

INTRODUCTION

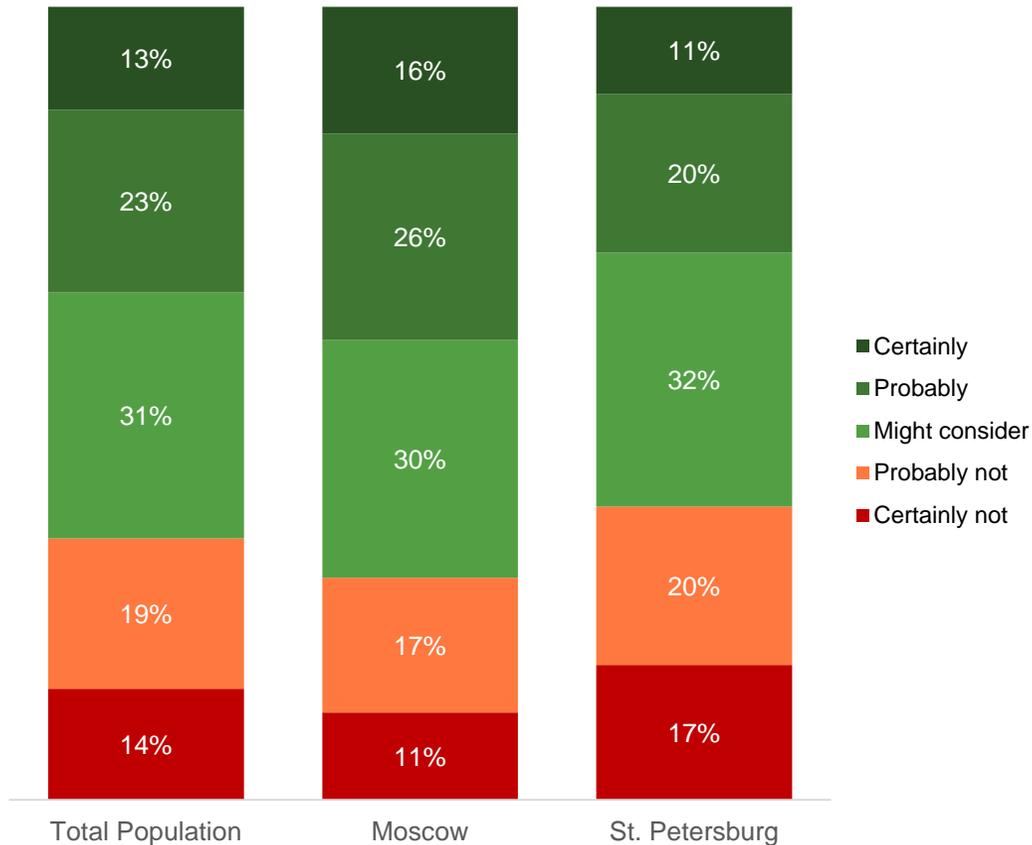
Medical travelling: total population

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?



| % of those at least considering (Total 67 %) | |
|--|------|
| GENDER | |
| Female | 67 % |
| Male | 68 % |
| AGE GROUP | |
| 30 - 39 years | 78 % |
| 40 - 49 years | 70 % |
| 50 - 59 years | 62 % |
| 60 years or older | 56 % |
| HOUSEHOLD INCOME | |
| Less than RUB 200 000 | 64 % |
| More than RUB 200 000 | 72 % |
| EDUCATION | |
| University graduate or higher | 73 % |
| Lower education than university graduate | 55 % |

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

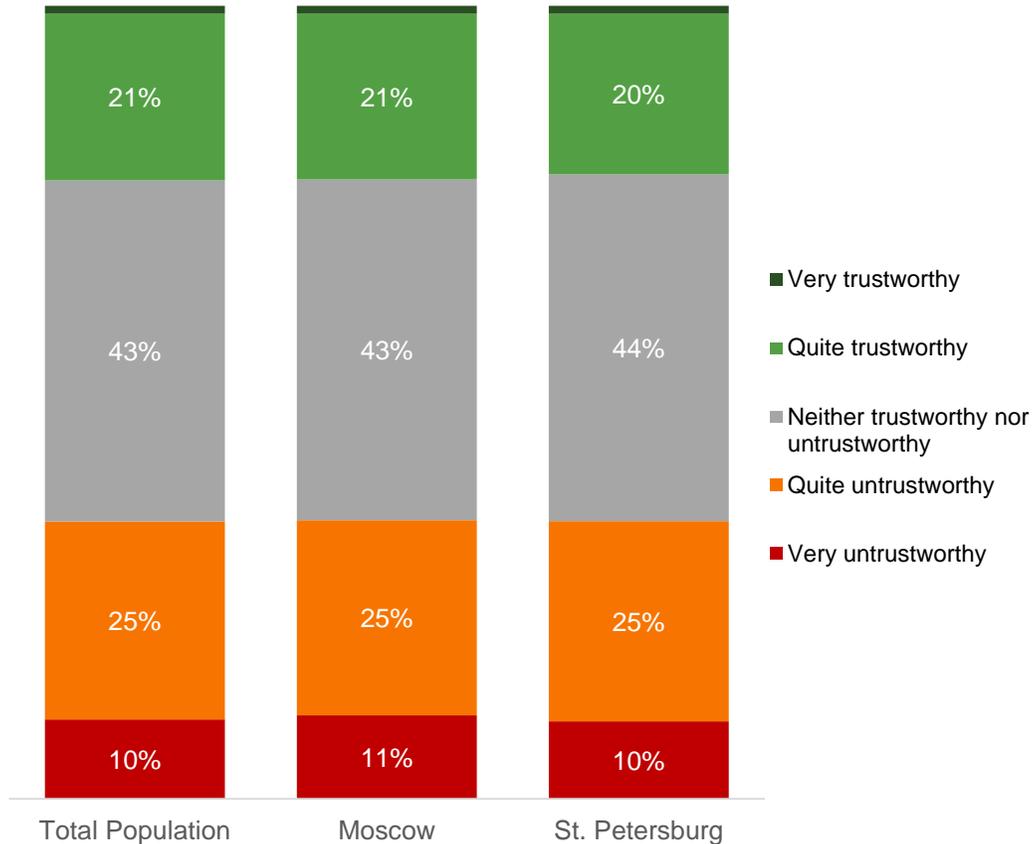
CHAPTER I

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?



| % considering Russian healthcare system as trustworthy (Total 22 %) | |
|---|------|
| GENDER | |
| Female | 19 % |
| Male | 24 % |
| AGE GROUP | |
| 30 - 39 years | 26 % |
| 40 - 49 years | 21 % |
| 50 - 59 years | 18 % |
| 60 years or older | 21 % |
| CONSIDERED COUNTRY | |
| Germany | 22 % |
| Israel | 20 % |
| Switzerland | 24 % |
| Finland | 18 % |

CHAPTER II

Treatments considered

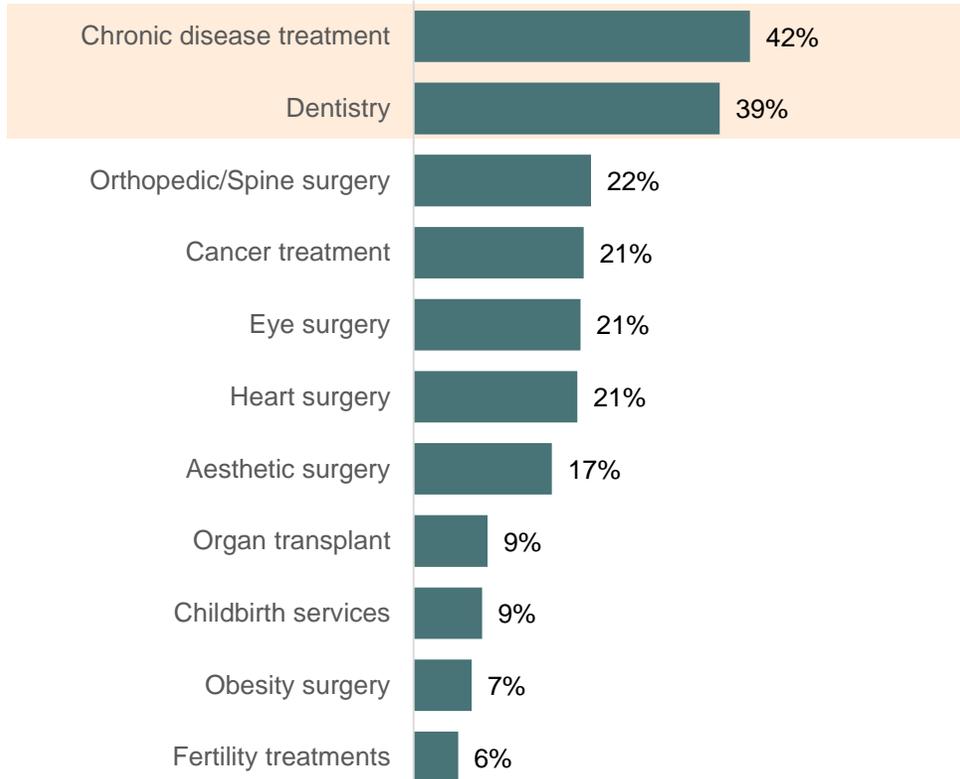
Key Findings:

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?

Total Sample



TOP 8: FEMALES

| | |
|----------------------------|------|
| Chronic disease treatment | 41 % |
| Dentistry | 36 % |
| Cancer treatment | 25 % |
| Aesthetic surgery | 24 % |
| Orthopedic / Spine surgery | 24 % |
| Eye surgery | 22 % |
| Heart surgery | 19 % |
| Childbirth services | 13 % |

TOP 8: MALES

| | |
|----------------------------|------|
| Chronic disease treatment | 44 % |
| Dentistry | 41 % |
| Heart surgery | 22 % |
| Orthopedic / Spine surgery | 21 % |
| Eye surgery | 20 % |
| Cancer treatment | 18 % |
| Aesthetic surgery | 18 % |
| Organ transplant | 8 % |

TOP 8: UNDER 50 YRS OLD

| | |
|----------------------------|------|
| Chronic disease treatment | 42 % |
| Dentistry | 41 % |
| Cancer treatment | 28 % |
| Eye surgery | 25 % |
| Orthopedic / Spine surgery | 23 % |
| Heart surgery | 22 % |
| Aesthetic surgery | 22 % |
| Childbirth services | 15 % |

TOP 8: 50 YRS OR OLDER

| | |
|----------------------------|------|
| Chronic disease treatment | 43 % |
| Dentistry | 35 % |
| Orthopedic / Spine surgery | 21 % |
| Heart surgery | 19 % |
| Eye surgery | 17 % |
| Cancer treatment | 14 % |
| Aesthetic surgery | 12 % |
| Obesity surgery | 6 % |

Green represents significant difference compared to total sample

CHAPTER III

Possible destinations

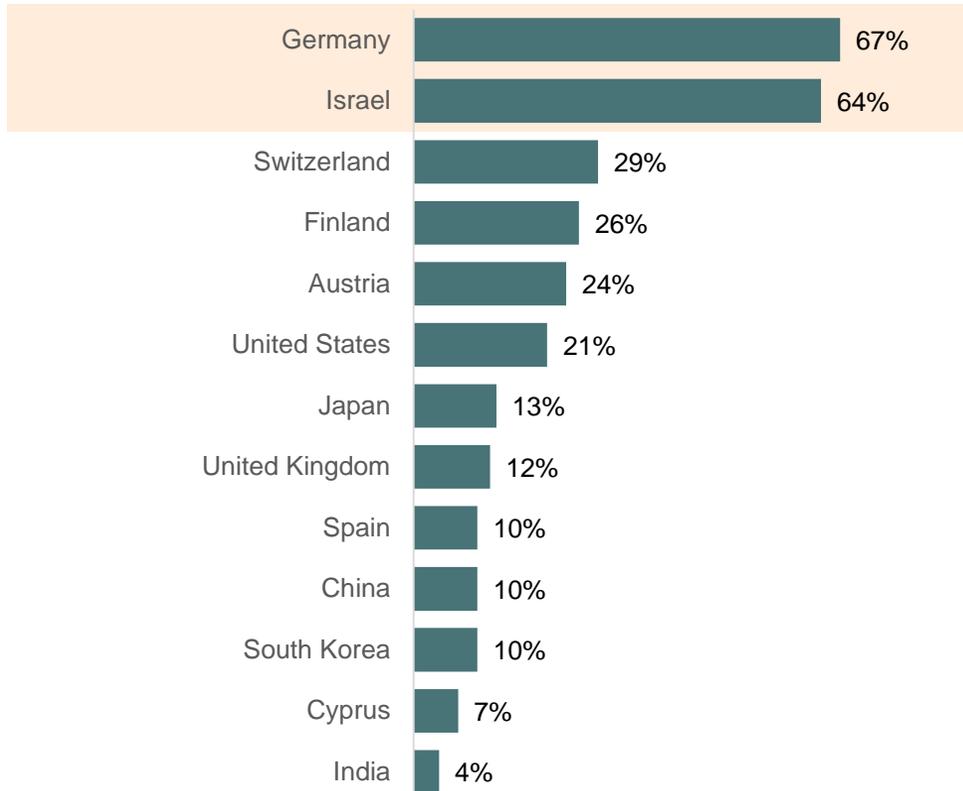
Key Findings:

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



TOP 4: MOSCOW

| | |
|-------------|------|
| Germany | 66 % |
| Israel | 65 % |
| Switzerland | 31 % |
| Austria | 27 % |

Finland (18 %) is sixth most considered destination

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 | 69 % |
| Israel | 62 % |
| Switzerland | 28 % |
| Austria | 27 % |

