INTRODUCTION

Medical travelling: total population
Moscow / St. Petersburg areas

Key Findings:
Two out of three persons of the population reached might at least consider travelling abroad to get medical treatment. The openness towards medical travelling is somewhat bigger in Moscow compared to St. Petersburg. 30-39-year-olds and respondents with higher education are the most open ones.
Would you ever consider travelling abroad to get medical treatment?

<table>
<thead>
<tr>
<th>% of those at least considering (Total 67 %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GENDER</td>
</tr>
<tr>
<td>Female</td>
</tr>
<tr>
<td>Male</td>
</tr>
<tr>
<td>AGE GROUP</td>
</tr>
<tr>
<td>30 - 39 years</td>
</tr>
<tr>
<td>40 - 49 years</td>
</tr>
<tr>
<td>50 - 59 years</td>
</tr>
<tr>
<td>60 years or older</td>
</tr>
<tr>
<td>HOUSEHOLD INCOME</td>
</tr>
<tr>
<td>Less than RUB 200 000</td>
</tr>
<tr>
<td>More than RUB 200 000</td>
</tr>
<tr>
<td>EDUCATION</td>
</tr>
<tr>
<td>University graduate or higher</td>
</tr>
<tr>
<td>Lower education than university graduate</td>
</tr>
</tbody>
</table>

NB! Here the group “could at least consider” is wider than the actual survey target group which we analyze in following slides. Green represents significant difference compared to total sample.
From this point on the report focuses on the actual survey target group:

Living in Moscow or St. Petersburg areas (n=400 each)
30-75-year-olds
Household income at least RUB 200 000
At least might consider travelling abroad to get medical treatment
CHAPTER I

Trusting the Russian medical system

Key Findings:
Trust in Russian healthcare system is pretty low overall – only a bit over fifth of the respondents consider it trustworthy. Females are a bit more sceptical than males.
Overall, how trustworthy do you find the Russian healthcare system?

<table>
<thead>
<tr>
<th>% considering Russian healthcare system as trustworthy (Total 22 %)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GENDER</strong></td>
</tr>
<tr>
<td>Female</td>
</tr>
<tr>
<td>Male</td>
</tr>
<tr>
<td><strong>AGE GROUP</strong></td>
</tr>
<tr>
<td>30 - 39 years</td>
</tr>
<tr>
<td>40 - 49 years</td>
</tr>
<tr>
<td>50 - 59 years</td>
</tr>
<tr>
<td>60 years or older</td>
</tr>
<tr>
<td><strong>CONSIDERED COUNTRY</strong></td>
</tr>
<tr>
<td>Germany</td>
</tr>
<tr>
<td>Israel</td>
</tr>
<tr>
<td>Switzerland</td>
</tr>
<tr>
<td>Finland</td>
</tr>
</tbody>
</table>
CHAPTER II

Treatments considered

Key Findings:
When thinking of treatments one could consider getting abroad there are two that stand out. The first one is getting chronic disease treatment, the other is getting dental care.

The basic difference between those two seem to be that to get chronic disease treatment one might make a trip – but to get dental care one should already be in the destination.
What kind of treatments could you consider to get abroad?

<table>
<thead>
<tr>
<th>Total Sample</th>
<th>Chronic disease treatment</th>
<th>Dentistry</th>
<th>Orthopedic/Spine surgery</th>
<th>Cancer treatment</th>
<th>Aesthetic surgery</th>
<th>Orthopedic / Spine surgery</th>
<th>Eye surgery</th>
<th>Heart surgery</th>
<th>Childbirth services</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>42%</td>
<td>39%</td>
<td>22%</td>
<td>21%</td>
<td>21%</td>
<td>21%</td>
<td>17%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TOP 8: FEMALES</th>
<th>Chronic disease treatment</th>
<th>Dentistry</th>
<th>Cancer treatment</th>
<th>Aesthetic surgery</th>
<th>Orthopedic / Spine surgery</th>
<th>Eye surgery</th>
<th>Heart surgery</th>
<th>Childbirth services</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>41%</td>
<td>36%</td>
<td>25%</td>
<td>24%</td>
<td>24%</td>
<td>22%</td>
<td>19%</td>
<td>13%</td>
</tr>
<tr>
<td>TOP 8: MALES</td>
<td>Chronic disease treatment</td>
<td>Dentistry</td>
<td>Cancer treatment</td>
<td>Aesthetic surgery</td>
<td>Orthopedic / Spine surgery</td>
<td>Eye surgery</td>
<td>Heart surgery</td>
<td>Organ transplant</td>
</tr>
<tr>
<td>--------------------</td>
<td>---------------------------</td>
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<td>------------------</td>
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<td>---------------</td>
<td>------------------</td>
</tr>
<tr>
<td></td>
<td>44%</td>
<td>41%</td>
<td>22%</td>
<td>18%</td>
<td>21%</td>
<td>20%</td>
<td>18%</td>
<td>8%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TOP 8: UNDER 50 YRS OLD</th>
<th>Chronic disease treatment</th>
<th>Dentistry</th>
<th>Cancer treatment</th>
<th>Eye surgery</th>
<th>Orthopedic / Spine surgery</th>
<th>Heart surgery</th>
<th>Aesthetic surgery</th>
<th>Childbirth services</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>42%</td>
<td>41%</td>
<td>28%</td>
<td>25%</td>
<td>23%</td>
<td>22%</td>
<td>22%</td>
<td>15%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TOP 8: 50 YRS OR OLDER</th>
<th>Chronic disease treatment</th>
<th>Dentistry</th>
<th>Orthopedic / Spine surgery</th>
<th>Eye surgery</th>
<th>Heart surgery</th>
<th>Aesthetic surgery</th>
<th>Obesity surgery</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>43%</td>
<td>35%</td>
<td>21%</td>
<td>17%</td>
<td>19%</td>
<td>14%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Green represents significant difference compared to total sample.
CHAPTER III

Possible destinations

Key Findings:
Germany and Israel dominate the preferences in Russia. Finland has a decent foothold in St. Petersburg, but is still far behind those two.

When taking a closer look at those who could consider Finland as an option, we can see that the main rival countries are other Western European countries – mainly Germany.
To which of the following countries you might consider travelling to get medical treatment?

**Total Sample**

- **Germany**: 67%
- **Israel**: 64%
- **Switzerland**: 29%
- **Finland**: 24%
- **Austria**: 21%
- **United States**: 19%
- **Japan**: 12%
- **United Kingdom**: 11%
- **Spain**: 10%
- **China**: 10%
- **South Korea**: 10%
- **Cyprus**: 8%
- **India**: 4%

**TOP 4: MOSCOW**

- **Germany**: 66%
- **Israel**: 65%
- **Switzerland**: 31%
- **Austria**: 27%

**TOP 4: ST. PETERSBURG**

- **Germany**: 68%
- **Israel**: 63%
- **Finland**: 34%
- **Switzerland**: 28%

**TOP 4: FEMALES**

- **Israel**: 66%
- **Germany**: 66%
- **Switzerland**: 31%
- **Finland**: 27%

**TOP 4: MALES**

- **Germany**: 72%
- **Israel**: 64%
- **Switzerland**: 40%
- **United States**: 29%

**TOP 4: UNDER 50 YRS OLD**

- **Finland**: 26% (significant difference compared to total sample)
- **Japan**: 13%
- **Austria**: 26%
- **United States**: 29%

**TOP 4: 50 YRS OR OLDER**

- **Finland**: 26%
- **Austria**: 18%
- **United States**: 29%

Green represents significant difference compared to total sample.

