

Estonian Medical Spa Survey

Report:
all countries

Soprano Oyj

Details

- Conducted 28 June - 4 July 2012
- N = 3400 respondents
- Target countries: Finland, Sweden, Norway, Russia and Latvia
- Survey conducted by Soprano Oyj.
Survey tool Digium. Contacts from CINT.

Gender

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	Female	1750	51,47%					
2.	Male	1650	48,53%					
	Yhteensä	3400	100%					

Age

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	18-30	845	24,85%					
2.	31-45	1148	33,76%					
3.	46-60	860	25,29%					
4.	60-	547	16,09%					
	Yhteensä	3400	100%					

Annual household incomes

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

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

- beauty services 76 %
- saunas 75 %
- health care services 51 %
- good food and drink 40 %
- exercise possibilities 36 %

Doctor's appointments (11 %), health examinations (16 %) and health and fitness tests (28 %) were not associated to "spas" in general.

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	2584	76,00%					
2.	health care services	1742	51,24%					
3.	saunas	2564	75,41%					
4.	doctor's appointments	373	10,97%					
5.	exercise possibilities	1217	35,79%					
6.	health and fitness tests	943	27,74%					
7.	health examinations	537	15,79%					
8.	good food and drink	1345	39,56%					
9.	<u>other, what</u>	220	6,47%					
	Yhteensä							

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

The most popular countries to travel abroad were

1. Sweden
2. Estonia
3. Spain

17 % answered they don't travel abroad at all.

Where do you normally travel on your holiday, if you go abroad? Please choose max three options, and number them in rank order from 1 to 3.

Sijointus	1		2		3	
	n	%	n	%	n	%
I don't travel abroad	535	16,67%	50	2,00%	113	5,04%
Sweden	447	13,93%	367	14,72%	265	11,83%
Estonia	402	12,52%	319	12,79%	264	11,78%
<u>Other, what?</u>	362	11,28%	195	7,82%	192	8,57%
Spain	290	9,03%	283	11,35%	228	10,17%
Greece	251	7,82%	228	9,14%	201	8,97%
Germany	160	4,98%	224	8,98%	207	9,24%
England	159	4,95%	211	8,46%	188	8,39%
USA	154	4,80%	144	5,77%	129	5,76%
Italy	144	4,49%	183	7,34%	163	7,27%
France	125	3,89%	149	5,97%	142	6,34%
Thailand	113	3,52%	77	3,09%	87	3,88%
Russia	68	2,12%	64	2,57%	62	2,77%
Yhteensä	3210	100,00%	2494	100,00%	2241	100,00%

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

The most popular activities on holiday were

- sightseeing (75 %)
- good food and drinks (62 %)
- beach (53 %)
- shopping (51 %)

25 % of respondents considered health care and wellbeing a more suitable option than partying (18 %) or sports activities (16 %).

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	2562	75,35%					
2.	cultural events	1244	36,59%					
3.	sports activities	532	15,65%					
4.	beach	1814	53,35%					
5.	shopping	1726	50,76%					
6.	health care and wellbeing	845	24,85%					
7.	good food and drinks	2108	62,00%					
8.	partying	627	18,44%					
9.	<u>other what?</u>	168	4,94%					
	Yhteensä							

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

- combining holiday and healthcare (avg 3,62)
- better service (avg 3,54)
- lower treatment costs (avg 3,52)
- better quality in treatment results (avg 3,50)
- broader variety of treatments (avg 3,45)
- more qualified and educated health care professionals (avg 3,43)

Food, short travel time and shorter queues were not considered as the most important reasons.

Would you be interested in travelling abroad for health care or wellbeing for any of the following reasons?

	very likely (Arvo: 5)	likely (Arvo: 4)	neutral (Arvo: 3)	unlikely (Arvo: 2)	very unlikely (Arvo: 1)	Yhteensä
lower treatment costs (avg: 3,52)						100 %
better quality in treatment results (avg: 3,50)						100 %
more qualified and educated health care professionals (avg: 3,43)						100 %
shorter queues (avg: 3,37)						100 %
broader variety of treatments (avg: 3,45)						100 %
short travel time (avg: 3,38)						100 %
better service (avg: 3,54)						100 %
combining holiday and healthcare (avg: 3,62)						100 %
food (avg: 3,40)						100 %
I wouldn't travel abroad for medical treatments (avg: 2,93)						100 %
<u>Other, please specify</u> (avg: 2,61)						100 %
Yhteensä	24 %	26 %	27 %	13 %	10 %	

5. Are you familiar with Estonian medical spas?

- 55 % of respondents are familiar with Estonian medical spas.
- 45 % says they didn't know about Estonian medical spas.

