



Medical Tourism from Russia

**A detailed report on the visitor Survey
conducted at the Moscow MedShow**

SPRING 2014

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Medical Tourism from Russia – Survey March 2014

Medical Tourism from Russia is in the news a lot these days as more Russians are making their presence known in major clinics and hospitals and rehabilitation centres around the world.

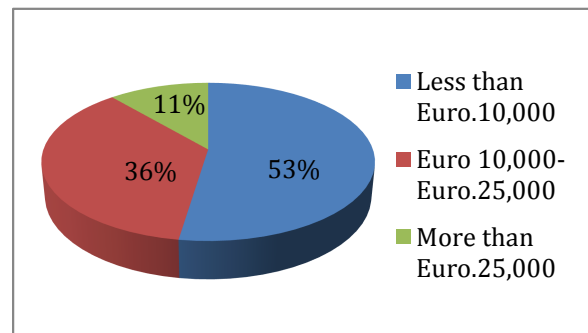
Many countries and several clinics have enjoyed good business from Russia for many years and now, as the market expands fast we wanted to find out who are these Russian medical tourists, what do they want and what do they spend?

With more than 3,500 visitors attending the March Moscow Medshow, it provided a superb opportunity to conduct the first major survey into the requirements and tendencies of the Russian client/patient today. The results make most interesting reading and will be conducive for many organisations either actively marketing or looking to promote their services in Russia:-

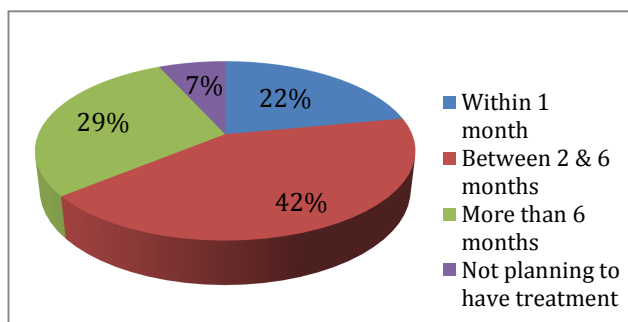
So who are these Russian medical tourists?

Q. How much would you be prepared to spend on Medical treatment abroad?

11% of the interviewed indicated that they are prepared to spend more than Euro.25,000 on their treatment abroad, 36% indicated that the cost of their treatment could be between Euro.10,000 to 25,000 and 53% indicated that their budgets for treatments are maximum Euro.10,000. This indicates that the total value of the Russian medical tourism market can be genuinely valued to be in excess of Euro.1 billion!



Q. When are you looking to have medical treatment made?



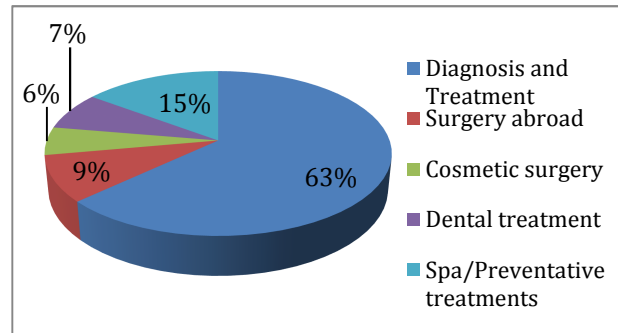
With 42% indicating that they will be travelling abroad within 2-6 months it shows that there are a substantial number of potential patients looking to travel for treatment very soon. As the market is reputedly estimated at 70,000 per year this means that there are almost 30,000 Russians planning to travel overseas for treatment within the next 6 months! 22% of

those polled indicated that they have chronic conditions and were looking to travel at the earliest opportunity.



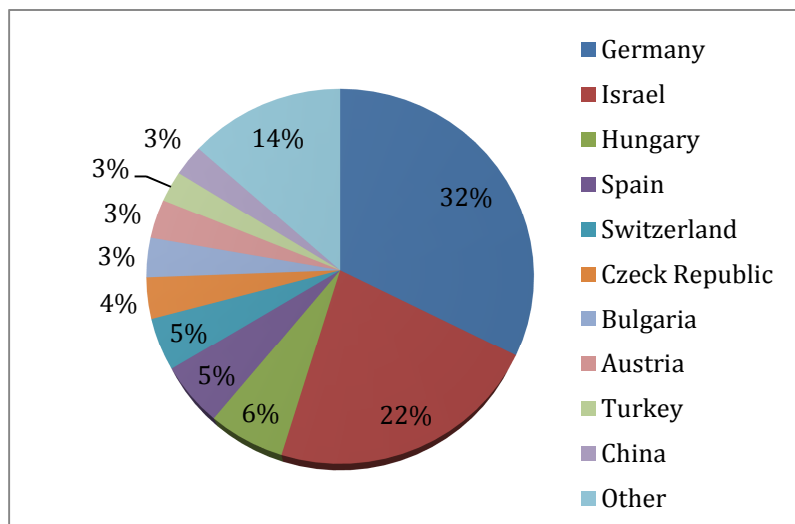
Q. What specific treatments are you looking for overseas?