Finland (25 %) is fifth most considered destination

TOP 4: UNDER 50 YRS OLD

| | |
|----------------------|-------------|
| Germany | 72 % |
| Israel | 64 % |
| Switzerland | 40 % |
| United States | 29 % |

Finland (26 %) is sixth most considered destination

TOP 4: 50 YRS OR OLDER

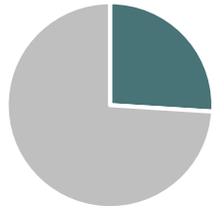
| | |
|----------------|-------------|
| Israel | 64 % |
| Germany | 61 % |
| Finland | 26 % |
| Austria | 18 % |

Green represents significant difference compared to total sample

Could consider travelling to Finland to get medical treatment

Finland chosen among the alternatives (n=207)

Group Size
25,9 %



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 %

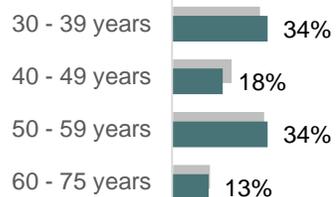
DEMOGRAPHICS: AREA



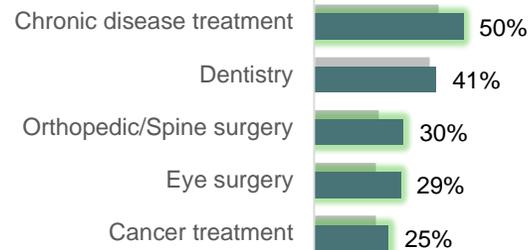
DEMOGRAPHICS: GENDER



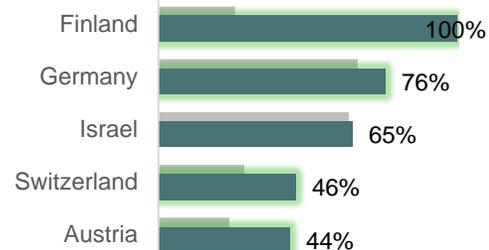
DEMOGRAPHICS: AGE GROUP



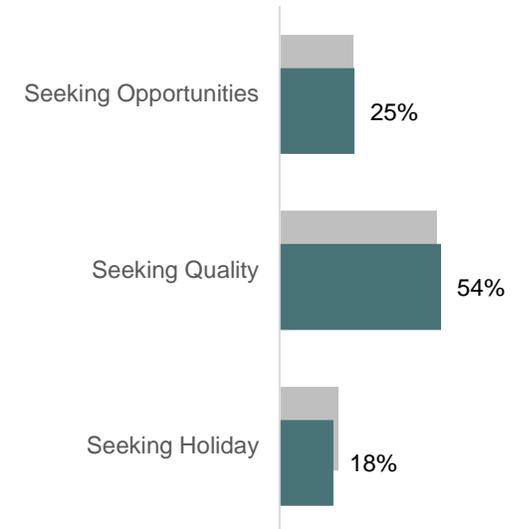
TOP 5 CONSIDERED TREATMENTS



TOP 5 CONSIDERED COUNTRIES



SEGMENTS



The segments are introduced later on this material

Those who can't see Finland as an option

Answered "can't see as an option" in a follow up question (n=60)

Group Size
7,5 %



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



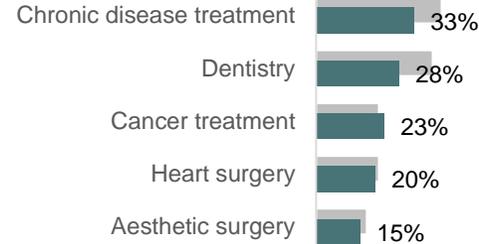
DEMOGRAPHICS: GENDER



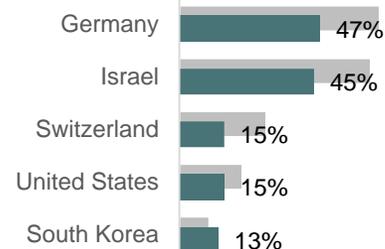
DEMOGRAPHICS: AGE GROUP



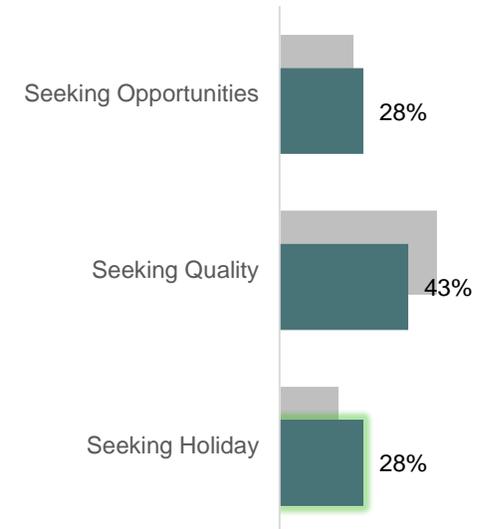
TOP 5 CONSIDERED TREATMENTS



TOP 5 CONSIDERED COUNTRIES



SEGMENTS



The segments are introduced later on this material

CHAPTER IV

Country images

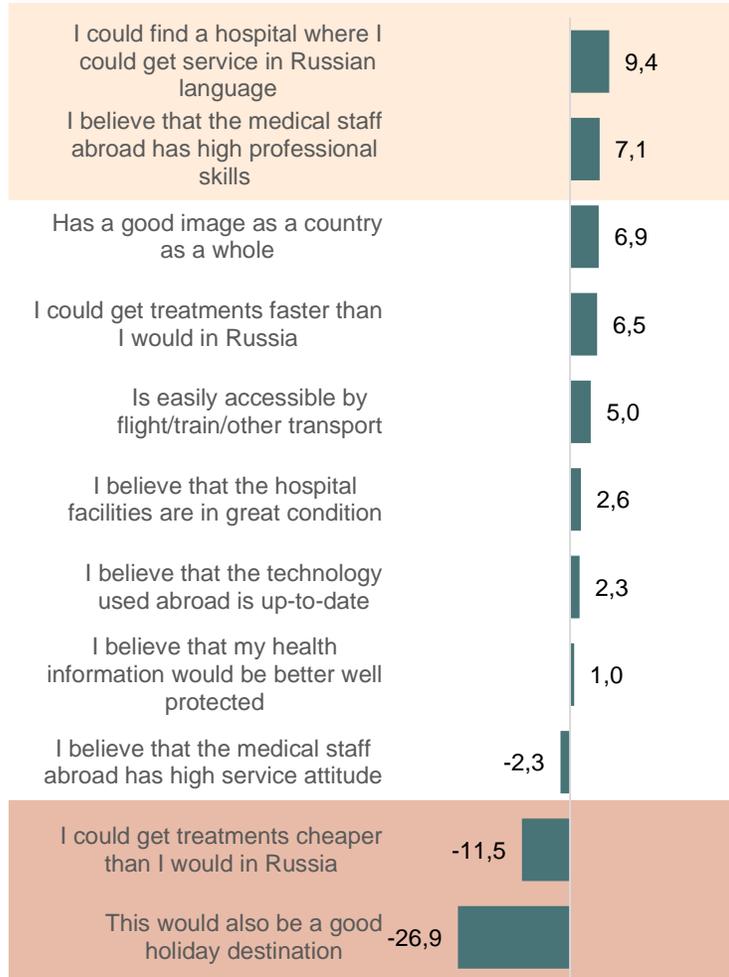
Key Findings:

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 staffs skills seems to be high, it is no surprise that they do well in consideration.

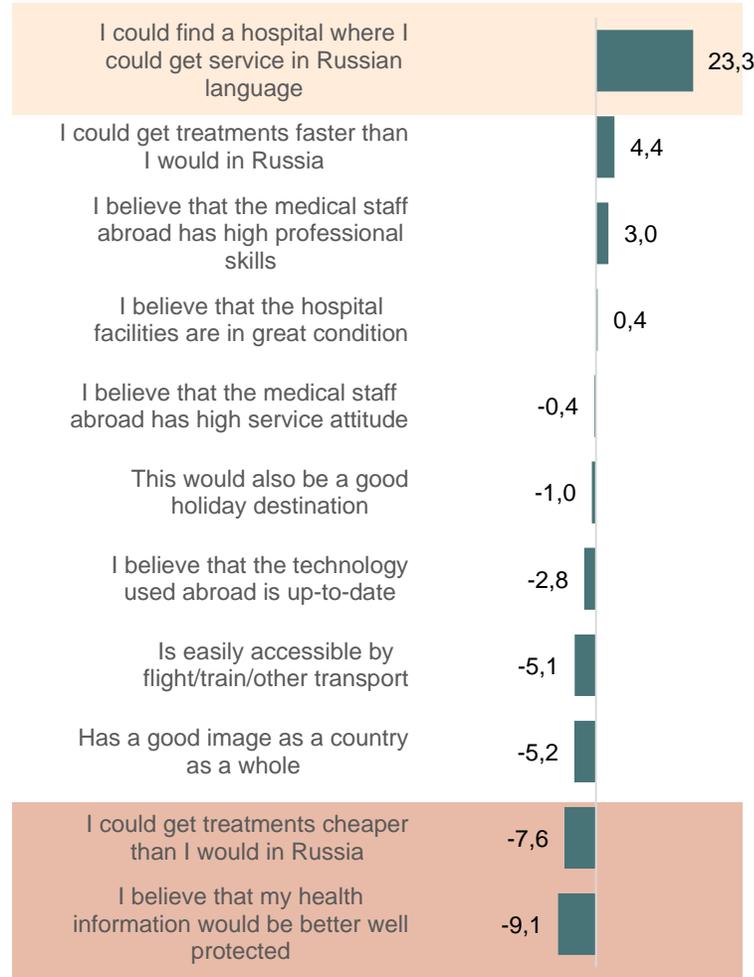
Finland's biggest advantage is that it is easily approachable (especially from St. Petersburg area). But the biggest image problem is that the trust in technology being up-to-date is far too low.