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	Yes, I have heard of them and visited as well	288	8,47%					
2.	Yes, I have heard of them but haven't visited yet	1032	30,35%					
3.	Yes, I have heard of them but I will probably never visit	559	16,44%					
4.	No, I didn't know about Estonian medical spas	1521	44,74%					
	Yhteensä	3400	100%					

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

- Recommendations from a friend or family (48 %)
- Travel agency (30 %)
- Advertisements (28 %)
- Offers and sales campaigns (22 %)
- Media (22 %)


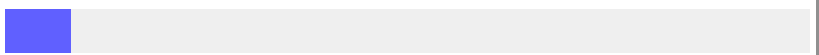
- Surprisingly very few received recommendations from their doctor (7%) or health care professionals (8%).

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	138	47,92%					
2.	Recommendations from my doctor	20	6,94%					
3.	Recommendations from a health care professional	24	8,33%					
4.	Recommendations from a celebrity	14	4,86%					
5.	Surveys and other factual information	21	7,29%					
6.	Testimonials by others who have visited	50	17,36%					
7.	Media	62	21,53%					
8.	Advertisements	81	28,13%					
9.	Travel agency	87	30,21%					
10.	Offers and sales campaigns	64	22,22%					
11.	Nothing	8	2,78%					
12.	<u>Other, what?</u>	22	7,64%					
	Yhteensä							

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

- 92 % of all respondents with previous experience would recommend Estonian medical spas to others!

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	Yes	264	91,67%					
2.	No	24	8,33%					
	Yhteensä	288	100%					

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

- Recommendations from a friend or family (53 %)
- Recommendations from my doctor (33%)
- Testimonials by others who have visited (32 %)
- Offers and sales campaigns (30 %)

Recommendations and testimonials are very important in deciding about medical spa visits. This combined with a good offer can lead to good results.

NOTE! At the moment doctors don't seem to recommend Estonian medical spas to their patients (question no. 6).

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	1653	53,12%					
2.	Recommendations from my doctor	1041	33,45%					
3.	Recommendations from a health care professional	750	24,10%					
4.	Recommendations from a celebrity	37	1,19%					
5.	Surveys and other factual information	573	18,41%					
6.	Testimonials by others who have visited	1005	32,29%					
7.	Media	150	4,82%					
8.	Advertisements	167	5,37%					
9.	Travel agency	96	3,08%					
10.	Offers and sales campaigns	948	30,46%					
11.	Nothing	375	12,05%					
12.	<u>Other, what?</u>	101	3,25%					
	Yhteensä							

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

- Service (avg 3,46)
- Cost-quality -ratio (avg 3,45)
- Accessibility (avg 3,45)
- Quality of treatments (3,42)
- Hygiene (avg 3,41)
- Lodging (avg 3,41)

Estonian medical spas are considered to have good cost-quality -ratio, offer excellent service and they are easy to access.



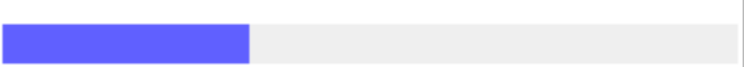





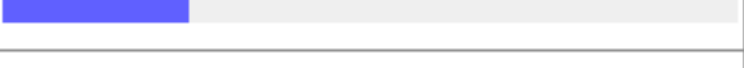
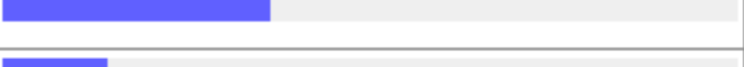

Based on your current information and beliefs, how would You assess Estonian medical spas?
Please rate on the level from 1–5, where 5 = the highest and 1 = lowest rate
1 – very poor rate; 2 – poor rate; 3 – average; 4 – good rate; 5 – very good rate