63% of the potential patients indicated that they are looking for Diagnosis and subsequent treatment as required, 9% or approximately 6,300 people indicated that they are looking for Surgery abroad, a further 6% are interested in cosmetic surgery while 7% are looking for dental treatment outside Russia. A further 15% expressed their interest in Spa & Preventative medicine.



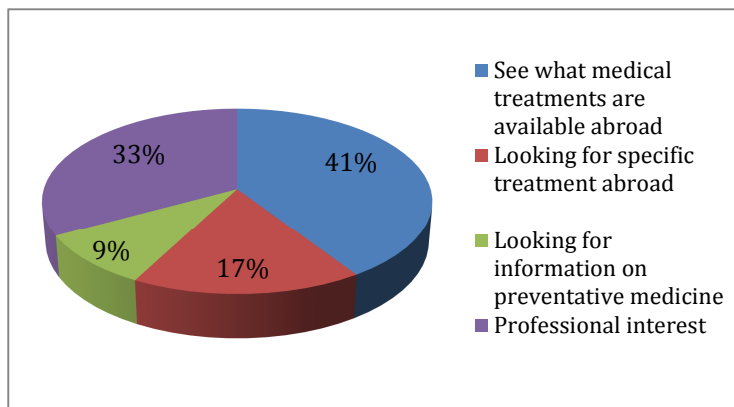
Q. What countries are of most interest for your treatment abroad?

Two countries, both with long involvement in the market lead the list, Germany comes top with a staggering 32% of the market followed by Israel with 22%. Other high contenders are Hungary 6%, Spain 5%, Switzerland 5%, Czech Rep. 4%. Bulgaria, Austria, Turkey & China each scored 3% (representing in excess of 2,000 visitors per year). In total 36 countries were indicated as medical tourism destinations of interest.



Q. What is your primary reason for visiting the Moscow MedShow today?

The 3,524 visitors to the March Moscow MedShow were highly representative of the general market from Russia. 41% indicated that they were visiting the exhibition to gather first-hand information on what medical treatments are available abroad, their costs and conditions. 17% came with a specific condition that required treatment and were looking for direct meetings/contacts with hospitals/clinics. 9% indicated that they were looking for information and details on preventative medicine whilst 33% indicated that they were there out

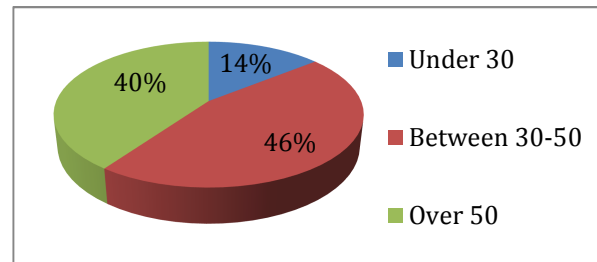




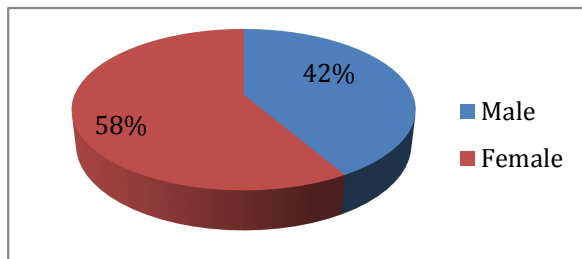
of professional interest indication that there are a growing number of specialised agents and facilitators emerging in Russia.

Age of the respondents.

The age of Russian looking for treatment abroad revealed some interesting statistics as 46% were aged 30-50 indicating the growing trend of middle aged professionals representing the fast growing affluent middle class. 40% were over 50 whilst only 14% under 30.



Gender of the respondents.



58% Female and 42% Male

The survey interviewed 422 individuals at the Moscow MedShow 01-02 March, providing a comprehensive insight and detailed cross section of the 3,500+ visitors over the two days.

The Moscow MedShow is the premier B2C medical tourism exhibition in Russia and the next event will take place in central Moscow 20-21 September 2014. For more information see www.MedShow.ru

This survey was produced independently for the aiGroup, organisers of the Moscow MedShow. Details and statistics can only be quoted with the consent of the aiGroup and all references should mention the Moscow MedShow.

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