



# Medical Tourism Category Overview

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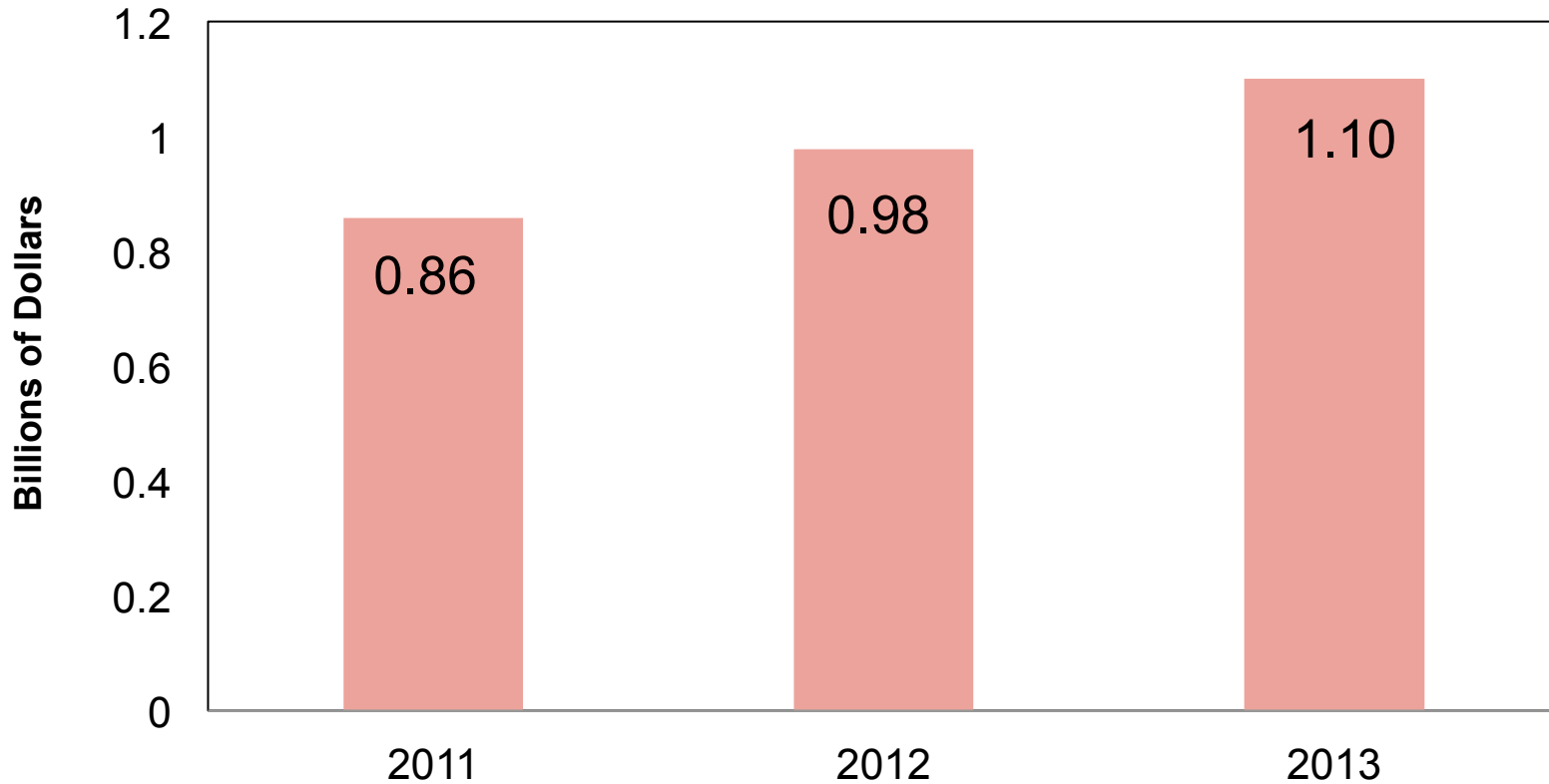
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# Medical Tourism Market and Health Treatment Abroad

- Market Volume
- Market Structure

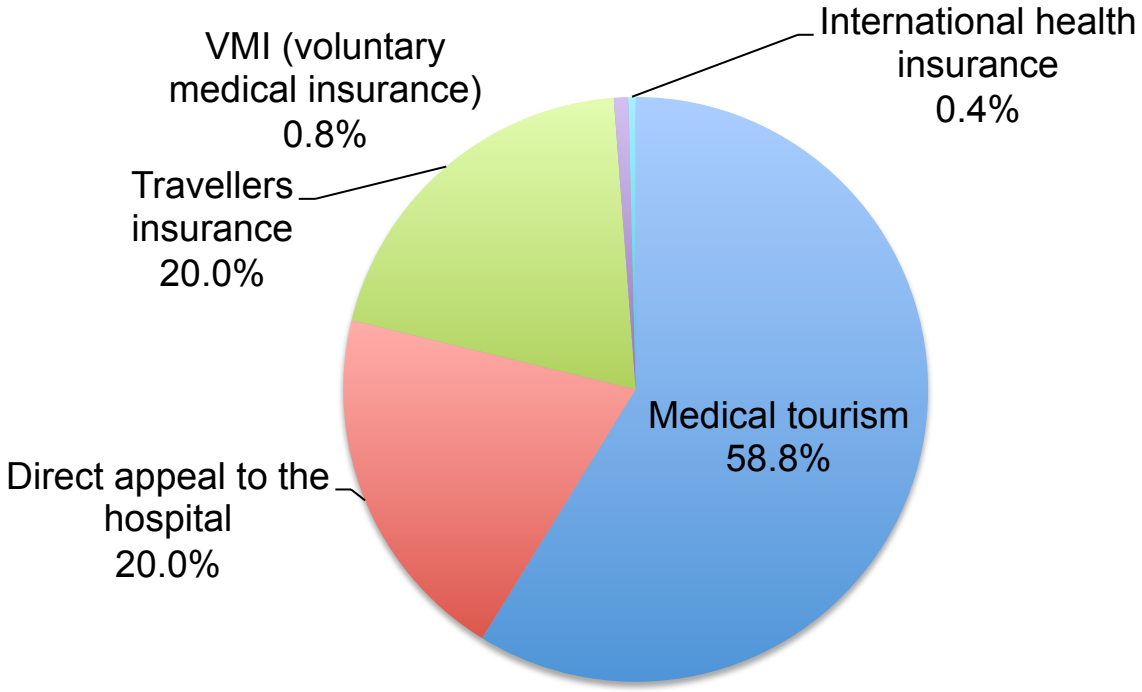
# Market Size

**Annual Expenditure on Medical Services Provided to Russians Abroad**



In 2013 Russians spent over 1.1 billion dollars on health care abroad.

