

Estonian Medical Spa Survey

Report:

Finland

Soprano Oyj


Details

- Conducted between 28 June - 4 July 2012
- N = 1000 respondents
- Target countries: Finland

- Survey conducted by Soprano Oyj.
Survey tool Digium. Contacts from CINT.

Gender

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	Female	461	46,10%					
		1750	51,47%					
2.	Male	539	53,90%					
		1650	48,53%					
Yhteensä		1000	100%					
Yhteensä		3400	100%					

 = Finland

 = All countries

Age

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	18-30	232	23,20%					
		845	24,85%					
2.	31-45	370	37,00%					
		1148	33,76%					
3.	46-60	279	27,90%					
		860	25,29%					
4.	60-	119	11,90%					
		547	16,09%					
Yhteensä		1000	100%					
Yhteensä		3400	100%					

Annual household incomes

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	0-60 000 €	593	59,30%					
		1039	30,56%					
2.	60 000-150 000 €	234	23,40%					
		1169	34,38%					
3.	> 150 000 €	14	1,40%					
		740	21,76%					
4.	I prefer not to say	159	15,90%					
		452	13,29%					
Yhteensä		1000	100%					
Yhteensä		3400	100%					

1. What services do You associate with the term "spa"?

- saunas 90 %
- beauty services 75 %
- good food and drink 69 %
- exercise possibilities 69 %
- health care services 44 %

Finns associate health care services with spas less than other countries. However health and fitness tests, health examinations, and doctor's appointments are associated with spas more often.

What services do You associate with the term "spa"? Please choose one or multiple options.

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	beauty services	747 2584	74,70% 76,00%					
2.	health care services	439 1742	43,90% 51,24%					
3.	saunas	901 2564	90,10% 75,41%					
4.	doctor's appointments	125 373	12,50% 10,97%					
5.	exercise possibilities	685 1217	68,50% 35,79%					
6.	health and fitness tests	355 943	35,50% 27,74%					
7.	health examinations	234 537	23,40% 15,79%					
8.	good food and drink	694 1345	69,40% 39,56%					
9.	<u>other, what</u>	95 220	9,50% 6,47%					
	Yhteensä							
	Yhteensä							

2. Where do you normally travel on your holiday, if you go abroad?

The most popular countries to travel abroad are

1. Estonia
2. Sweden
3. Spain

14 % of Finnish respondents say they don't travel abroad at all.

Sijointus	1		2		3	
	n	%	n	%	n	%
Estonia	250	25,41%	193	23,31%	132	17,91%
Sweden	163	16,57%	212	25,60%	111	15,06%
I don't travel abroad	141	14,33%	12	1,45%	27	3,66%
<u>Other, what?</u>	89	9,04%	44	5,31%	61	8,28%
Spain	86	8,74%	87	10,51%	82	11,13%
Greece	52	5,28%	51	6,16%	58	7,87%
England	39	3,96%	50	6,04%	38	5,16%
Italy	37	3,76%	38	4,59%	43	5,83%
USA	36	3,66%	28	3,38%	28	3,80%
Germany	34	3,46%	48	5,80%	73	9,91%
Thailand	34	3,46%	28	3,38%	29	3,93%
France	14	1,42%	19	2,29%	32	4,34%
Russia	9	0,91%	18	2,17%	23	3,12%
Yhteensä	984	100,00%	828	100,00%	737	100,00%

3. What kind of activities would You choose to do during your visit abroad?

The most popular activities on holiday are

- sightseeing 81 %
- good food and drinks 79 %
- shopping 66 %
- Beach 50 %

Health care and wellbeing is chosen by 14 % of Finnish respondents, which is 10 % less than other countries.

What kind of activities would You choose to do during your visit abroad? Please choose one or multiple options.

