



St. Petersburg
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Outbound medical tourism in Russia

**Quantitative research
Online interviews**

December 2021

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Research description

RESEARCH GOAL

To better understand the outbound health travel landscape

RESEARCH OBJECTIVES

- ✓ The most attractive medical treatments overseas
- ✓ Reasons for travelling abroad for medical treatment as well as reasons for choosing a certain destination
- ✓ Finland's country image
- ✓ Finland's strengths and weaknesses and keys to success

TARGET GROUP

20-75-year-olds living in Moscow or St. Petersburg with more than 150,000 RUB monthly household income, who might consider traveling abroad to get medical treatment

DATA COLLECTION

Online interviews

SAMPLE SOURCE

OMI online panel

SAMPLE SIZE

607 respondents.

390 respondents are from Moscow, 217 - from St. Petersburg area (SPb).

FIELDWORK DATES

November 19 – November 24, 2021

DROP-OUT RATE

6,5%

Potential consideration of medical treatment/ medical services abroad

Q1. Tick your gender. Q2. Which of the following age groups do you belong to? Q3. In which city do you permanently reside? Q4. Please indicate the monthly aggregate household income . Q5. How likely is it that you would consider to receive medical treatment/ medical services abroad for yourself and/ or your family?

% total respondents (after passing gender/ age/ city of residence questions)

N=3430

CITY	
Moscow	54,5 %
St. Petersburg	45,5 %

GENDER*	
Female	54,2 %
Male	45,8 %

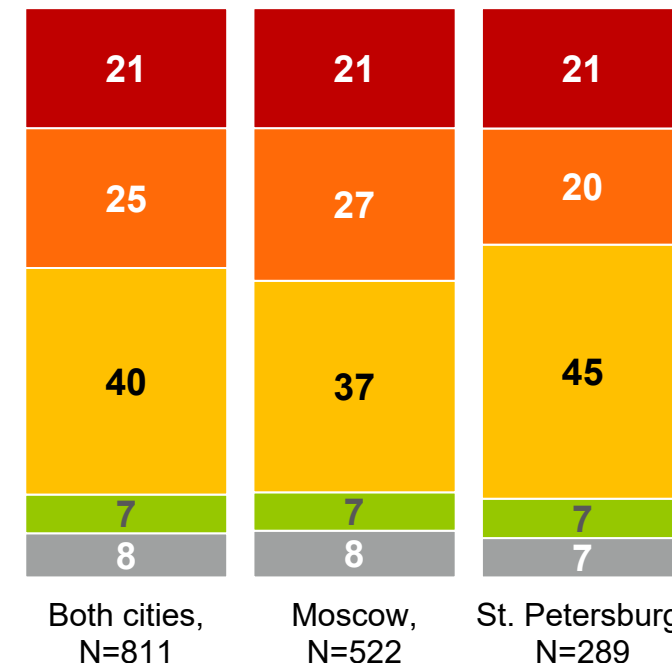
AGE GROUP*	
20 – 29 years	14 %
30 – 39 years	29 %
40 – 49 years	24 %
50 – 59 years	18 %
60 – 75 years	15 %

MONTHLY HOUSEHOLD INCOME	
Less than RUB 50,000	12 %
From RUB 50,000 to 99,999	34 %
From RUB 100,000 to 149,999	26 %
From RUB 150,000 to 199,999	13 %
From RUB 200,000 to 249,999	5 %
From RUB 250,000 to 299,999	3 %
From RUB 300,000 to 399,999	1 %
RUB 400,000 or more	2 %
Don't know/	
Don't want to answer	4 %

% of respondents that have over 150,000 rubles monthly household income

N=811 (24% of total respondents)

- Definitely would consider
- Probably would consider
- Might consider
- Probably would not consider
- Definitely would not consider



IR - 24%

28% out of all Moscow respondents

19% out of all St. Petersburg respondents

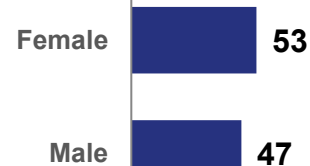
- 85% of respondents (out of those who have over 150,000 rubles of monthly aggregate household income) at least might consider going abroad to receive medical treatment/ medical services for themselves and/ or family member(s).
- 21% - definitely would consider receiving medical treatment/ medical services abroad.

* There were gender and age group quotas in each city

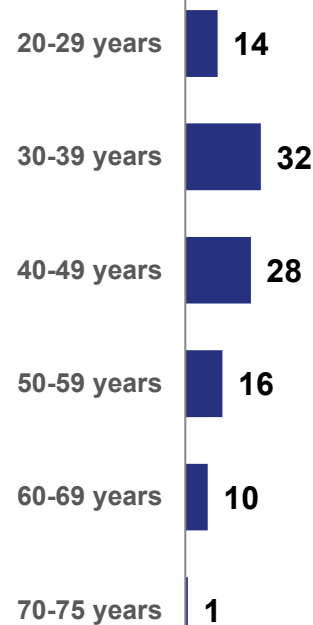
Sample composition

% of total sample, n=607

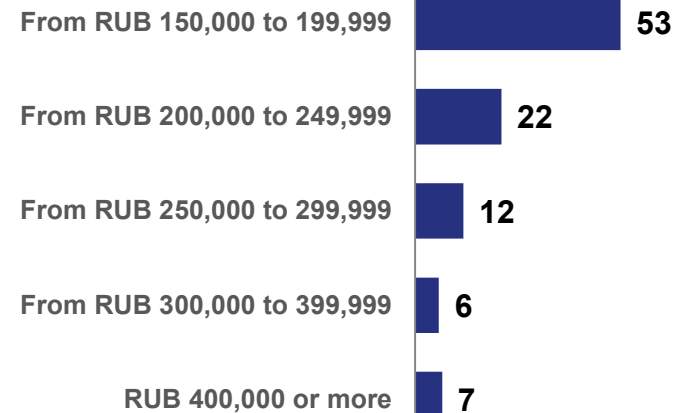
GENDER



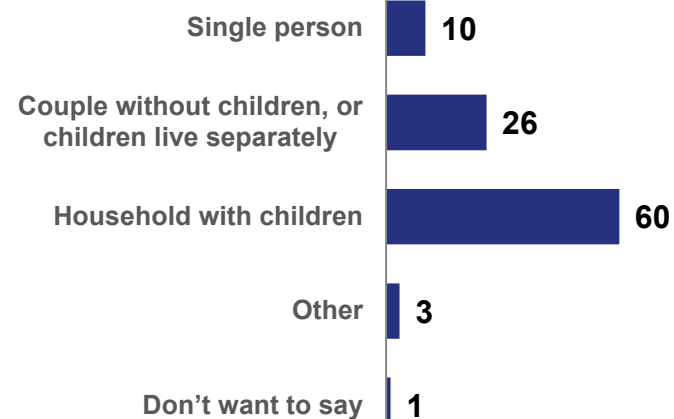
AGE



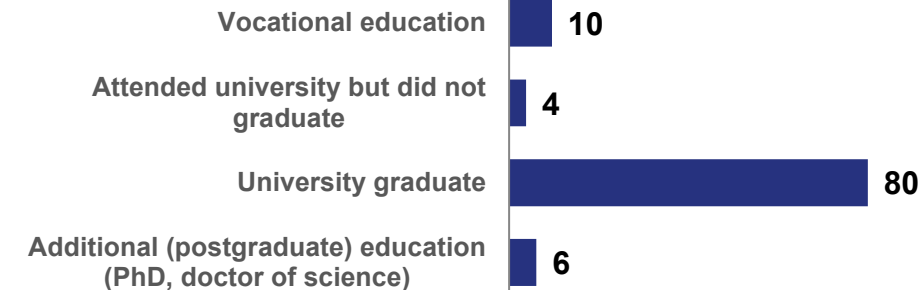
HOUSEHOLD MONTHLY INCOME



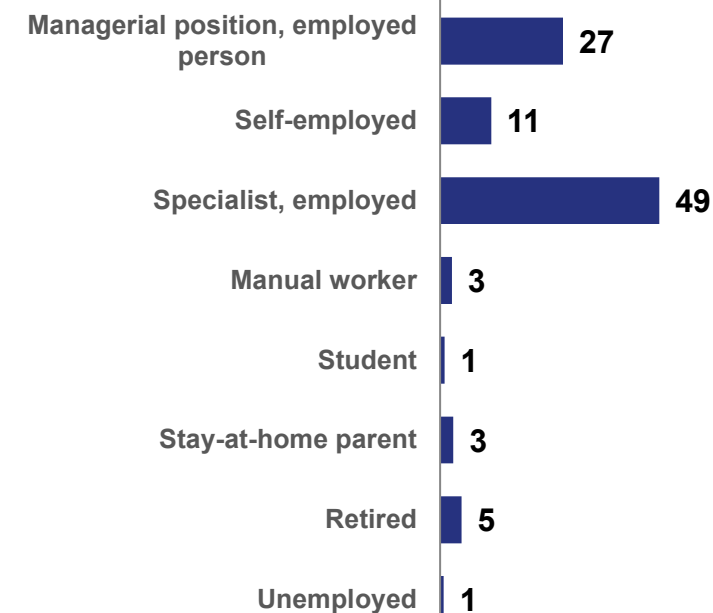
HOUSEHOLD COMPOSITION



EDUCATION



OCCUPATION





Summary

The most potential treatment areas for Finland

The most popular treatments/ medical services abroad for potential consideration

Cancer treatment – 45%

Treatment of cardiovascular diseases – 42%

Dentistry – 42%

Cosmetic/ Plastic Surgery – 39%

Dentistry – the main treatment which was received abroad

Treatments/ medical services that are also popular among those **who might consider Finland**

Treatment of eye diseases

Neurosurgery



- Finland is included in the Top 5 countries, which are potentially considered as a place for receiving medical services
- About 75% of the target audience generally does not reject Finland as a country for treatment
- Proximity to Russia and transport accessibility
- Significant lag as a potential country for treatment from the leaders - Germany and Israel
- In comparison with the leading countries, poor association with the quality of medical services, technology and staff qualifications
- Lack of information about health services in Finland



- Supporting the image of Finland as a country where you can **quickly and conveniently travel from Russia**, including for medical treatment
- Promoting the **quality of medical services, technologies and equipment** as the most important driving factor for making decision to get treatment abroad
- Greater emphasis on **dentistry** as one of the most interesting (attractive) areas in general and the service most often sought after by existing customers. That could be also a good starting point in getting treatment in Finland which could further lead to consideration of other treatments there.
- The possibility to receive **health services in Russian** - this factor is important for the majority of the target audience.
- **High level of patient satisfaction.** For those who actually received medical treatment abroad, the advice of friends and family members is an extremely important source of information and a factor of choice.

The study target group comprises residents of Moscow and St. Petersburg with a total monthly household income of at least 150 thousand rubles who do not reject the possibility of traveling abroad to get medical treatment.

The share of households with a monthly income of 150+ thousand rubles is about 25% of the population aged 20–75 years, it is significantly higher in Moscow vs. St. Petersburg. 85% of this group representatives do not reject (probably would consider / might consider / definitely would consider) receiving medical treatment or medical services abroad.

The main types of medical treatment or medical services abroad considered by the target group representatives are related to oncologic or cardiovascular diseases, dentistry, and cosmetic/plastic surgery.

Germany and Israel are the Top2 countries where the target group representatives could consider receiving medical treatment (about 70% of the audience). The next most often preferred countries are Switzerland and the United States (35%-40%). About 25% of the target audience consider Finland for receiving medical treatment, the share of such respondents is significantly higher in St. Petersburg vs. Moscow. About 10% refer Finland to the list of Top3 countries for receiving medical treatment, more often in St. Petersburg and in the older groups aged 40-75 years.

The high quality of medical services is most often spontaneously mentioned by the target group as a reason for choosing a potential country for treatment. This factor is typical of all the leading countries – Israel, Germany, Switzerland, and the United States. The main reason for the possible choice of Finland is its convenient and close location. It is noteworthy that its geographical accessibility as a benefit and the relatively low perception of its service quality vs. other countries as a drawback are mentioned both spontaneously in answers to open-ended questions and in responses given within a fixed list of image attributes.

Taking into account that geographical accessibility is rarely mentioned in relation to other countries, it is expedient to use it as a competitive benefit, while also emphasizing the quality of medical services provided there.

Up-to-date technologies, hospital facilities, and professional medical staff are the main reasons to choose a specific country for getting medical treatment. Finland is inferior to the leaders (Germany and Israel) and does not outstrip its other closest competitors (Switzerland and the United States) in these attributes.

About 75% of the target audience overall do not reject visiting Finland to receive medical services. The main reason for refusal or uncertainty is the shortage of information about the services provided there.

25% of the target audience have experience in receiving medical services abroad for themselves or their family members. The most sought-after type of services is dentistry being the leader in this group both among the services actually received and the services considered for potential use.