Finland (25%) is the fifth most considered destination.
Those considering Finland live mainly on St. Petersburg area. The main rival is Germany.

**Satisfied with own physical health**
- Below Average: 45% (Total Sample: 49%)

**Satisfied with own mental health**
- Below Average: 66% (Total Sample: 74%)

**Trusts in Russian healthcare system**
- Below Average: 18% (Total Sample: 22%)

**Would consider Finland as an option**
- Above Average: 100% (Total Sample: 26%)

**TOP 5 considered treatments**
- Chronic disease treatment: 50%
- Dentistry: 41%
- Orthopedic/Spine surgery: 30%
- Eye surgery: 29%
- Cancer treatment: 25%

**TOP 5 considered countries**
- Finland: 100%
- Germany: 76%
- Israel: 65%
- Switzerland: 46%
- Austria: 44%

**Segments**
- Seeking Opportunities: 25%
- Seeking Quality: 54%
- Seeking Holiday: 18%
Those who can’t see Finland as an option
Answered “can’t see as an option” in a follow up question (n=60)

Those not considering Finland at all are also those who are most unlikely to travel to get medical treatment generally.

SATISFIED WITH OWN PHYSICAL HEALTH
- Average: 50% (Total Sample: 49%)

SATISFIED WITH OWN MENTAL HEALTH
- Above Average: 83% (Total Sample: 74%)

TRUSTS IN RUSSIAN HEALTHCARE SYSTEM
- Average: 22% (Total Sample: 22%)

WOULD CONSIDER FINLAND AS AN OPTION
- Below Average: 0% (Total Sample: 26%)

DEMOGRAPHICS: AREA
- Moscow: 57%
- St. Petersburg: 43%

DEMOGRAPHICS: GENDER
- Female: 62%
- Male: 38%

DEMOGRAPHICS: AGE GROUP
- 30 - 39 years: 28%
- 40 - 49 years: 28%
- 50 - 59 years: 23%
- 60 - 75 years: 20%

TOP 5 CONSIDERED TREATMENTS
- Chronic disease treatment: 33%
- Dentistry: 28%
- Cancer treatment: 23%
- Heart surgery: 20%
- Aesthetic surgery: 15%

TOP 5 CONSIDERED COUNTRIES
- Germany: 47%
- Israel: 45%
- Switzerland: 15%
- United States: 15%
- South Korea: 13%

SEGMENTS
- Seeking Opportunities: 28%
- Seeking Quality: 43%
- Seeking Holiday: 28%
CHAPTER IV
Country images

Key Findings:
Both Germany and Israel stand out from the others by (at least imagewise) offering treatments in Russian language. When in both cases also the trust in medical staff's skills seems to be high, it is no surprise that they do well in consideration.

Finland’s biggest advantage is that it is easily approachable (especially from St. Petersburg area). But the biggest image problem is that the trust in technology being up-to-date is far too low.
I could find a hospital where I could get service in Russian language
I believe that the medical staff abroad has high professional skills
Has a good image as a country as a whole
I could get treatments faster than I would in Russia
Is easily accessible by flight/train/other transport
I believe that the hospital facilities are in great condition
I believe that the technology used abroad is up-to-date
I believe that my health information would be better well protected
I believe that the medical staff abroad has high service attitude
I could get treatments cheaper than I would in Russia
This would also be a good holiday destination

Chi-Square Observed-Expected. The higher the score, the more the country stands out compared to the others in the attribute in question.
### Images of most preferred countries

<table>
<thead>
<tr>
<th>Country</th>
<th>Has a good image as a country as a whole</th>
<th>Is easily accessible by flight/train/other transport</th>
<th>I believe that the technology used abroad is up-to-date</th>
<th>I believe that the hospital facilities are in great condition</th>
<th>I believe that the medical staff abroad has high professional skills</th>
<th>I believe that my health information would be better well protected</th>
<th>I could find a hospital where I could get service in Russian language</th>
<th>I believe that the medical staff abroad has high service attitude</th>
<th>I could get treatments faster than I would in Russia</th>
<th>I could get treatments cheaper than I would in Russia</th>
<th>This would also be a good holiday destination</th>
<th>I believe that the hospital facilities are in great condition</th>
<th>I believe that the medical staff abroad has high professional skills</th>
<th>I believe that my health information would be better well protected</th>
<th>I could find a hospital where I could get service in Russian language</th>
<th>I believe that the medical staff abroad has high service attitude</th>
<th>I could get treatments faster than I would in Russia</th>
<th>I could get treatments cheaper than I would in Russia</th>
<th>This would also be a good holiday destination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finland</td>
<td>5.0</td>
<td>19.8</td>
<td>-0.7</td>
<td>-1.8</td>
<td>-2.3</td>
<td>-3.3</td>
<td>-1.8</td>
<td>-3.7</td>
<td>-4.8</td>
<td>-8.4</td>
<td>-9.5</td>
<td>-13.6</td>
<td>-17.4</td>
<td>-17.6</td>
<td>-13.6</td>
<td>-17.4</td>
<td>-17.6</td>
<td>-13.6</td>
<td>-17.4</td>
</tr>
<tr>
<td>Austria</td>
<td>9.3</td>
<td>9.0</td>
<td>3.0</td>
<td>2.4</td>
<td>0.6</td>
<td>-0.1</td>
<td>-0.1</td>
<td>-0.2</td>
<td>-1.0</td>
<td>-4.7</td>
<td>-7.3</td>
<td>-10.8</td>
<td>-13.6</td>
<td>-17.4</td>
<td>-17.6</td>
<td>-13.6</td>
<td>-17.4</td>
<td>-17.6</td>
<td>-13.6</td>
</tr>
<tr>
<td>United States</td>
<td>13.0</td>
<td>9.3</td>
<td>8.9</td>
<td>6.6</td>
<td>6.5</td>
<td>4.2</td>
<td>4.2</td>
<td>2.0</td>
<td>-1.8</td>
<td>-13.6</td>
<td>-17.4</td>
<td>-17.4</td>
<td>-13.6</td>
<td>-17.4</td>
<td>-17.6</td>
<td>-13.6</td>
<td>-17.4</td>
<td>-17.6</td>
<td>-13.6</td>
</tr>
</tbody>
</table>

Chi-Square Observed-Expected. The higher the score, the more the country stands out compared to the others in the attribute in question.
CHAPTER V

Destination decision criterias

Key Findings:
The most important driver to travel abroad to get treatments is the belief that the technology abroad is more up-to-date. And this is Finland’s biggest weakness imagewise.

There are no differences between genders / age groups in importances, but the sample can be divided in three different segments based on their motives. First seeks treatments that are not available in Russia. Second (and biggest) segment seeks higher quality services – including modern technology. Third segment wants to combine getting treatments with having a holiday – and the holiday may be the primary travel reason!
Which of the following statements would most likely make you decide going abroad?