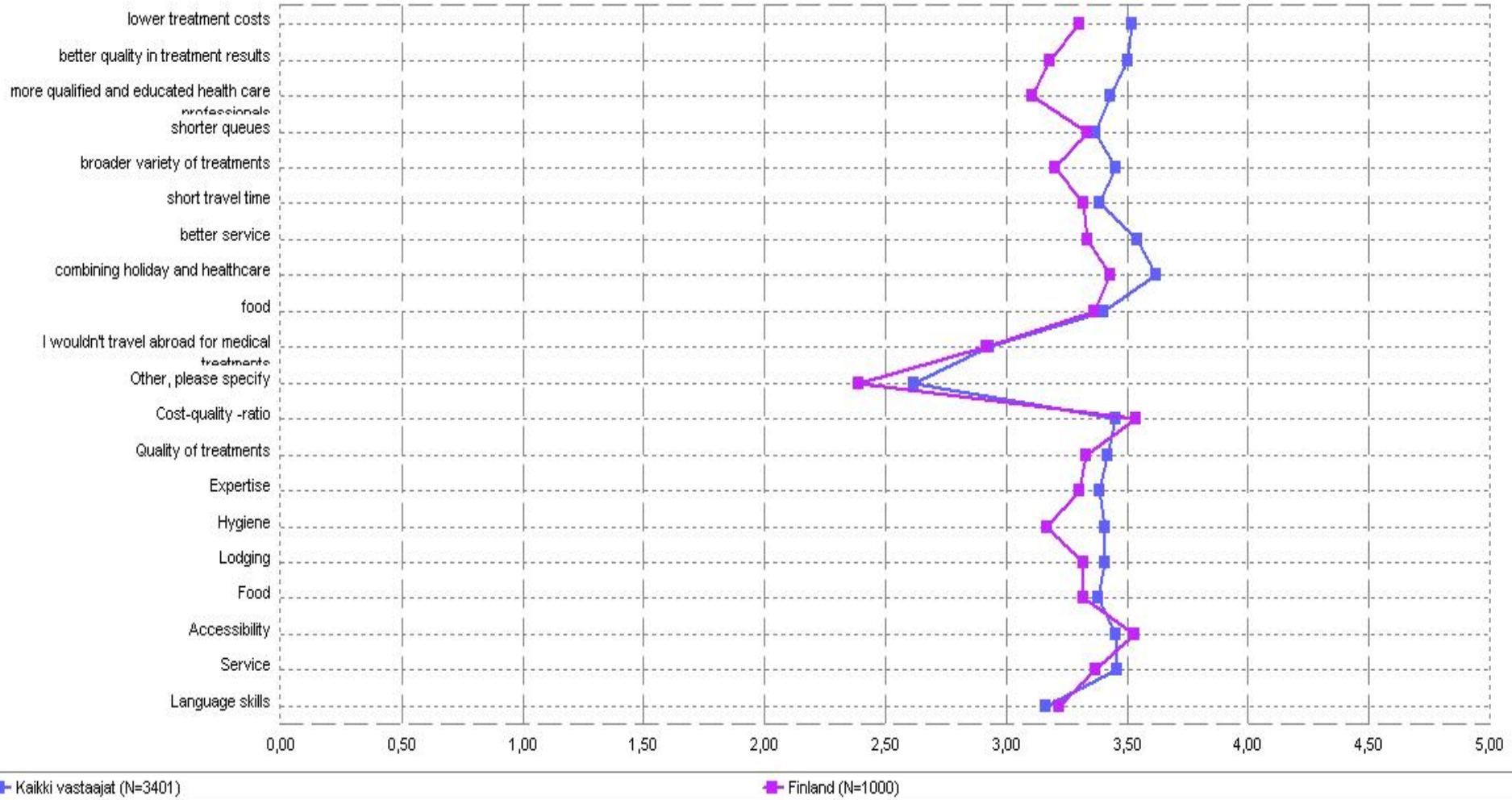
	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	sightseeing	805 2562	80,50% 75,35%					
2.	cultural events	316 1244	31,60% 36,59%					
3.	sports activities	214 532	21,40% 15,65%					
4.	beach	504 1814	50,40% 53,35%					
5.	shopping	655 1726	65,50% 50,76%					
6.	health care and wellbeing	144 845	14,40% 24,85%					
7.	good food and drinks	787 2108	78,70% 62,00%					
8.	partying	223 627	22,30% 18,44%					
9.	<u>other what?</u>	45 168	4,50% 4,94%					
	Yhteensä							
	Yhteensä							

4. Would you be interested in travelling abroad for health care or wellbeing for any reason?

- combining holiday and healthcare (avg 3,43)
- food (avg 3,36)
- better service (avg 3,34)
- shorter queues (avg 3,34)
- short travel time (avg 3,32)
- lower treatment costs (avg 3,30)

Variety of treatments, quality in treatment results, and education of health care professionals are not considered as important reasons for Finns.