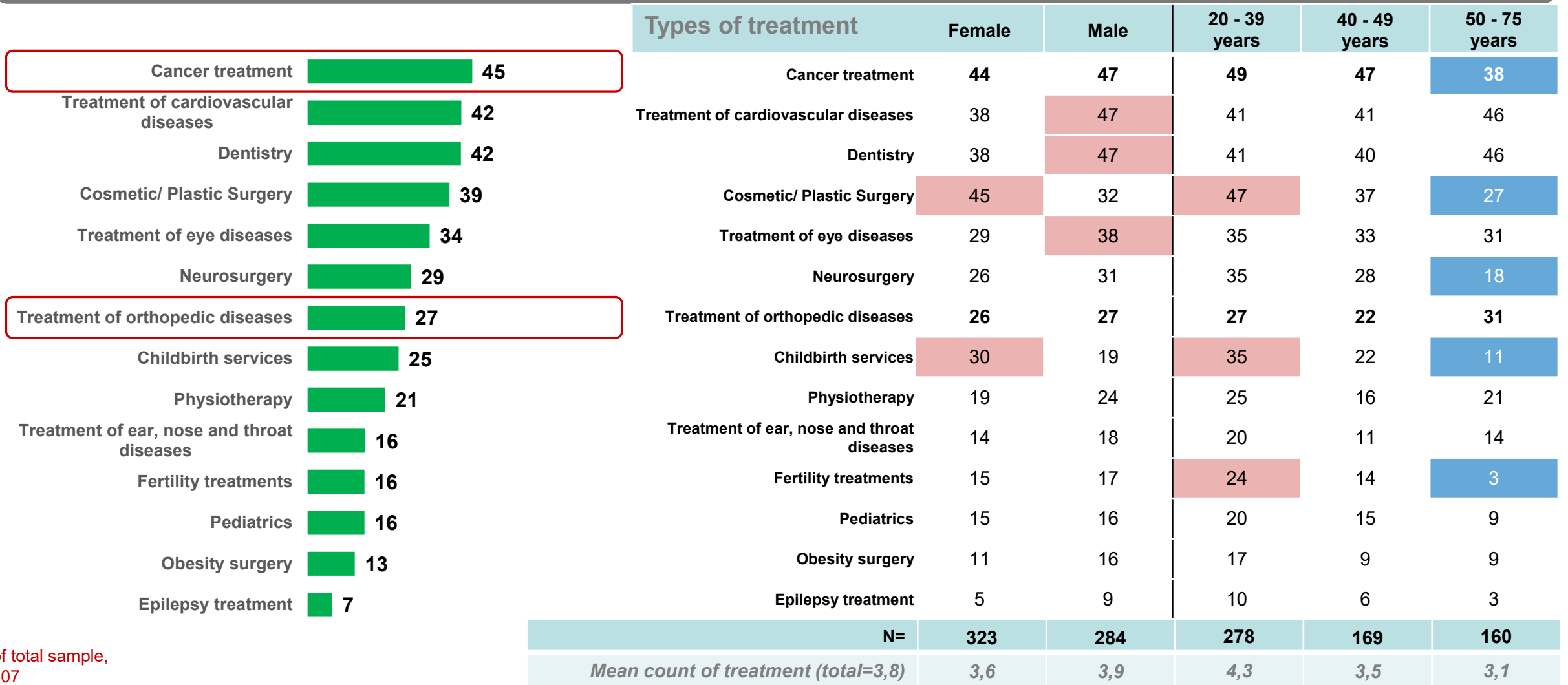
Overall, the research findings allow us to make the following conclusions and give the following development recommendations:

- 1) Maintaining the perception of Finland as a country where it is easy and convenient to come to from Russia for medical treatment vs. other countries.
- 2) Laying emphasis on the quality of medical services provided there, which is a strength of other countries, but it is not pronounced enough for Finland.
- 3) Ensuring the active information support of Finland as a country providing high-quality medical services. The target audience representatives who do not consider Finland most often note the shortage of information.
- 4) Probably – paying greater attention to dentistry as a type of services most often sought in other countries by the actual users of medical services abroad.
- 5) Potentially competitive factors are the possibility of providing medical services that are not available in Russia, as well as obtaining medical services faster than in Russia.

Treatment and countries

Types of treatment/ medical services abroad for potential consideration

Q6. What types of treatment/ medical services abroad would you potentially consider for yourself and/ or your family?



% of total sample, n=607

- The older group is less interested in medical services abroad. Medical services they could consider receiving abroad are mainly treatment of cancer, cardiovascular diseases, dentistry, and cosmetic/plastic surgery.

Significantly higher than total or other group
Significantly lower than total or other group

Medical travel destinations

Q7. Which of the following countries you might consider for medical treatment/ medical services?

Significantly higher than total or other group

Significantly lower than total or other group

Countries	Female	Male	20 - 39 years	40 - 49 years	50 - 75 years
Israel	71	75	72	73	74
Germany	72	71	74	66	74
Switzerland	38	42	43	38	36
United States	40	31	49	31	20
Finland	28	27	28	30	23
Austria	21	26	26	23	19
Japan	18	26	29	18	13
South Korea	16	21	24	17	11
United Kingdom	19	18	23	15	14
Italy	14	19	21	15	10
Spain	17	15	21	12	12
China	15	15	18	12	15
Turkey	11	10	14	8	8
Cyprus	6	8	8	7	5
India	3	8	6	5	4
N=	323	284	278	169	160

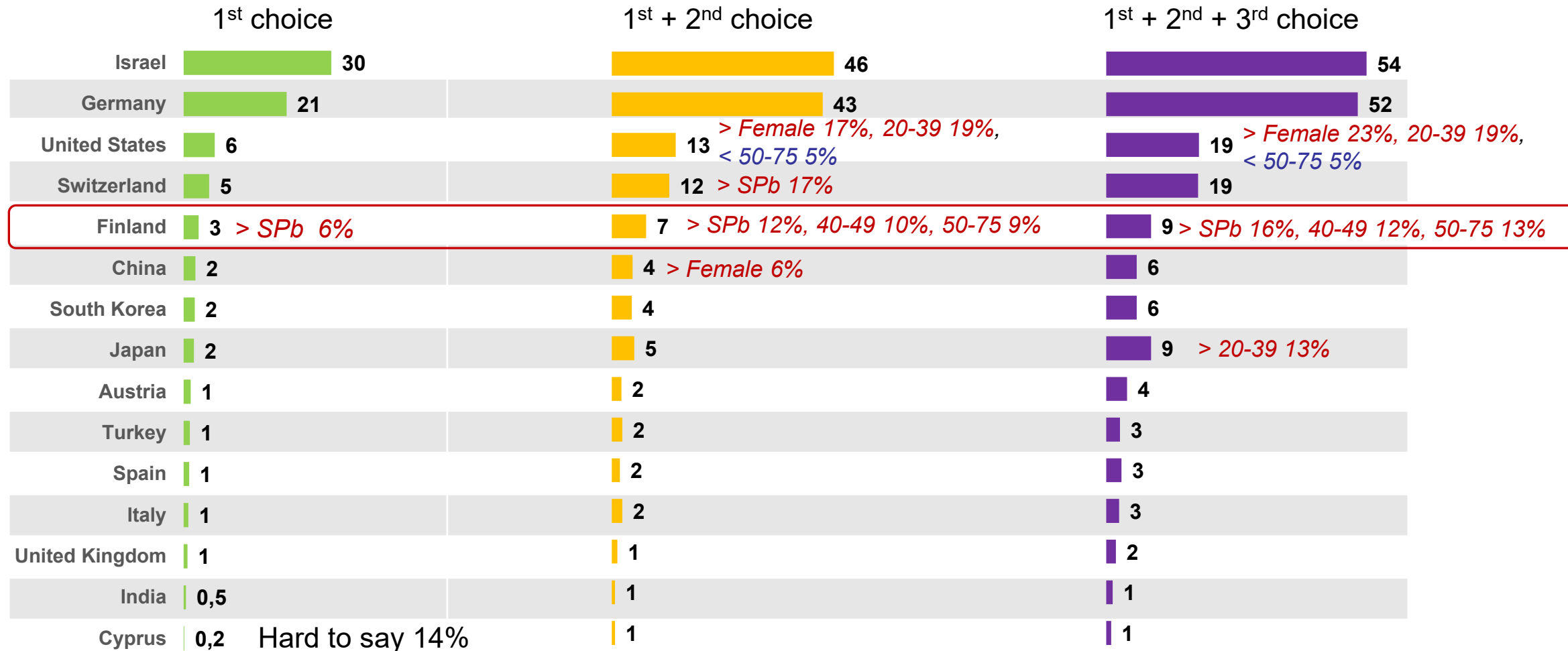
Two most popular destinations are Israel and Germany. 25% of the target group could consider Finland as an option.

- * the respondents from St. Petersburg are significantly more likely to choose Finland as a country to get treatment / medical services: 36% of the respondents from St. Petersburg vs. 22% of the respondents from Moscow.
- There are no other significant differences between the residents of the two cities in their choice of a destination.

% of total sample, n=607

Countries potentially considered for treatment / medical services. 1ST, 2ND AND 3RD choice

Q8. Which of these countries would be your first choice? Q9. Which country would you consider second? Q10. Finally, which country would be your third choice?



% of total sample, n=607

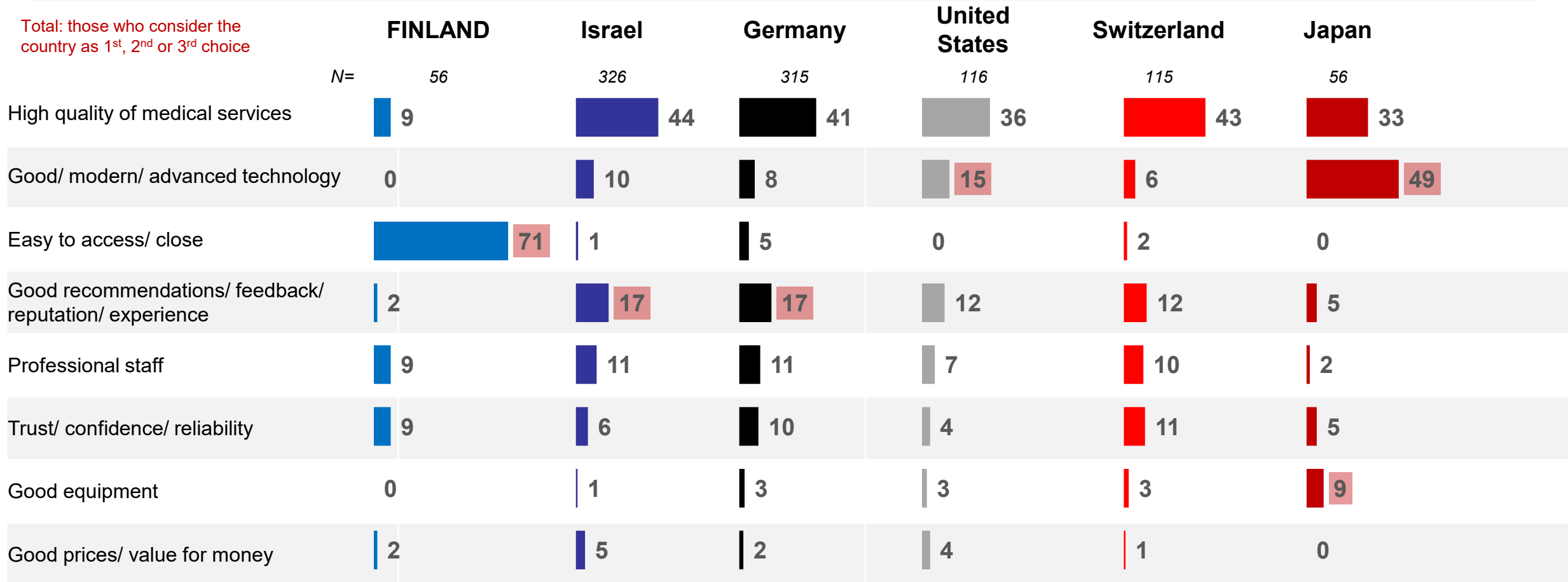
- Israel is the most preferable country to get medical treatment/ services, Germany is the 2nd choice.
- About 10% of the target group would consider Finland in Top3 countries, while being more attractive for St. Petersburg residents and older age groups (40-75 years).

Significantly higher than total or other group
Significantly lower than total or other group

Reasons for choosing a specific country (OPEN-ENDED QUESTION)

Q8, Q9, Q10. Why would you consider <country>?

Total: those who consider the country as 1st, 2nd or 3rd choice



Significantly higher than total or other group

- The main reasons for mentioning a country to get medical treatment are the quality of healthcare/ medical services and advanced technologies.
- Finland was mentioned because of its close location, but at the same time Finland is significantly behind the leading countries in terms of key attributes of quality and technologies.

Brand image analysis via GLM analysis: interpretation

- Strong and well-known brands always enjoy the largest number of associations with all image attributes. The GLM analysis identifies the most differentiating attributes for each brand regardless of its market position.
- The GLM analysis makes it possible to identify the attributes associated with the brand vs. competitors and other attributes.
- For example, as we can see in the charts to the right, Brand 1 has lower evaluations in all attributes, except Attribute 5, vs. Brand 2. When looking at the percentage distributions, one may conclude that Brand 1 is associated with Attribute 5 as often as Brand 2. However, Attribute 5 for Brand 1 has much higher evaluations vs. other attributes, while it has lower evaluations for Brand 2. Thus, Brand 1 will be more closely associated with this attribute than Brand 2.
- Interpretation of deviations:
 - more than "2" – the attribute is very pronounced
 - "1" to "2" – the attribute is medium-pronounced
 - less than "-2" – the attribute is not associated with the brand at all
 - "-1" to "-2" – irrelevant to the brand