<table>
<thead>
<tr>
<th>Statement</th>
<th>Total Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>I believe that the technology used abroad is more up-to-date</td>
<td>19,4</td>
</tr>
<tr>
<td>I believe that the hospital facilities are in better condition abroad</td>
<td>14,3</td>
</tr>
<tr>
<td>I believe that the medical staff abroad has higher professional skills</td>
<td>12,0</td>
</tr>
<tr>
<td>I believe that the medical staff abroad has better service attitude</td>
<td>10,6</td>
</tr>
<tr>
<td>I could receive treatments that are not allowed / available in Russia</td>
<td>10,3</td>
</tr>
<tr>
<td>I could get treatments faster than I would in Russia</td>
<td>9,3</td>
</tr>
<tr>
<td>I could combine getting treatments to having a holiday</td>
<td>7,4</td>
</tr>
<tr>
<td>My friends would recommend me a certain hospital/doctor abroad</td>
<td>5,5</td>
</tr>
<tr>
<td>My doctor would recommend me a certain hospital/doctor abroad</td>
<td>4,6</td>
</tr>
<tr>
<td>I could get treatments cheaper than I would in Russia</td>
<td>4,0</td>
</tr>
<tr>
<td>I believe that my health information would be better protected abroad</td>
<td>2,4</td>
</tr>
</tbody>
</table>

We can divide the respondents in three segments based on their motives:

S1. SEEKING OPPORTUNITIES
The segment seek treatments that are not allowed / available in Russia. They also believe that the technology abroad is more up-to-date.

S2. SEEKING QUALITY
The segment believes that they would receive higher standard treatment abroad: more skilled professionals, better service attitude, better hospital facilities and more up-to-date technology.

S3. SEEKING HOLIDAY
The segment likes the idea that they could combine getting treatments to having a holiday. They may make a destination decision based on friends recommendations.

MaxDiff index, ratio scale. Sums up to 100.
There are no mentionable differences in importances between genders or age groups.

We will dig deeper into these segments later in our report.
Which of the following statements would most likely make you decide going abroad?

### S1: Seeking Opportunities
- I believe that the technology used abroad is more up-to-date: 18.2
- I believe that the hospital facilities are in better condition abroad: 11.1
- I believe that the medical staff abroad has higher professional skills: 7.1
- I believe that the medical staff abroad has better service attitude: 7.2
- I could receive treatments that are not allowed / available in Russia: 20.9
- I could get treatments faster than I would in Russia: 12.1
- I could combine getting treatments to having a holiday: 5.5
- My friends would recommend me a certain hospital/doctor abroad: 4.5
- My doctor would recommend me a certain hospital/doctor abroad: 6.2
- I could get treatments cheaper than I would in Russia: 4.9
- I believe that my health information would be better protected abroad: 2.2

### S2: Seeking Quality
- I believe that the technology used abroad is more up-to-date: 22.9
- I believe that the hospital facilities are in better condition abroad: 18.1
- I believe that the medical staff abroad has higher professional skills: 16.9
- I believe that the medical staff abroad has better service attitude: 13.8
- I could receive treatments that are not allowed / available in Russia: 6.2
- I could get treatments faster than I would in Russia: 6.8
- I could combine getting treatments to having a holiday: 4.5
- My friends would recommend me a certain hospital/doctor abroad: 4.0
- My doctor would recommend me a certain hospital/doctor abroad: 2.7
- I could get treatments cheaper than I would in Russia: 2.0
- I believe that my health information would be better protected abroad: 2.1

### S3: Seeking Holiday
- I believe that the technology used abroad is more up-to-date: 12.6
- I believe that the hospital facilities are in better condition abroad: 9.2
- I believe that the medical staff abroad has higher professional skills: 5.5
- I believe that the medical staff abroad has better service attitude: 6.7
- I could receive treatments that are not allowed / available in Russia: 8.2
- I could get treatments faster than I would in Russia: 12.3
- I could combine getting treatments to having a holiday: 17.8
- My friends would recommend me a certain hospital/doctor abroad: 9.6
- My doctor would recommend me a certain hospital/doctor abroad: 6.3
- I could get treatments cheaper than I would in Russia: 8.2
- I believe that my health information would be better protected abroad: 3.6

Glowing bar highlights significant differences. MaxDiff index, ratio scale. Sums up to 100.
How important is it to you, that you could get service in Russian language abroad?

<table>
<thead>
<tr>
<th></th>
<th>Extremely important</th>
<th>Quite important</th>
<th>Not very important</th>
<th>Not at all important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Population</td>
<td>55%</td>
<td>27%</td>
<td>16%</td>
<td>2%</td>
</tr>
<tr>
<td>Moscow</td>
<td>52%</td>
<td>29%</td>
<td>18%</td>
<td>2%</td>
</tr>
<tr>
<td>St. Petersburg</td>
<td>58%</td>
<td>26%</td>
<td>14%</td>
<td>2%</td>
</tr>
</tbody>
</table>

% of those to whom it is at least quite important (Total 83%)

<table>
<thead>
<tr>
<th>GENDER</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>87%</td>
</tr>
<tr>
<td>Male</td>
<td>79%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>AGE GROUP</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>30 - 39 years</td>
<td>84%</td>
</tr>
<tr>
<td>40 - 49 years</td>
<td>84%</td>
</tr>
<tr>
<td>50 - 59 years</td>
<td>81%</td>
</tr>
<tr>
<td>60 years or older</td>
<td>80%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CONSIDERED COUNTRY</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>82%</td>
</tr>
<tr>
<td>Israel</td>
<td>83%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>81%</td>
</tr>
<tr>
<td>Finland</td>
<td>80%</td>
</tr>
</tbody>
</table>
CHAPTER VI
How does Finland meet the criterias?

Key Findings:
Finland’s image as medical treatment provider is not optimal. The more important the factor is, the more poorly does Finland succeed in it – based on the regression line.

By improving one image factor – improving our image in having an up-to-date technology – we would improve our situation a lot. This should be the key attribute to use in advertising!
I believe that the medical staff abroad has high professional skills
I believe that the medical staff abroad has high service attitude
I believe that the hospital facilities are in great condition
I believe that my health information would be better well protected
I could get treatments faster than I would in Russia
This would also be a good holiday destination
I could get treatments cheaper than I would in Russia

OVERALL FINLAND SHOULD:
- Strengthen its profile overall – people do not have strong opinion on Finland!
- Focus on the most important factors to the potential medical travellers – now the overall view shows that the more important the factor is, the more poorly Finland performs

KEY TASK:
- To improve Finland’s image in the most important factor overall: make sure that people are confident that our technology is up-to-date

WHICH COUNTRIES CURRENTLY BEST MEET THE EXPECTATIONS OF THE TRAVELLERS?
1. Germany
2. Israel
3. Switzerland
4. United States
5. Japan
6. United Kingdoms
7. Austria
8. Finland
9. South Korea
CHAPTER VIII

General travelling habits

Key Findings:
Every fifth respondents had travelled or had a family member who had travelled abroad to get medical treatment. When comparing the target countries with the considerations the results are quite alike – although in done travelling China stands out compared to its consideration.
**Travelling Habits**

**Total Sample**

<table>
<thead>
<tr>
<th>HOW OFTEN USUALLY TRAVELS ABROAD</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Several times a year</td>
<td>32%</td>
<td></td>
</tr>
<tr>
<td>About once a year</td>
<td>32%</td>
<td></td>
</tr>
<tr>
<td>About once in every two years</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>More seldom</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>I have never travelled abroad</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Don’t want to say</td>
<td>1%</td>
<td></td>
</tr>
</tbody>
</table>

**HAVE YOU OR SOME OF YOUR FAMILY MEMBERS EVER TRAVELLED ABROAD TO GET MEDICAL TREATMENT?**

- Yes: 19%
- No: 79%
- Don’t want to say: 3%

**HOW BOOKS A TRIP / FLIGHT WHEN TRAVELLING ABROAD**

- Online, on an airline’s website: 25%
- By phoning a travel agency or by visiting their office in person: 22%
- Online, on a travel agency website: 21%
- Online, on the website of a travel agency operator/booking: 19%
- By phoning an airline: 2%
- By other means: 3%

