основной части населения остаётся низкой.

Маркетинговые исследования рынка медицинских услуг призваны выявить реальную тенденцию соотношения бесплатной и платной медицины, удовлетворенность потребителей качеством медицинского обслуживания, особенности спроса в различных регионах и различных по демографическому и психо-графическому признакам групп населения. Авторами выявлены современные тенденции и механизмы формирования стратегий развития маркетинга на региональном рынке медицинских услуг, позволяющих определить и укрепить экономические основы функционирования некоммерческих организаций на национальном рынке.

Исследование проводилось с использованием традиционных методов маркетингового исследования, таких как глубинное интервью, фокус-группы, опрос, а также методы экономического анализа: сравнительное, графическое и сценарное планирование.

В статье раскрыты сущность маркетинга в здравоохранении, учтены особенности маркетингового исследования; проанализирован и оценен рынок медицинских услуг Павлодарской области и предложены пути его совершенствования. Результаты исследования могут быть полезны для разработки мероприятий в целях дальнейшего совершенствования деятельности медицинских организаций в Республике Казахстан.

Ключевые слова: медицинские услуги, маркетинговые исследования, региональный аспект, особенности опроса, факторы влияния на развитие рынка услуг в сфере медицины.

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