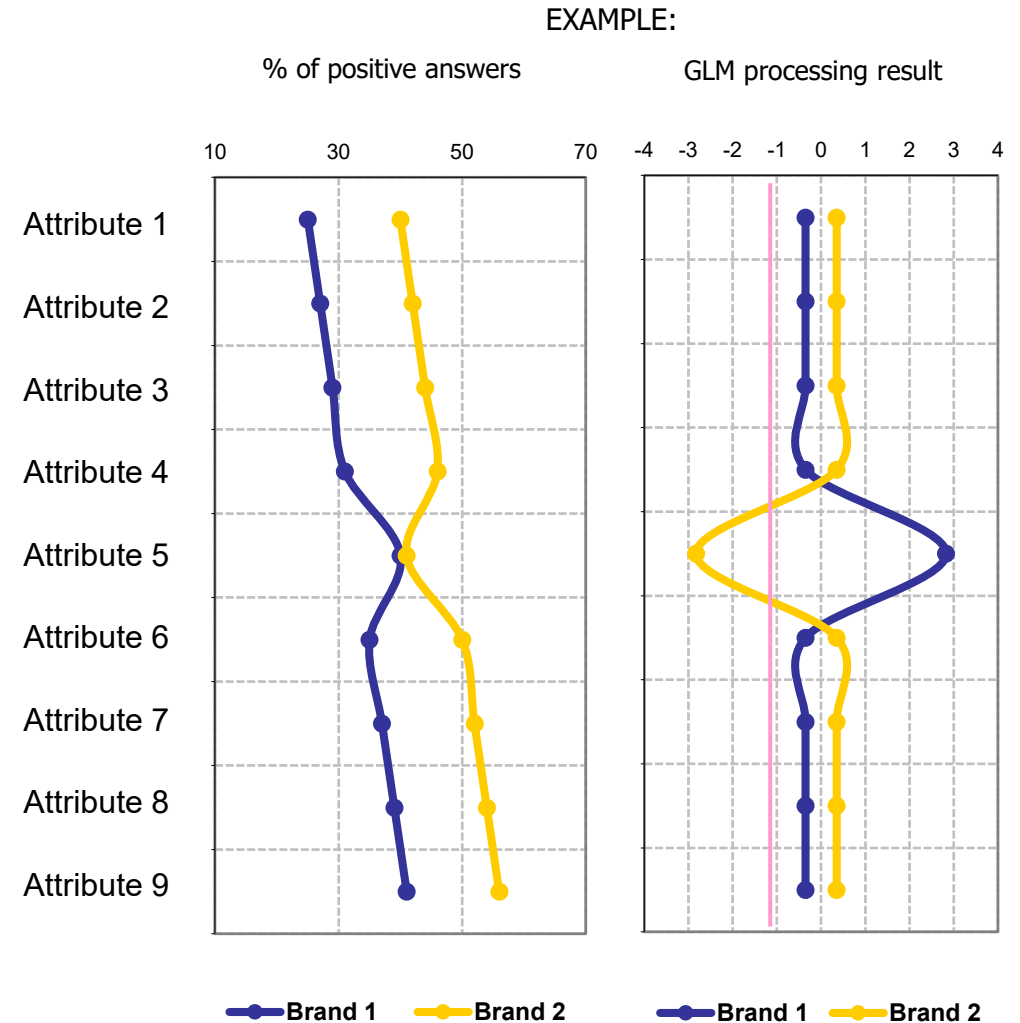
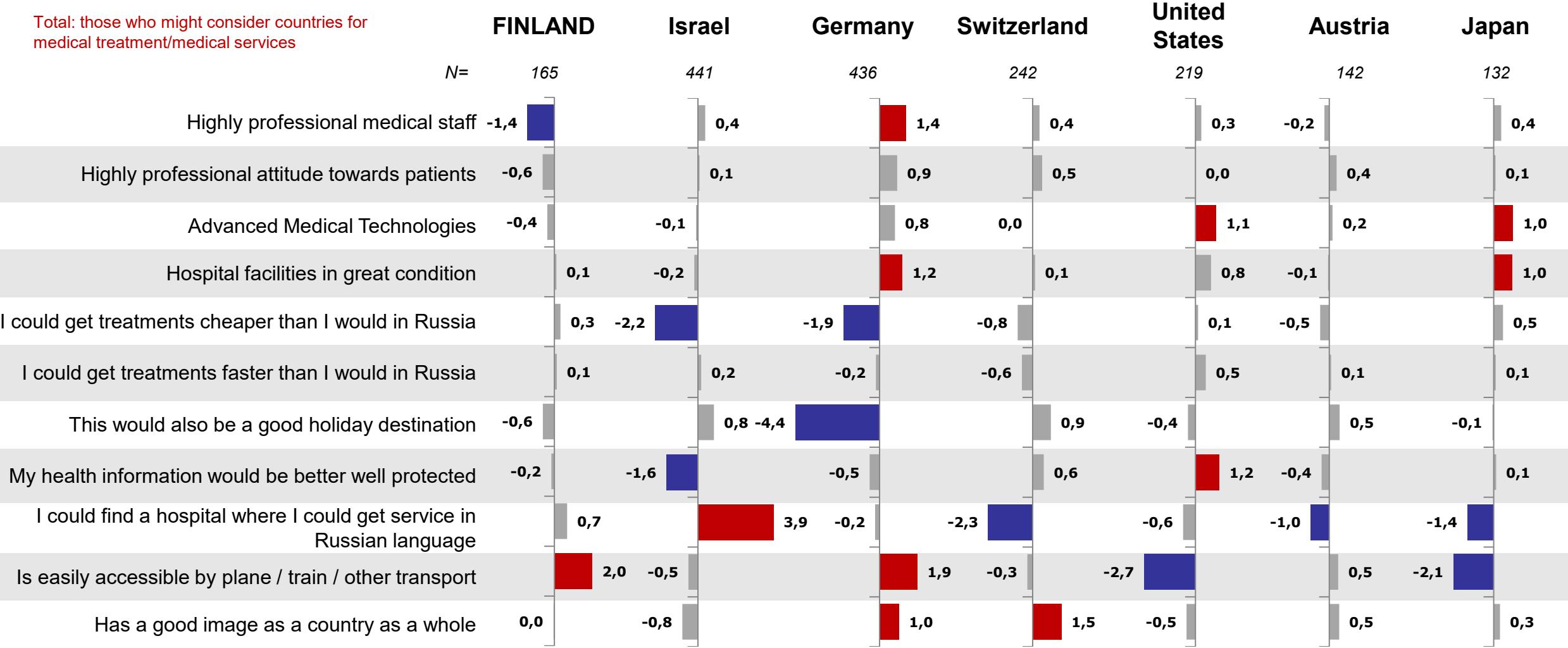


Image of the countries. GLM analysis (1)

Q16.Which countries in your opinion do the following statements correspond to?

Total: those who might consider countries for medical treatment/medical services



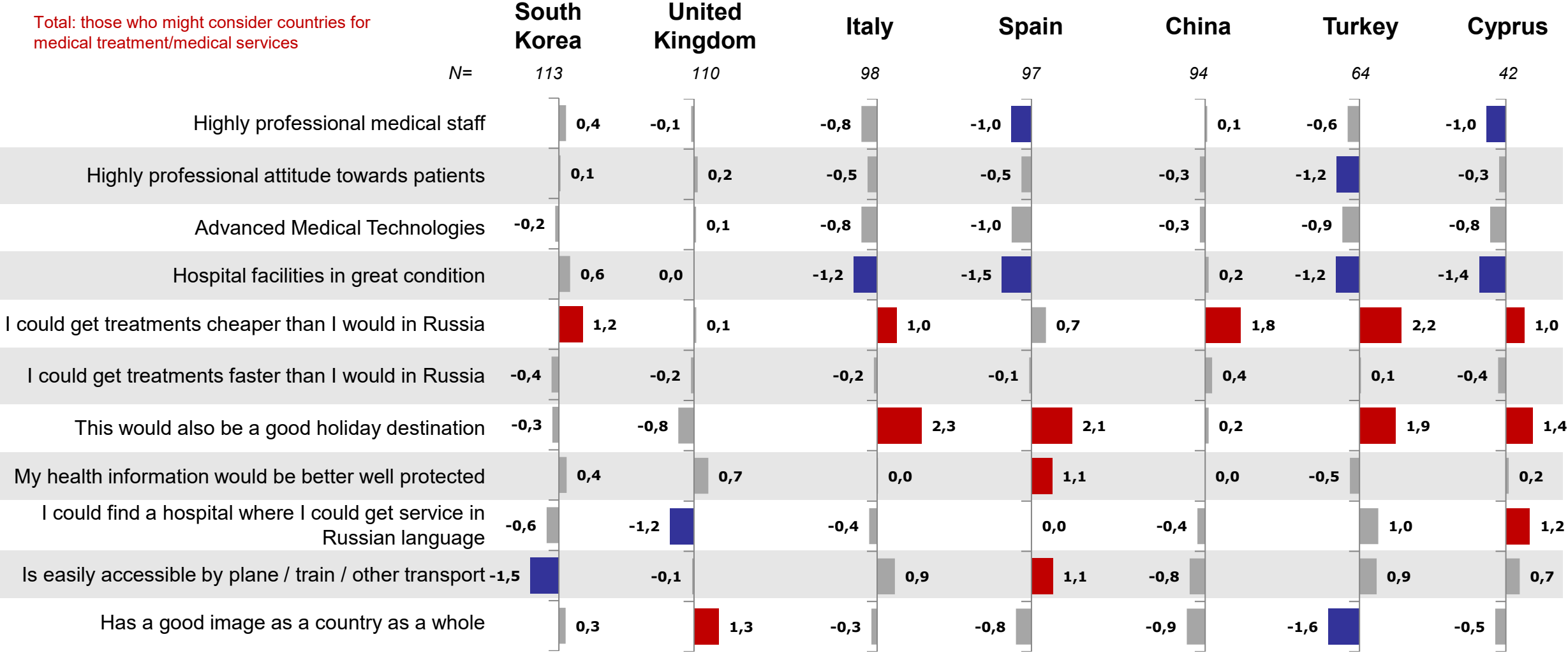
• The country image analysis also confirms that the main benefit of Finland as a country that is easily accessible, but the quality of medicine is not its strength.

■ the attribute is pronounced
 ■ irrelevant to the brand

Image of the countries. GLM analysis (2)

Q16.Which countries in your opinion do the following statements correspond to?

Total: those who might consider countries for medical treatment/medical services



■ the attribute is pronounced
■ irrelevant to the brand

Factors for choosing treatment overseas (Top 3)

Q132. Please choose THREE most important statements that would most likely make you decide to receive treatment abroad



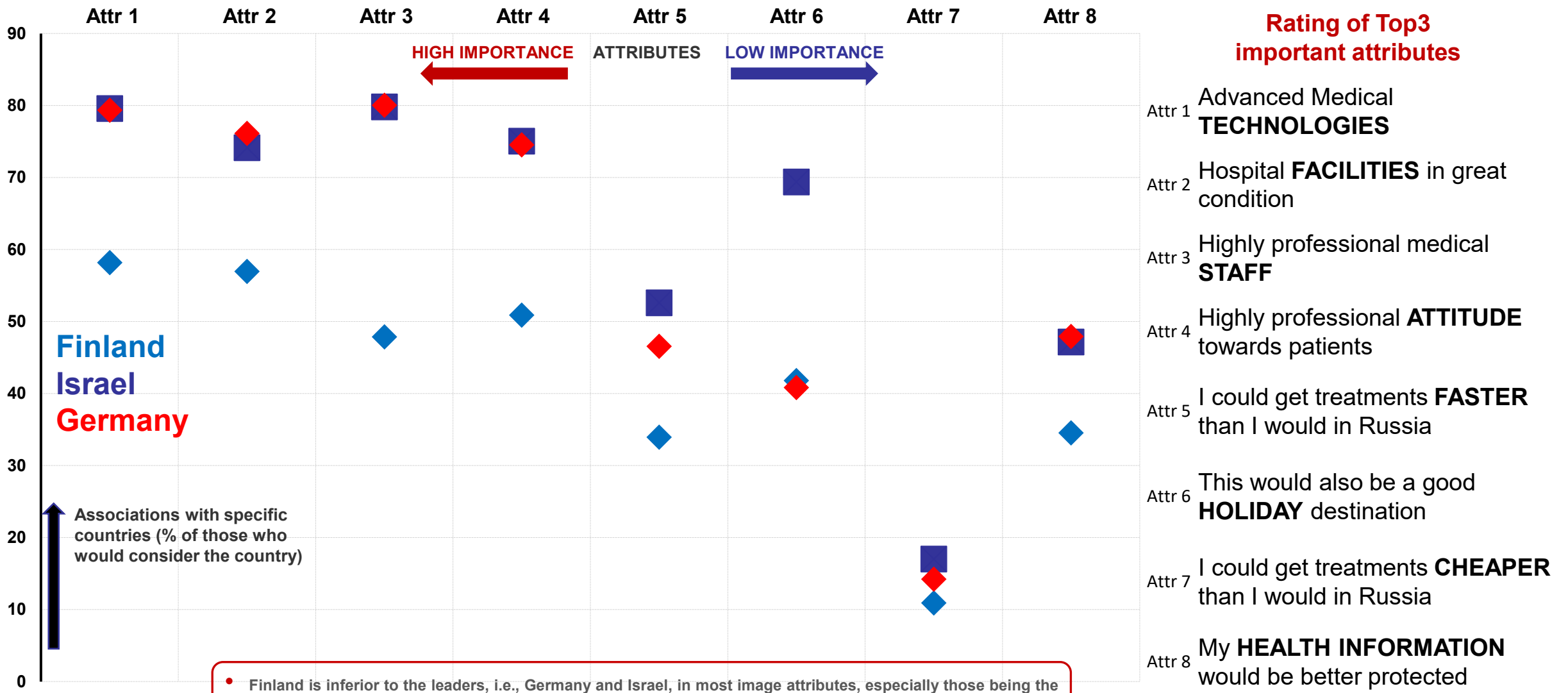
% of total sample, n=607

- Up-to-date technologies, hospital facilities, and professional medical staff are the key factors for choosing a specific country to get medical treatment.

Significantly higher than total or other group
Significantly lower than total or other group

Image of the countries. Map (1)

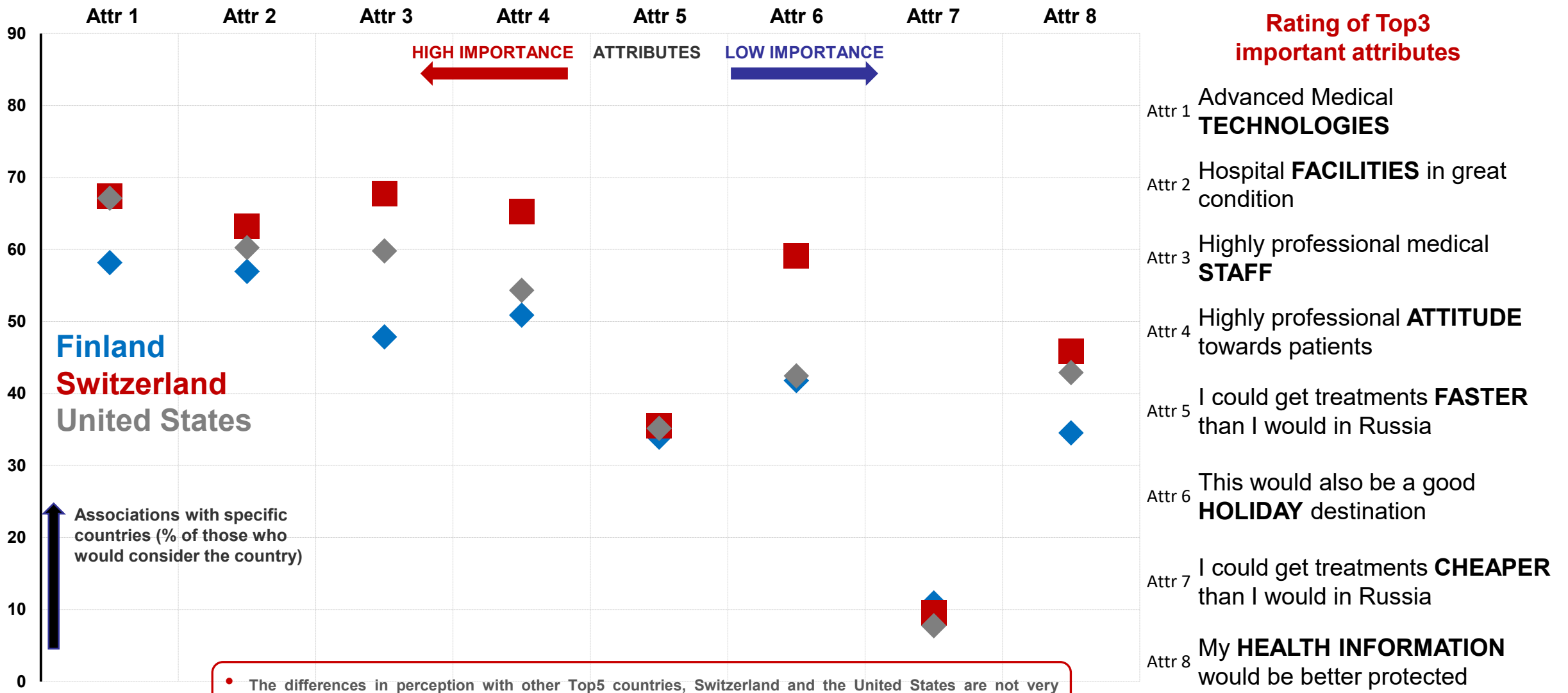
Q132. Please choose THREE most important statements that would most likely make you decide to receive treatment abroad
 Q16. Which countries in your opinion do the following statements correspond to?