Estonian medical spas (N=3401)



5. Are you familiar with Estonian medical spas?

- Among Finnish respondents 86 % are familiar with Estonian medical spas!
- 36 % say they will probably never visit Estonian medical spas.
- Only 14 % say they didn't know about Estonian medical spas.

Awareness about Estonian medical spas is not a problem in Finland, but over third of respondents thinks it's not suitable for them.

Are you familiar with Estonian medical spas?

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	Yes, I have heard of them and visited as well	174	17,40%					
2.	Yes, I have heard of them but haven't visited yet	323	32,30%					
3.	Yes, I have heard of them but I will probably never visit	359	35,90%					
4.	No, I didn't know about Estonian medical spas	144	14,40%					
	Yhteensä	1000	100%					
	Yhteensä	3400	100%					

6. How did You come aware about the medical spa(s) that You visited?

- Recommendations from a friend or family 44 %
- Advertisements 28 %
- Travel agency 27 %
- Offers and sales campaigns 22 %
- Media 19 %

Surprisingly only 2 % of Finnish respondents received recommendations from their doctors and 3 % from health care professionals.

How did You come aware about the spa(s) that You visited? Please choose one or multiple options.

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	Recommendations from a friend or family	76 138	43,68% 47,92%					
2.	Recommendations from my doctor	3 20	1,72% 6,94%					
3.	Recommendations from a health care professional	6 24	3,45% 8,33%					
4.	Recommendations from a celebrity	5 14	2,87% 4,86%					
5.	Surveys and other factual information	6 21	3,45% 7,29%					
6.	Testimonials by others who have visited	22 50	12,64% 17,36%					
7.	Media	33 62	18,97% 21,53%					
8.	Advertisements	48 81	27,59% 28,13%					
9.	Travel agency	47 87	27,01% 30,21%					
10.	Offers and sales campaigns	38 64	21,84% 22,22%					
11.	Nothing	5 8	2,87% 2,78%					
12.	<u>Other, what?</u>	17 22	9,77% 7,64%					
	Yhteensä							
	Yhteensä							

7. Based on Your own experience, would You recommend Estonian medical spas to others?

- 90 % of all Finnish respondents with previous experience would recommend Estonian medical spas to others!

Based on Your own experience, would You recommend Estonian medical spas to others?

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	Yes	157	90,23%					
		264	91,67%					
2.	No	17	9,77%					
		24	8,33%					
	Yhteensä	174	100%					
	Yhteensä	288	100%					

8. What would convince You to visit an Estonian medical spa?

- Recommendations from a friend or family 58 %
- Offers and sales campaigns 34 %
- Testimonials by others who have visited 30 %
- Surveys and other factual information 25 %
- Recommendations from my doctor 21 %

Recommendations, testimonials and sales campaigns are very important also in Finland in deciding about medical spa visits. Recommendations from doctors are not considered as convincing to Finns as to other countries, but surveys are appreciated.

What would convince You to visit an Estonian medical spa? Choose maximum 3 options.

