Trends of consumer preferences in the segment of private medical services in Moscow

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Abstract. This scientific article analyzes the factors that influence to consumer preferences and its changes under impact of economic and financial events in the area of modern medical services at the city of Moscow. When there is made a choice of applying of paid medical services and medic institutions, the first of all Moscow residents take into account the educational level and specialization experience of senior medical personnel. According to opinions of medical services consumers the success of treatment depends on the qualifications of doctors that work at the private medic sector at Moscow. These clients are ready to spend relatively large amounts of material resources for consultations and cure by the best specialists. The Covid-19 pandemic and the political situation at the country have made changes to the consumer preferences of Muscovites. On the one hand they began to save more, and health issues became secondary ones at the most cases. On the other hand, they are still willing to invest financial resources in their health and also appearance. This explains the ranking of costs for the services of surgeons, cosmetologists and dentists. The previous financial year was marked by instability not only at the political arena, but also by high volatility of the financial market: the exchange rate of the national currency changed dramatically several times during the year. These data led to increased prices at medic centers. To maintain high level customer loyalty at private centers at Moscow they need train doctors, regularly improve their qualifications, create conditions for their additional education aimed to expanding skills and updating existing knowledge level.

1 Introduction

Currently the Government of the Russian Federation is working to implement the Healthcare Development Strategy, the main objective of which is to ensure sustainable population growth by 2030.

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The corona virus pandemic has significantly affected the achievement of the mentioned indicators and the pace of implemented activities. At the same time the situation with COVID-2019 has accelerated the development of new treatment methods and diagnostic systems, the production of specific medical equipment and the introduction of modern technologies [1-5].

The sanctioning by Western countries and a sharp ban on the import of many medical drugs and equipment into Russia has faced the healthcare industry with the urgent task of import substitution of Western products with domestic developments.

Pandemic conditions have caused consumers of medical services to be directed to private medic centers from public medic institutions.

The need to urgently change from foreign equipment and medical products to domestic ones the first of all became the reason for the modernization of commercial medic institutions [6-10].

Due to the fact that Moscow consumers of medical services are the most demanding, Moscow paid medic institutions were the first to have to rebuild their business model. At Moscow in 2022 in addition to resolving issues of import substitution, the owners of private medic institutions resolved the issues of conducting money transfers with situations of restricting foreign exchange transactions, changing the cost of medical services and organizing remote communication with patients who had gone abroad.

Also at Moscow at the same time consumers of medical services are faced with the need to reconsider their preferences in the conditions of increased uncertainty in many areas of life.

In connection with the mentioned above the relevance of this article is explained by the high intensity of development of Moscow paid medicine and the rapid growth of requirements and variability of consumer preferences. The quality of paid medical services is associated with the comfort of the medic center, the politeness and attention of the medical staff. In their opinion that is the circumstances that determine the factors of consumer choice at the mentioned area. The main determining factors of consumer preferences are reviews of medic institutions, recommendations from friends, and the possibility of electronic recording through the clinic’s website [11-13].

Authors of the article came to the conclusion that consumer preferences after the pandemic have shifted from the “doctor’s qualifications” factor to the “price of medical services”. Also they identified location and market value as the main factors in choosing a paid medical service. Consumer preferences at Moscow medicine depend not only on the solvency of its residents, but also on the state of the economy and foreign trade relations.

The purpose of the scientific article is to study consumer preferences at paid medical services sector at Moscow and analyze their changes under the influence of various factors. The object of scientific research is paid medicine in the city of Moscow, the subject is consumer preferences for paid medical services. The study is based on the use of methods for comparing absolute and relative indicators, deduction and induction of cost indicators. For the analysis it was used research on the market for paid medical services conducted by BusinesStat and RBC, based on an online survey, a survey of patients, market experts, an audit of services and prices.

2 Main part

Table 1 shows data on the percentage of Moscow residents who applied to paid medic centers in Moscow in 2022 as part of cash commercial medicine and as part of voluntary medical care.
Table 1. Proportion of Moscow residents who visited paid medic centers in 2022, %

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<td>Cash paid medicine</td>
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<td>Voluntary health insurance</td>
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At 2022 as it can be seen in Table 1 50.3 % of Moscow residents went to paid medic institutions, of which 30 % paid for medical services themselves, and 20.3 % of capital residents paid for medical services from an insurance company.

Figure 1 shows the change at the number of appointments in Moscow paid medic institutions.

Fig. 1: Number of paid medical appointments at Moscow in 2018-2022, millions

At 2021 as it can be seen at the Figure 1 there was a maximum number of appointments – 26.9 million appointments, which is an increase of 6.8 million in absolute terms and 33.8 % in relative terms compared to 2020. The increase at visits to paid medic institutions at Moscow at 2021 is explained by complications of chronic diseases and deterioration of health after corona virus infection in 2020.

In 2022 the number of appointments at private medic centers in the capital compared to 2021 decreased by 3.3 million in absolute terms and by 12.3 % at relative terms.

This change is explained by the tendency to save in conditions of an unstable political situation in the country associated with the start of a special military operation, and the tightening of the monetary policy of the Central Bank of the Russian Federation (increasing the interest rate to 19%).

At Figure 2 it is showed the reasons for patients at choosing medic institutions.
As it can be seen at Figure 2, the main determining factors at the consumer preferences of Muscovites at 2022 were qualifications of doctors (35% of patients mentioned it as the reason for choosing a paid medic center), the effectiveness of treatment (mentioned by 33.8% of patients) and the accuracy of diagnosis (mentioned by 31.7% of patients).

The most insignificant factor influencing consumer behavior at the private medicine segment was the location of the clinic. Only 3.4% of patients selected clinic location as a factor influencing their choice. One of the unimportant factors also was the speed of services, it was chosen by 8.9% of patients.