• Finland is inferior to the leaders, i.e., Germany and Israel, in most image attributes, especially those being the most important choice factors for the target group.

Image of the countries. Map (2)

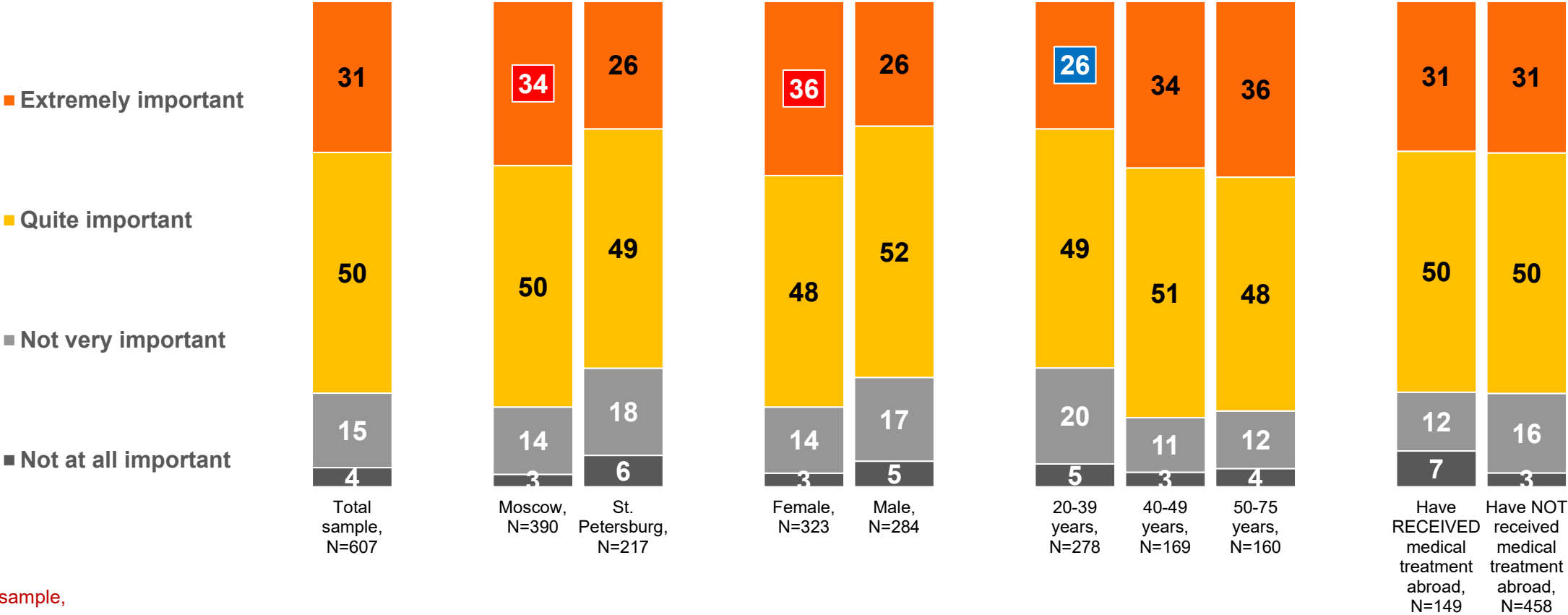
Q132. Please choose THREE most important statements that would most likely make you decide to receive treatment abroad
 Q16. Which countries in your opinion do the following statements correspond to?



• The differences in perception with other Top5 countries, Switzerland and the United States are not very significant., but at the same time Finland is not the leader in any of the attributes.

Receiving service in Russian

Q14. How important is it to you, that you could get service in Russian language abroad?



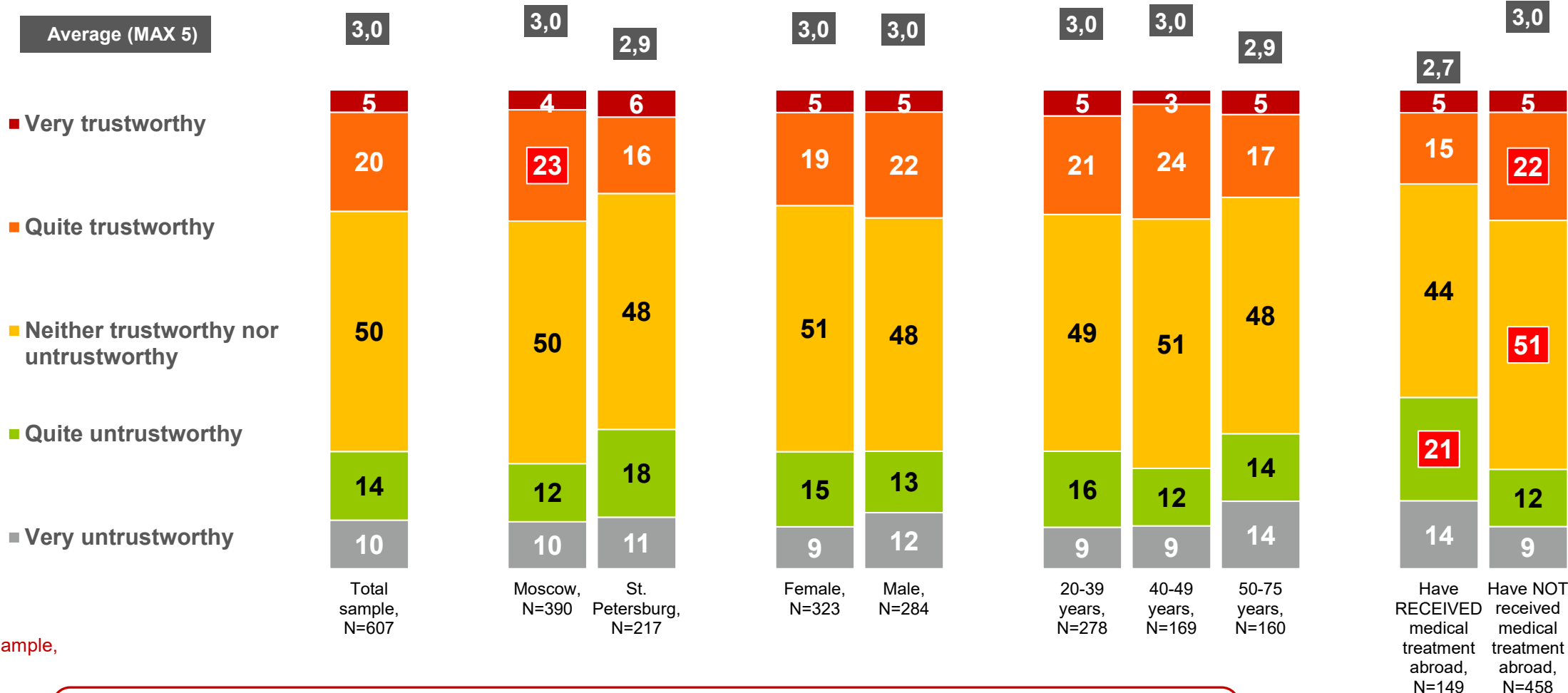
% of total sample, n=607

• For most of the target group, the possibility to receive services in Russian language abroad is important.

Significantly HIGHER than total or other group
Significantly LOWER than total or other group

Trust in Russian healthcare system

Q15. Overall, how trustworthy do you find the Russian healthcare system?



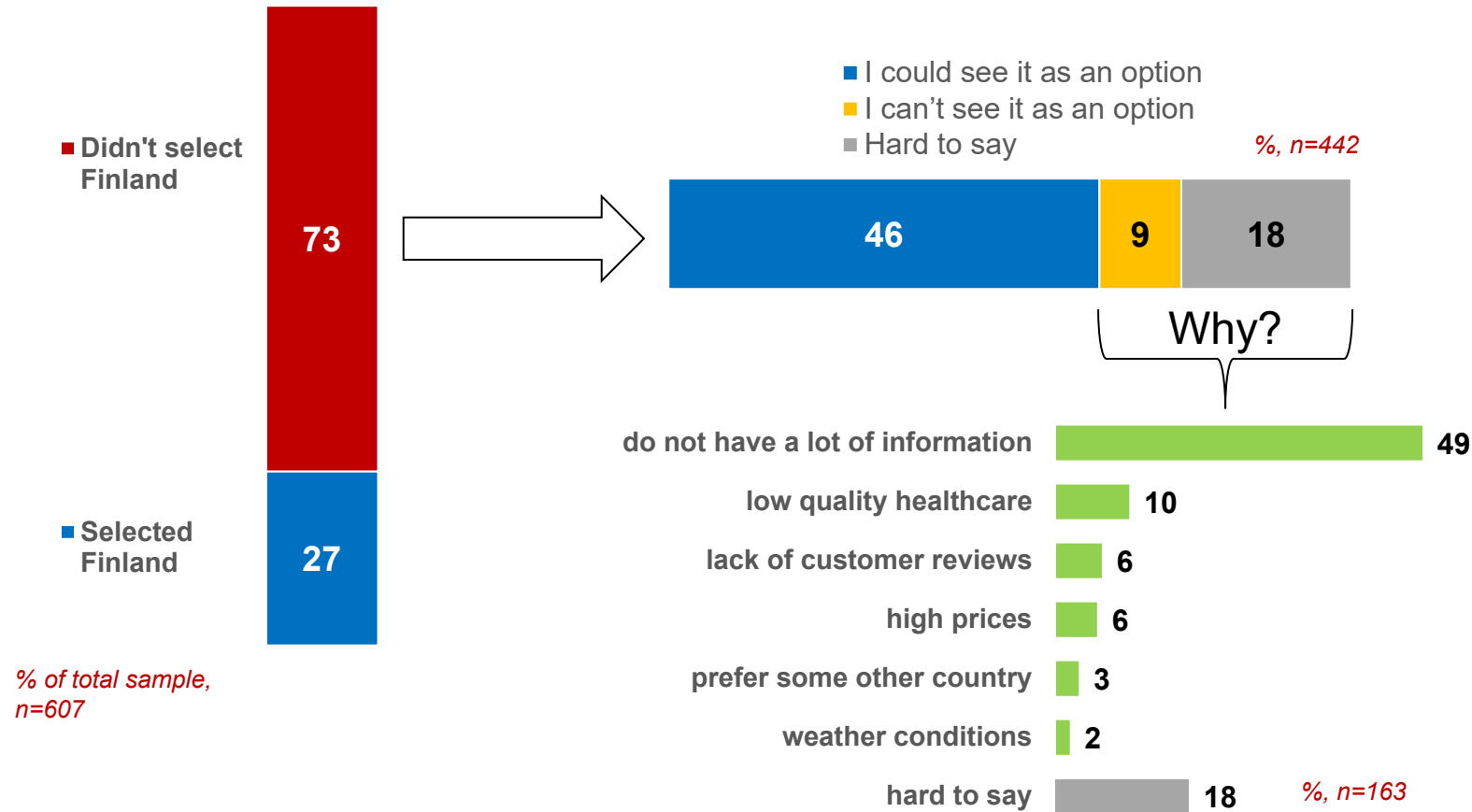
% of total sample, n=607

- Trust in Russian healthcare system is overall pretty low – only ¼ of the respondents consider it trustworthy.
- The number is lower in St. Petersburg in comparison to Moscow, also it is a bit lower for older age group (50-75 years).
- People who received medical treatment abroad also tend to trust Russian healthcare system less than those who haven't travelled abroad for treatment.

Significantly higher than total or other group

Finland as an destination for treatment / medical services

Q7. Which of the following countries you might consider for medical treatment/ medical services? Q19. If you now think of just Finland as a destination for medical treatment, which of the following best describes your opinion? Q20. Why don't you see Finland as an option for treatment/ medical services?



- About 75% (27%+46%) could potentially consider Finland as a country for getting medical treatment/services. Lack of information is the main reason for those who would not consider it or answered "hard to say".

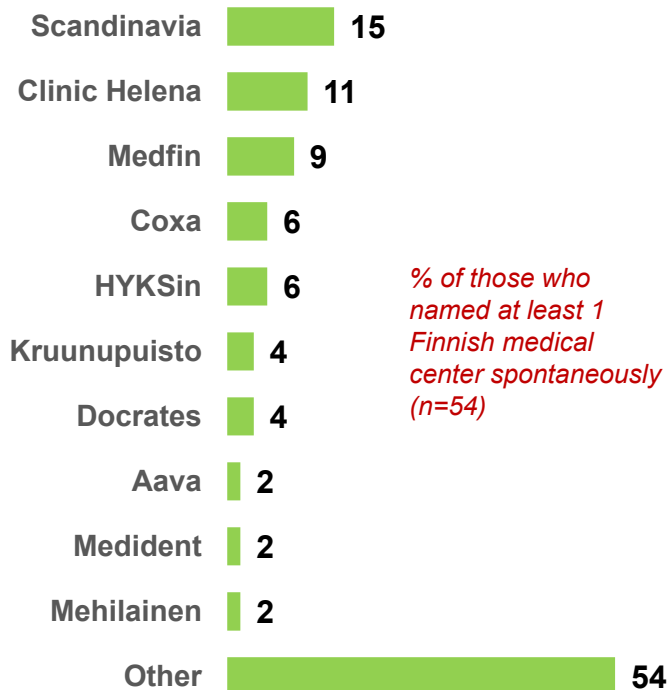
Awareness of Finnish medical centers and clinics

Q21. Which Finnish medical centers and clinics do you know at least by name? Please write down the Finnish medical centers and clinics that you know. Please DO NOT search the internet for information.
 Q22. Have you heard of any of the following Finnish medical centers and clinics (at least by name)?