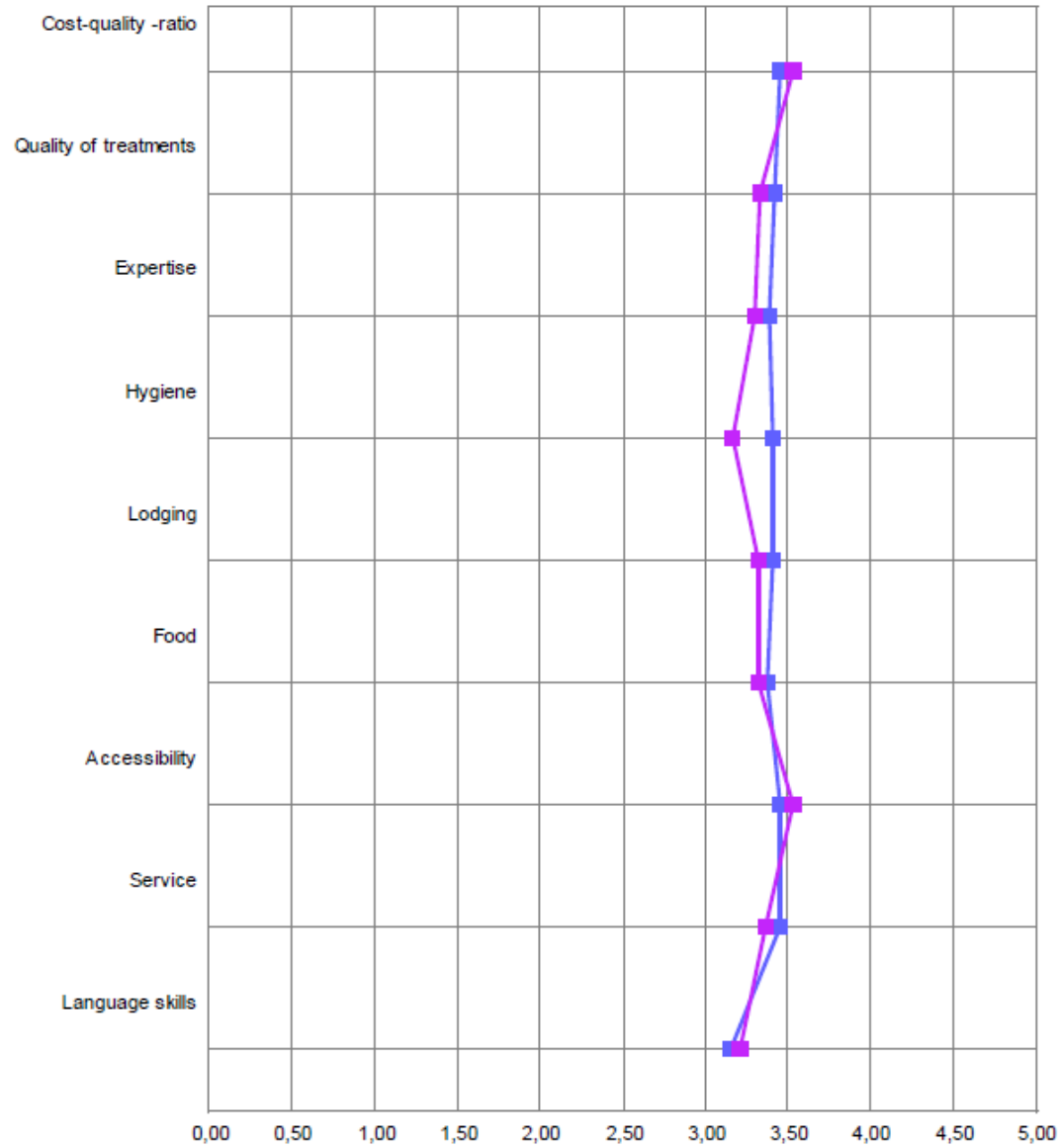
	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	Recommendations from a friend or family	478 1653	57,87% 53,12%					
2.	Recommendations from my doctor	176 1041	21,31% 33,45%					
3.	Recommendations from a health care professional	162 750	19,61% 24,10%					
4.	Recommendations from a celebrity	8 37	0,97% 1,19%					
5.	Surveys and other factual information	206 573	24,94% 18,41%					
6.	Testimonials by others who have visited	247 1005	29,90% 32,29%					
7.	Media	38 150	4,60% 4,82%					
8.	Advertisements	46 167	5,57% 5,37%					
9.	Travel agency	24 96	2,91% 3,08%					
10.	Offers and sales campaigns	277 948	33,54% 30,46%					
11.	Nothing	109 375	13,20% 12,05%					
12.	<u>Other, what?</u>	16 101	1,94% 3,25%					
	Yhteensä							
	Yhteensä							

9. Based on your current information, how would You assess Estonian medical spas?

- Cost-quality -ratio (avg 3,54)
- Accessibility (avg 3,53)
- Service (avg 3,37)
- Quality of treatments (avg 3,33)
- Food (avg 3,32)
- Lodging (avg 3,32)

Estonian medical spas are considered to have good cost-quality -ratio, offer excellent service and they are easy to access. Finns rate hygiene a bit lower than other countries.