**WHERE DID YOU / YOUR FAMILY MEMBER TRAVEL TO? IF HAD TRAVELLED**

- Germany: 32%
- Israel: 28%
- China: 7%
- Finland: 7%
- United States: 4%
- Austria: 3%
- Switzerland: 3%
- Cyprus: 3%
Key Findings:
The following slide shows the media usage in total sample. One must however notice that there are some regional medias, so when planning media usage one should also check the areawise (and also segmentwise) media usages.
### Total Sample
#### Media Usage

**SEEKS / GETS INFORMATION OF HEALTH CARE PROVIDERS ABROAD**
- Online search engines: 74%
- Doctors/Medical professionals: 43%
- Health provider web pages: 27%
- Medical tourism agents: 11%
- Travel agents: 5%

**TOP 10 SOCIAL MEDIA SERVICES USED**
- WhatsApp: 78%
- VK: 67%
- Youtube: 60%
- Instagram: 44%
- Facebook: 41%
- Viber: 35%
- Telegram: 25%
- OK.ru: 25%
- Twitter: 11%
- LinkedIn: 3%

**TOP 10 RADIO CHANNELS LISTENED**
- Avtoradio: 24%
- Dorozhnoe Radio: 22%
- Europa Plus: 21%
- Retro FM: 18%
- Russkoe Radio: 15%
- Nashe Radio: 14%
- Chanson: 12%
- Ekho Moskvy: 11%
- Radio Dacha: 11%
- Love Radio: 10%

**TOP 8 AREAS OF INTEREST**
- Reading: 65%
- Music: 63%
- Travel: 63%
- Food: 54%
- Pets: 49%
- Health and Fitness: 46%
- Technology: 39%
- Gardening: 31%

**TOP 10 TV CHANNELS WATCHED**
- Pervy: 38%
- Rossiya 1: 36%
- CTC: 35%
- TNT: 33%
- NTV: 33%
- Ren: 28%
- Friday: 28%
- Match TV: 24%
- Rossiya 24: 23%
- Zvezda: 21%

**TOP 10 NEWSPAPERS READ**
- Argumenty i Fakty: 21%
- Komsomolskaya Pravda: 13%
- Kommersant: 11%
- Moskovskij Komsomolets: 9%
- Sport Express: 7%
- Rossiyskaya Gazeta: 6%
- Vechernyaya Moskva: 6%
- St. P. Vedomosti: 5%
- Sovietsky Sport: 5%
- Izvestia: 4%

**TOP 10 MAGAZINES READ**
- Vokrua Sveta: 14%
- Karavan Istory: 11%
- National Geographic: 11%
- Za Rulem: 10%
- 7 Dnev: 10%
- Cosmopolitan: 8%
- Idei vashego doma: 8%
- GEO: 7%
- Autoreview: 7%
- Teleprogramma: 7%

**TOP 10 MAGAZINE TYPES OF INTEREST**
- Cooking: 17%
- Tourism: 17%
- Auto / Moto: 15%
- Gardening: 14%
- Health: 14%
- Women's: 14%
- Interior & Design: 13%
- Computer: 11%
- Entertaining: 11%
- Sport: 10%
CHAPTER X
Moscow in a nutshell

Key Findings:
To get people to travel from Moscow to Finland is quite a hard task – we should be able to beat Germany and Israel, both of which we are currently far behind. The only way to do this is to ensure people that we have the best technology in the world regarding the treatments provided. But is this realistic?
Moscow Area
Basic Information

Finland's position as considered destination is clearly weaker in Moscow area.

**SATISFIED WITH OWN PHYSICAL HEALTH**
- Average 51% Total Sample: 49%
- Below Average 70% Total Sample: 74%

**SATISFIED WITH OWN MENTAL HEALTH**
- Average 70% Total Sample: 70%
- Below Average 22% Total Sample: 74%

**TRUSTS IN RUSSIAN HEALTHCARE SYSTEM**
- Average 22% Total Sample: 22%
- Below Average 18% Total Sample: 26%

**DEMOGRAPHICS: AREA**
- Moscow 100%
- St. Petersburg 0%

**DEMOGRAPHICS: GENDER**
- Female 49%
- Male 51%

**DEMOGRAPHICS: AGE GROUP**
- 30 - 39 years 37%
- 40 - 49 years 22%
- 50 - 59 years 30%
- 60 - 75 years 12%

**TOP 5 CONSIDERED TREATMENTS**
- Chronic disease treatment 44%
- Dentistry 40%
- Eye surgery 23%
- Cancer treatment 22%
- Orthopedic/Spine surgery 22%

**TOP 5 CONSIDERED COUNTRIES**
- Germany 66%
- Switzerland 31%
- Austria 27%
- United States 24%
- None of the above 73%

**AWARENESS OF FINNISH SERVICE PROVIDERS**
- Orton 12%
- Clinic Helena 11%
- FinnHealth 7%
- Mehiläinen NEO Sports Hospital 6%
- Coxa 4%
- Aava 4%
- Docrates 3%
- Medident 3%
- Hyksin 3%
- Kruunupuisto 2%
- None of the above 73%
Moscow Area
Media Usage

SEEKS / GETS INFORMATION OF HEALTH CARE PROVIDERS ABROAD

- Online search engines: 76%
- Doctors/Medical professionals: 44%
- Health provider web pages: 27%
- Medical tourism agents: 15%
- Travel agents: 6%

TOP 10 SOCIAL MEDIA SERVICES USED

- WhatsApp: 80%
- Youtube: 60%
- VK: 56%
- Instagram: 48%
- Facebook: 43%
- OK.ru: 30%
- Viber: 30%
- Telegram: 25%
- Twitter: 13%
- LinkedIn: 3%

TOP 10 RADIO CHANNELS LISTENED

- Avtoradio: 24%
- Europa Plus: 20%
- Dorozhnoe Radio: 18%
- Retro FM: 18%
- Russkoe Radio: 17%
- Chanson: 14%
- Nashe Radio: 14%
- Ekho Moskvy: 14%
- Hit FM: 13%
- Radio Dacha: 13%

TOP 8 AREAS OF INTEREST

- Music: 67%
- Travel: 67%
- Reading: 64%
- Food: 58%
- Pets: 51%
- Health and Fitness: 49%
- Technology: 41%
- Gardening: 31%

TOP 10 TV CHANNELS WATCHED

- CTC: 38%
- Pervy: 38%
- TNT: 36%
- Rossiya 1: 35%
- Friday: 30%
- NTV: 30%
- Ren: 29%
- Rossiya 24: 23%
- Match TV: 22%
- Zvezda: 20%

TOP 10 NEWSPAPERS READ

- Argumenty i Fakty: 20%
- Komsomolskaya Pravda: 14%
- Moskovskij Komsomolets: 13%
- Vechernaya Moskva: 11%
- Kommersant: 10%
- Sport Express: 7%
- Izvestia: 5%
- Sovietsky Sport: 5%
- Rossiyskaya Gazeta: 4%
- Sovietsky Sport: 3%

TOP 10 MAGAZINES READ

- Vokrui Sveta: 17%
- 7 Dny: 14%
- National Geographic: 11%
- Karavan Istory: 11%
- Idei vashego doma: 10%
- Za Rulem: 10%
- Cosmopolitan: 8%
- GEO: 7%
- Skanvordy Teschin...: 7%
- Antenna/Telesam: 7%

TOP 10 MAGAZINE TYPES OF INTEREST

- Cooking: 18%
- Tourism: 18%
- Health: 17%
- Auto / Moto: 15%
- Gardening: 15%
- Women's: 14%
- Entertaining: 13%
- Interior & Design: 12%
- Computer: 12%
- Sport: 10%

Group Size
50.0 %
CHAPTER XI

St. Petersburg in a nutshell

Key Findings:
Regarding St. Petersburg we have one great advantage compared to other countries, and that is being easily accessible. However that by itself is not enough – improving image in having modern, world-leading technology must be done also here!
Finland’s potential is clearly found in the St. Petersburg area.