Unaided awareness

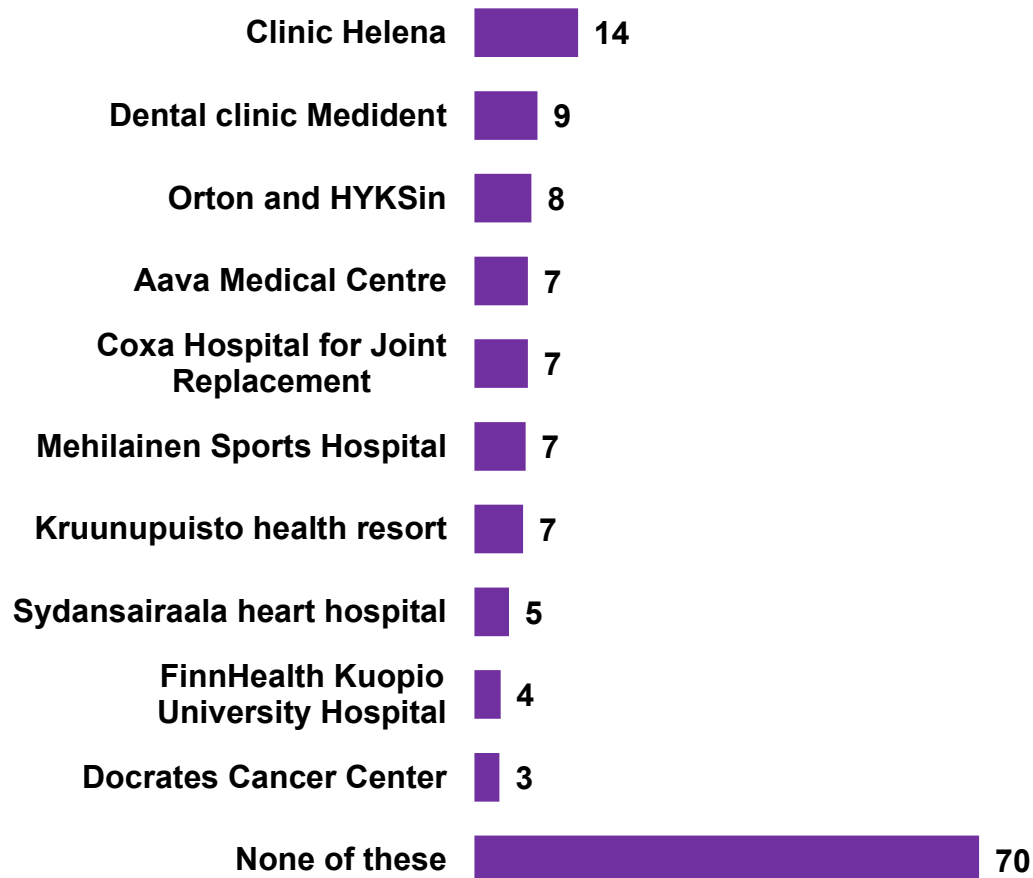
% of total sample, n=607

- Named at least 1 Finnish medical center spontaneously
- Do not know



Aided awareness

% of total sample, n=607



• Awareness of Finnish medical centers is low – only about 10% of target group named at least 1 clinic/medical center spontaneously and 70% do not know any clinic from the list (aided awareness).

Sources of information

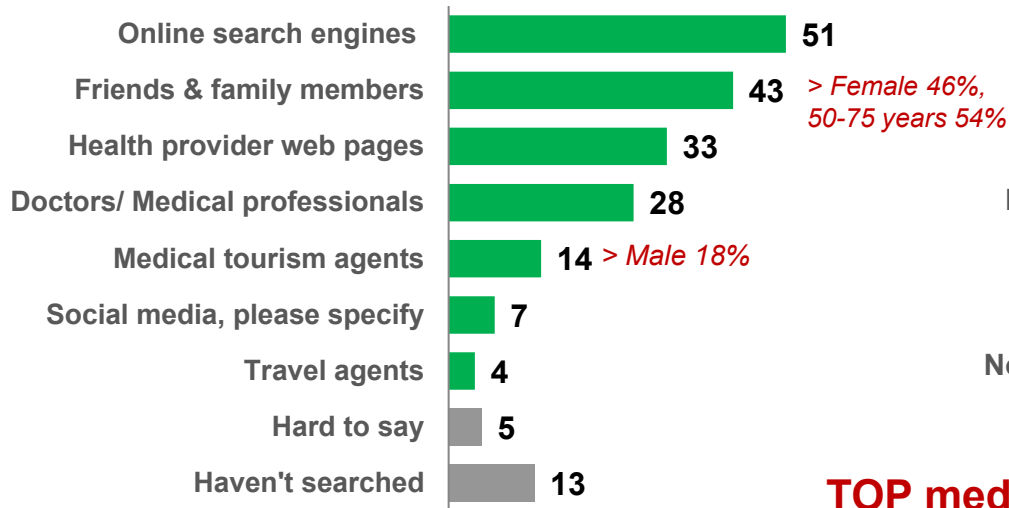
Sources of information about healthcare providers abroad. Media Usage

Q23. Where do you seek or get information of health care service providers abroad?

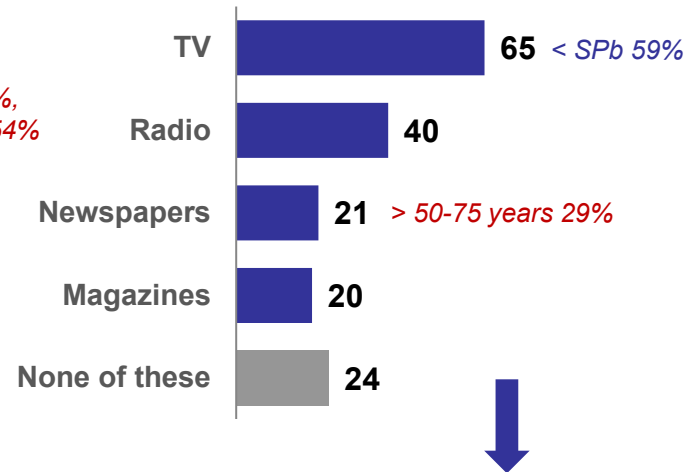
Q24. Which of the following medias do you follow actively? Q25. Which of the following social media services / messenger services do you use actively?

Significantly higher than total or other group Significantly lower than total or other group

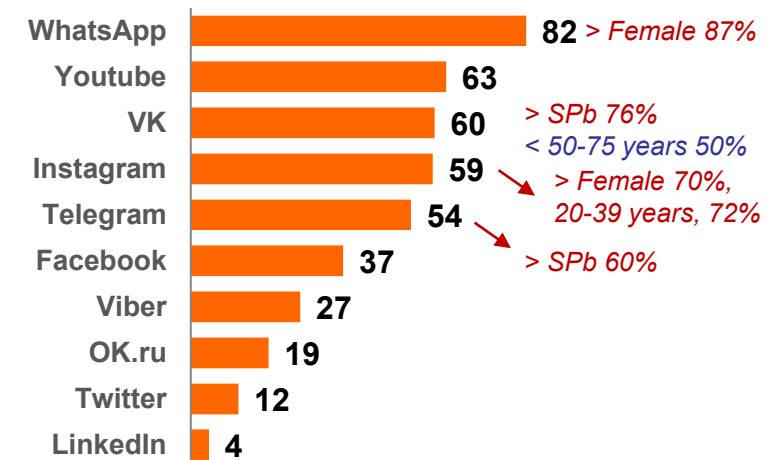
Get information about healthcare providers abroad



Media consumed

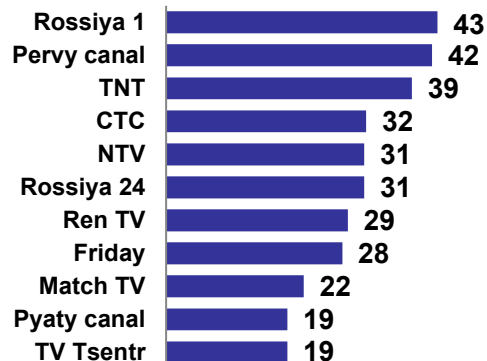


Social media services used

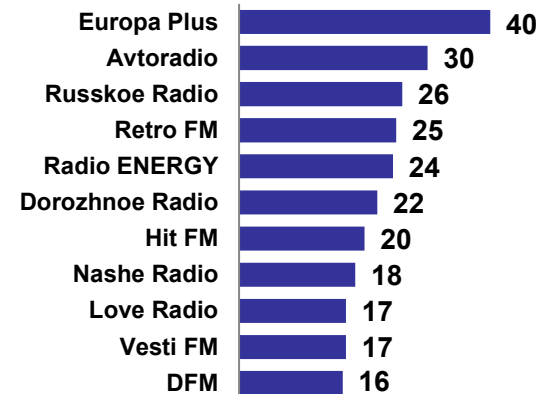


TOP media channels (% of users of each media)

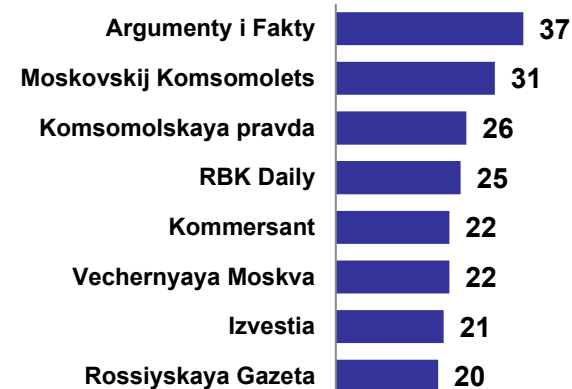
TV channels



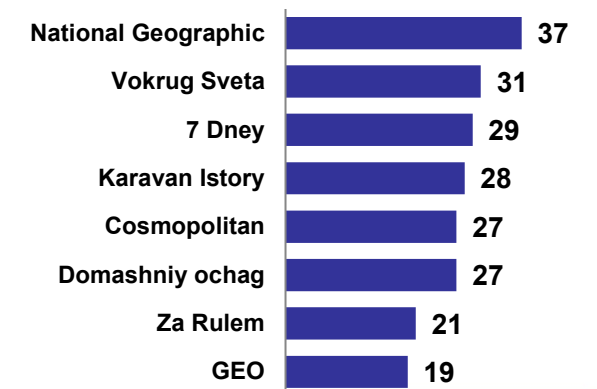
Radio stations



Newspapers



Magazines

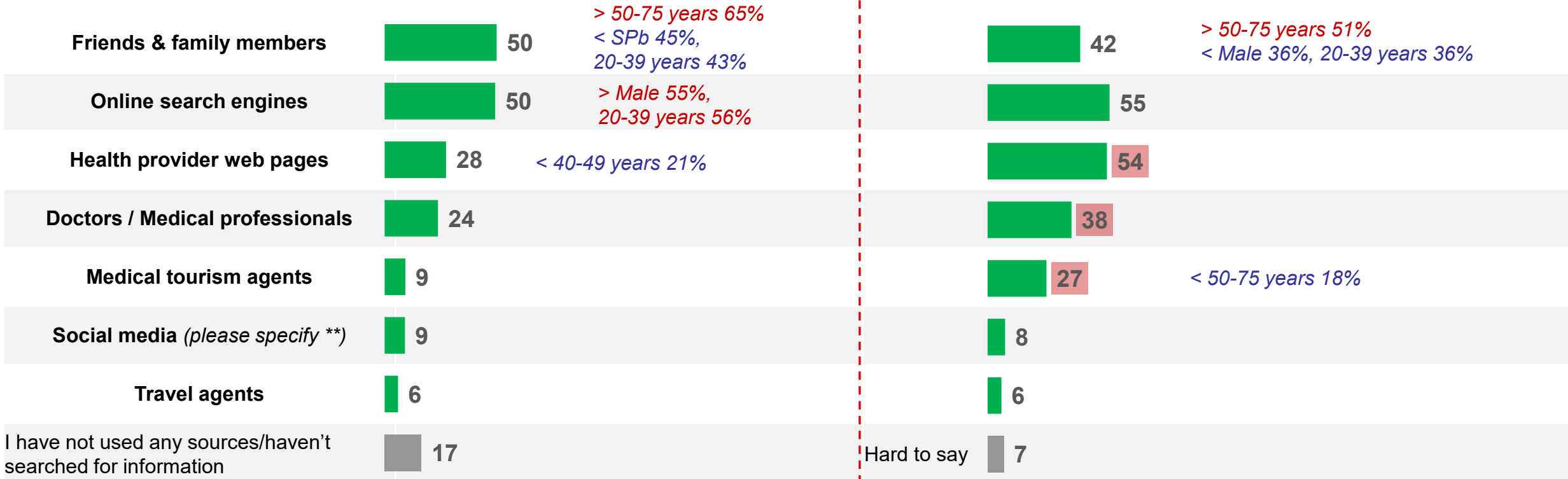


Sources of information about treatment/ medical services abroad

Q11. How did you first hear about medical treatment/medical services in the countries you'd consider?
 Q12. Please tick all the sources that you used when looking for information about treatment/ medical services in these countries.
 Q1200. Where do you plan to look for information on treatment/ medical services in these countries, if the need arises?

Sources that were USED

Sources that are PLANNED to be used if the need arises



% of total sample, n=607

Significantly higher than total or other group
 Significantly lower than total or other group

How did you first hear about medical treatment/ medical services in the countries you'd consider.

- Among the sources of information named spontaneously, the most popular are : from Internet (in general, without specifications) – 30%, from friends & family members – 29%, from television – 11%.

** The most popular social media that respondents used to get information about treatment/ medical services abroad (9% of total sample): 45% used Instagram, 23% VK and Facebook.

Plan to use: 44% Instagram, 33% VK, 27% Facebook.

• The sources of information on treatment/medical services abroad that the respondents actually used and which they plan to use somewhat differ. When planning, it is more often assumed to use sources directly related to healthcare - health provider web pages, doctors/ medical professionals and also medical tourism agents.