# Market Structure by Business Segment



Medical tourism makes up the majority of all healthcare services provided abroad (58,8% of market).

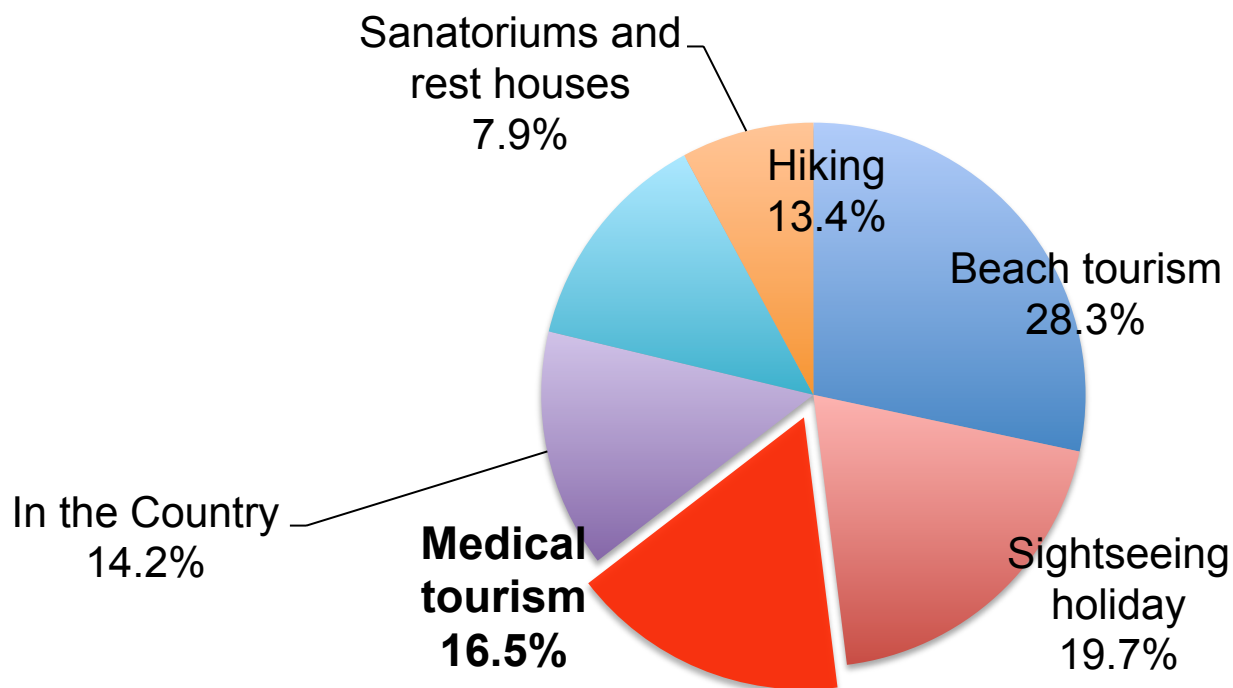
Source: Insurance Marketing Report

# Top Spenders in International Tourism:

Rank	International Tourism Expenditure (US\$ billion)		
	2011	2012*	
1	China	72.6	102.0
2	Germany	85.9	83.8
3	United States	78.2	83.5
4	United Kingdom	51.0	52.3
5	Russian Federation	32.9	42.8
6	France	44.1	37.2
7	Canada	33.3	35.1
8	Japan	27.2	27.9
9	Australia	26.7	27.6
10	Italy	28.7	26.4

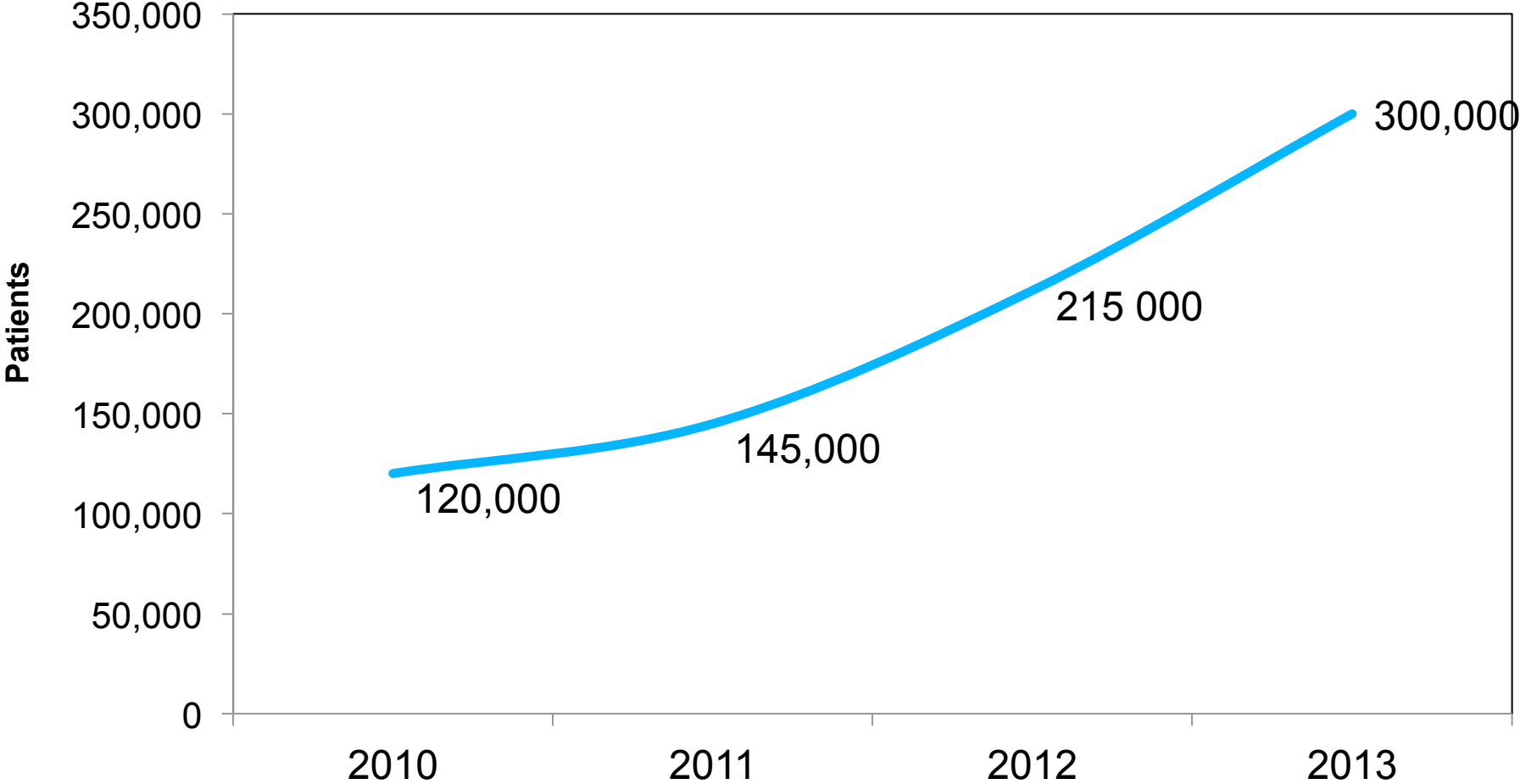
With over \$43 billion spent on international tourism in 2012, Russia shows an impressive advance in recent years, moving up to 5th position with over 35% annual growth. Russia along with China, India and Brazil will drive growth in the coming years.