**SATISFIED WITH OWN PHYSICAL HEALTH**
- Average: 47%
- Total Sample: 49%
- Above Average: 78%
- Total Sample: 74%

**SATISFIED WITH OWN MENTAL HEALTH**
- Average: 21%
- Total Sample: 22%
- Above Average: 34%
- Total Sample: 26%

**DEMOGRAPHICS: AREA**
- Moscow: 0%
- St. Petersburg: 100%

**DEMOGRAPHICS: GENDER**
- Female: 51%
- Male: 49%

**DEMOGRAPHICS: AGE GROUP**
- 30 - 39 years: 27%
- 40 - 49 years: 21%
- 50 - 59 years: 36%
- 60 - 75 years: 16%

**TOP 5 CONSIDERED TREATMENTS**
- Chronic disease treatment: 40%
- Dentistry: 37%
- Orthopedic/Spine surgery: 23%
- Heart surgery: 23%
- Cancer treatment: 21%

**TOP 5 CONSIDERED COUNTRIES**
- Germany: 68%
- Israel: 63%
- Finland: 34%
- Switzerland: 28%
- Austria: 22%

**TRUSTS IN RUSSIAN HEALTHCARE SYSTEM**
- Average: 50%
- Total Sample: 50%

**WOULD CONSIDER FINLAND AS AN OPTION**
- Average: 50%
- Total Sample: 50%

**AWARENESS OF FINNISH SERVICE PROVIDERS**
- Clinic Helena: 16%
- Orton: 10%
- FinnHealth: 7%
- Medident: 5%
- Meihäinen NEO Sports Hospital: 3%
- Aava: 2%
- Docrates: 2%
- Coxa: 2%
- Kruunupuisto: 1%
- Hyksin: 1%
- None of the above: 70%
St. Petersburg Area
Media Usage

**SEEKS / GETS INFORMATION OF HEALTH CARE PROVIDERS ABROAD**
- Online search engines: 72%
- Doctors/Medical professionals: 42%
- Health provider web pages: 26%
- Medical tourism agents: 8%
- Travel agents: 4%

**TOP 8 AREAS OF INTEREST**
- Reading: 65%
- Music: 60%
- Travel: 59%
- Food: 50%
- Pets: 46%
- Health and Fitness: 44%
- Technology: 38%
- Arts and Crafts: 32%

**TOP 10 SOCIAL MEDIA SERVICES USED**
- VK: 78%
- WhatsApp: 76%
- Youtube: 60%
- Viber: 41%
- Instagram: 40%
- Facebook: 38%
- Telegram: 26%
- OK.ru: 20%
- Twitter: 9%
- LinkedIn: 2%

**TOP 10 TV CHANNELS WATCHED**
- Pervy: 39%
- Rossiya 1: 37%
- NTV: 36%
- CTC: 32%
- TNT: 30%
- Ren: 28%
- Friday: 27%
- Match TV: 26%
- Rossiya 24: 23%
- Zvezda: 22%

**TOP 10 RADIO CHANNELS LISTENED**
- Dorozhnoe Radio: 27%
- Avtoradio: 24%
- Europa Plus: 22%
- Retro FM: 19%
- Nashe Radio: 14%
- Russkoe Radio: 13%
- Love Radio: 10%
- Chanson: 9%
- Radio Dacha: 9%
- Ekho Moskvy: 9%

**TOP 10 NEWSPAPERS READ**
- Argumenty i Fakty: 22%
- Komsomolskaya Pravda: 12%
- Kommersant: 12%
- St.P. Vedomosti: 9%
- Sport Express: 8%
- Rossiyaskaya Gazeta: 7%
- Sovietsky Sport: 5%
- Moskovskij Komsomol: 4%
- Novaya Gazeta: 4%
- RBK Daily: 4%

**TOP 10 MAGAZINE TYPES OF INTEREST**
- Tourism: 16%
- Cooking: 16%
- Auto / Moto: 14%
- Women's: 13%
- Interior & Design: 13%
- Gardening: 13%
- Health: 10%
- Computer: 9%
- Sport: 9%
- TV Guides: 9%

**TOP 10 MAGAZINES READ**
- Karavan Istory: 11%
- Za Rulem: 11%
- Vokrua Sveta: 11%
- National Geographic: 10%
- Teleprogramma: 9%
- Cosmopolitan: 8%
- GEO: 8%
- Autoreview: 7%
- Domashniy ochag: 6%
- 7 Dney: 6%

Group Size
50.0 %
CHAPTER XII
The Segments

Key Findings:
The following three segments all have their unique needs. In order to succeed Finland (and Finnish providers) has a lot of improvement to do in each of these segments.

To be successful in “Seeking Opportunities” we need to offer something not available in Russia. To be successful in “Seeking Quality” we must ensure that we have the best technology, service and facilities. To be successful in “Seeking Holiday” we must provide something that truly attracts tourists.

The key segment of these seems to be “Seeking Quality”, but whichever segment we target, we must improve our image in having leading technology.
Which of the following statements would most likely make you decide going abroad?

**S1: Seeking Opportunities**
- I believe that the technology used abroad is more up-to-date: 18.2
- I believe that the hospital facilities are in better condition abroad: 11.1
- I believe that the medical staff abroad has higher professional skills: 7.1
- I believe that the medical staff abroad has better service attitude: 7.2
- I could receive treatments that are not allowed / available in Russia: 20.9
- I could get treatments faster than I would in Russia: 12.1
- I could combine getting treatments to having a holiday: 5.5
- My friends would recommend me a certain hospital/doctor abroad: 4.5
- My doctor would recommend me a certain hospital/doctor abroad: 6.2
- I could get treatments cheaper than I would in Russia: 4.9
- I believe that my health information would be better protected abroad: 2.2

**S2: Seeking Quality**
- I believe that the technology used abroad is more up-to-date: 22.9
- I believe that the hospital facilities are in better condition abroad: 18.1
- I believe that the medical staff abroad has higher professional skills: 16.9
- I believe that the medical staff abroad has better service attitude: 13.8
- I could receive treatments that are not allowed / available in Russia: 6.2
- I could get treatments faster than I would in Russia: 6.8
- I could combine getting treatments to having a holiday: 4.5
- My friends would recommend me a certain hospital/doctor abroad: 4.0
- My doctor would recommend me a certain hospital/doctor abroad: 2.7
- I could get treatments cheaper than I would in Russia: 2.0
- I believe that my health information would be better protected abroad: 2.1

**S3: Seeking Holiday**
- I believe that the technology used abroad is more up-to-date: 12.6
- I believe that the hospital facilities are in better condition abroad: 9.2
- I believe that the medical staff abroad has higher professional skills: 5.5
- I believe that the medical staff abroad has better service attitude: 6.7
- I could receive treatments that are not allowed / available in Russia: 8.2
- I could get treatments faster than I would in Russia: 12.3
- I could combine getting treatments to having a holiday: 17.8
- My friends would recommend me a certain hospital/doctor abroad: 9.6
- My doctor would recommend me a certain hospital/doctor abroad: 6.3
- I could get treatments cheaper than I would in Russia: 8.2
- I believe that my health information would be better protected abroad: 3.6
"I’m seeking modern technology and such treatments that I can’t get in Russia!"