	5 (Arvo: 5)	4 (Arvo: 4)	3 (Arvo: 3)	2 (Arvo: 2)	1 (Arvo: 1)	Yhteensä
Cost-quality -ratio (avg: 3,45)						100 %
Quality of treatments (avg: 3,42)						100 %
Expertise (avg: 3,39)						100 %
Hygiene (avg: 3,41)						100 %
Lodging (avg: 3,41)						100 %
Food (avg: 3,38)						100 %
Accessibility (avg: 3,45)						100 %
Service (avg: 3,46)						100 %
Language skills (avg: 3,16)						100 %
Yhteensä	11 %	30 %	50 %	6 %	3 %	

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

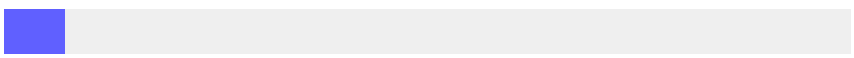
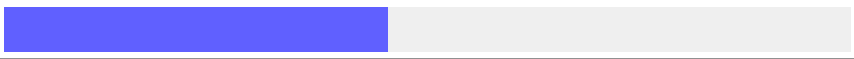
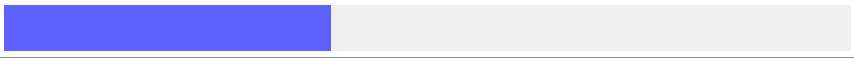
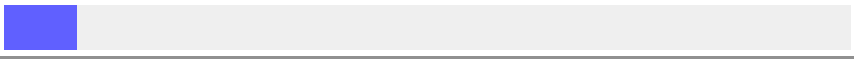
- Better quality of life (37 %)
- Treatment of some particular ailment (34 %)
- Comfortable healthcare (31 %)
- Health care consultation (28%)
- Inspiration for healthier lifestyle (25%)
- Prevention of illness (22 %)

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	947	27,85%					
2.	Prevention of illness	764	22,47%					
3.	Treatment of some particular ailment	1142	33,59%					
4.	Comfortable healthcare	1064	31,29%					
5.	Nutritional consultation	389	11,44%					
6.	Fitness consultation	394	11,59%					
7.	Longlasting patient-doctor -relations	229	6,74%					
8.	Inspiration for healthier lifestyle	857	25,21%					
9.	Better quality of life	1243	36,56%					
10.	Longer lifespan	485	14,26%					
11.	<u>Other, what?</u>	257	7,56%					
Yhteensä								

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



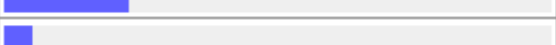

- Respondents would like to stay for a weekend (45 %) or a whole week (39 %)

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	day	240	7,30%					
2.	weekend	1495	45,48%					
3.	whole week	1272	38,70%					
4.	more	280	8,52%					
	Yhteensä	3287	100%					

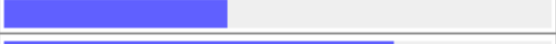


12. How would you prefer to get information about medical spas?

- Media: Internet (79 %), Newspapers or magazines (37 %).
- Advertisements: Online (71 %), print (41 %)
- Social media: Facebook, Twitter, Google+ etc (59 %), discussion forums (41 %)
- Other sources: doctors (58 %), other healthcare professionals (48 %), travel agencies (31 %)


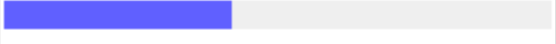
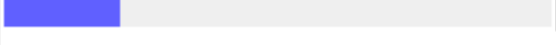
Media

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	newspapers, magazines	1188	36,87%					
2.	internet	2557	79,36%					
3.	tv	738	22,91%					
4.	radio	168	5,21%					
	Yhteensä							



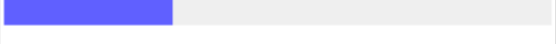
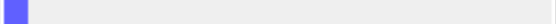
Advertisements

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	print	1227	40,67%					
2.	online	2143	71,03%					
3.	mobile	156	5,17%					
	Yhteensä							

Social media

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	Facebook, Twitter, Google+ etc	1540	59,21%					
2.	Discussion forums	1076	41,37%					
3.	Blogs	561	21,57%					
	Yhteensä							











Other sources

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	from doctor	1758	58,35%					
2.	from other healthcare professional	1437	47,69%					
3.	from travel agency	921	30,57%					
4.	other what?	137	4,55%					