Estonian medical spas (N=3401)



■ Kaikki vastaajat (N=3401)


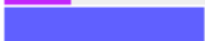

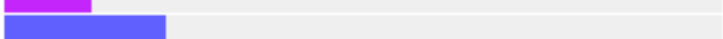




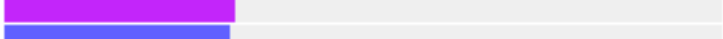
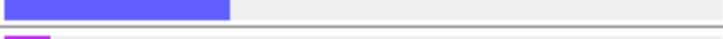

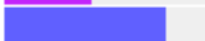

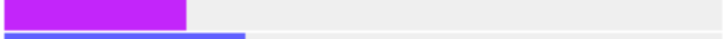
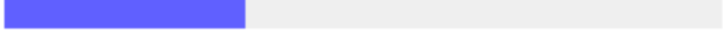


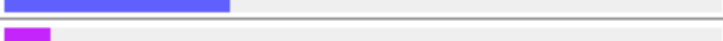
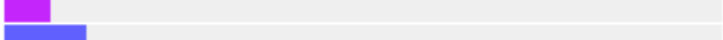
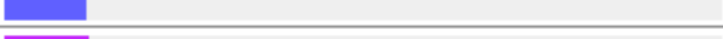



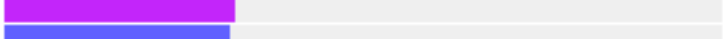
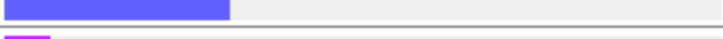
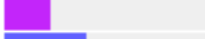

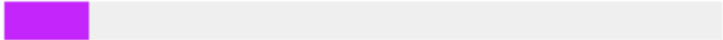
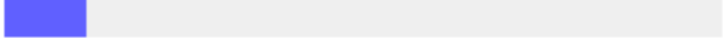
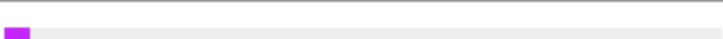


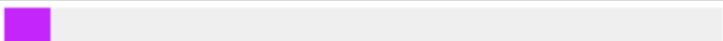
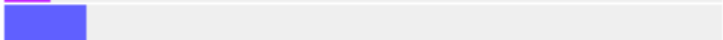
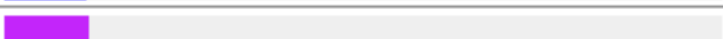

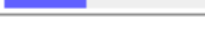
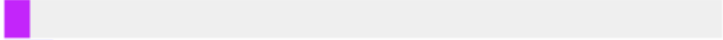
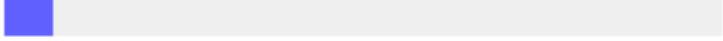



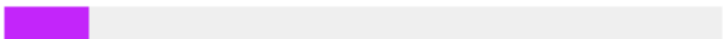
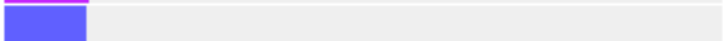




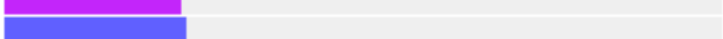




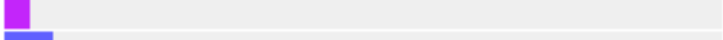
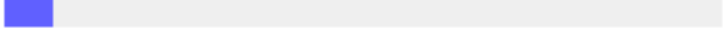



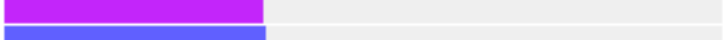




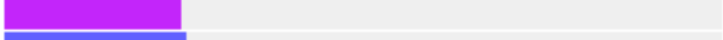
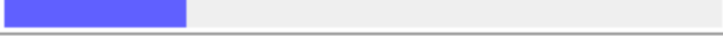


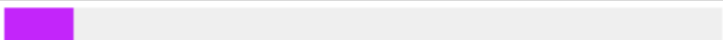
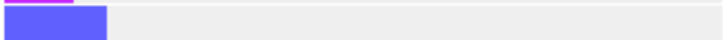
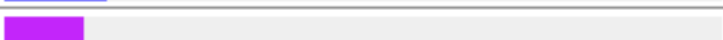


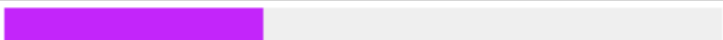
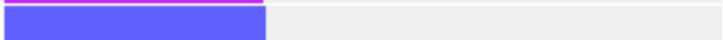
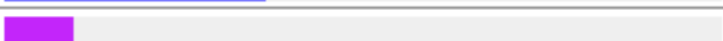