**S1: Seeking Opportunities**

**SATISFIED WITH OWN PHYSICAL HEALTH**
- Average: 51%
  - Total Sample: 49%

**SATISFIED WITH OWN MENTAL HEALTH**
- Average: 74%
  - Total Sample: 74%

**TRUSTS IN RUSSIAN HEALTHCARE SYSTEM**
- Average: 23%
  - Total Sample: 22%

**WOULD CONSIDER FINLAND AS AN OPTION**
- Average: 26%
  - Total Sample: 26%

**DEMOGRAPHICS: AREA**
- Moscow: 50%
- St. Petersburg: 51%

**DEMOGRAPHICS: GENDER**
- Female: 55%
- Male: 46%

**DEMOGRAPHICS: AGE GROUP**
- 30 - 39 years: 32%
- 40 - 49 years: 26%
- 50 - 59 years: 30%
- 60 - 75 years: 13%

**TOP 5 CONSIDERED TREATMENTS**
- Chronic disease treatment: 40%
- Dentistry: 34%
- Cancer treatment: 34%
- Heart surgery: 24%
- Orthopedic/Spine surgery: 22%

**TOP 5 CONSIDERED COUNTRIES**
- Israel: 74%
- Germany: 73%
- Switzerland: 32%
- Austria: 27%
- Finland: 26%

**AWARENESS OF FINNISH SERVICE PROVIDERS**
- Clinic Helena: 15%
- Orton: 13%
- FinnHealth: 8%
- Medident: 8%
- Mehliläinen NEO Sports Hospital: 5%
- Coxa: 4%
- Aava: 3%
- Docrates: 3%
- Kruunupuisto Hospital: 2%
- Hyksin: 2%
- None of the above: 69%

**Group Size**
- 25.5%
S1: Seeking Opportunities
Media Usage

### SEEKS / GETS INFORMATION OF HEALTH CARE PROVIDERS ABROAD

<table>
<thead>
<tr>
<th>Service</th>
<th>Total</th>
<th>Segment</th>
<th>Confidential</th>
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</thead>
<tbody>
<tr>
<td>Online search engines</td>
<td>73%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Doctors/Medical professionals</td>
<td>52%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health provider web pages</td>
<td>25%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical tourism agents</td>
<td>8%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel agents</td>
<td>3%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### TOP 10 SOCIAL MEDIA SERVICES USED

<table>
<thead>
<tr>
<th>Service</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>WhatsApp</td>
<td>76%</td>
</tr>
<tr>
<td>VK</td>
<td>61%</td>
</tr>
<tr>
<td>Youtube</td>
<td>61%</td>
</tr>
<tr>
<td>Instagram</td>
<td>45%</td>
</tr>
<tr>
<td>Facebook</td>
<td>39%</td>
</tr>
<tr>
<td>Viber</td>
<td>37%</td>
</tr>
<tr>
<td>Telegram</td>
<td>24%</td>
</tr>
<tr>
<td>OK.ru</td>
<td>21%</td>
</tr>
<tr>
<td>Twitter</td>
<td>11%</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>3%</td>
</tr>
</tbody>
</table>

### TOP 10 RADIO CHANNELS LISTENED

<table>
<thead>
<tr>
<th>Channel</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avtoradio</td>
<td>23%</td>
</tr>
<tr>
<td>Dorozhnoe Radio</td>
<td>20%</td>
</tr>
<tr>
<td>Europa Plus</td>
<td>19%</td>
</tr>
<tr>
<td>Nashe Radio</td>
<td>16%</td>
</tr>
<tr>
<td>Retro FM</td>
<td>14%</td>
</tr>
<tr>
<td>Russkoe Radio</td>
<td>13%</td>
</tr>
<tr>
<td>Business FM</td>
<td>10%</td>
</tr>
<tr>
<td>Ekhos Moskvy</td>
<td>10%</td>
</tr>
<tr>
<td>Hit FM</td>
<td>9%</td>
</tr>
<tr>
<td>Radio Dacha</td>
<td>9%</td>
</tr>
</tbody>
</table>

### TOP 8 AREAS OF INTEREST

<table>
<thead>
<tr>
<th>Area</th>
<th>Interest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel</td>
<td>66%</td>
</tr>
<tr>
<td>Reading</td>
<td>65%</td>
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<tr>
<td>Food</td>
<td>60%</td>
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<tr>
<td>Music</td>
<td>59%</td>
</tr>
<tr>
<td>Pets</td>
<td>47%</td>
</tr>
<tr>
<td>Health and Fitness</td>
<td>45%</td>
</tr>
<tr>
<td>Technology</td>
<td>37%</td>
</tr>
<tr>
<td>Photography</td>
<td>32%</td>
</tr>
</tbody>
</table>

### TOP 10 TV CHANNELS WATCHED

<table>
<thead>
<tr>
<th>Channel</th>
<th>Interest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pervy</td>
<td>41%</td>
</tr>
<tr>
<td>Rossiya 1</td>
<td>34%</td>
</tr>
<tr>
<td>TNT</td>
<td>31%</td>
</tr>
<tr>
<td>CTC</td>
<td>30%</td>
</tr>
<tr>
<td>Ren</td>
<td>27%</td>
</tr>
<tr>
<td>NTV</td>
<td>27%</td>
</tr>
<tr>
<td>Friday</td>
<td>25%</td>
</tr>
<tr>
<td>Rossiya 24</td>
<td>23%</td>
</tr>
<tr>
<td>Match TV</td>
<td>21%</td>
</tr>
<tr>
<td>Zvezda</td>
<td>20%</td>
</tr>
</tbody>
</table>

### TOP 10 NEWSPAPERS READ

<table>
<thead>
<tr>
<th>Newspaper</th>
<th>Interest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Argumenty i Fakty</td>
<td>20%</td>
</tr>
<tr>
<td>Kommersant</td>
<td>11%</td>
</tr>
<tr>
<td>Komsomolskaya Pravda</td>
<td>9%</td>
</tr>
<tr>
<td>Sport Express</td>
<td>7%</td>
</tr>
<tr>
<td>Moskovskij Komsomol</td>
<td>6%</td>
</tr>
<tr>
<td>Rossiyskaya Gazeta</td>
<td>4%</td>
</tr>
<tr>
<td>Nezavisimaya Gazeta</td>
<td>4%</td>
</tr>
<tr>
<td>St.P. Vedomosti</td>
<td>4%</td>
</tr>
<tr>
<td>Novaya Gazeta</td>
<td>3%</td>
</tr>
<tr>
<td>Sovietsky Sport</td>
<td>3%</td>
</tr>
</tbody>
</table>

### TOP 10 MAGAZINES READ

<table>
<thead>
<tr>
<th>Magazine</th>
<th>Interest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vokrua Sveta</td>
<td>12%</td>
</tr>
<tr>
<td>Za Rulem</td>
<td>11%</td>
</tr>
<tr>
<td>National Geographic</td>
<td>11%</td>
</tr>
<tr>
<td>7 Dny</td>
<td>8%</td>
</tr>
<tr>
<td>Autoreview</td>
<td>8%</td>
</tr>
<tr>
<td>GEO</td>
<td>8%</td>
</tr>
<tr>
<td>Karavan Istory</td>
<td>8%</td>
</tr>
<tr>
<td>Teleprogramma</td>
<td>7%</td>
</tr>
<tr>
<td>Cosmopolitan</td>
<td>6%</td>
</tr>
<tr>
<td>Domashniy ochag</td>
<td>5%</td>
</tr>
</tbody>
</table>