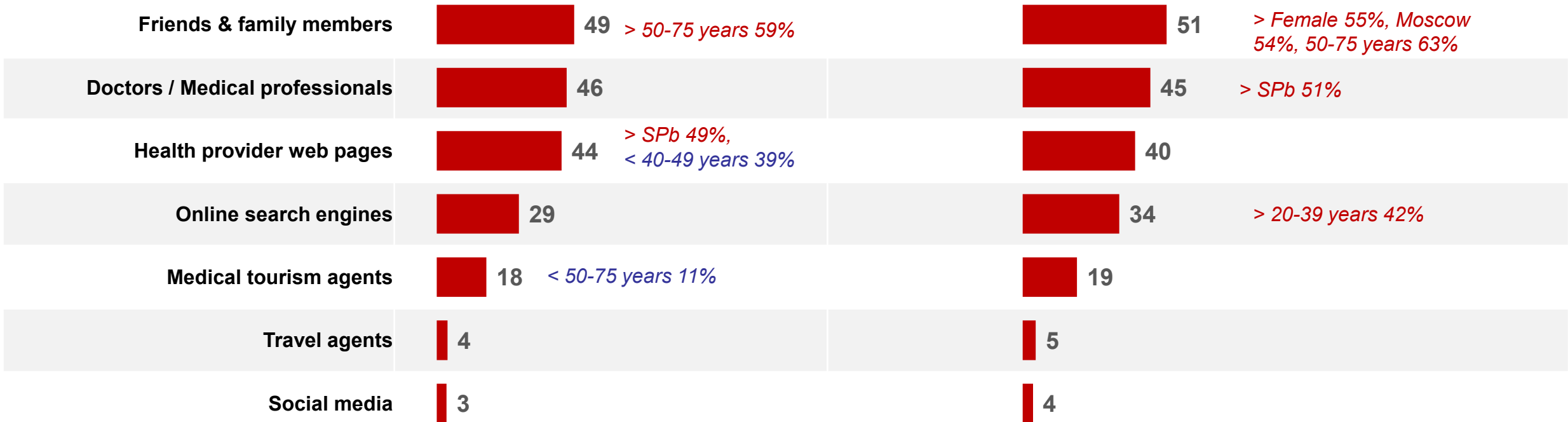
Reliable sources of information about treatment/ medical services and healthcare providers abroad

Q120. Which sources of information about medical treatment/ medical services abroad do you trust the most? Please select no more than THREE options.
 Q230. Which sources of information about health care service providers abroad do you trust the most? Please select no more than 3 options.

% of total sample, n=607

Most reliable sources of information about treatment/ medical services abroad

Most reliable sources of information about healthcare providers abroad



The most reliable sources of information about both treatment / medical services abroad and healthcare providers abroad are friends & family members, doctors / medical professionals, and health provider web pages.

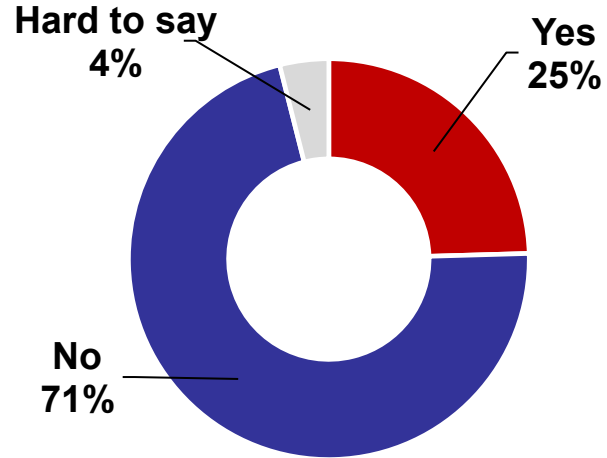
Significantly higher than total or other group
 Significantly lower than total or other group

Receiving medical treatment abroad

Experience in traveling abroad for medical treatment/ medical services

Q17. Have you or some of your family members ever travelled abroad to get medical treatment/ medical services?

Have travelled abroad to get medical treatment/ medical services



% of total sample, n=607

	20 - 39 years	40 - 49 years	50 - 75 years
Yes *	23 %	21 %	31 %
No	74 %	74 %	65 %
Hard to say	4 %	5 %	4 %

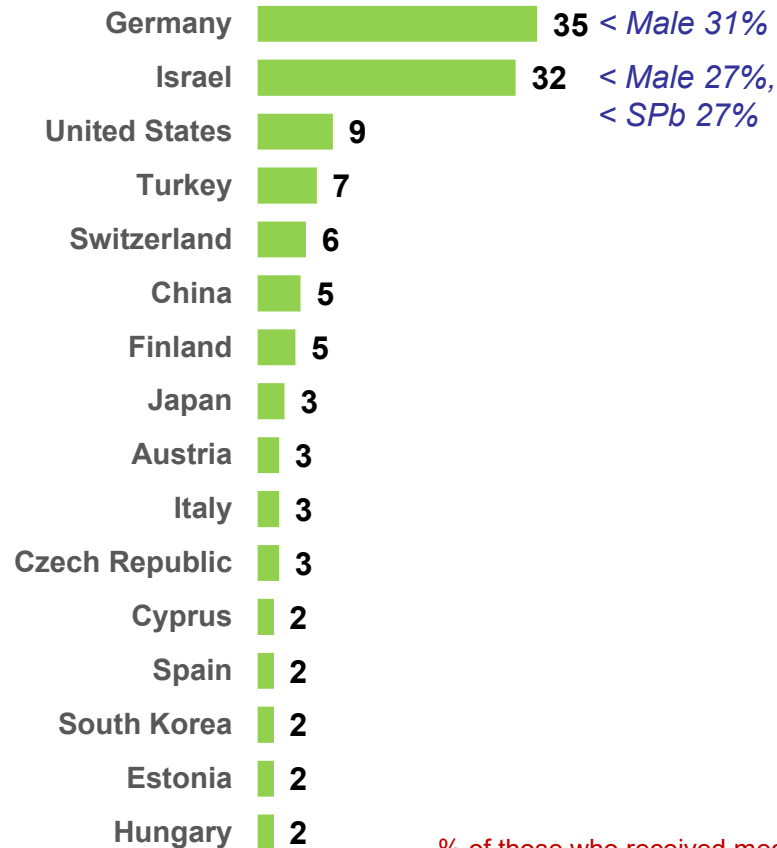
* There are no significant differences in the data between different genders and cities

- 25% of the target audience received medical treatment abroad for themselves or their family members, which is significantly more relevant to the older group aged 50-75 years.

Destinations and types of medical treatment/ medical services received abroad

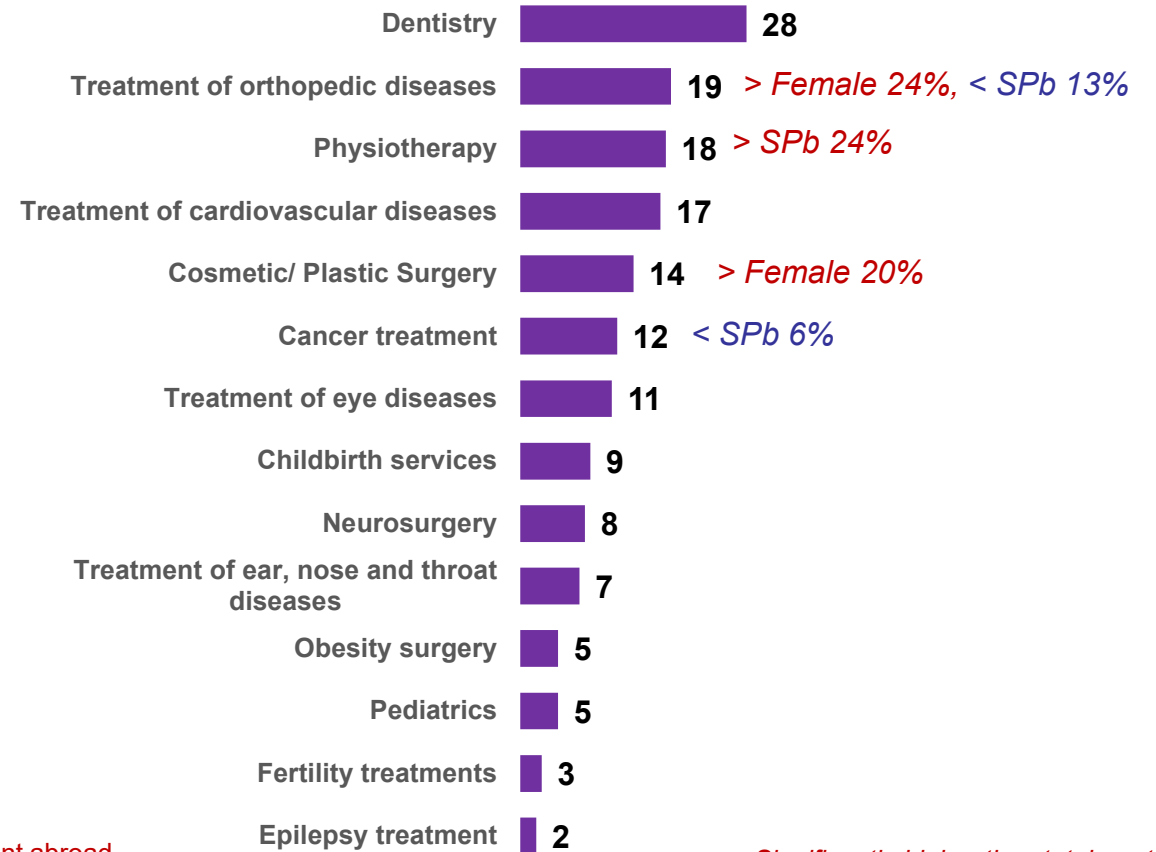
Q18. Where did you or your family member travel to for medical treatment or medical services?
 Q181. What treatment / medical services did you or any member of your family receive abroad?

Country



% of those who received medical treatment abroad, n=149 (=25% of total sample)

Type of medical treatment



Significantly higher than total or other group
 Significantly lower than total or other group

• About 30% of those who went for treatment abroad received dental treatment; this treatment area is potentially promising.

RECEIVED medical treatment abroad VS NOT received medical treatment abroad (1)

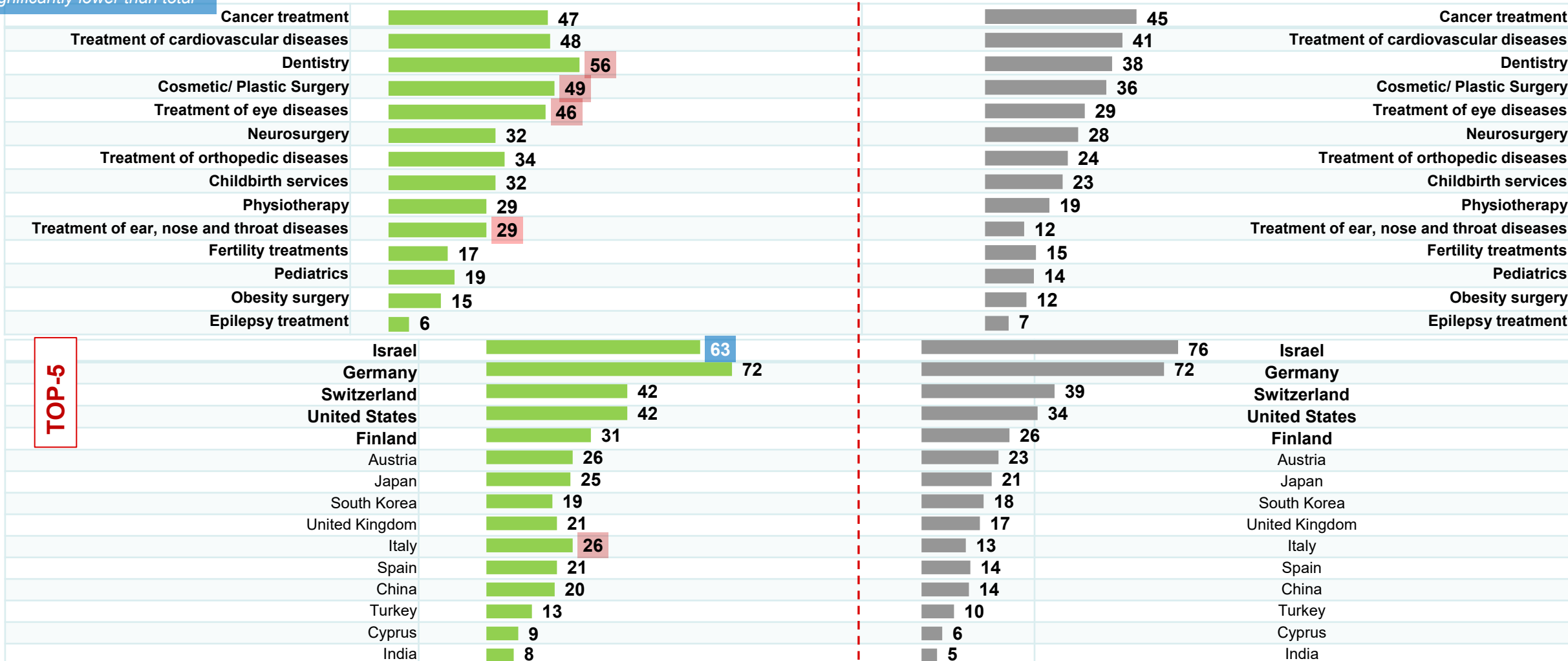
Q6. What types of treatment/ medical services abroad would you potentially consider for yourself and/or your family?

Q7. Which of the following countries you might consider for medical treatment/medical services?

Significantly higher than total
Significantly lower than total

RECEIVED N=149 (=25% of total sample)

NOT received N=458 (=75% of total sample)



TOP-5

RECEIVED medical treatment abroad VS NOT received medical treatment abroad (2)

Q8. Which of these countries would be your first choice?

Q9. Which country would you consider second? Q10. Finally, which country would be your third choice?

Significantly higher than total

Significantly lower than total

RECEIVED
N=149 (=25% of total sample)

NOT received
N=458 (=75% of total sample)

TOP-5 countries

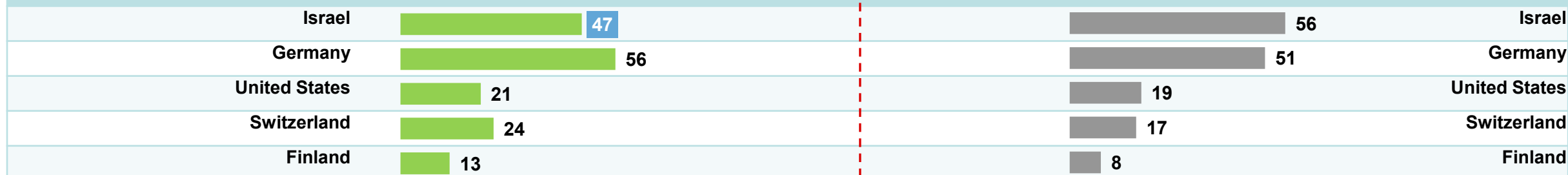
COUNTRY. 1st choice



COUNTRY. 1st + 2nd choice



COUNTRY. 1st + 2nd + 3rd choice



RECEIVED medical treatment abroad VS NOT received medical treatment abroad (3)

Q12. Please tick all the sources that you used when looking for information about treatment/ medical services in these countries.