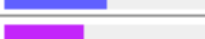
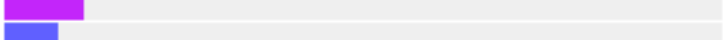
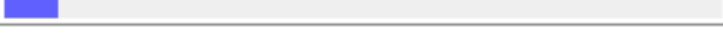



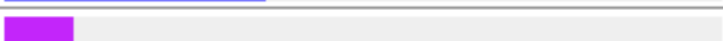
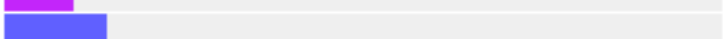
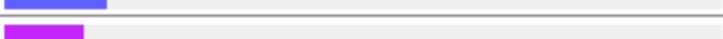
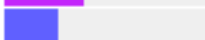





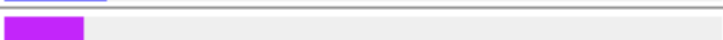
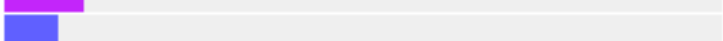
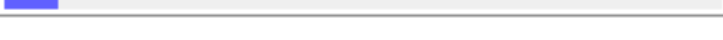







■ Finland (N=1000)

10. If You would consider visiting an Estonian medical spa, what would be the reason?

- Better quality of life 36 %
- Comfortable healthcare 32 %
- Treatment of some particular ailment 25 %
- Inspiration for healthier lifestyle 25 %

Finns don't find health care consultation or prevention of illness a reason for visiting Estonian medical spas.









If You would consider visiting an Estonian medical spa, what would be the reason? Please choose one or multiple options.

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	Health care consultation	94	9,40%					
		947	27,85%					
2.	Prevention of illness	121	12,10%					
		764	22,47%					
3.	Treatment of some particular ailment	252	25,20%					
		1142	33,59%					
4.	Comfortable healthcare	320	32,00%					
		1064	31,29%					
5.	Nutritional consultation	63	6,30%					
		389	11,44%					
6.	Fitness consultation	117	11,70%					
		394	11,59%					
7.	Longlasting patient-doctor -relations	34	3,40%					
		229	6,74%					
8.	Inspiration for healthier lifestyle	247	24,70%					
		857	25,21%					
9.	Better quality of life	360	36,00%					
		1243	36,56%					
10.	Longer lifespan	95	9,50%					
		485	14,26%					
11.	<u>Other, what?</u>	112	11,20%					
		257	7,56%					
	Yhteensä							
	Yhteensä							

11. How long would you like to stay in a medical spa?

Finnish respondents would like to stay for a weekend 57 % or a whole week 33 %.

How long would you like to stay in a medical spa?

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	day	67	6,87%					
		240	7,30%					
2.	weekend	556	57,03%					
		1495	45,48%					
3.	whole week	321	32,92%					
		1272	38,70%					
4.	more	31	3,18%					
		280	8,52%					
Yhteensä		975	100%					
Yhteensä		3287	100%					

12. How would you prefer to get information about medical spas?

- Media: Internet 80 %, newspapers or magazines 41 %
- Advertisements: Online 75 %, print 41 %
- Social media: Facebook, Twitter, Google+ etc 55 %, discussion forums 40 %
- Other sources: other healthcare professionals 49 %, travel agencies 46 % and doctors 39 %.

13. Which magazines would You read to find information about health and wellbeing?

1. Hyvä Terveys 54 %
2. Kauneus & Terveys 47 %
3. Kotilääkäri 37 %

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	Gloria	55	7,02%	<div style="width: 7.02%;"></div>				
2.	Olivia	49	6,26%	<div style="width: 6.26%;"></div>				
3.	Hyvä Terveys	425	54,28%	<div style="width: 54.28%;"></div>				
4.	Evita	42	5,36%	<div style="width: 5.36%;"></div>				
5.	Fit	115	14,69%	<div style="width: 14.69%;"></div>				
6.	Kotilääkäri	293	37,42%	<div style="width: 37.42%;"></div>				
7.	Kauneus & Terveys	369	47,13%	<div style="width: 47.13%;"></div>				
8.	Voi Hyvin	229	29,25%	<div style="width: 29.25%;"></div>				
9.	Me Naiset	138	17,62%	<div style="width: 17.62%;"></div>				
10.	Anna	90	11,49%	<div style="width: 11.49%;"></div>				
	Yhteensä							