Images of most preferred countries

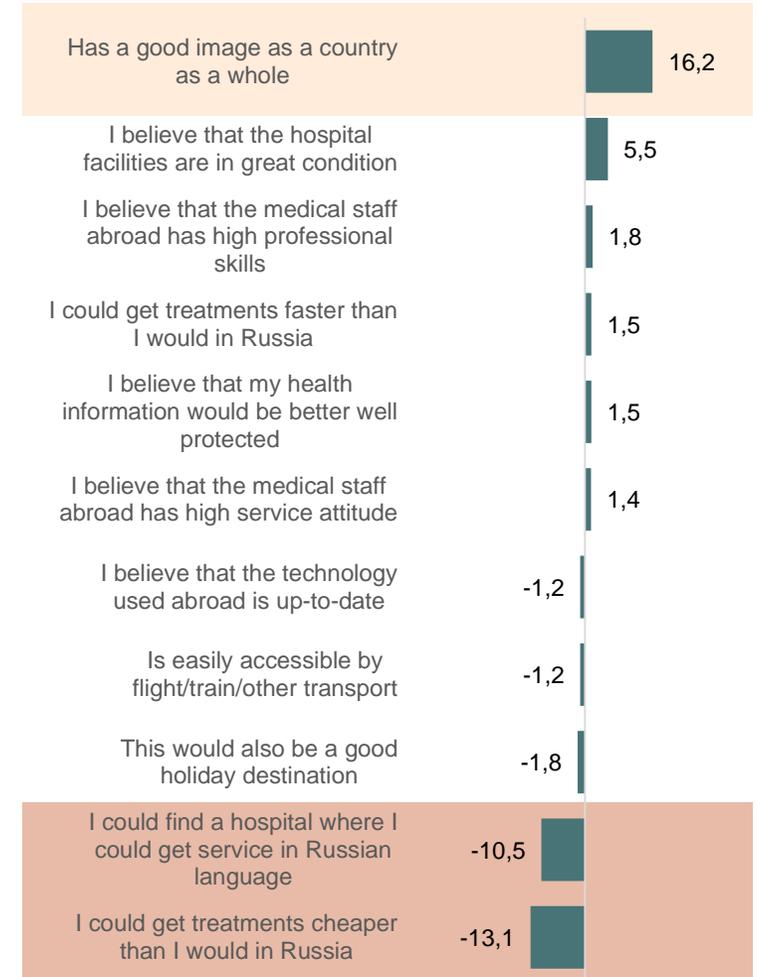
Germany



Israel



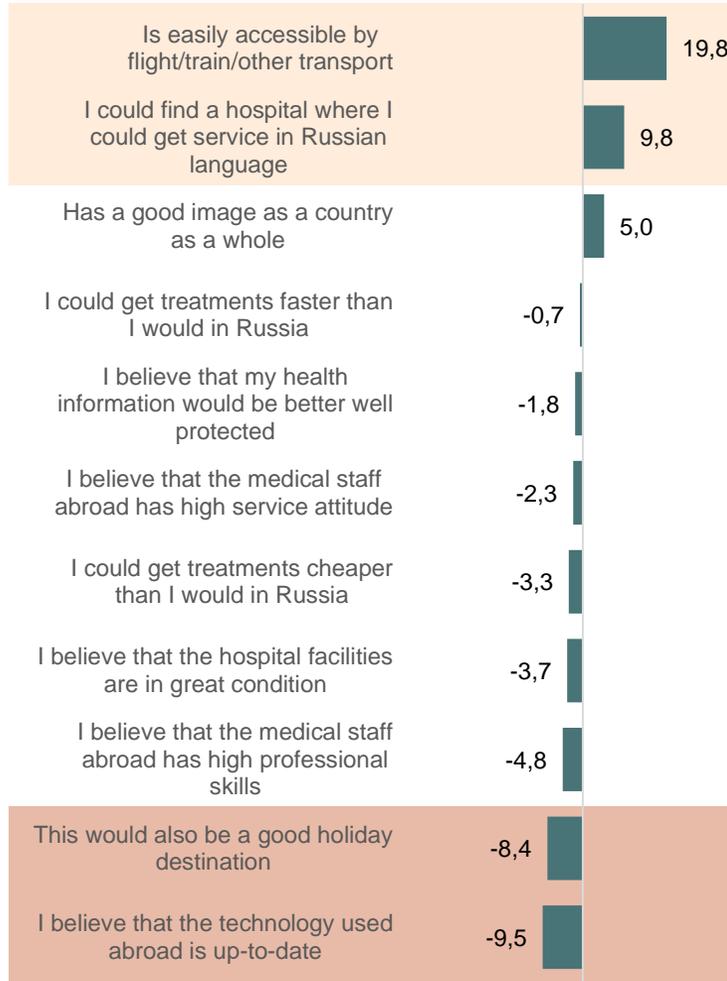
Switzerland



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

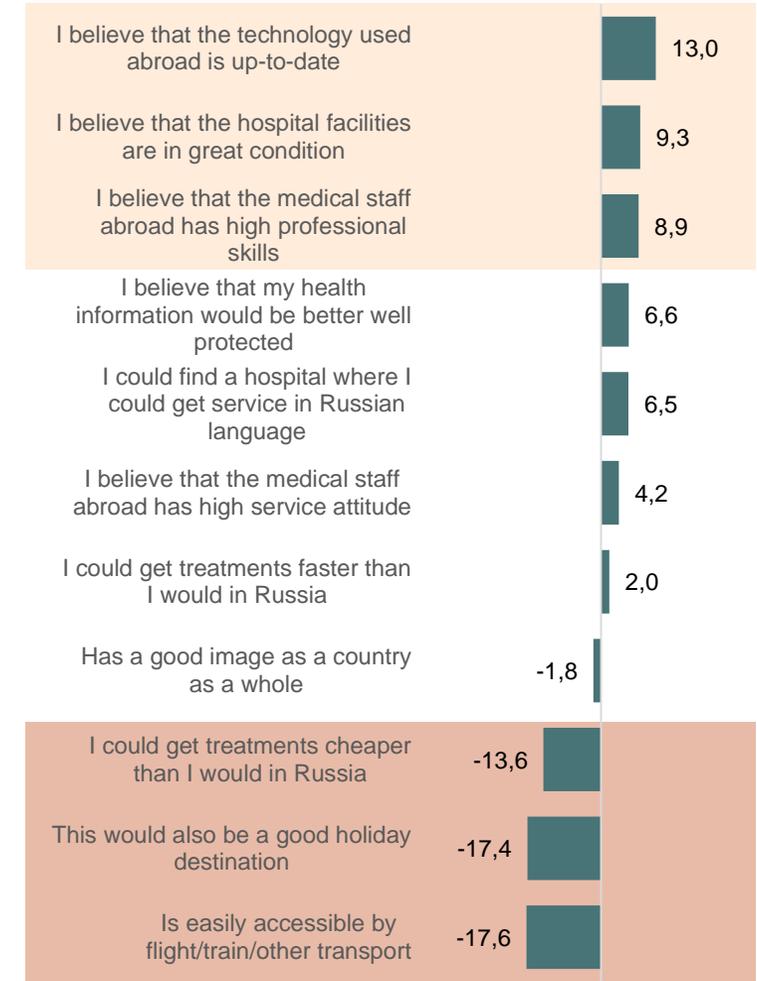
Finland



Austria



United States



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

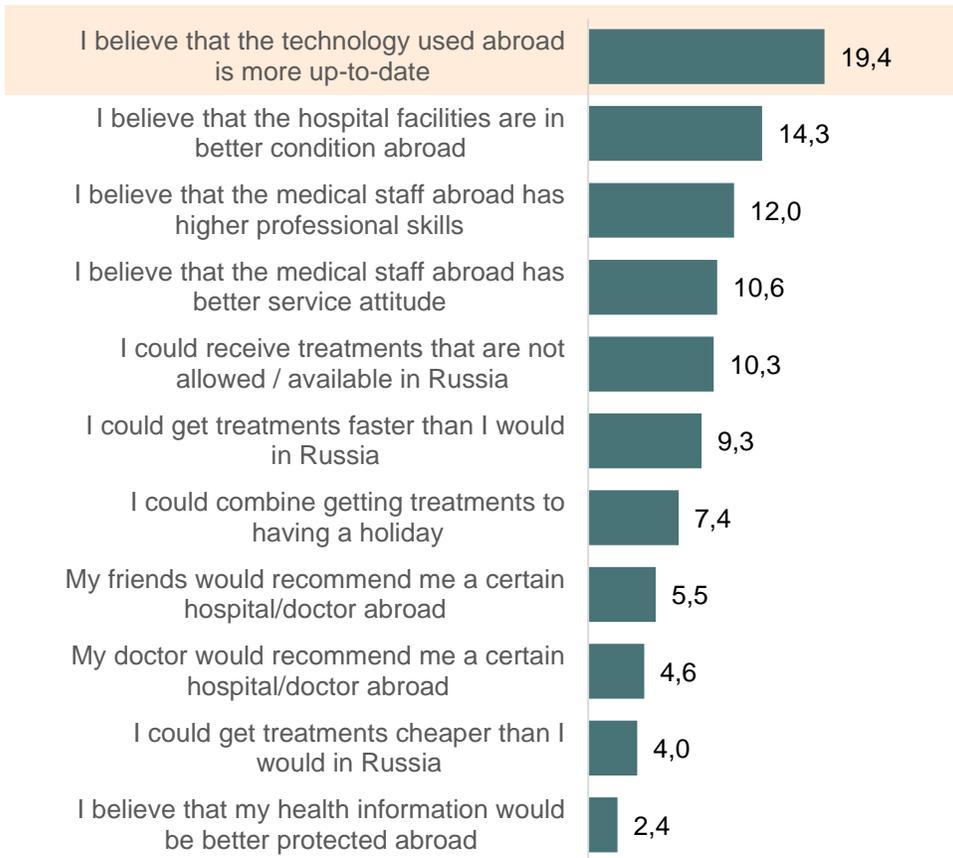
Key Findings:

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?

Total Sample

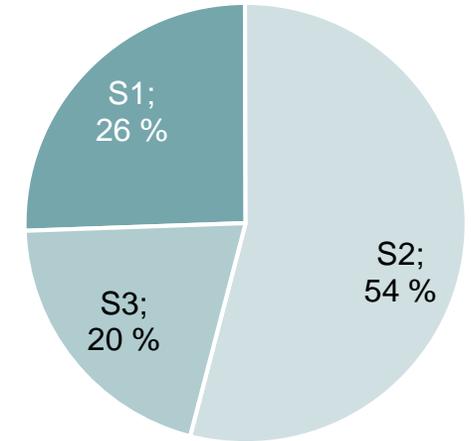


MaxDiff index, ratio scale. Sums up to 100.

There are no mentionable differences in importances between genders or age groups.

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

We will dig deeper into these segments later in our report.



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

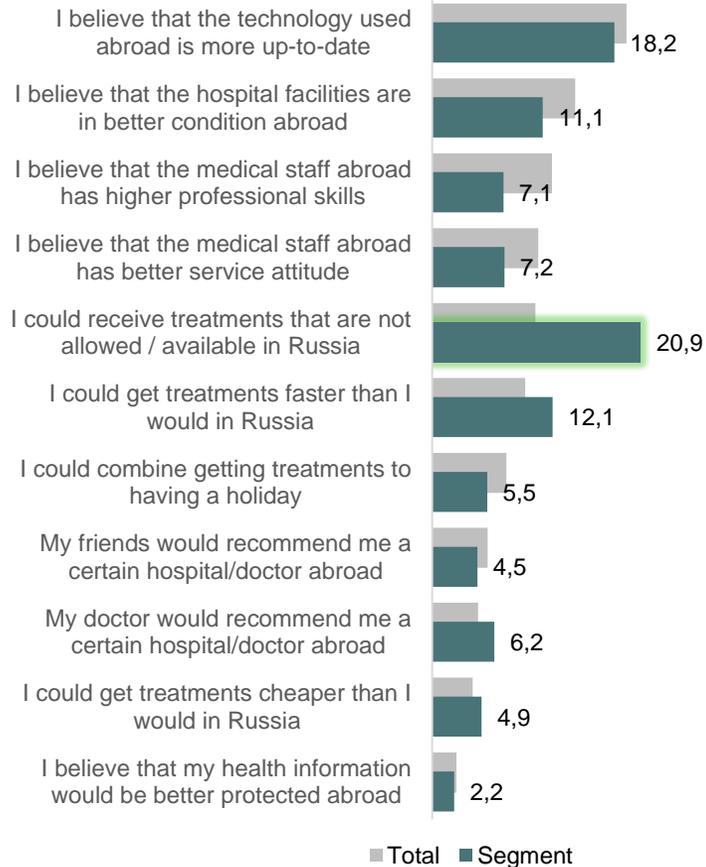
The segment believes that they would receive higher standard treatment abroad: more skilled professionals, better service attitude, better hospital facilities and more up-to-date technology.

S3. SEEKING HOLIDAY

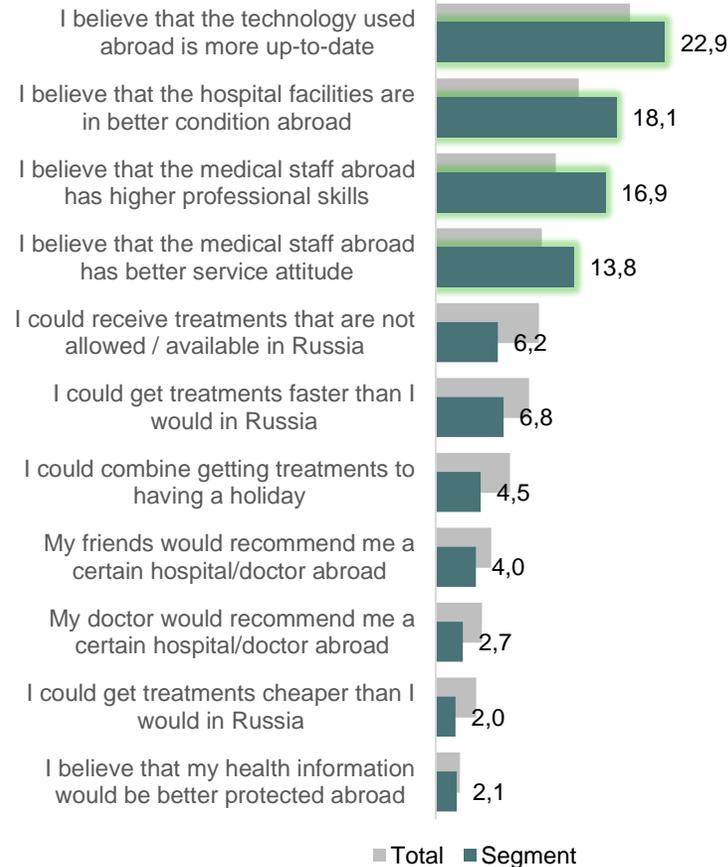
The segment likes the idea that they could combine getting treatments to having a holiday. They may make a destination decision based on friends recommendations.

Which of the following statements would most likely make you decide going abroad?