# Main Locations & Purposes of Tourism



Medical tourism made up 16.5% of the tourist market in Russia.

# Outbound Patient Flow Dynamics 2010-2013



Over 300,000 Russians traveled abroad for medical care in 2013.

Source: Patient Management

# Projected Growth in 2014

In 2014 the number of search queries on outbound medical tourism grew by 23%. Future growth is expected to be fueled by:

- Population aging and the rise of chronic diseases
- Rising interest in disease prevention
- Decreasing trust to the local health care system
- Rising interest to alternative therapies

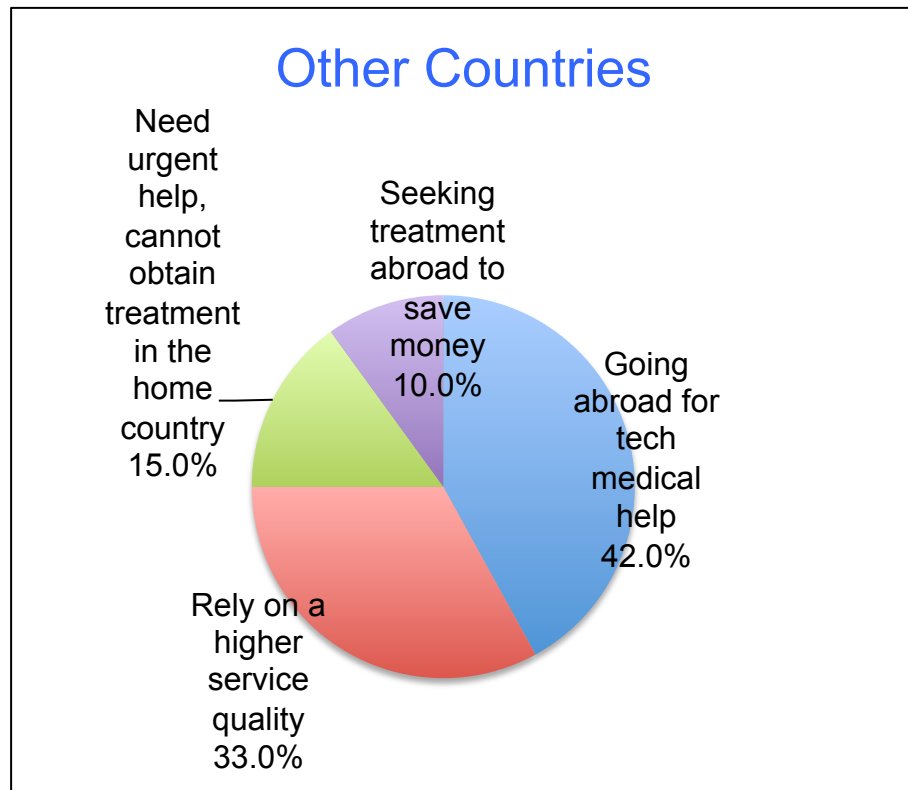
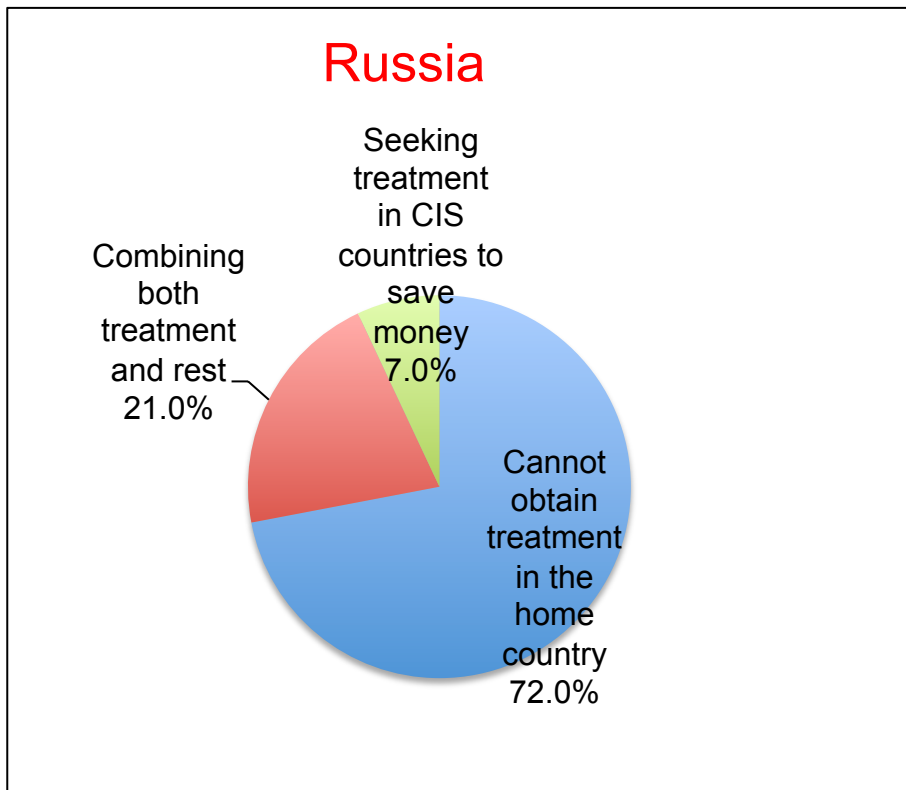