Q120. Which sources of information about medical treatment/ medical services abroad do you trust the most? Please select no more than THREE options.

Significantly higher than total

Significantly lower than total

RECEIVED

N=149 (=25% of total sample)

NOT received

N=458 (=75% of total sample)

Sources of information about treatment/ medical services (USED)

Source	RECEIVED (N=149)	NOT received (N=458)
Friends & family members	66	45
Online search engines	54	48
Health provider web pages	36	25
Doctors / Medical professionals	36	20
Medical tourism agents	19	6
Social media	15	7
Travel agents	10	5

Most reliable sources of information

Source	RECEIVED (N=149)	NOT received (N=458)
Friends & family members	54	47
Doctors / Medical professionals	50	45
Health provider web pages	47	43
Online search engines	25	31
Medical tourism agents	18	17
Travel agents	5	3
Social media	5	3

RECEIVED medical treatment abroad VS NOT received medical treatment abroad (4)

Q132. Please choose THREE most important statements that would most likely make you decide to receive treatment abroad

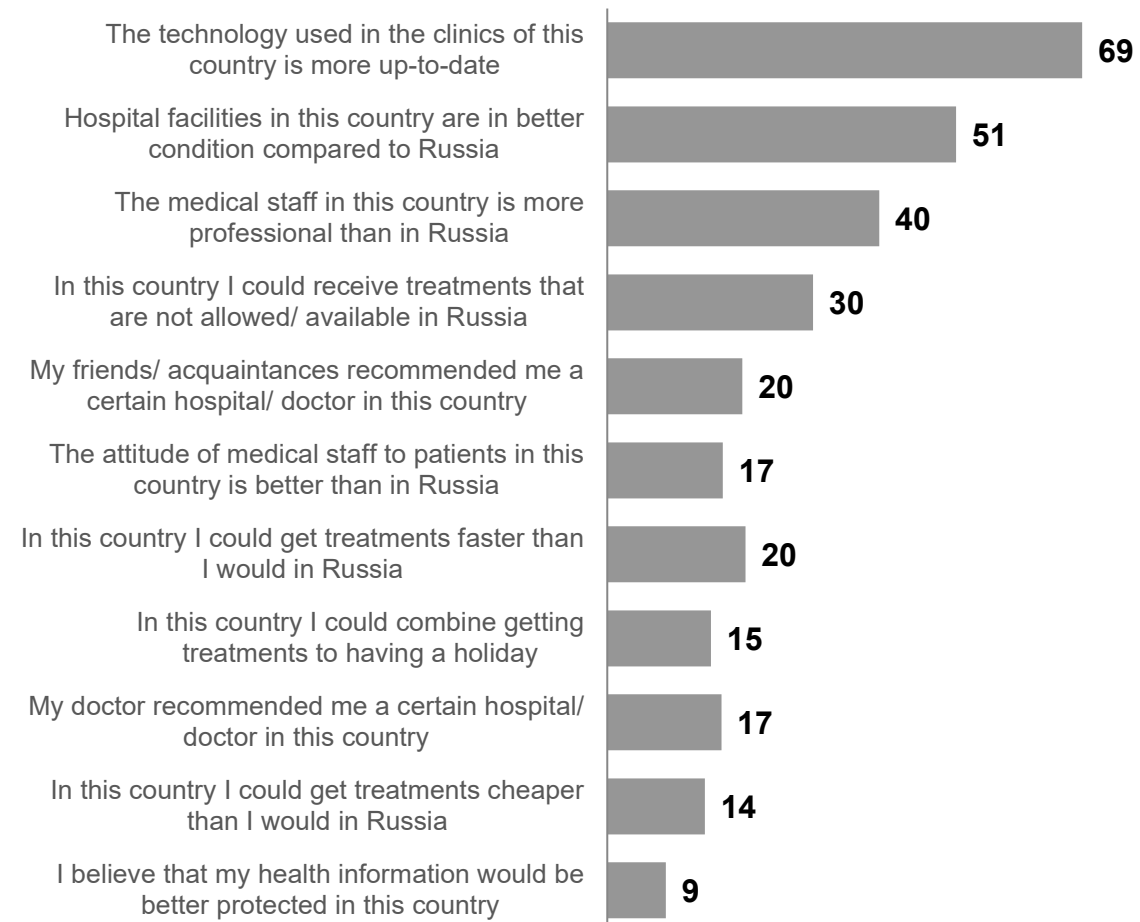
Significantly higher than total

Significantly lower than total

RECEIVED
N=149 (=25% of total sample)

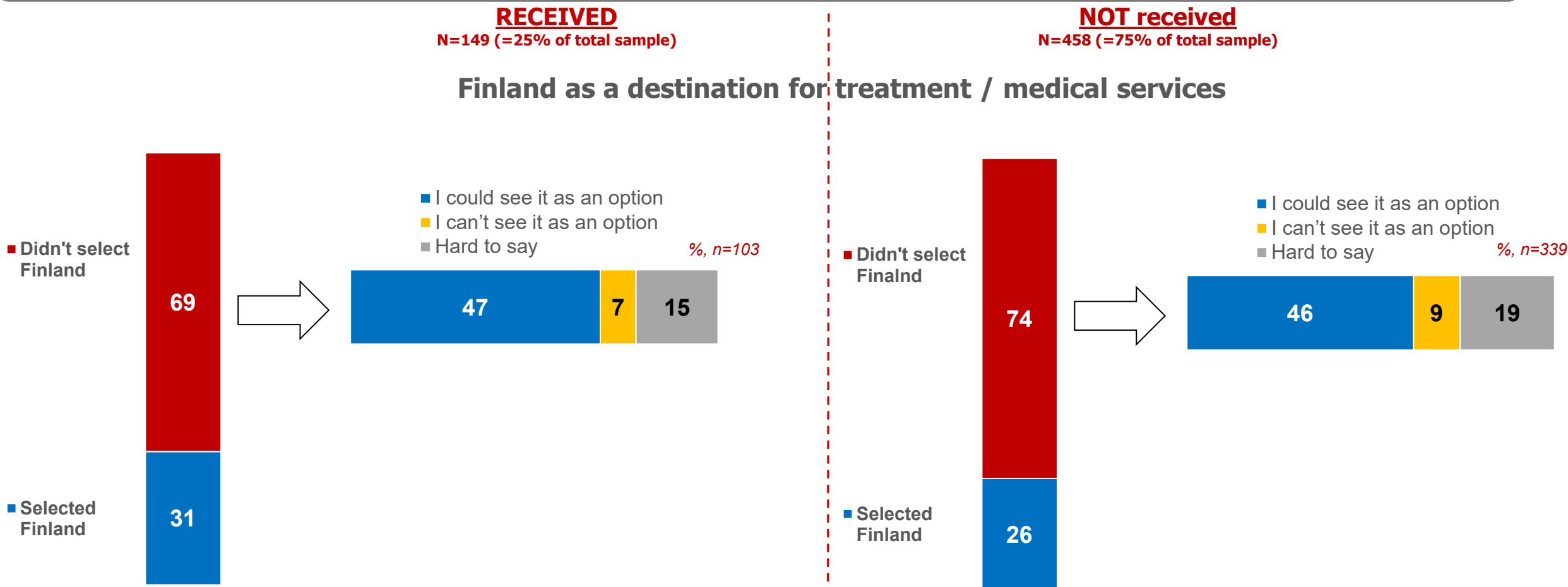
NOT received
N=458 (=75% of total sample)

Factors for choosing treatment overseas



RECEIVED medical treatment abroad VS NOT received medical treatment abroad (5)

Q7. Which of the following countries you might consider for medical treatment/ medical services?
 Q19. If you now think of just Finland as a destination for medical treatment, which of the following best describes your opinion?



• Among those with experience of receiving medical services abroad, a slightly larger number consider Finland as a possible destination to get medical treatment (31% versus 26%).

RECEIVED medical treatment abroad VS NOT received medical treatment abroad (6)

Q21. Which Finnish medical centers and clinics do you know at least by name?
 Q22. Have you heard of any of the following Finnish medical centers and clinics (at least by name)?

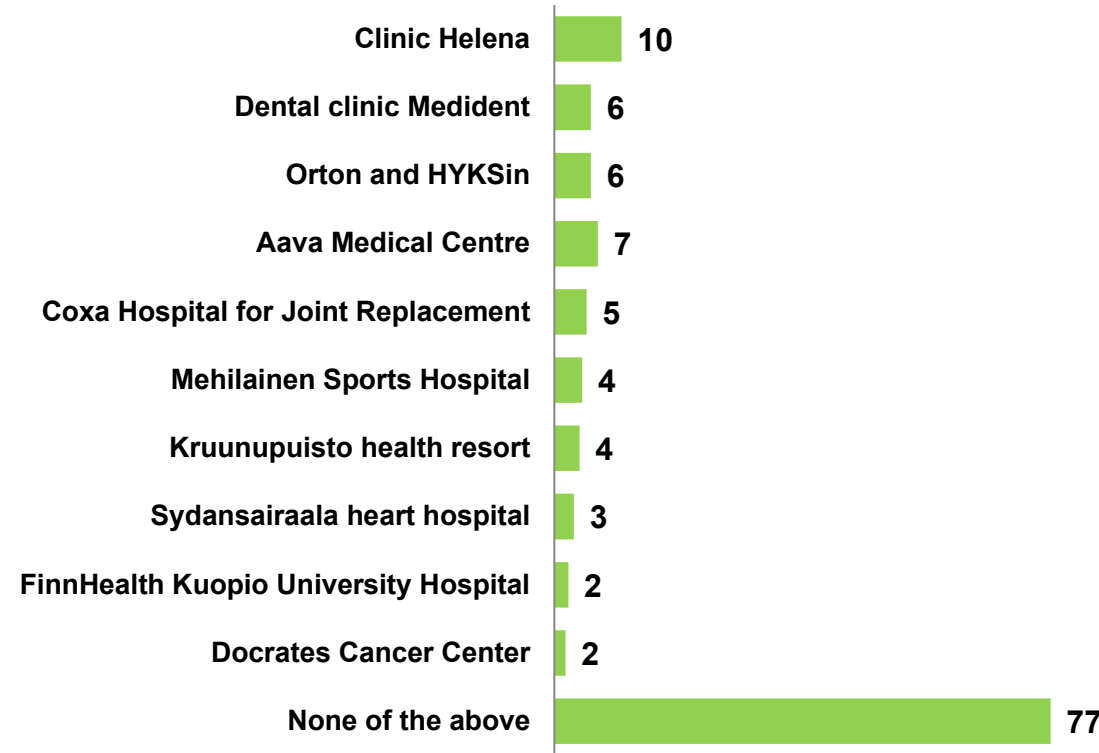
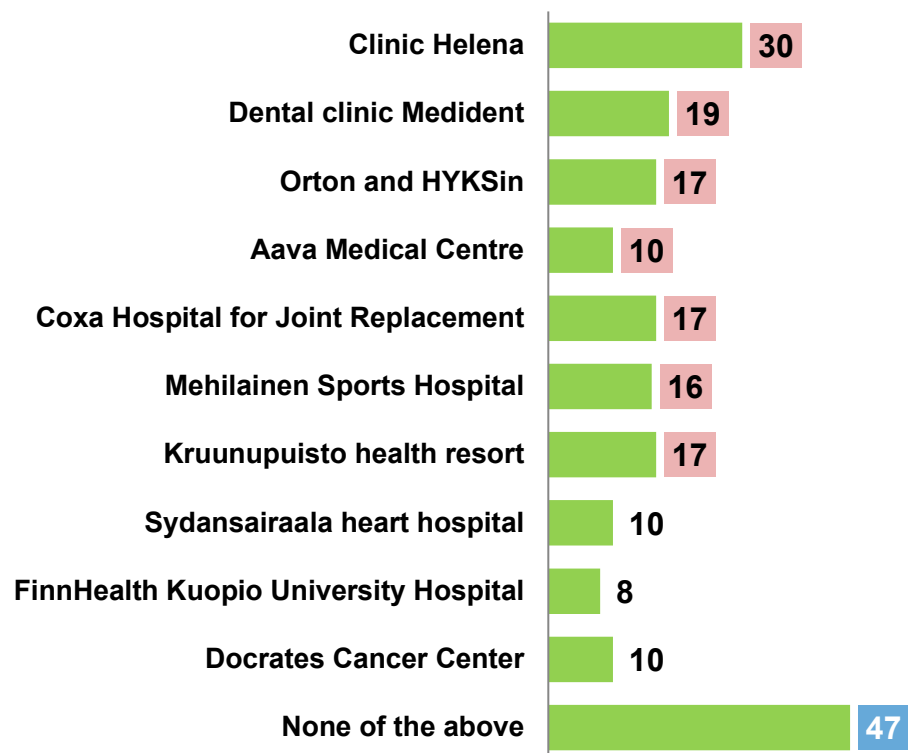
Significantly higher than total

Significantly lower than total

RECEIVED
 N=149 (=25% of total sample)

NOT received
 N=458 (=75% of total sample)

Awareness of Finnish medical centers and clinics (aided + unaided*)