### TOP 10 MAGAZINE TYPES OF INTEREST

<table>
<thead>
<tr>
<th>Type</th>
<th>Interest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cooking</td>
<td>15%</td>
</tr>
<tr>
<td>Tourism</td>
<td>15%</td>
</tr>
<tr>
<td>Gardening</td>
<td>13%</td>
</tr>
<tr>
<td>Auto / Moto</td>
<td>13%</td>
</tr>
<tr>
<td>Entertaining</td>
<td>12%</td>
</tr>
<tr>
<td>Interior &amp; Design</td>
<td>10%</td>
</tr>
<tr>
<td>Sport</td>
<td>9%</td>
</tr>
<tr>
<td>Women's</td>
<td>9%</td>
</tr>
<tr>
<td>Business &amp; Analytical</td>
<td>8%</td>
</tr>
<tr>
<td>Health</td>
<td>8%</td>
</tr>
</tbody>
</table>

**Group Size**
25.5%
S1: Seeking Opportunities

I believe that the medical staff abroad has high professional skills.
I believe that the medical staff abroad has high service attitude.
I believe that the technology used abroad is up-to-date.
I believe that the hospital facilities are in great condition.
I could get treatments cheaper than I would in Russia.
I could get treatments faster than I would in Russia.
This would also be a good holiday destination.

PERFORMANCE

IMPORTANCE

HYGIENICS
KEEP IN ORDER, NOT KEY FACTORS

STRENGTHS
KEY FACTORS IN WHICH SHINES

THINGS TO IMPROVE
KEY FACTORS IN WHICH UNDERPERFORMS

KEY TASK TO WIN THIS SEGMENT:

- The key thing is to keep people informed of the possible treatments not available / allowed in Russia.
- The second key is to hugely improve Finland’s image in “up-to-date” technology. We are currently clearly behind Germany, USA, Japan, Switzerland and Israel in this.

WHICH COUNTRIES CURRENTLY BEST MEET THE EXPECTATIONS OF THE TRAVELLERS?
1. Germany
2. United States
3. Japan
4. Switzerland
5. Israel
6. Austria
7. United Kingdom
8. South Korea
9. Finland
S2: Seeking Quality

"I’m after great professional skills, great hospital facilities, great service attitude and especially great technology!”

SATISFIED WITH OWN PHYSICAL HEALTH

<table>
<thead>
<tr>
<th>Category</th>
<th>Below average</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Sample: 49 %</td>
<td>46 %</td>
<td></td>
</tr>
</tbody>
</table>

SATISFIED WITH OWN MENTAL HEALTH

<table>
<thead>
<tr>
<th>Category</th>
<th>Below average</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Sample: 74 %</td>
<td>73 %</td>
<td></td>
</tr>
</tbody>
</table>

TRUSTS IN RUSSIAN HEALTHCARE SYSTEM

<table>
<thead>
<tr>
<th>Category</th>
<th>Below average</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Sample: 22 %</td>
<td>17 %</td>
<td></td>
</tr>
</tbody>
</table>

WOULD CONSIDER FINLAND AS AN OPTION

<table>
<thead>
<tr>
<th>Category</th>
<th>Below average</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Sample: 26 %</td>
<td>26 %</td>
<td></td>
</tr>
</tbody>
</table>

DEMOGRAPHICS: AREA

<table>
<thead>
<tr>
<th>City</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moscow</td>
<td>51 %</td>
</tr>
<tr>
<td>St. Petersburg</td>
<td>49 %</td>
</tr>
</tbody>
</table>

DEMOGRAPHICS: GENDER

<table>
<thead>
<tr>
<th>Gender</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>48 %</td>
</tr>
<tr>
<td>Male</td>
<td>52 %</td>
</tr>
</tbody>
</table>

DEMOGRAPHICS: AGE GROUP

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 - 39 years</td>
<td>33 %</td>
</tr>
<tr>
<td>40 - 49 years</td>
<td>18 %</td>
</tr>
<tr>
<td>50 - 59 years</td>
<td>36 %</td>
</tr>
<tr>
<td>60 - 75 years</td>
<td>13 %</td>
</tr>
</tbody>
</table>

TOP 5 CONSIDERED TREATMENTS

<table>
<thead>
<tr>
<th>Treatment</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chronic disease treatment</td>
<td>45 %</td>
</tr>
<tr>
<td>Dentistry</td>
<td>39 %</td>
</tr>
<tr>
<td>Orthopedic/Spine surgery</td>
<td>24 %</td>
</tr>
<tr>
<td>Eye surgery</td>
<td>23 %</td>
</tr>
<tr>
<td>Cancer treatment</td>
<td>19 %</td>
</tr>
</tbody>
</table>

TOP 5 CONSIDERED COUNTRIES

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>68 %</td>
</tr>
<tr>
<td>Israel</td>
<td>64 %</td>
</tr>
<tr>
<td>Switzerland</td>
<td>30 %</td>
</tr>
<tr>
<td>Finland</td>
<td>26 %</td>
</tr>
<tr>
<td>Austria</td>
<td>25 %</td>
</tr>
</tbody>
</table>

AWARENESS OF FINNISH SERVICE PROVIDERS

<table>
<thead>
<tr>
<th>Service Provider</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinic Helena</td>
<td>12 %</td>
</tr>
<tr>
<td>Orton</td>
<td>10 %</td>
</tr>
<tr>
<td>FinnHealth</td>
<td>6 %</td>
</tr>
<tr>
<td>Mehiläinen NEO Sports Hospital</td>
<td>4 %</td>
</tr>
<tr>
<td>Coxa</td>
<td>3 %</td>
</tr>
<tr>
<td>Medident</td>
<td>3 %</td>
</tr>
<tr>
<td>Aava</td>
<td>3 %</td>
</tr>
<tr>
<td>Docrates</td>
<td>3 %</td>
</tr>
<tr>
<td>Hyksin</td>
<td>2 %</td>
</tr>
<tr>
<td>Kruunupuisto</td>
<td>1 %</td>
</tr>
<tr>
<td>None of the above</td>
<td>75 %</td>
</tr>
</tbody>
</table>
## S2: Seeking Quality
### Media Usage

#### SEeks / Gets Information of Health Care Providers Abroad
- Online search engines: 76%
- Doctors/Medical professionals: 41%
- Health provider web pages: 30%
- Medical tourism agents: 13%
- Travel agents: 5%

#### Top 10 Social Media Services Used
- WhatsApp: 80%
- VK: 67%
- Youtube: 61%
- Instagram: 46%
- Facebook: 44%
- Viber: 35%
- Telegram: 28%
- OK.ru: 27%
- Twitter: 12%
- LinkedIn: 3%

#### Top 8 Areas of Interest
- Music: 65%
- Reading: 63%
- Travel: 62%
- Food: 52%
- Pets: 49%
- Health and Fitness: 47%
- Technology: 41%
- Watching Sports: 31%

#### Top 10 TV Channels Watched
- CTC: 36%
- Pervy: 36%
- Rossiya 1: 36%
- TNT: 36%
- NTV: 33%
- Ren: 30%
- Friday: 30%
- Match TV: 26%
- Zvezda: 21%
- TV-3: 21%

#### Top 10 Radio Channels Listened
- Avtoradio: 25%
- Dorozhnoe Radio: 24%
- Europa Plus: 22%
- Retro FM: 21%
- Russkoe Radio: 19%
- Nashe Radio: 16%
- Ekho Moskvy: 14%
- Love Radio: 12%
- Chanson: 12%
- Hit FM: 12%