# Medical Tourism Market and Health Treatment Abroad

- Motivation behind outbound medical tourism
- Market structure

# Motivation of Outbound Medical Tourism

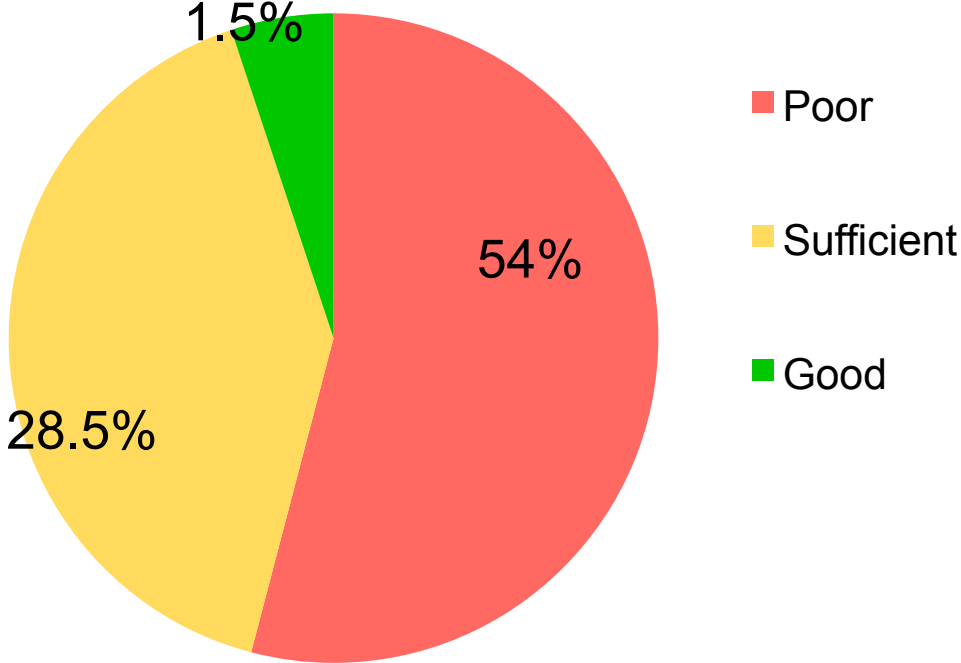
## Determining factors for outbound medical tourism in Russia:



The lack of domestic high quality treatment in a wide range of cases is the major reason for outbound medical tourism for Russians

# Local Opinion on Healthcare in Russia

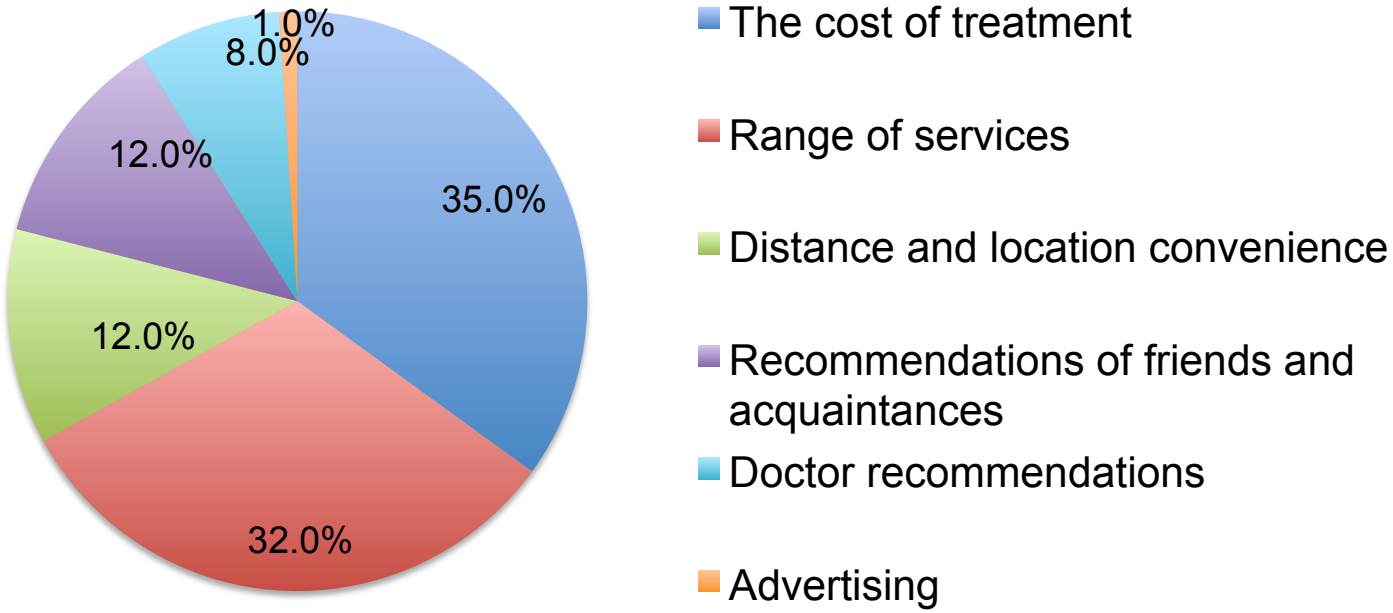
**How does the local population estimate national health care system?**



This objective state of things combined with a profound lack of trust in the local health care system contributes to a low opinion of the Russian healthcare system.

Source: Medical & Health Tourism Magazine, №6

# Determinants for Patient Choice of Healthcare Providers



The Russian audience is still extremely price-conscious. Approximately 50% of searches related to treatment abroad are made by users from the outer regions of the country. Despite the fact that 65%+ of patient flow from Russia is directed to Israel and Germany, “cheap” countries such as Turkey, CIS-countries and Eastern Europe remain popular.