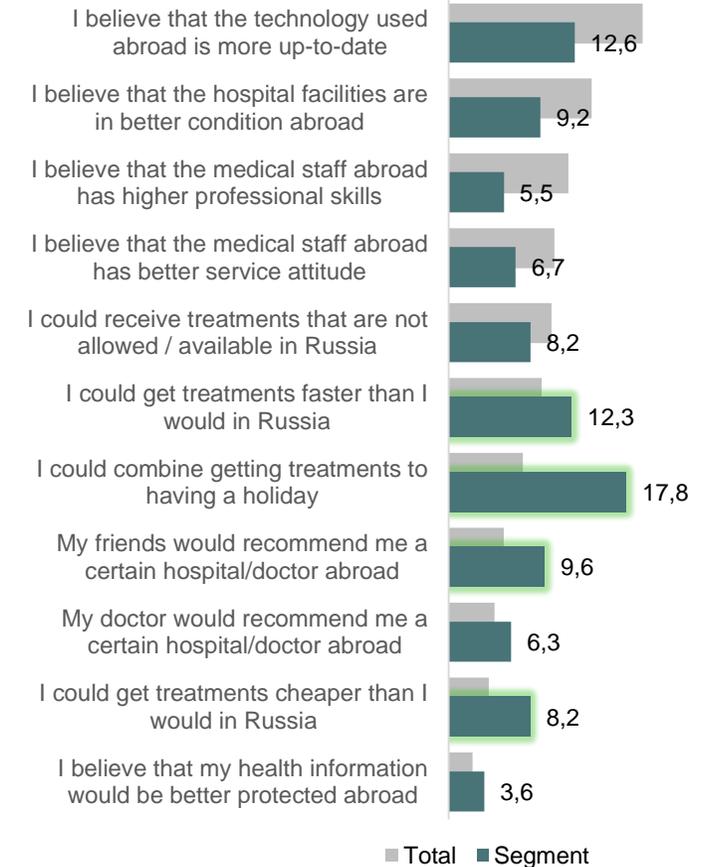
S1: Seeking Opportunities



S2: Seeking Quality



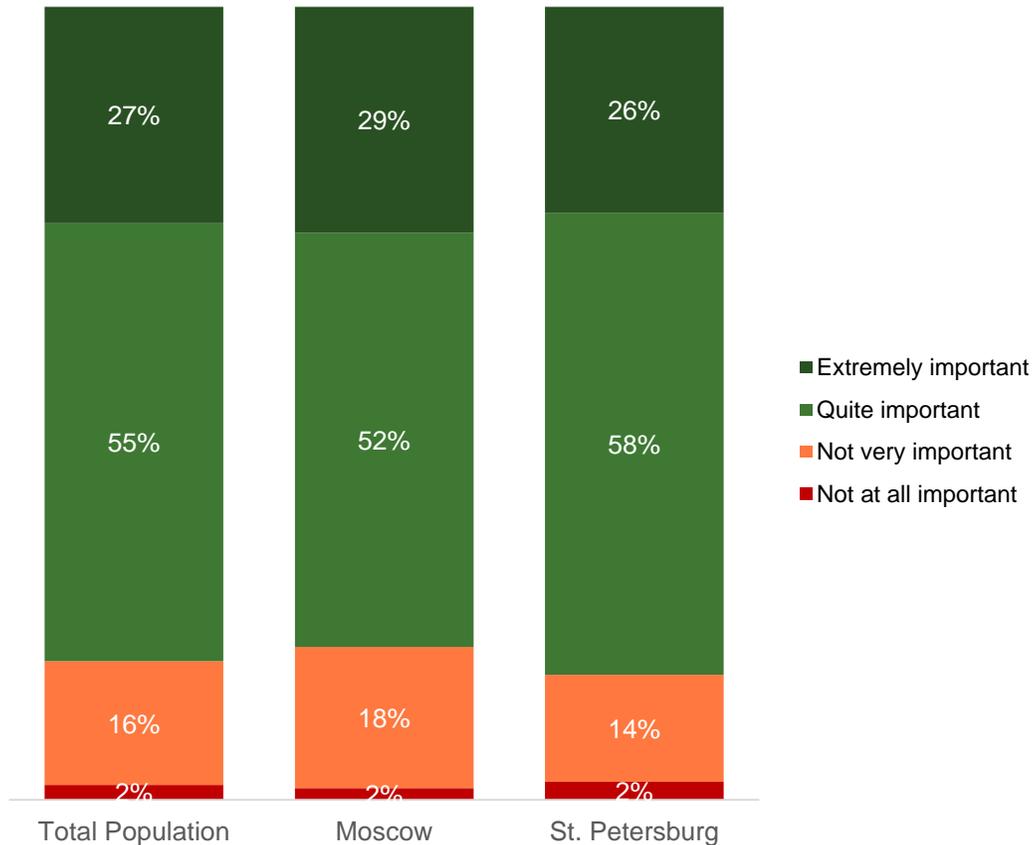
S3: Seeking Holiday



MaxDiff index, ratio scale
Sums up to 100

■ Glowing bar highlights significant differences

How important is it to you, that you could get service in Russian language abroad?



| % of those to whom it is at least quite important (Total 83 %) | |
|---|------|
| GENDER | |
| Female | 87 % |
| Male | 79 % |
| AGE GROUP | |
| 30 - 39 years | 84 % |
| 40 - 49 years | 84 % |
| 50 - 59 years | 81 % |
| 60 years or older | 80 % |
| CONSIDERED COUNTRY | |
| Germany | 82 % |
| Israel | 83 % |
| Switzerland | 81 % |
| Finland | 80 % |

CHAPTER VI

How does Finland meet the criterias?

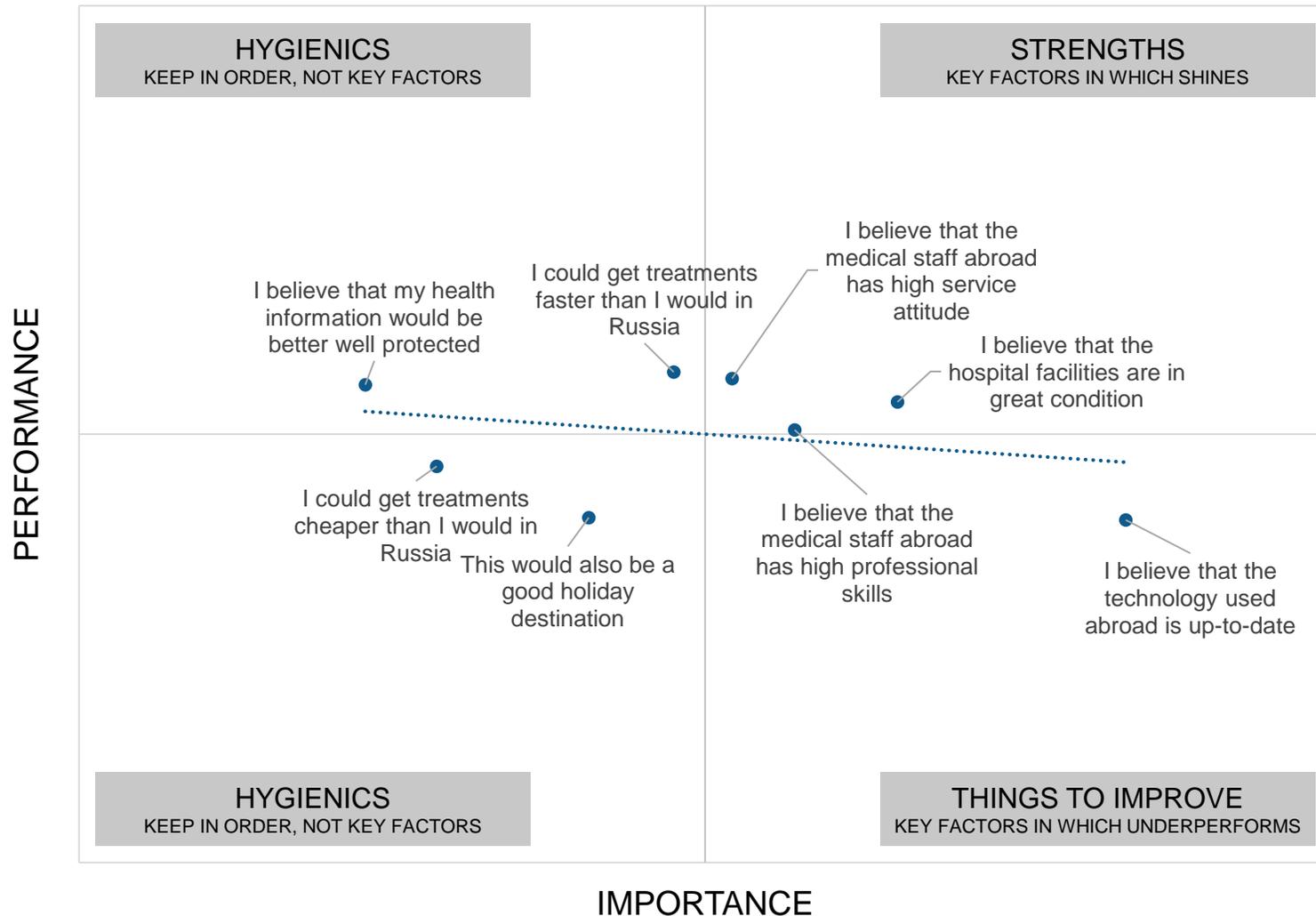
Key Findings:

Finland's image as medical treatment provider is not optimal. The more important the factor is, the more poorly does Finland success 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!

Country Importance/Performance Map: Finland

Total Sample



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

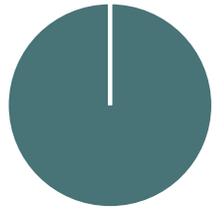
Key Findings:

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.

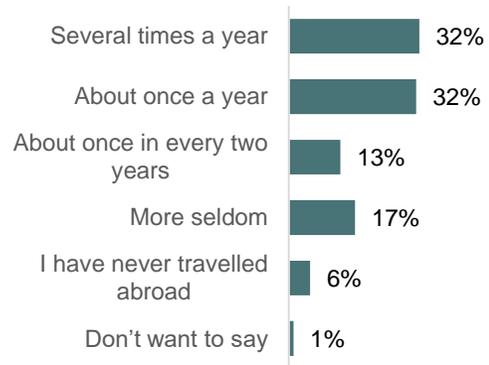
Travelling Habits

Total Sample

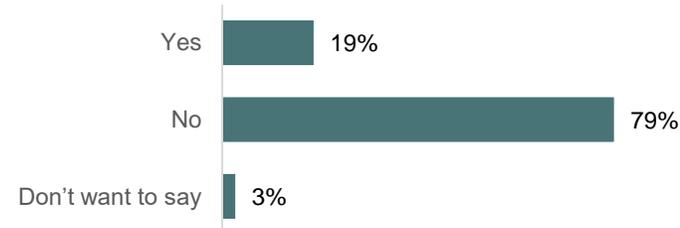
Group Size
100,0 %



HOW OFTEN USUALLY TRAVELS ABROAD



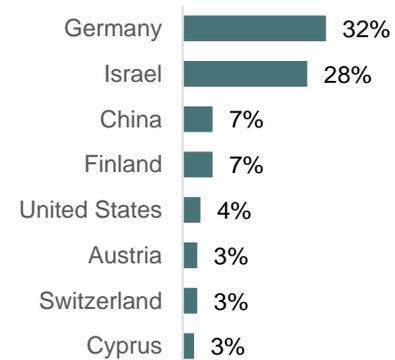
HAVE YOU OR SOME OF YOUR FAMILY MEMBERS EVER TRAVELLED ABROAD TO GET MEDICAL TREATMENT?



HOW BOOKS A TRIP / FLIGHT WHEN TRAVELLING ABROAD



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



CHAPTER IX

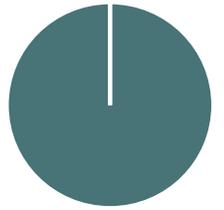
Media Usage

Key Findings:

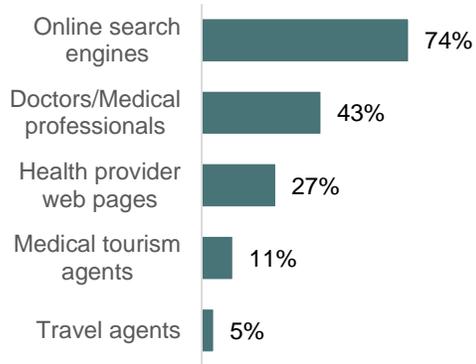
The following slide shows the media usage in total sample. One must however notice that there are some regional medias, so when planning media usage one should also check the areawise (and also segmentwise) media usages.

Total Sample Media Usage

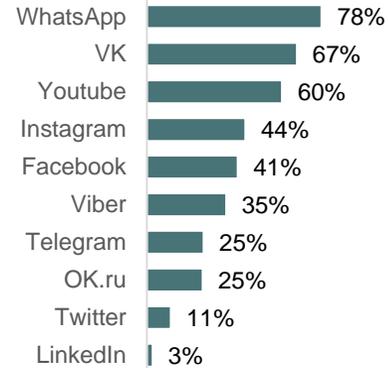
Group Size
100,0 %



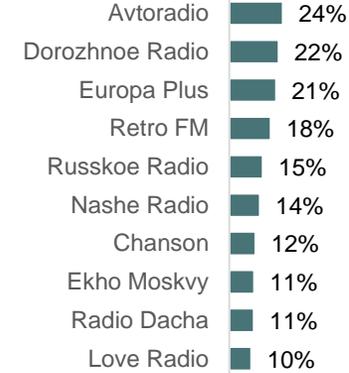
SEEKS / GETS INFORMATION OF HEALTH CARE PROVIDERS ABROAD



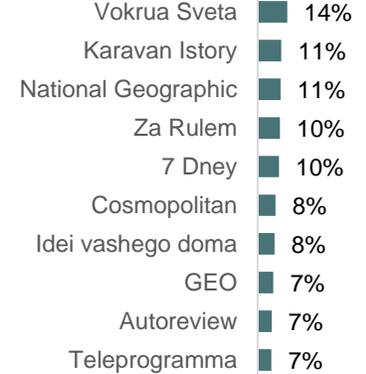
TOP 10 SOCIAL MEDIA SERVICES USED



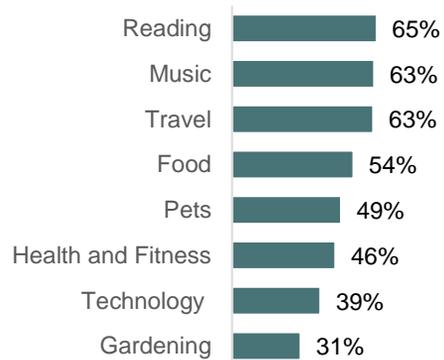
TOP 10 RADIO CHANNELS LISTENED



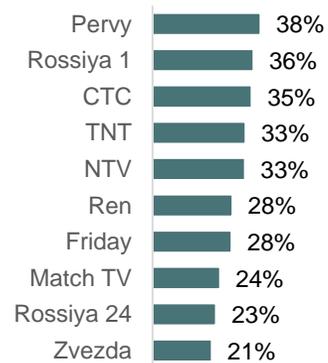
TOP 10 MAGAZINES READ



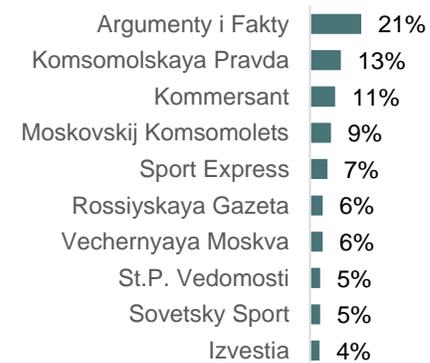
TOP 8 AREAS OF INTEREST



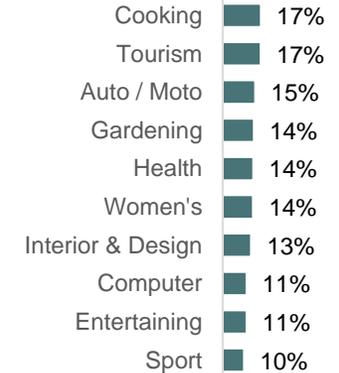
TOP 10 TV CHANNELS WATCHED



TOP 10 NEWSPAPERS READ



TOP 10 MAGAZINE TYPES OF INTEREST



CHAPTER X

Moscow in a nutshell

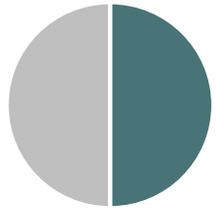
Key Findings:

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

Group Size
50,0 %



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

SATISFIED WITH OWN PHYSICAL HEALTH

Average
51 %
Total Sample: 49 %

SATISFIED WITH OWN MENTAL HEALTH

Below Average
70 %
Total Sample: 74 %

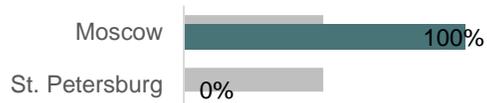
TRUSTS IN RUSSIAN HEALTHCARE SYSTEM

Average
22 %
Total Sample: 22 %

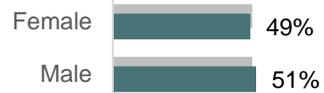
WOULD CONSIDER FINLAND AS AN OPTION

Below Average
18 %
Total Sample: 26 %

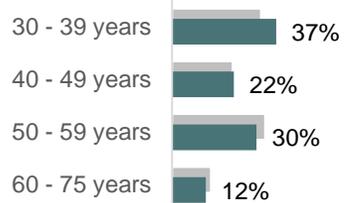
DEMOGRAPHICS: AREA



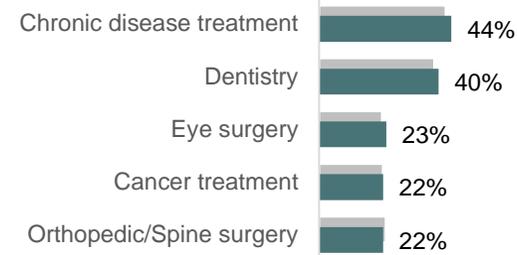
DEMOGRAPHICS: GENDER



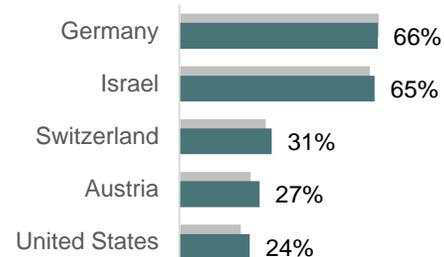
DEMOGRAPHICS: AGE GROUP



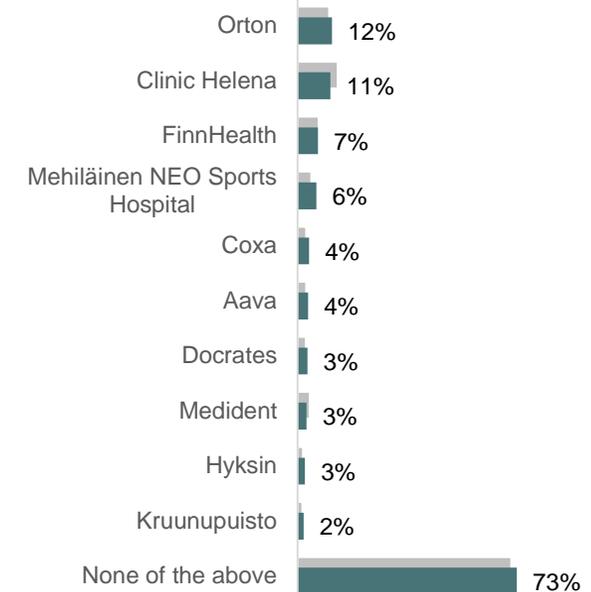
TOP 5 CONSIDERED TREATMENTS



TOP 5 CONSIDERED COUNTRIES

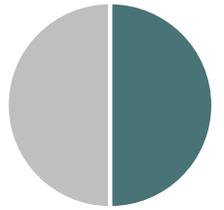


AWARENESS OF FINNISH SERVICE PROVIDERS

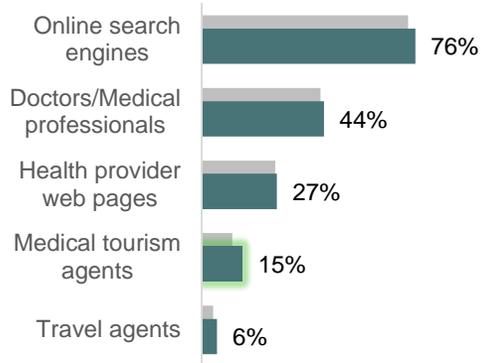


Moscow Area Media Usage

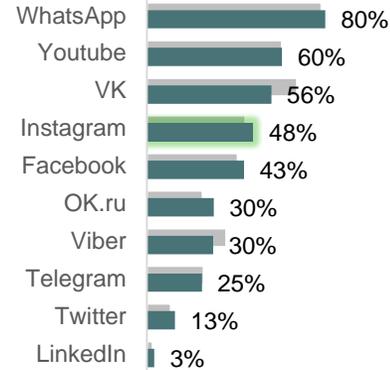
Group Size
50,0 %



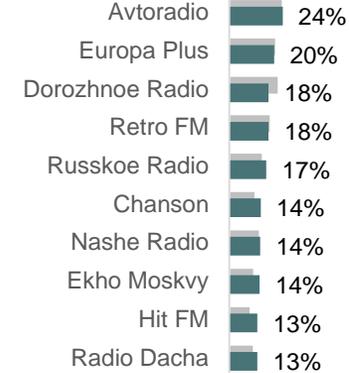
SEEKS / GETS INFORMATION OF
HEALTH CARE PROVIDERS ABROAD



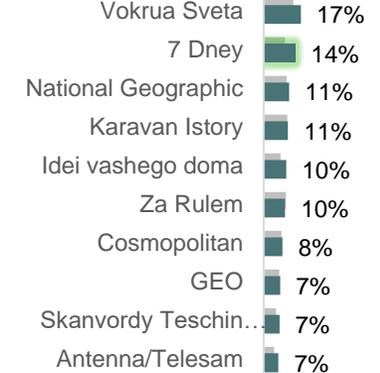
TOP 10
SOCIAL MEDIA SERVICES USED



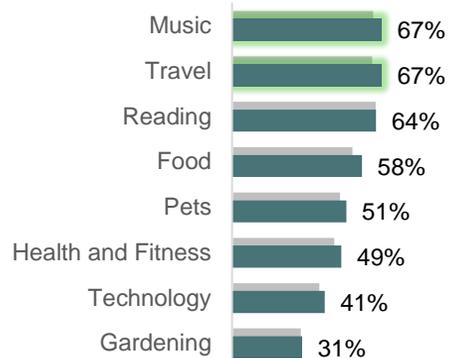
TOP 10
RADIO CHANNELS LISTENED



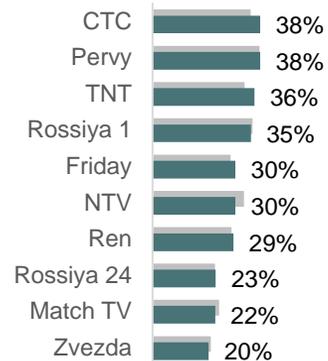
TOP 10
MAGAZINES READ



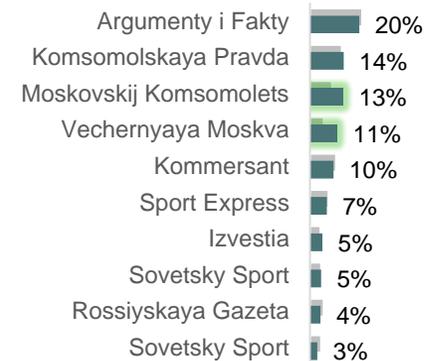
TOP 8
AREAS OF INTEREST



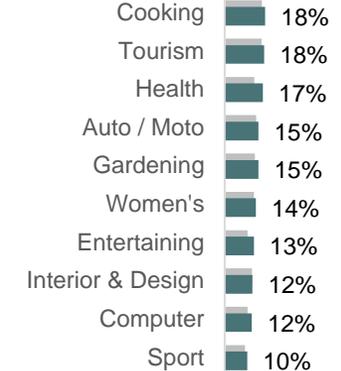
TOP 10
TV CHANNELS WATCHED



TOP 10
NEWSPAPERS READ



TOP 10
MAGAZINE TYPES OF INTEREST



CHAPTER XI

St. Petersburg in a nutshell

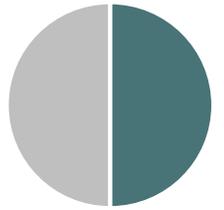
Key Findings:

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!

St. Petersburg Area

Basic Information

Group Size
50,0 %



Finland's potential is clearly found in St. Petersburg area.