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

- **Finland**
Hyvä Terveys (54 %), Kauneus & Terveys (47 %), Kotilääkäri (37 %)
- **Sweden**
Må bra (53 %), Hälsa (49 %), Aftonbladet (31 %)
- **Norway**
Bedre helse (44 %), I form (37 %), Vi over 60 (28 %)
- **Latvia**
Ieva (50 %), Veselība (48 %), 36,6 C (38 %)
- **Russia**
Здоровье (42 %), Cosmopolitan (40 %), Красота и здоровье (28 %)

Finland

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	Gloria	55	7,02%					
2.	Olivia	49	6,26%					
3.	Hyvä Terveys	425	54,28%					
4.	Evita	42	5,36%					
5.	Fit	115	14,69%					
6.	Kotilääkäri	293	37,42%					
7.	Kauneus & Terveys	369	47,13%					
8.	Voi Hyvin	229	29,25%					
9.	Me Naiset	138	17,62%					
10.	Anna	90	11,49%					
	Yhteensä							

Sweden

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	Amelia	85	16,16%	<div style="width: 16.16%;"></div>				
2.	Tara	27	5,13%	<div style="width: 5.13%;"></div>				
3.	M-Magazine	32	6,08%	<div style="width: 6.08%;"></div>				
4.	Året Runt	30	5,70%	<div style="width: 5.70%;"></div>				
5.	Hemmets Journal	39	7,41%	<div style="width: 7.41%;"></div>				
6.	Hemmets veckotidning	32	6,08%	<div style="width: 6.08%;"></div>				
7.	Elle	35	6,65%	<div style="width: 6.65%;"></div>				
8.	Hälsa	260	49,43%	<div style="width: 49.43%;"></div>				
9.	Femina	38	7,22%	<div style="width: 7.22%;"></div>				
10.	Må bra	281	53,42%	<div style="width: 53.42%;"></div>				
11.	Laura	6	1,14%	<div style="width: 1.14%;"></div>				
12.	Aftonbladet	165	31,37%	<div style="width: 31.37%;"></div>				
13.	Expressen	121	23,00%	<div style="width: 23.00%;"></div>				
	Yhteensä							














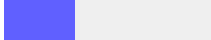
Norway

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	Elle	52	10,32%	<div style="width: 10.32%;"></div>				
2.	Kvinner og klær	75	14,88%	<div style="width: 14.88%;"></div>				
3.	Tara	35	6,94%	<div style="width: 6.94%;"></div>				
4.	Camille	53	10,52%	<div style="width: 10.52%;"></div>				
5.	Henne	37	7,34%	<div style="width: 7.34%;"></div>				
6.	Det Nye	41	8,13%	<div style="width: 8.13%;"></div>				
7.	Allers	78	15,48%	<div style="width: 15.48%;"></div>				
8.	Det gode liv	66	13,10%	<div style="width: 13.10%;"></div>				
9.	Vi over 60	143	28,37%	<div style="width: 28.37%;"></div>				
10.	Bedre helse	220	43,65%	<div style="width: 43.65%;"></div>				
11.	I form	186	36,90%	<div style="width: 36.90%;"></div>				
	Yhteensä							

Latvia

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	Ieva	285	49,48%					
2.	Veselība	279	48,44%					
3.	36,6 C	220	38,19%					
4.	Doctus	28	4,86%					
5.	Santa	82	14,24%					
6.	Lilit	82	14,24%					
7.	Sestdiena	103	17,88%					
8.	Stella	15	2,60%					
9.	Patiesā Dzīve	84	14,58%					
10.	Lublu	52	9,03%					
	Yhteensä							

Russia

	Vastaus	Lukumäärä	Prosentti	20%	40%	60%	80%	100%
1.	Совершенство	28	4,71%					
2.	Cosmopolitan	239	40,24%					
3.	Health and Lifestyle	84	14,14%					
4.	Metro Beauty	41	6,90%					
5.	PRO Здоровье	135	22,73%					
6.	Shape	33	5,56%					
7.	Атмосфера красоты	42	7,07%					
8.	Здоровье	249	41,92%					
9.	Женское здоровье	127	21,38%					
10.	Красота и здоровье	168	28,28%					
11.	Красота, здоровье, фитнес	103	17,34%					
12.	Салон красоты	48	8,08%					
13.	Эстетическая медицина	52	8,75%					
14.	Другое	154	25,93%					
	Yhteensä							