Source: Medical & Health Tourism Magazine, №6

# Medical Tourism Market and Health Treatment Abroad

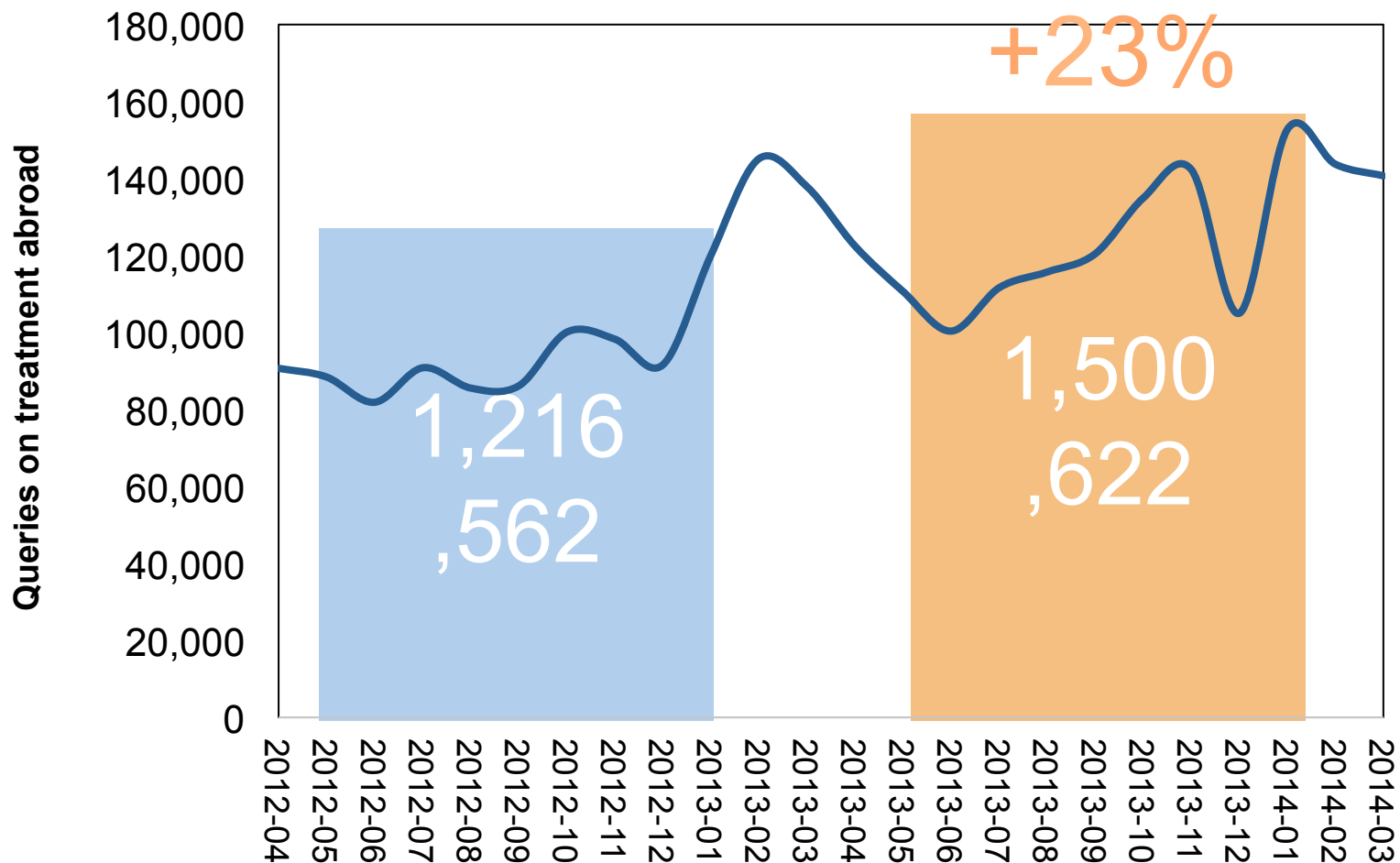
Segment Volume:

- User interest dynamics
- Audience location

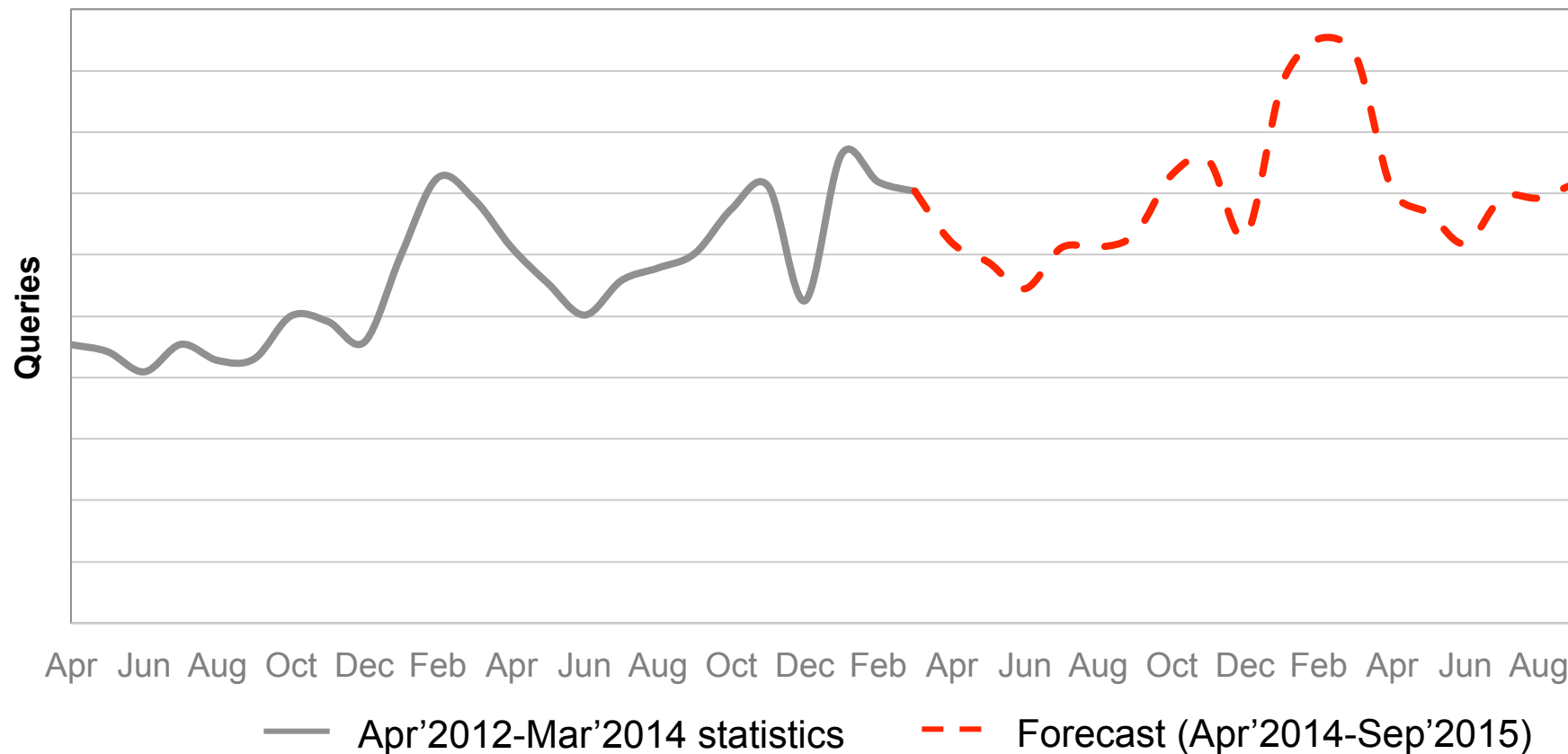
# Segment Dynamics

■ Apr 2012 – Mar 2013

■ Apr 2013 – Mar 2014

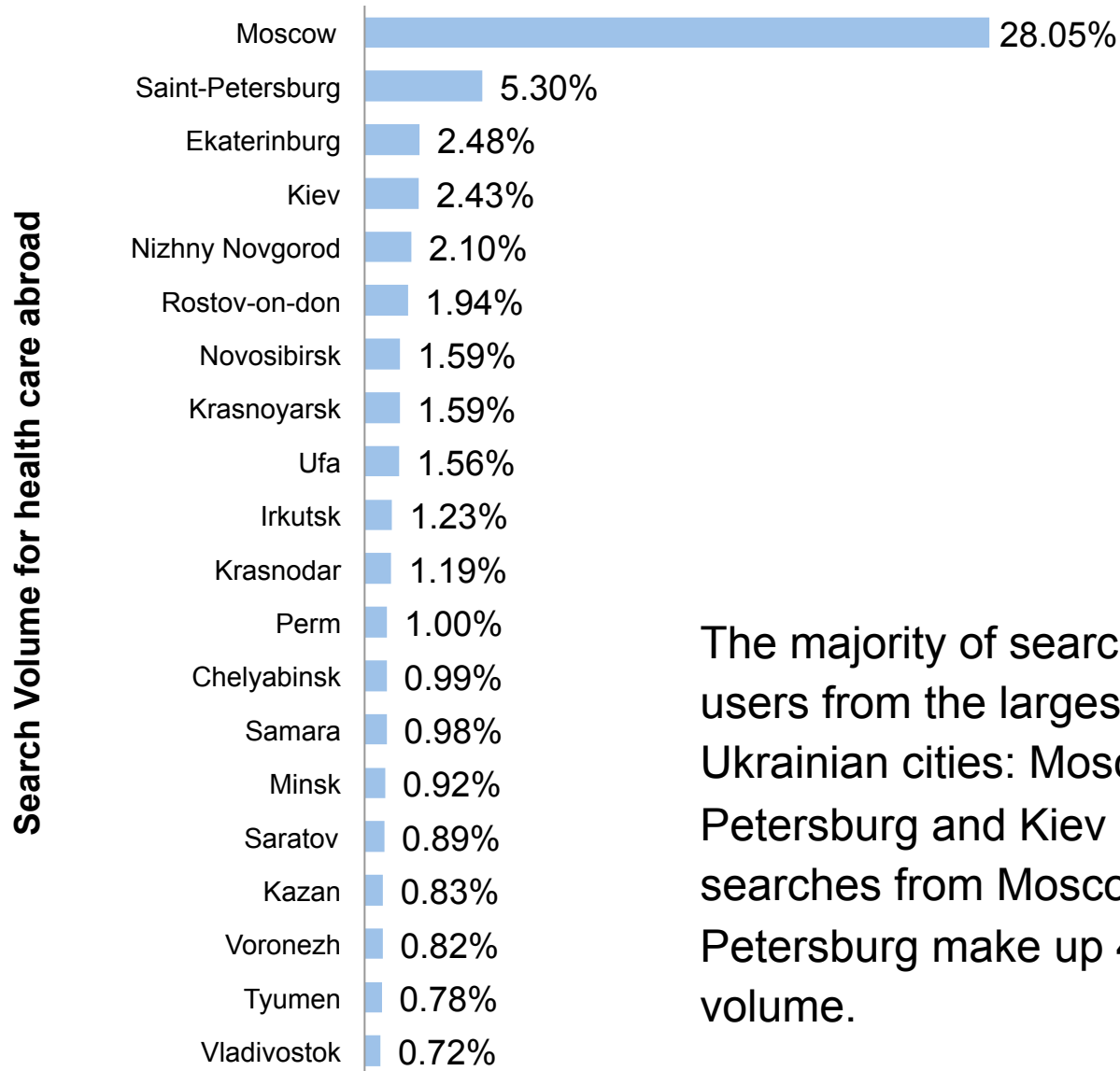


# User Interest Dynamics: +17% in 2014



User interest is expected to grow by 17% by 2014.