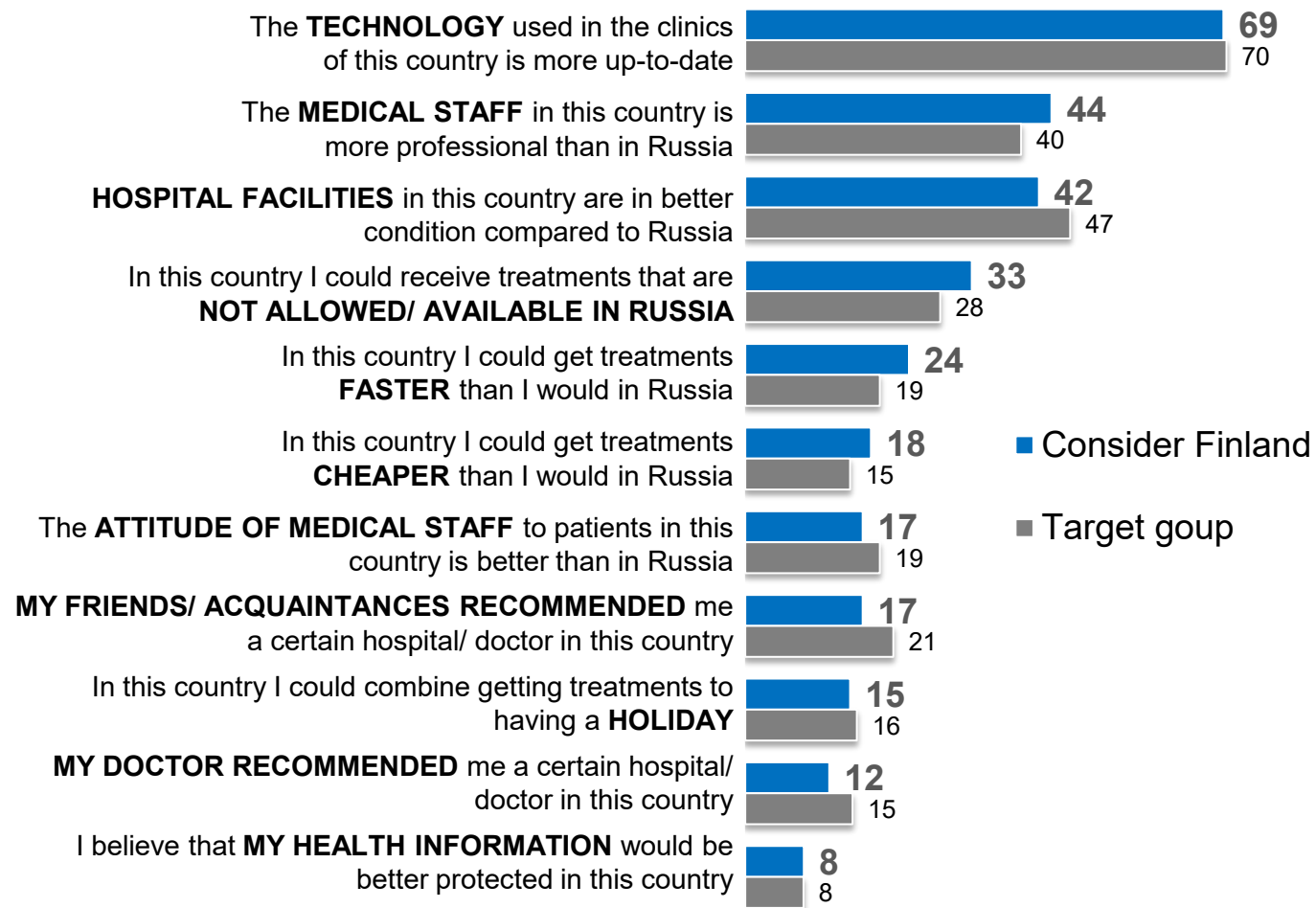
• Knowledge of almost all of the Finnish medical centers and clinics (specified in the q-re) is significantly higher among the respondents who received medical treatment / medical services abroad vs. those who have not received any medical treatment abroad.

* % of spontaneous mentions is very small

Finland as a health travel destination

MIGHT CONSIDER FINLAND: Factors for choosing treatment overseas (Top 3)

Q132. Please choose THREE most important that would most likely make you decide to receive treatment abroad



• Among those who would consider Finland, the following factors for choosing a country for treatment are slightly more pronounced: the inaccessibility of certain medical services in Russia and the possibility to receive treatment faster than in Russia..

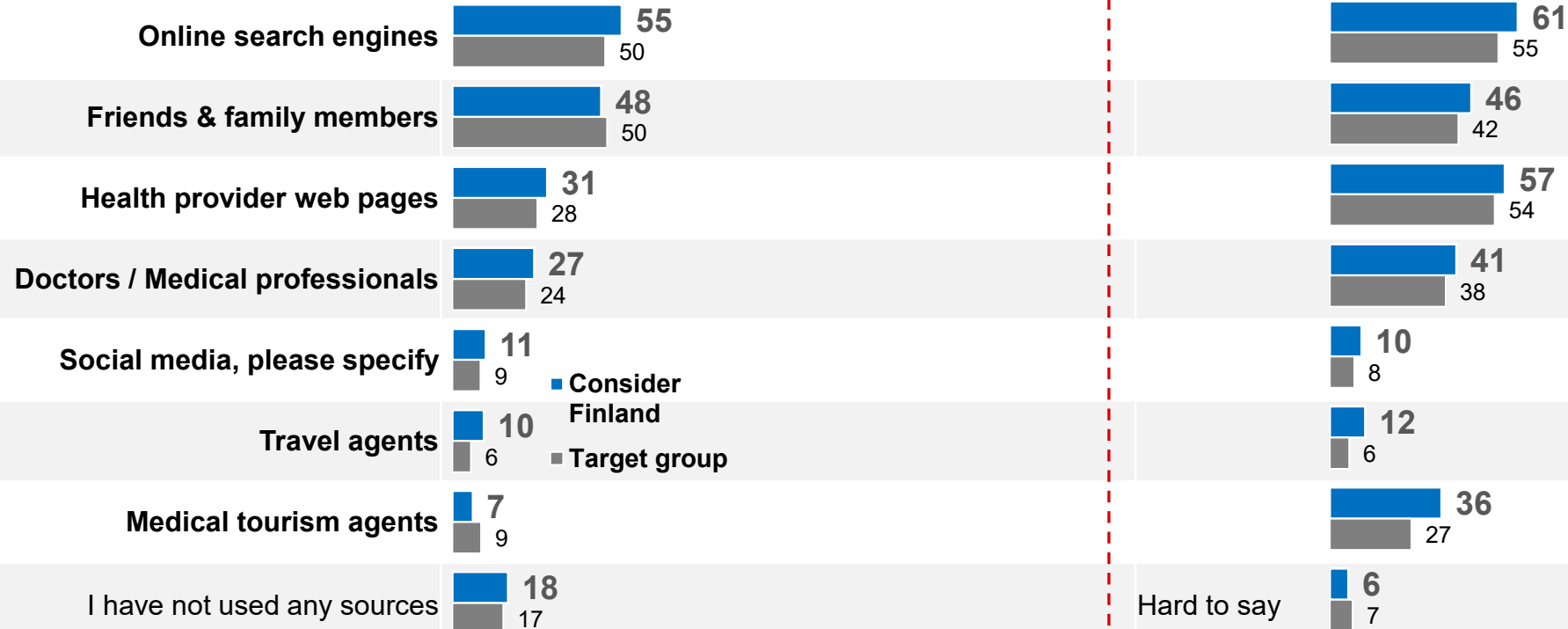
% out of those who consider Finland as a country for medical treatment, n=165 / total sample n=607

MIGHT CONSIDER FINLAND: Sources of information

Q12. Please tick all the sources that you used when looking for information about treatment/ medical services in these countries.
 Q1200. Where do you plan to look for information on treatment/ medical services in these countries, if the need arises?

Sources USED

Sources PLANNED to be used if the need arises



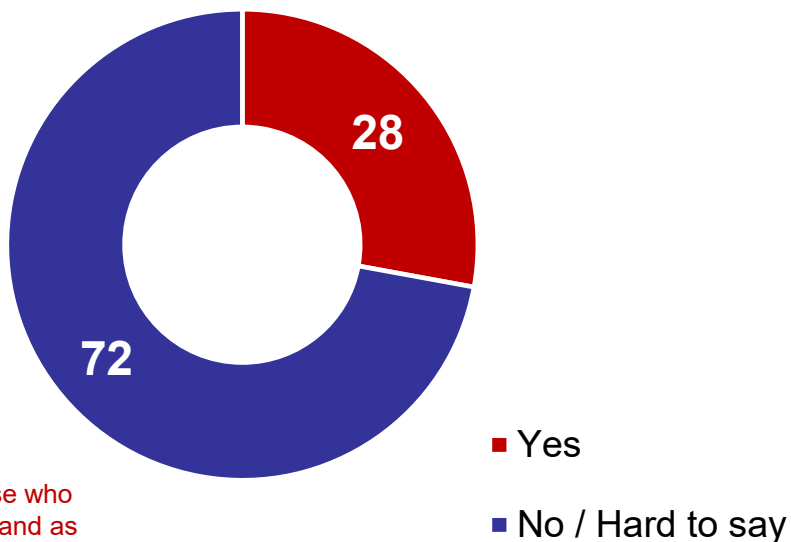
% out of those who consider Finland as a country for medical treatment, n=165 / total sample n=607

MIGHT CONSIDER FINLAND: Experience in traveling abroad for medical services

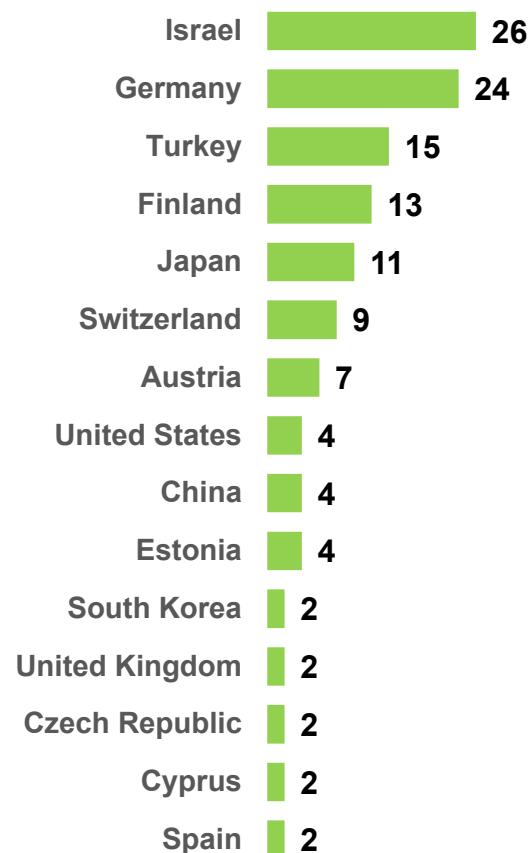
Q17. Have you or some of your family members ever travelled abroad to get medical treatment/ medical services?

Q18. Where did you or your family member travel to for medical treatment or medical services?

Have travelled abroad to get medical treatment/ medical services



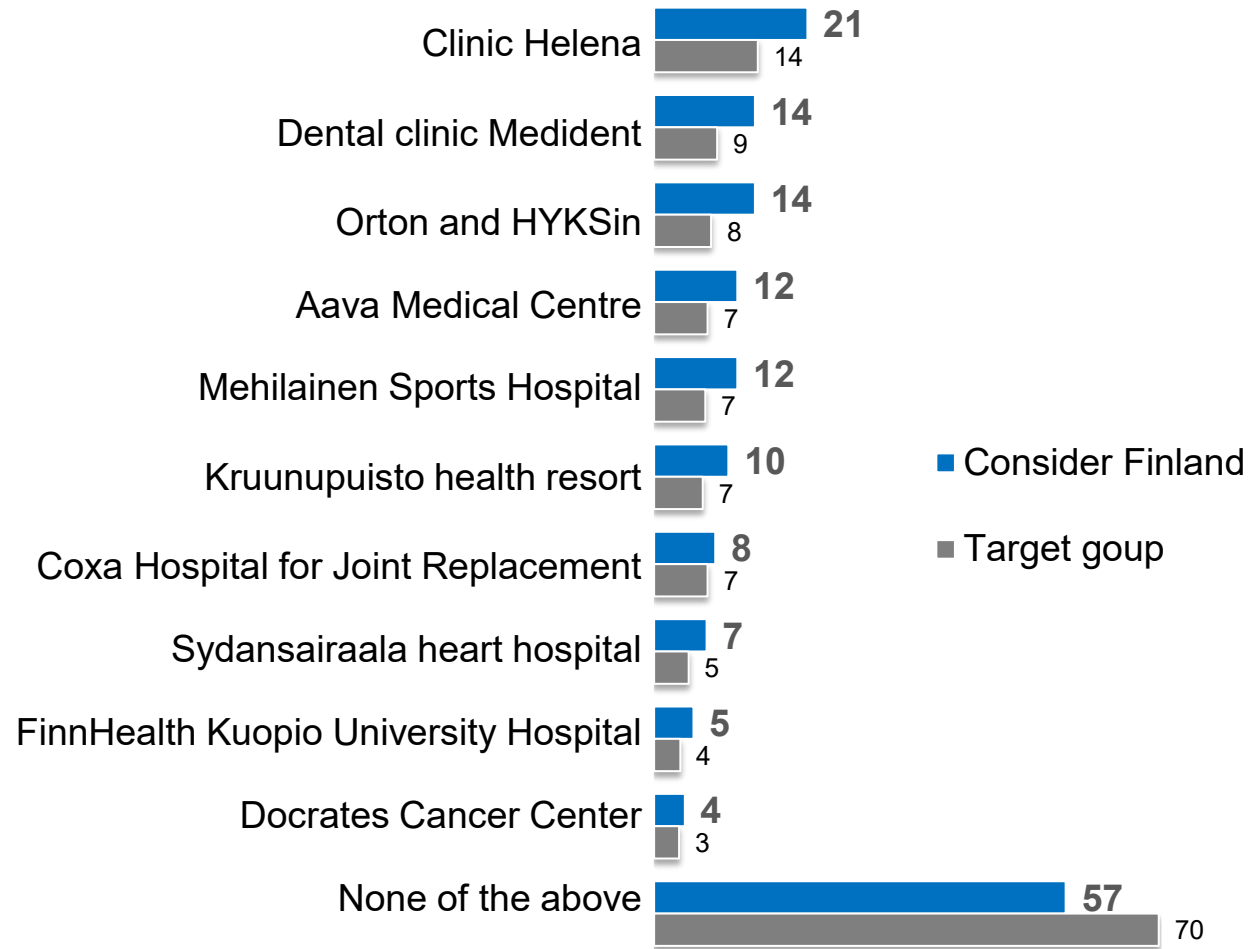
% out of those who consider Finland as a country for medical treatment, n=165



% out of those who consider Finland and have travelled abroad for medical treatment, n=46

MIGHT CONSIDER FINLAND: awareness of Finnish medical centers and clinics

Q22. Have you heard of any of the following Finnish medical centers and clinics (at least by name)?



% out of those who consider Finland as a country for medical treatment, n=165 / total sample n=607

- Finnish medical centers and clinics are better known by those who consider Finland as a possible country for receiving medical treatment.



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Thank You