Figure 3 illustrates the average expenses of Muscovites for doctor’s services at 2020-2021.
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Figure 3 illustrates the average expenses of Muscovites for doctor’s services at 2020-2021.

At 2020-2021 as it can be seen at Figure 3 residents of the capital spent the most on medical services related to improving their appearance: expenses for the services of cosmetologists, stomatologists and surgeons greatly exceed the expenses for the services of other doctors. The high costs of these doctors’ services are also explained by the fact that in most cases their services are not included in voluntary and compulsory medical care programs.

At 2020-2021 there were the most expensive services of traumatologists and orthopedists which is also explained by the attention Muscovites pay to their appearance.
The lowest costs are for the services of therapists which is most likely due to seeking consultation with a therapist at public medic institutions.

Figure 4 illustrates the average expenses of Muscovites for doctor’s services in 2021-2022.

![Fig. 4. Average expenses of Muscovites for doctor’s services in 2021-2022, rubles](image)

As it can be seen at Figure 4 residents of the capital at 2021-2022 as such as at the previous year also spent the most on services related to appearance. The difference at expenses for the two periods under consideration is that in 2022 the maximum bill for Muscovites is for the services of a surgeons, and not cosmetologists, as at 2021. This change is most likely explained by increase at prices for the services of plastic surgeons with an emerging shortage of materials used during operations.

Exactly half of the residents (50.3 %) of Moscow go to paid clinics to receive medical care. If at 2018-2020 the number of visits to medic centers at Moscow was almost at the same level – 20-21 million per year, then in 2021 their number increased sharply which is explained by the consequences of Covid-19.

Receiving medical care including the opportunity to take medical tests at home also refers to the good organization of the medic center. Consumers of medical services at Moscow prefer to call nurses home to donate blood rather than visit the laboratory.

At public medic institutions the time allotted for consultation is usually not enough to have time to ask all the questions to the doctor and discuss the prescribed treatment. At the private medic institutions much more time is allocated for examination a patient and this
explains the attractiveness of private medicine compared to public one. Therefore 27.4 % of Muscovites identified the factor “fullness of intake” as one of the determining factors of their consumer behavior.

Most Muscovites want to spend their time and money to see a specific specialist. Only 25.2 % of them surveyed chose the reason “price-quality ratio” as a factor determining their consumer preferences in choosing a medical service, for the rest it is not important.

Nevertheless, a number of consumers of private medical services at Moscow are not ready to spend a lot of time on services at medic centers. 19.3 % of patients chose the factor “no queues” as a circumstance determining their choice of a medic institution.

The politeness and attentiveness of staff is important only for 15.2 % of consumers of commercial medicine at Moscow which is most likely explained by the fact that at the capital region the service is quite high and consumers no longer pay attention to this.

The most expensive medical services for Muscovites are those provided by cosmetologists, surgeons and dentists. This is also explained by the desire of residents of the capital region to look better, attention to their appearance and the cost of services from these doctors.

At 2022 at Moscow surgeon services increased by an average of 1500 rubles compared to the previous year which is explained by the weakening of the national currency.

The next most expensive services at 2020-2022 were traumatologists and orthopedists. Muscovites spent 5940 rubles on their services at 2020-2021 and 6892 rubles in 2021-2022. The total bill for their services increased about a thousand rubles. That is explained by high inflation at the beginning of 2022. Costs for paid services of other doctors such as a gynecologist, urologist, neurologist and ophthalmologist, have only increased during recent years.

3 Conclusions

During the last three years the medical industry has faced new challenges; medical personnel have had to not only solve the problem of treating a new disease and its consequences, but also cope with a significantly increased number of patients. State medic institutions could no longer cope with the influx of patients, and private medic institutions began to provide some medical services, including compulsory health insurance.

At 2020-2021 the Covid-19 pandemic and its consequences greatly influenced not only the number of patients, but also the preferences of consumers of medical services. During these years people preferred to avoid crowds, so they preferred telemedicine.

At 2022 the political situation in the world caused the need for an urgent transition from foreign equipment and materials to domestic ones, and the economic situation led not only to an increase at the cost of services but also to problems with non-cash payment for services.

Despite all these circumstances at 2022 the demand for private medical services at Moscow fell by only 12.3 % which is explained by the high solvency of the capital’s residents.

The results obtained at this scientific work allow to assert that the main factors influencing consumer preferences at the field of paid medical services at Moscow are the qualifications of the doctor and the quality of treatment but not saving time, money and territorial accessibility.

Most Muscovites do not pay attention to such factors as speed of service, quality of equipment and professionalism of nursing staff. The priority factor when choosing a private medical service for them is the qualifications of senior medical personnel.
In terms of costs, medical services of cosmetologists, surgeons and dentists significantly exceed the costs of consumers for doctors of other specialties which on the one hand indicate the tendency of patients in Moscow paid medic clinics to take care of their appearance and spend significant financial resources on this. On the other hand, this imbalance at costs is explained by the fact that the services of cosmetologists, plastic surgeons and some dental services are not provided at public medic institutions and are not included to voluntary health insurance programs.

Due to the fact that Moscow private medic centers offer the highest wages and the best working conditions the most qualified doctors are concentrated there.

At the same time, to increase customer loyalty and increase their competitiveness, private medic centers are forced to constantly invest in the latest medical technologies which include not only innovative medical equipment but also digital communication with consumers of their services.

Considering that residents of the capital choose medical services and clinics based on the qualifications of senior medical personnel, doctors at Moscow medic institutions are also forced to constantly study, including treatment methods using preventive medicine and high-tech equipment.

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References