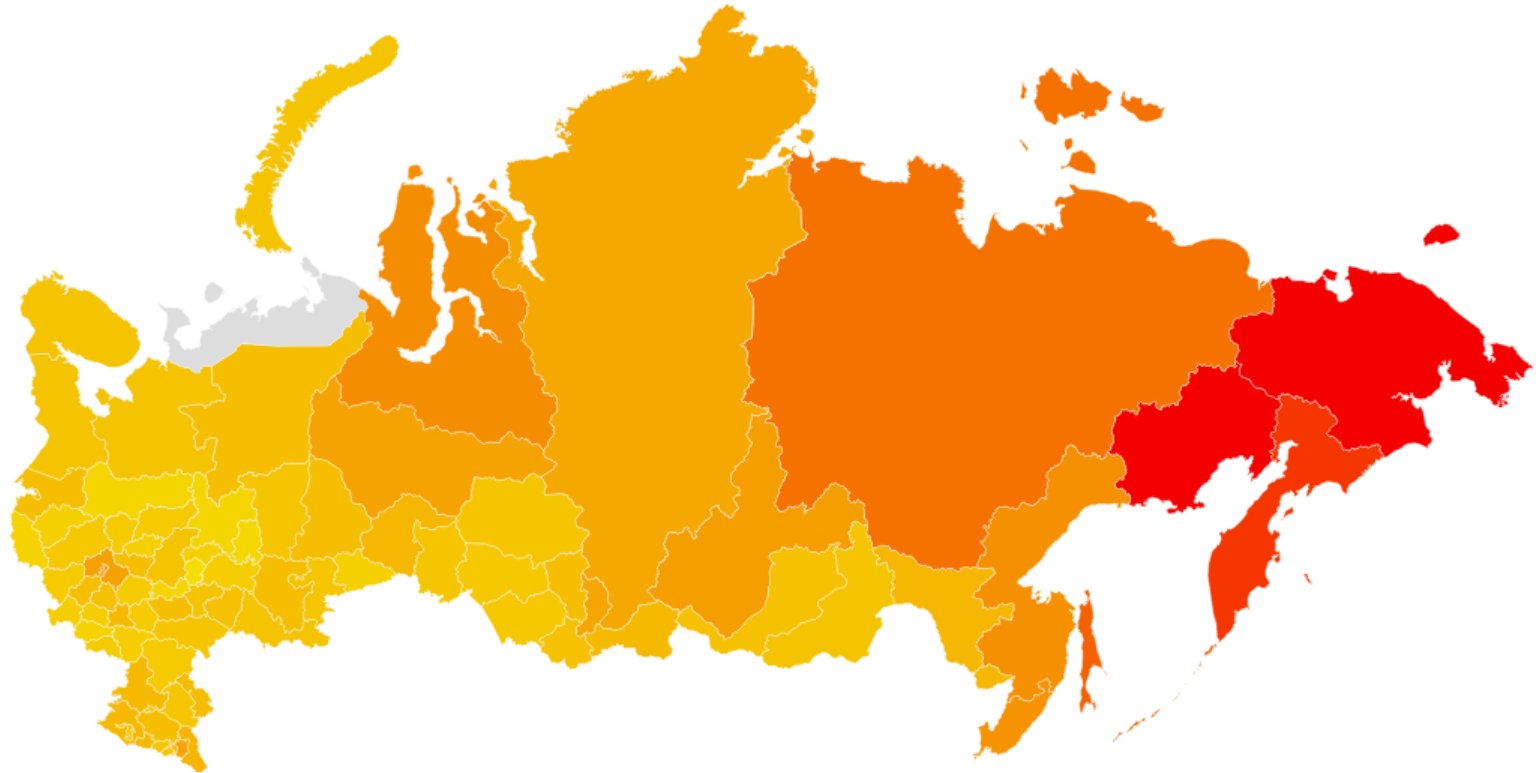
# Audience Location: Top Cities



The majority of searches are made by users from the largest Russian and Ukrainian cities: Moscow, Saint-Petersburg and Kiev (36%). In Russia, searches from Moscow and Saint-Petersburg make up 40%+ of the total volume.



# Audience Location: Regional Popularity



Regional popularity is heavily dependent on two factors:

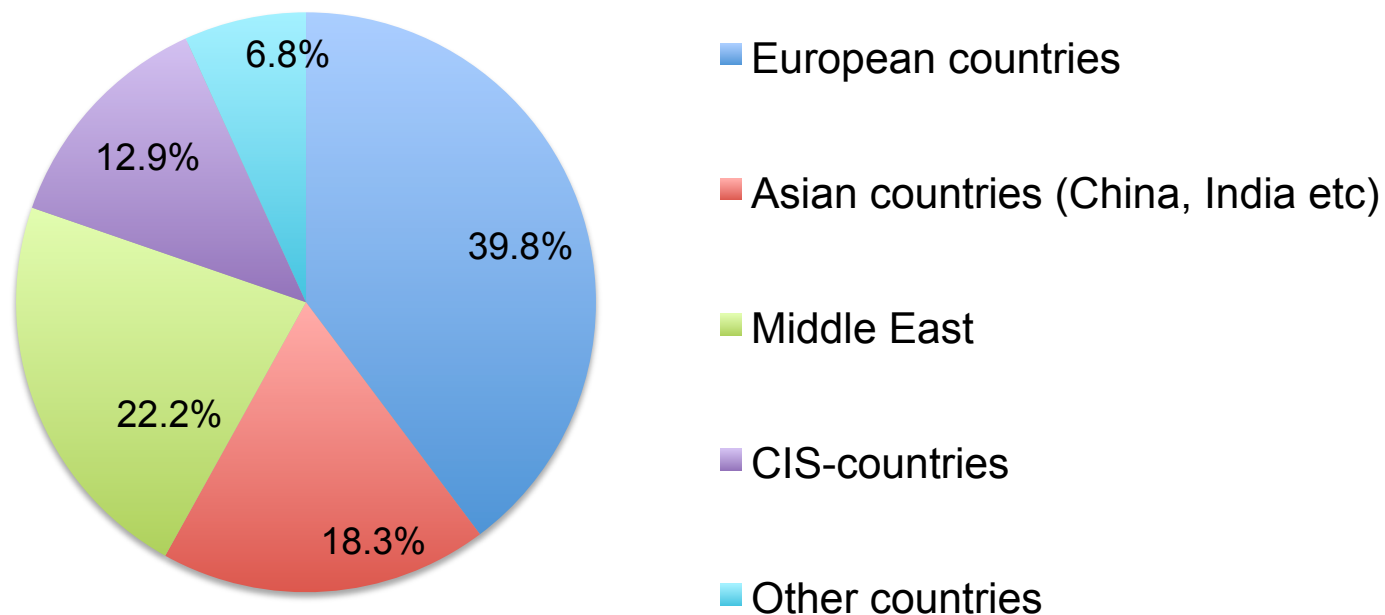
- Purchasing power (high affinity in Moscow: 152% compared to average 107%);
- State of healthcare system in region (the highest affinity: 350-450% in the north regions of far East).