SATISFIED WITH OWN PHYSICAL HEALTH

Average
47 %
Total Sample: 49 %

SATISFIED WITH OWN MENTAL HEALTH

Above Average
78 %
Total Sample: 74 %

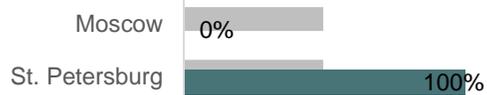
TRUSTS IN RUSSIAN HEALTHCARE SYSTEM

Average
21 %
Total Sample: 22 %

WOULD CONSIDER FINLAND AS AN OPTION

Above Average
34 %
Total Sample: 26 %

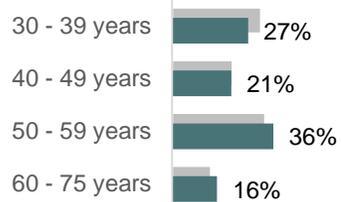
DEMOGRAPHICS: AREA



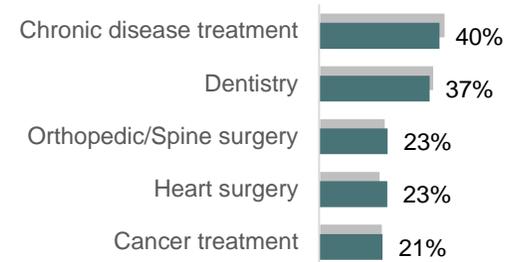
DEMOGRAPHICS: GENDER



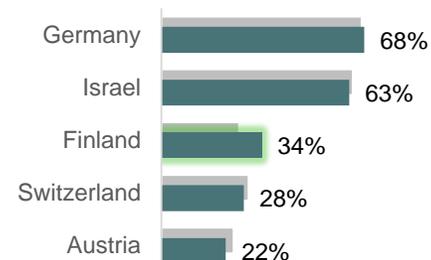
DEMOGRAPHICS: AGE GROUP



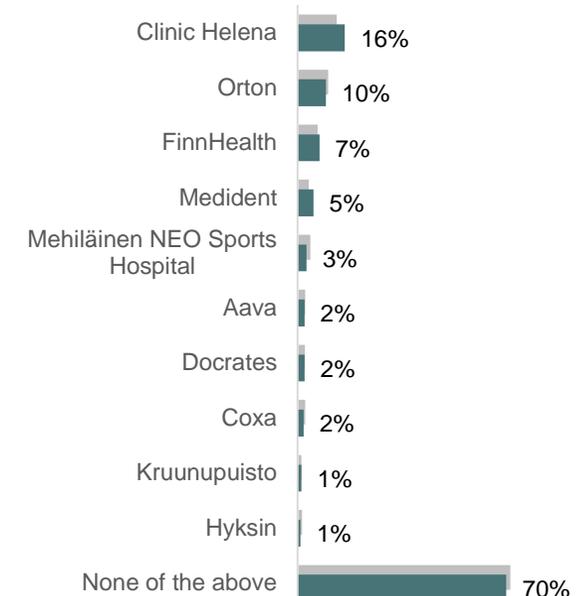
TOP 5 CONSIDERED TREATMENTS



TOP 5 CONSIDERED COUNTRIES

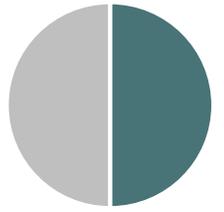


AWARENESS OF FINNISH SERVICE PROVIDERS



St. Petersburg Area Media Usage

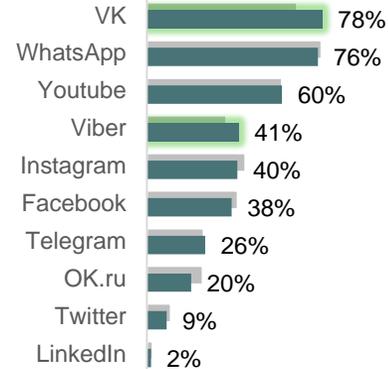
Group Size
50,0 %



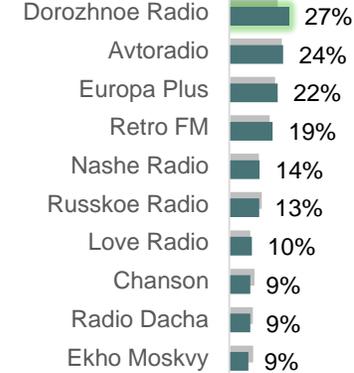
SEEKS / GETS INFORMATION OF
HEALTH CARE PROVIDERS ABROAD



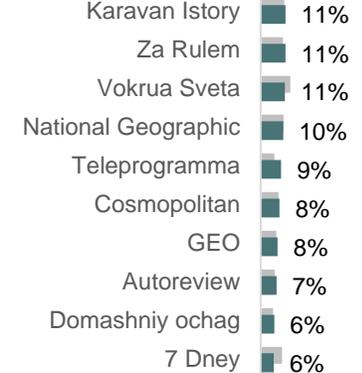
TOP 10
SOCIAL MEDIA SERVICES USED



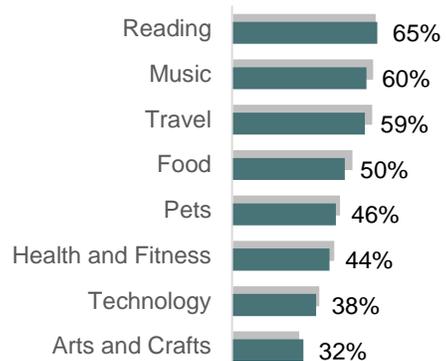
TOP 10
RADIO CHANNELS LISTENED



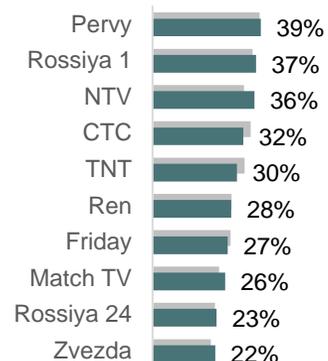
TOP 10
MAGAZINES READ



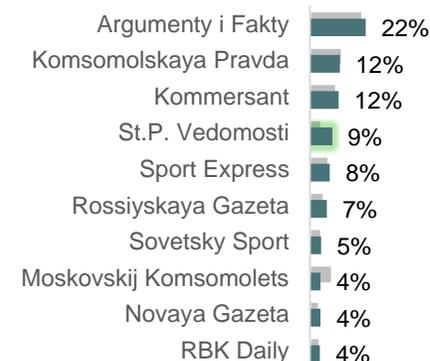
TOP 8
AREAS OF INTEREST



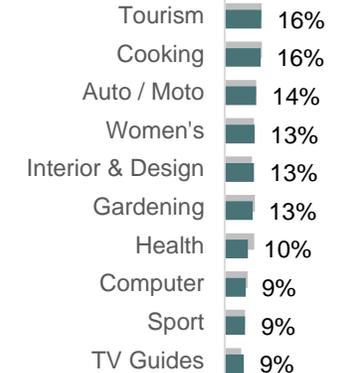
TOP 10
TV CHANNELS WATCHED



TOP 10
NEWSPAPERS READ



TOP 10
MAGAZINE TYPES OF INTEREST



CHAPTER XII

The Segments

Key Findings:

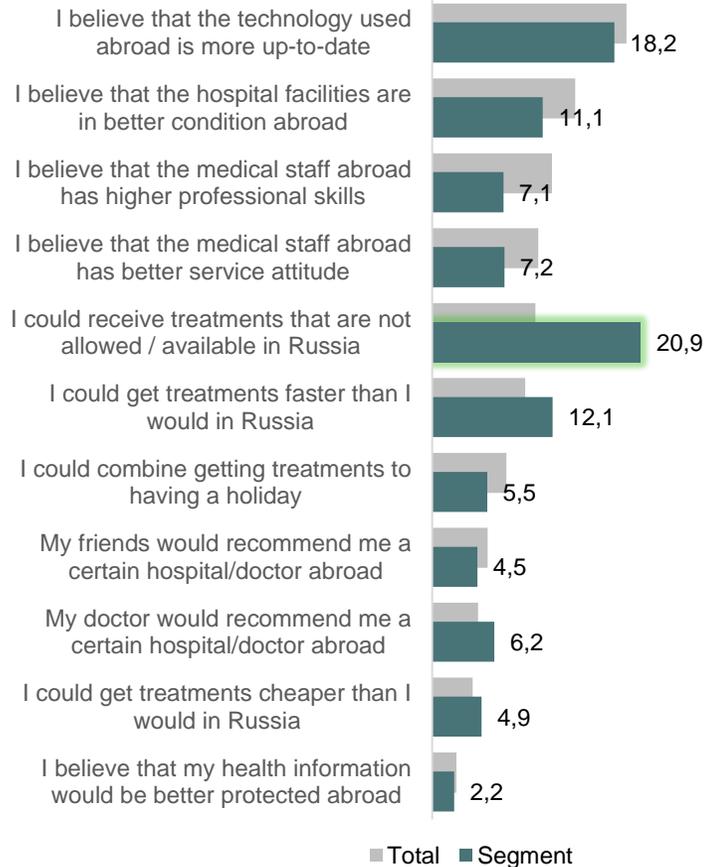
The following three segments all have their unique needs. In order to succeed Finland (and Finnish providers) has a lot of improvement to do in each of these segments.

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.

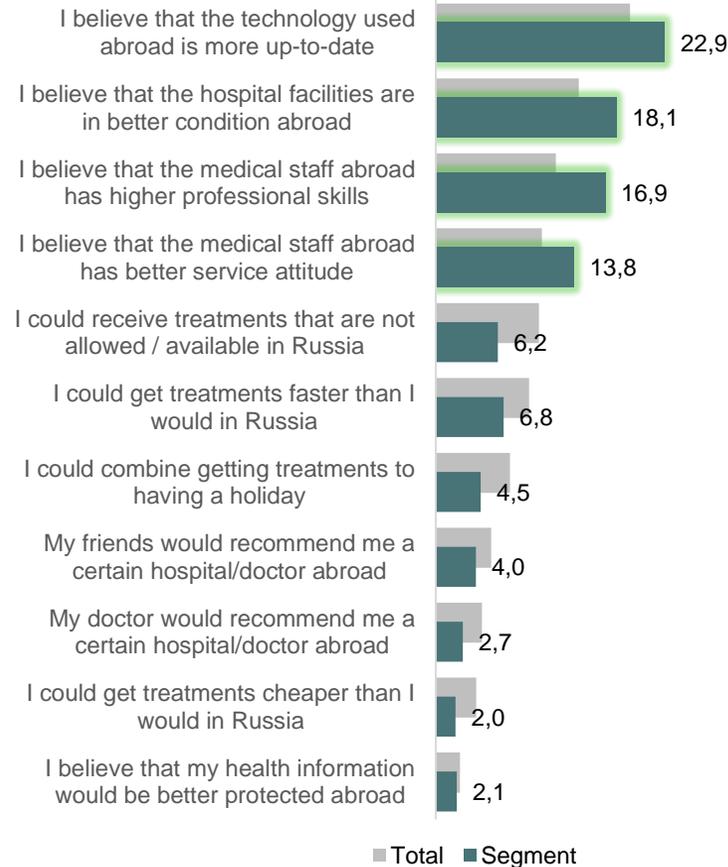
The key segment of these seems to be “Seeking Quality”, but whichever segment we target, we must improve our image in having leading technology.

Which of the following statements would most likely make you decide going abroad?

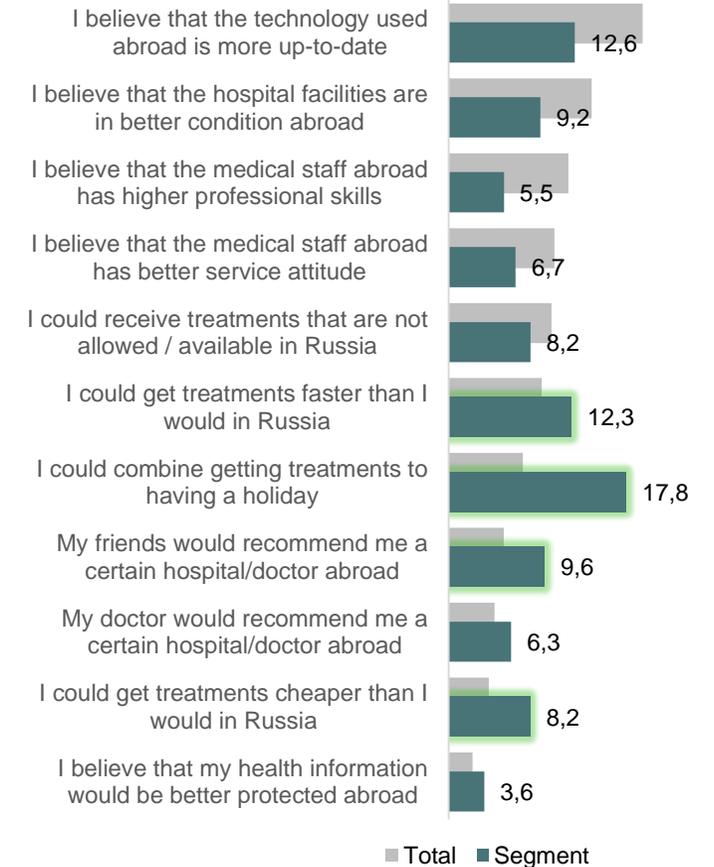
S1: Seeking Opportunities



S2: Seeking Quality



S3: Seeking Holiday



MaxDiff index, ratio scale
Sums up to 100

Glowing bar highlights significant differences

S1: Seeking Opportunities

Group Size
25,5 %



”I’m seeking modern technology and such treatments that I can’t get in Russia!”