#### Top 10 Magazines Read
- Vokrua Sveta: 14%
- Karavan Istory: 11%
- Za Rulem: 11%
- National Geographic: 11%
- 7 Dney: 10%
- Cosmopolitan: 10%
- Idei Vashego Dom: 8%
- GEO: 7%
- Skanvord Teschn..: 6%
- Autoreview: 6%

#### Top 10 Magazine Types of Interest
- Tourism: 17%
- Cooking: 16%
- Auto / Moto: 16%
- Women’s Health: 15%
- Gardening: 14%
- Interior & Design: 14%
- Computer: 12%
- Entertaining: 10%
- Business & Analytical: 10%

### Confidential

Group Size
54.1%
Country Importance/Performance Map: Finland
S2: Seeking Quality

KEY TASK TO WIN THIS SEGMENT:
- Three dimensions must be improved in order to be competitive in this segment: image in up-to-date technology, image in medical staffs' professional skills and image in the quality of hospital facilities
- In all of this we are currently far behind Germany and Israel – but the real pain point is the poor image in up-to-date technology

WHICH COUNTRIES CURRENTLY BEST MEET THE EXPECTATIONS OF THE TRAVELLERS?
1. Germany
2. Israel
3. United States
4. Switzerland
5. Japan
6. United Kingdom
7. Austria
8. Finland
9. South Korea
"If getting treatments abroad can be combined with having a great holiday, I’m all for it! Although the situation is currently quite hard to imagine."

### SATISFIED WITH OWN PHYSICAL HEALTH
- **Above average:** 56% (Total Sample: 49%)
- **Average:** 76% (Total Sample: 74%)

### SATISFIED WITH OWN MENTAL HEALTH
- **Above average:** 31% (Total Sample: 22%)
- **Average:** 24% (Total Sample: 26%)

### DEMOGRAPHICS: AREA
- Moscow: 49%
- St. Petersburg: 51%

### DEMOGRAPHICS: GENDER
- Female: 47%
- Male: 53%

### DEMOGRAPHICS: AGE GROUP
- 30 - 39 years: 31%
- 40 - 49 years: 24%
- 50 - 59 years: 29%
- 60 - 75 years: 16%

### TOP 5 CONSIDERED TREATMENTS
- **Dentistry:** 44%
- **Chronic disease treatment:** 39%
- **Heart surgery:** 21%
- **Eye surgery:** 19%
- **Aesthetic surgery:** 18%

### TOP 5 CONSIDERED COUNTRIES
- **Germany:** 58%
- **Israel:** 51%
- **Switzerland:** 25%
- **Finland:** 24%
- **Austria:** 19%
- **None of the above:** 65%

### AWARENESS OF FINNISH SERVICE PROVIDERS
- Clinic Helena: 15%
- Orton: 9%
- FinnHealth: 9%
- Mehiläinen NEO Sports Hospital: 6%
- Medident: 6%
- Aava: 4%
- Kruunupuisto: 4%
- Docrates: 3%
- Hyksin: 2%
- Coxa: 1%
- None of the above: 65%
S3: Seeking Holiday
Media Usage

SEEKS / GETS INFORMATION OF HEALTH CARE PROVIDERS ABROAD
- Online search engines: 70%
- Doctors/Medical professionals: 33%
- Health provider web pages: 22%
- Medical tourism agents: 12%
- Travel agents: 6%

TOP 10 SOCIAL MEDIA SERVICES USED
- WhatsApp: 78%
- Vk: 74%
- Youtube: 59%
- Instagram: 39%
- Facebook: 36%
- Viber: 34%
- Ok.ru: 26%
- Telegram: 22%
- Twitter: 7%
- Linkedin: 1%

TOP 10 TV CHANNELS WATCHED
- Pervy: 42%
- CTC: 40%
- NTV: 39%
- Rossiy 1: 39%
- TNT: 30%
- Friday: 29%
- Rossiy 24: 28%
- Ren: 25%
- Zvezda: 24%
- Match TV: 23%

TOP 10 RADIO CHANNELS LISTENED
- Avtoradio: 23%
- Dorozhnoe Radio: 21%
- Europa Plus: 21%
- Retro FM: 20%
- Russian Radio: 16%
- Chanson: 16%
- Radio Dacha: 13%
- Nashe Radio: 11%
- Vest FM: 11%
- Love Radio: 10%

TOP 10 AREAS OF INTEREST
- Reading: 65%
- Music: 64%
- Travel: 62%
- Food: 51%
- Pets: 48%
- Health and Fitness: 44%
- Technology: 39%
- Arts and Crafts: 38%

TOP 10 MAGAZINES READ
- Vokrua Sveta: 14%
- Karavan Istory: 13%
- 7 Dny: 12%
- National Geographic: 10%
- Idei vashego doma: 9%
- Teleprogramma: 9%
- Za Rulem: 8%
- Domashnyi ochag: 8%
- GEO: 7%
- Autoreview: 7%

TOP 10 MAGAZINE TYPES OF INTEREST
- Cooking: 21%
- Tourism: 18%
- Health: 18%
- Interior & Design: 16%
- Women's: 15%
- Gardening: 15%
- Computer: 14%
- Auto / Moto: 13%
- Entertaining: 11%
- Sport: 10%

Group Size
20.4%
I believe that the medical staff abroad has high professional skills. I believe that my health information would be better well protected.

I could get treatments cheaper than I would in Russia. I believe that the medical staff abroad has high service attitude.

I believe that the technology used abroad is up-to-date. I could get treatments faster than I would in Russia.

This would also be a good holiday destination. The hospital facilities are in great condition.

**KEY TASK TO WIN THIS SEGMENT:**

- This segment wants to combine medical treatments with holiday. How could we better challenge Israel / Spain in this sense?
- We could however emphasize the ability to get treatments fast – this is an important factor where we are relatively strong.
- Also here improving image in having up-to-date technology is crucial.

**WHICH COUNTRIES CURRENTLY BEST MEET THE EXPECTATIONS OF THE TRAVELLERS?**

1. Israel
2. Spain
3. Cyprus
4. Switzerland
5. Austria
6. Germany
7. India
8. South Korea
9. Finland
EPILOGUE

Summary
## Overall Summary

### THE MOST POTENTIAL TREATMENTS

Two treatments stand out: having chronic disease treatment and having dental care. There however seems to be a difference between these two: having chronic disease treatment may be the sole reason for a trip, while dental care may be just an offshoot.

### FINLAND IS NOT ON TOP

Finland is the fourth most considered country, but among under 50 year olds it is only sixth. Those considering Finland often also consider other Western European countries, mainly Germany.

### WE ARE LACKING CLEAR STRENGTHS

Yes, when talking of St. Petersburg being easily accessible is a clear strength but usually it is not enough. The real key to success is having stand-out technology, and in that sense Finland’s image is not even close to our main rivals (Germany, Israel for example).

### THE KEYS TO SUCCESS ARE SIMPLE!

The country (or provider) who can ensure that it has the best technology and most skilled professionals has a real advantage. One must stand out. And providing service in Russian language is also a must – for example Israel has a strong image in this!

### THREE DIFFERENT SEGMENTS

Based on the motives we can find three clear segments. In one people seek treatments not available in Russia. In the second (and largest) people seek world-class performance. In the third people seek something that can be combined with a holiday.

The key question is which of these three needs Finland / provider can answer the best in the future!

### TIPS TO IMAGE BUILDING

Whether talking of Finland as a country or a single provider – concentrate on these:

1) Can you provide something not found in Russia? Bring it out clearly!
2) Do you have technology which can be described as world-leading? This may win you a lot of customers!
3) As a hygiene factor – also make sure that people know that the services are available also in Russian language!