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



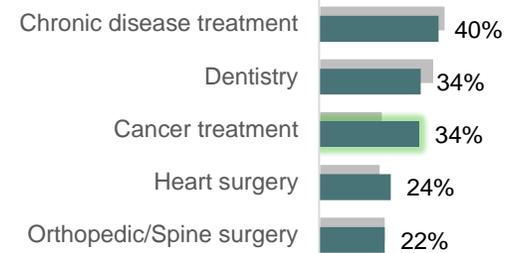
DEMOGRAPHICS: GENDER



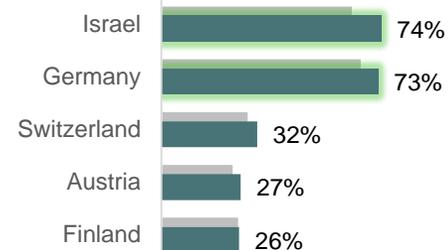
DEMOGRAPHICS: AGE GROUP



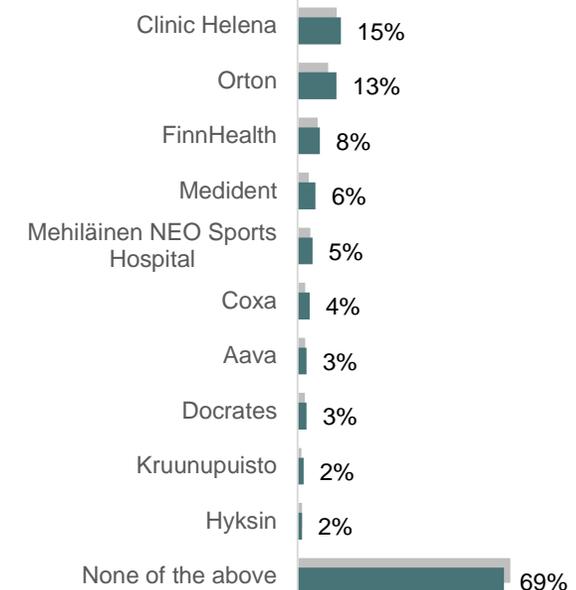
TOP 5 CONSIDERED TREATMENTS



TOP 5 CONSIDERED COUNTRIES



AWARENESS OF FINNISH SERVICE PROVIDERS



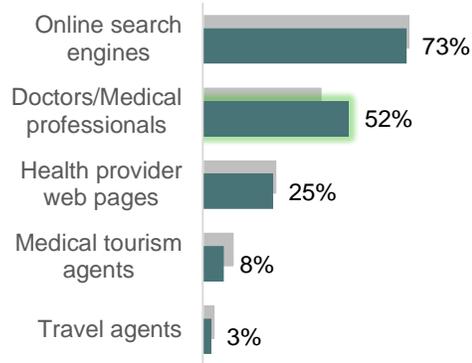
S1: Seeking Opportunities

Media Usage

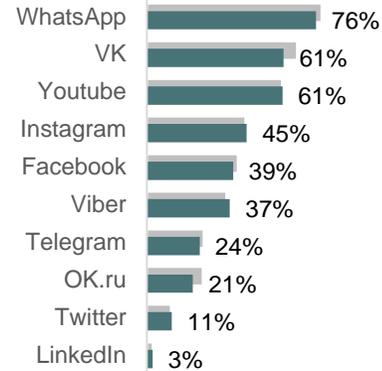
Group Size
25,5 %



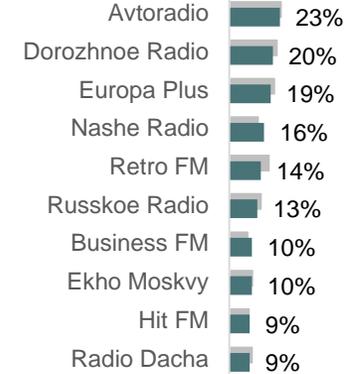
SEEKS / GETS INFORMATION OF HEALTH CARE PROVIDERS ABROAD



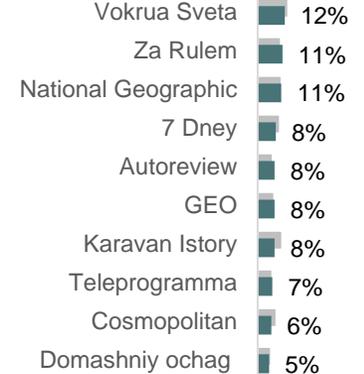
TOP 10 SOCIAL MEDIA SERVICES USED



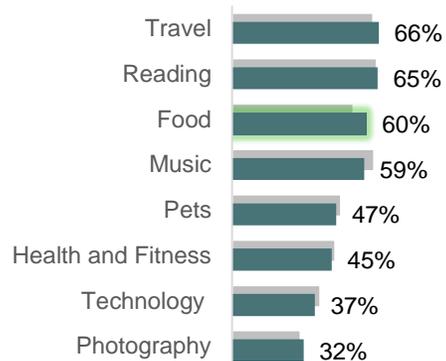
TOP 10 RADIO CHANNELS LISTENED



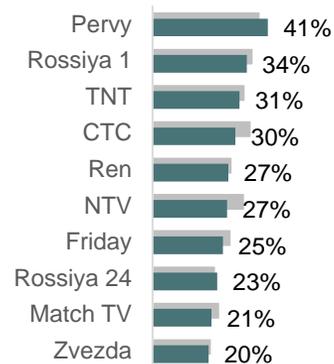
TOP 10 MAGAZINES READ



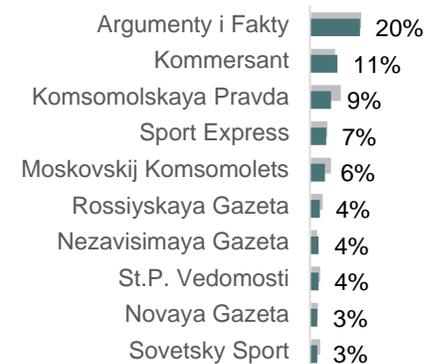
TOP 8 AREAS OF INTEREST



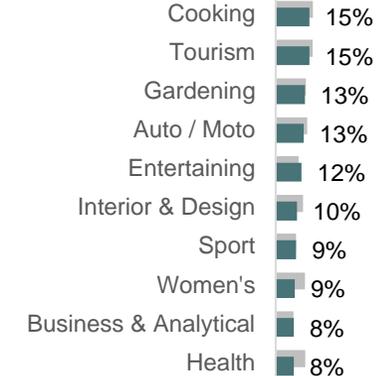
TOP 10 TV CHANNELS WATCHED



TOP 10 NEWSPAPERS READ

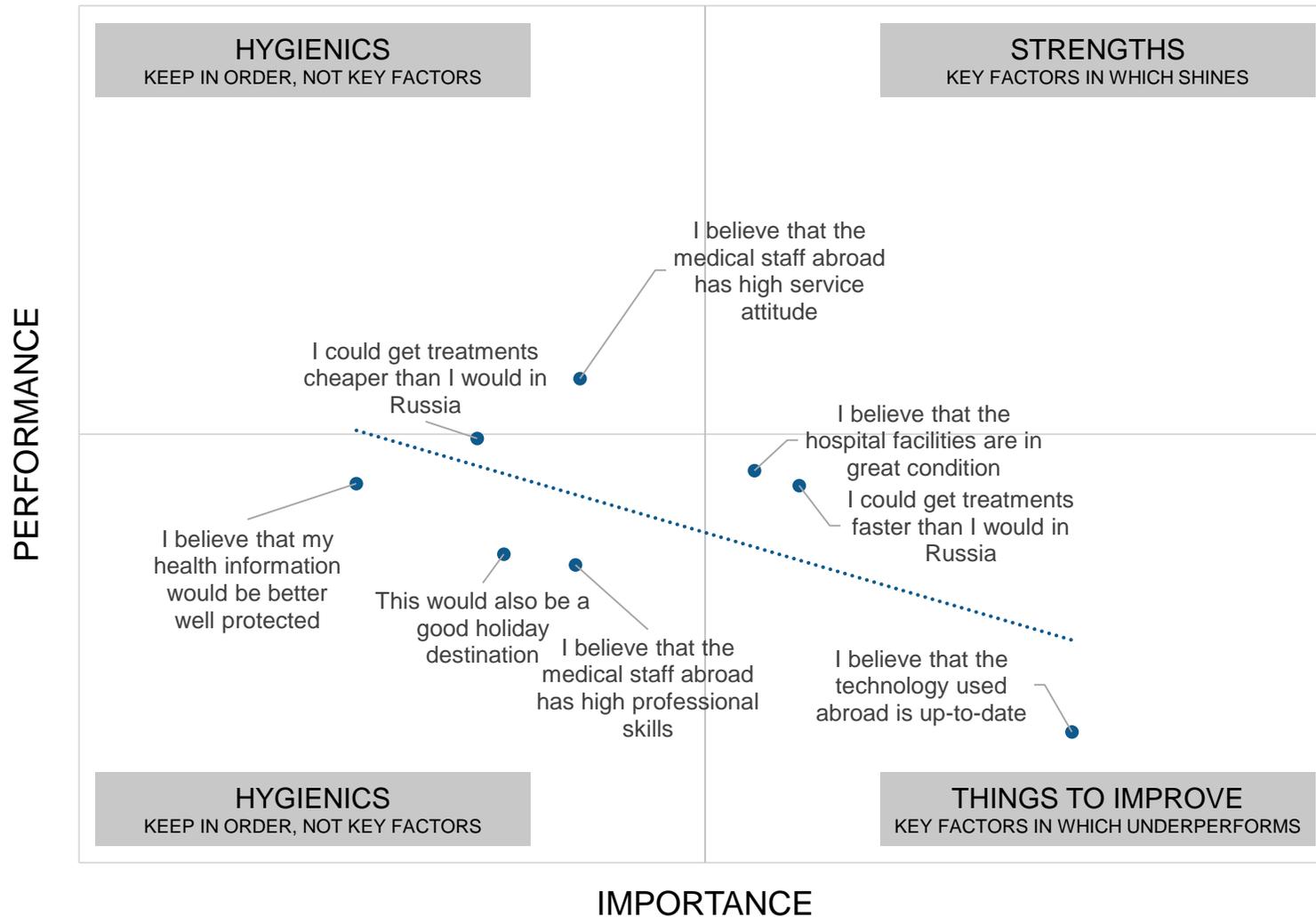


TOP 10 MAGAZINE TYPES OF INTEREST



Country Importance/Performance Map: Finland

S1: Seeking Opportunities



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

Group Size
54,1 %



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

SATISFIED WITH OWN PHYSICAL HEALTH

Below average
46 %
Total Sample: 49 %

SATISFIED WITH OWN MENTAL HEALTH

Average
73 %
Total Sample: 74 %

TRUSTS IN RUSSIAN HEALTHCARE SYSTEM

Below average
17 %
Total Sample: 22 %

WOULD CONSIDER FINLAND AS AN OPTION

Average
26 %
Total Sample: 26 %

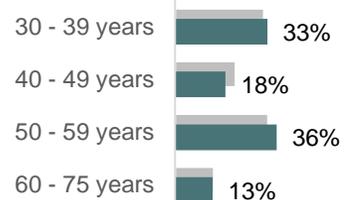
DEMOGRAPHICS: AREA



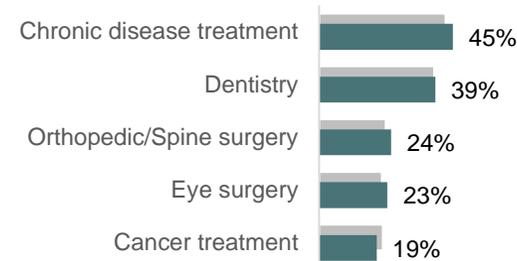
DEMOGRAPHICS: GENDER



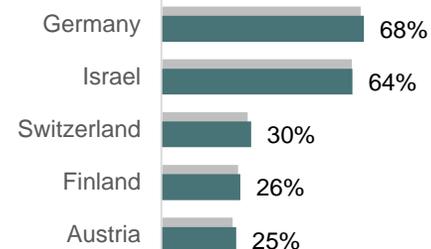
DEMOGRAPHICS: AGE GROUP



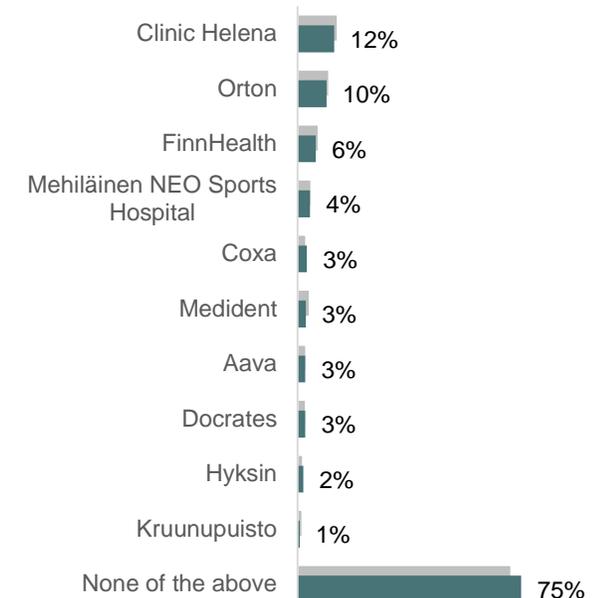
TOP 5 CONSIDERED TREATMENTS



TOP 5 CONSIDERED COUNTRIES

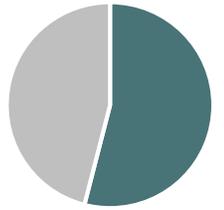


AWARENESS OF FINNISH SERVICE PROVIDERS

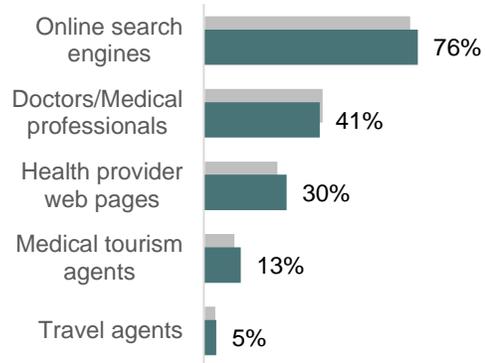


S2: Seeking Quality Media Usage

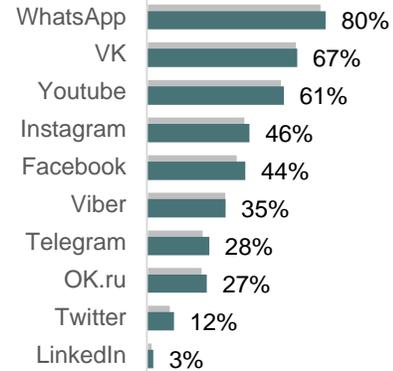
Group Size
54,1 %



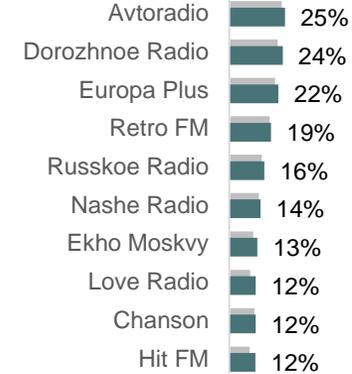
SEEKS / GETS INFORMATION OF HEALTH CARE PROVIDERS ABROAD



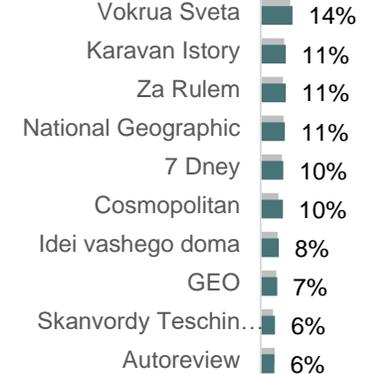
TOP 10 SOCIAL MEDIA SERVICES USED



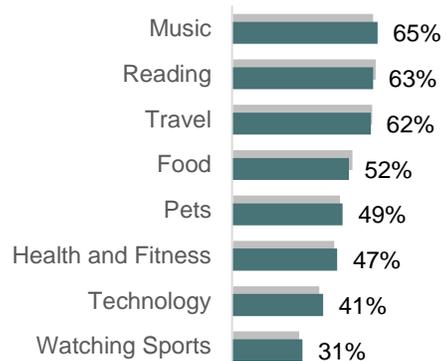
TOP 10 RADIO CHANNELS LISTENED



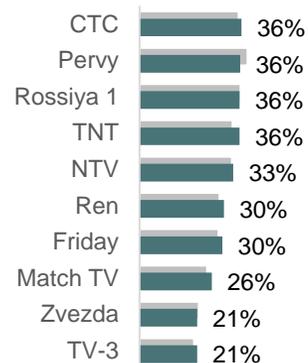
TOP 10 MAGAZINES READ



TOP 8 AREAS OF INTEREST



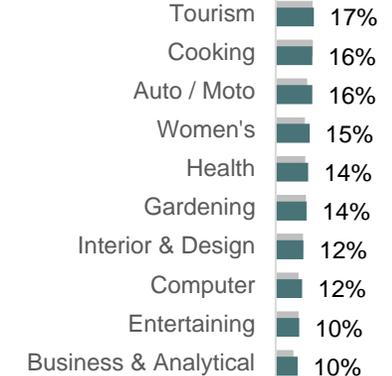
TOP 10 TV CHANNELS WATCHED



TOP 10 NEWSPAPERS READ

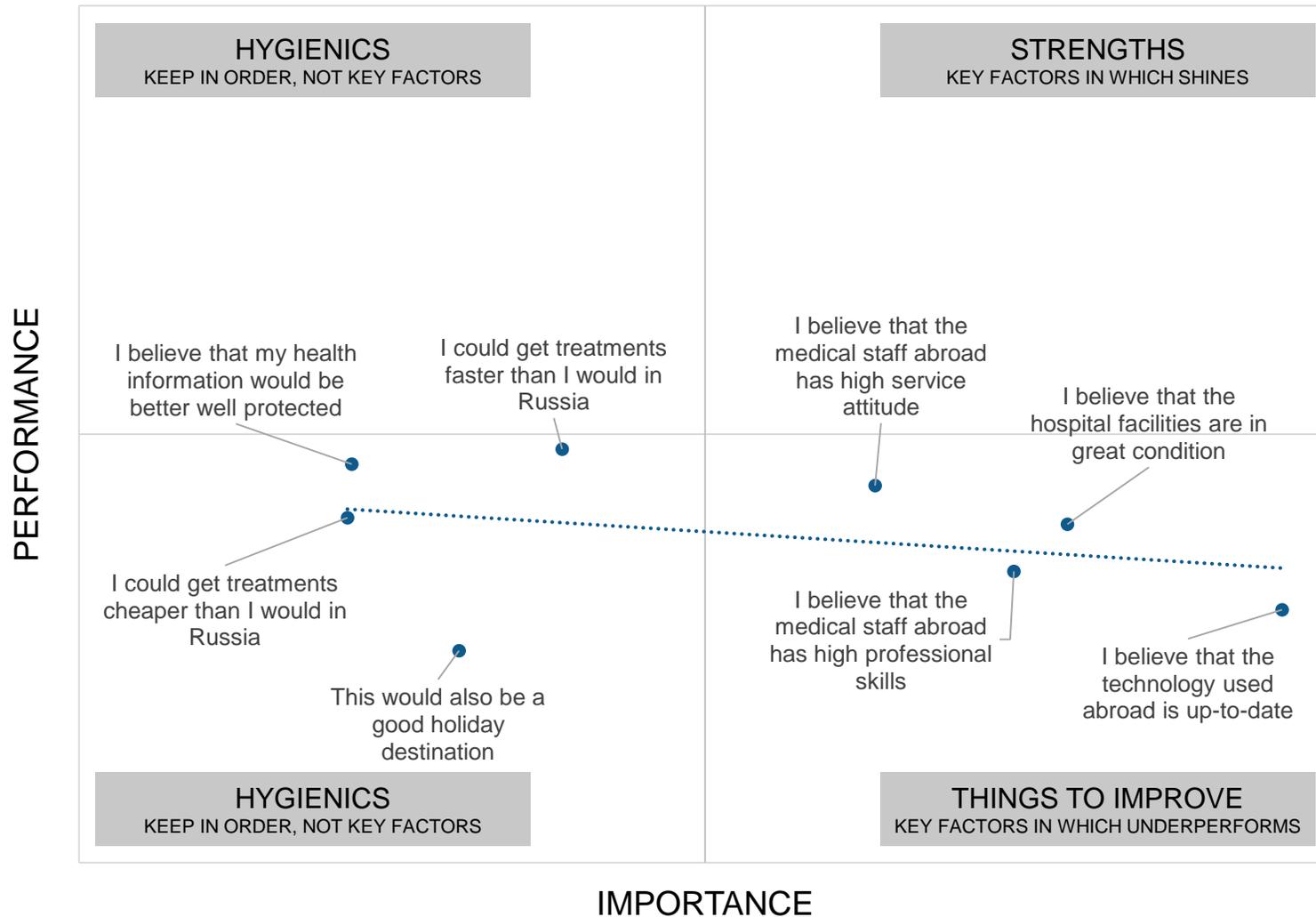


TOP 10 MAGAZINE TYPES OF INTEREST



Country Importance/Performance Map: Finland

S2: Seeking Quality



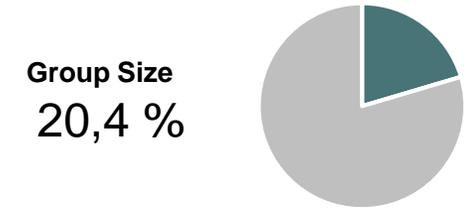
KEY TASK TO WIN THIS SEGMENT:

- 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

S3: Seeking Holiday



”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 %

SATISFIED WITH OWN MENTAL HEALTH

Average
76 %
Total Sample: 74 %

TRUSTS IN RUSSIAN HEALTHCARE SYSTEM

Above average
31 %
Total Sample: 22 %

WOULD CONSIDER FINLAND AS AN OPTION

Average
24 %
Total Sample: 26 %

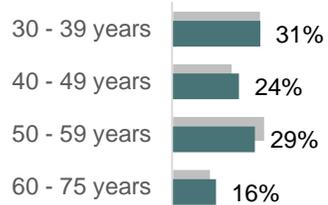
DEMOGRAPHICS: AREA



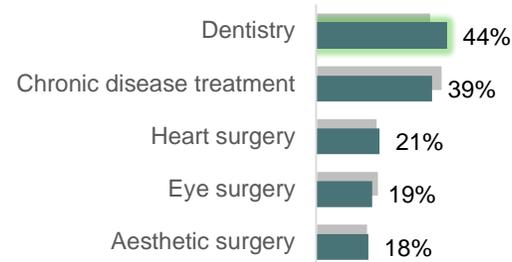
DEMOGRAPHICS: GENDER



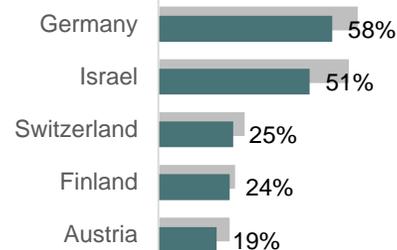
DEMOGRAPHICS: AGE GROUP



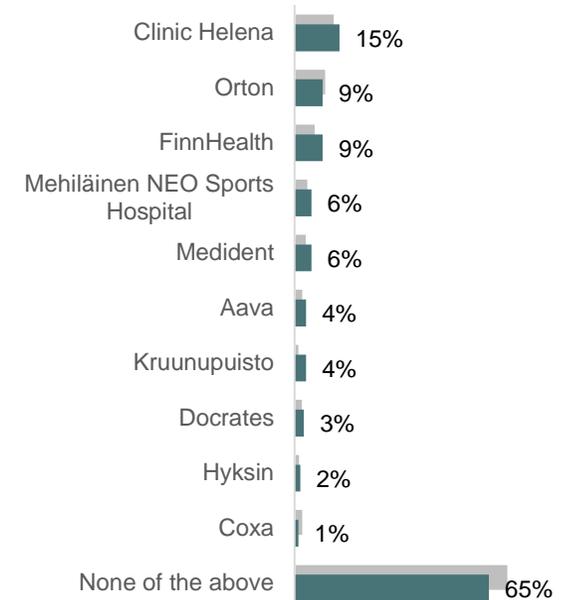
TOP 5 CONSIDERED TREATMENTS



TOP 5 CONSIDERED COUNTRIES

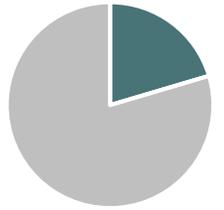


AWARENESS OF FINNISH SERVICE PROVIDERS

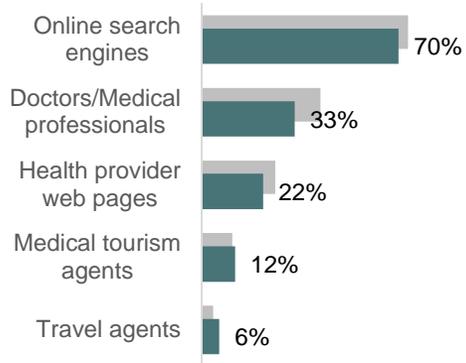


S3: Seeking Holiday Media Usage

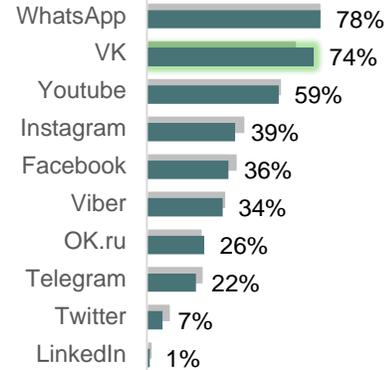
Group Size
20,4 %



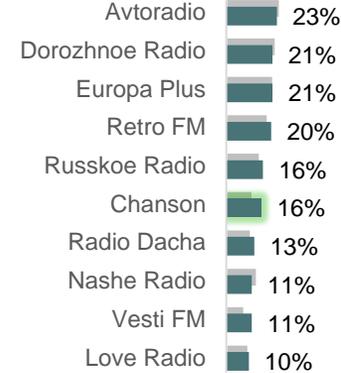
SEEKS / GETS INFORMATION OF HEALTH CARE PROVIDERS ABROAD



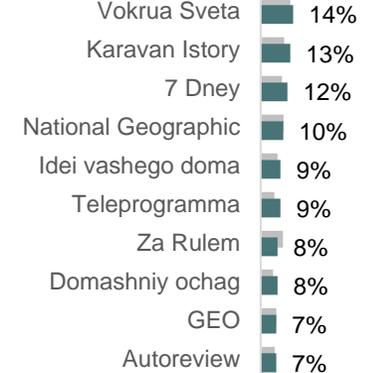
TOP 10 SOCIAL MEDIA SERVICES USED



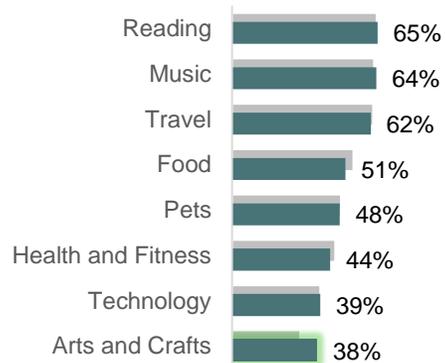
TOP 10 RADIO CHANNELS LISTENED



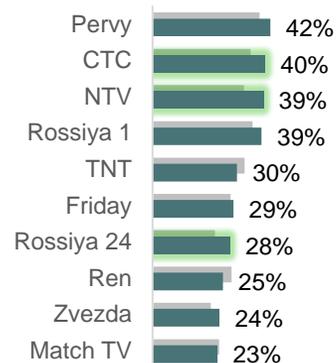
TOP 10 MAGAZINES READ



TOP 8 AREAS OF INTEREST



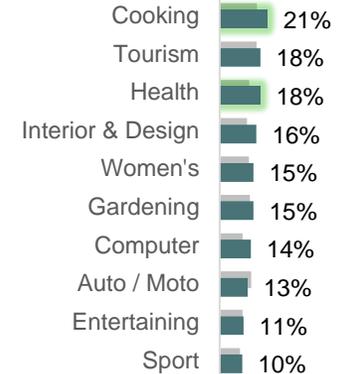
TOP 10 TV CHANNELS WATCHED



TOP 10 NEWSPAPERS READ

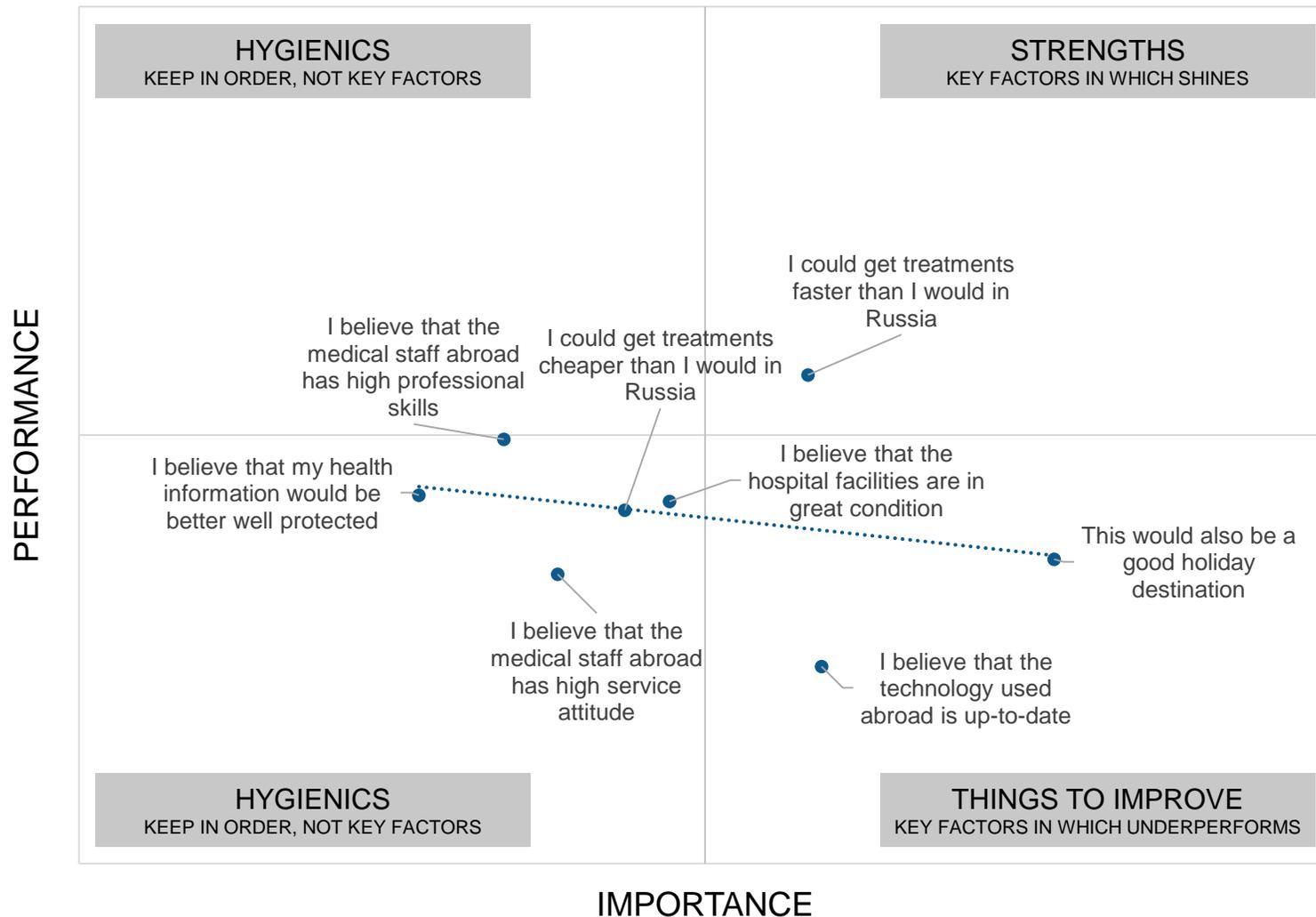


TOP 10 MAGAZINE TYPES OF INTEREST



Country Importance/Performance Map: Finland

S3: Seeking Holiday



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 hygienic factor – also make sure that people know that the services are available also in Russian language!