# Medical Tourism Market and Health Treatment Abroad

## User Interest in Destinations:

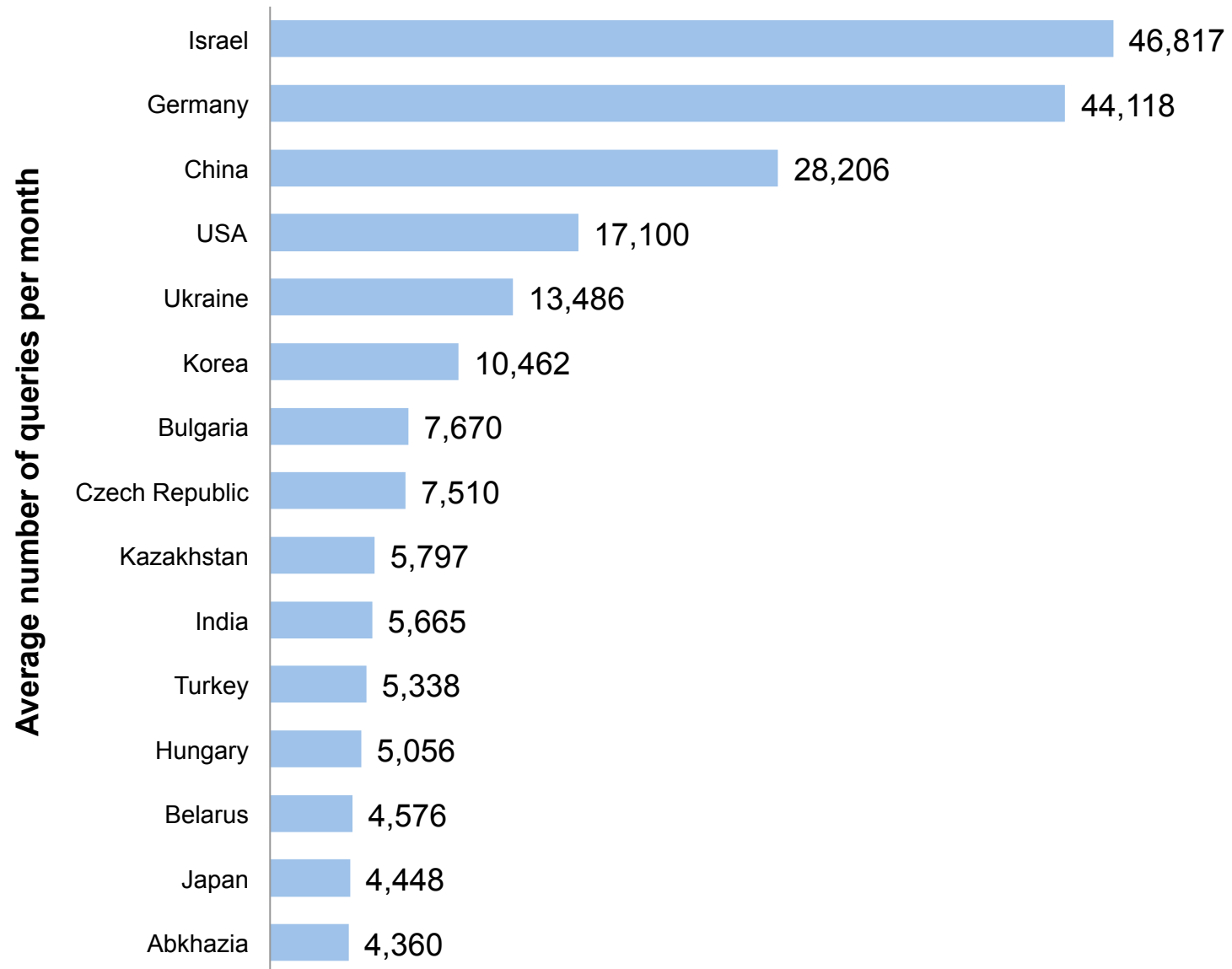
- By regions / countries
- Search patterns

# Health Treatment Abroad: Destinations

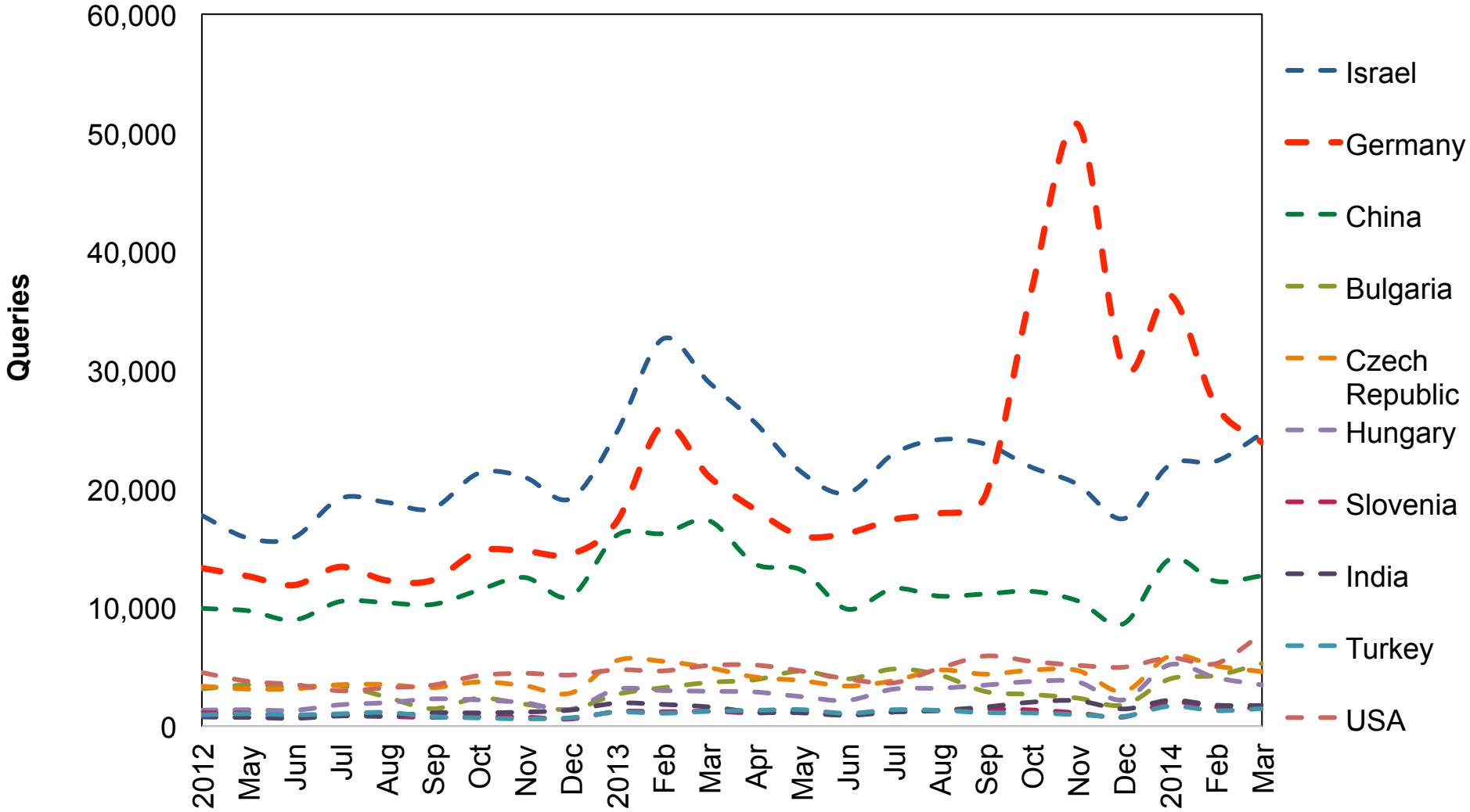


Queries on medical tourism and health treatment in TOP-10 countries make up to 65% of all queries. Most users are seeking treatment in European countries (40%), Asian (China, India) – 18,3% and Middle East – 22,2%.

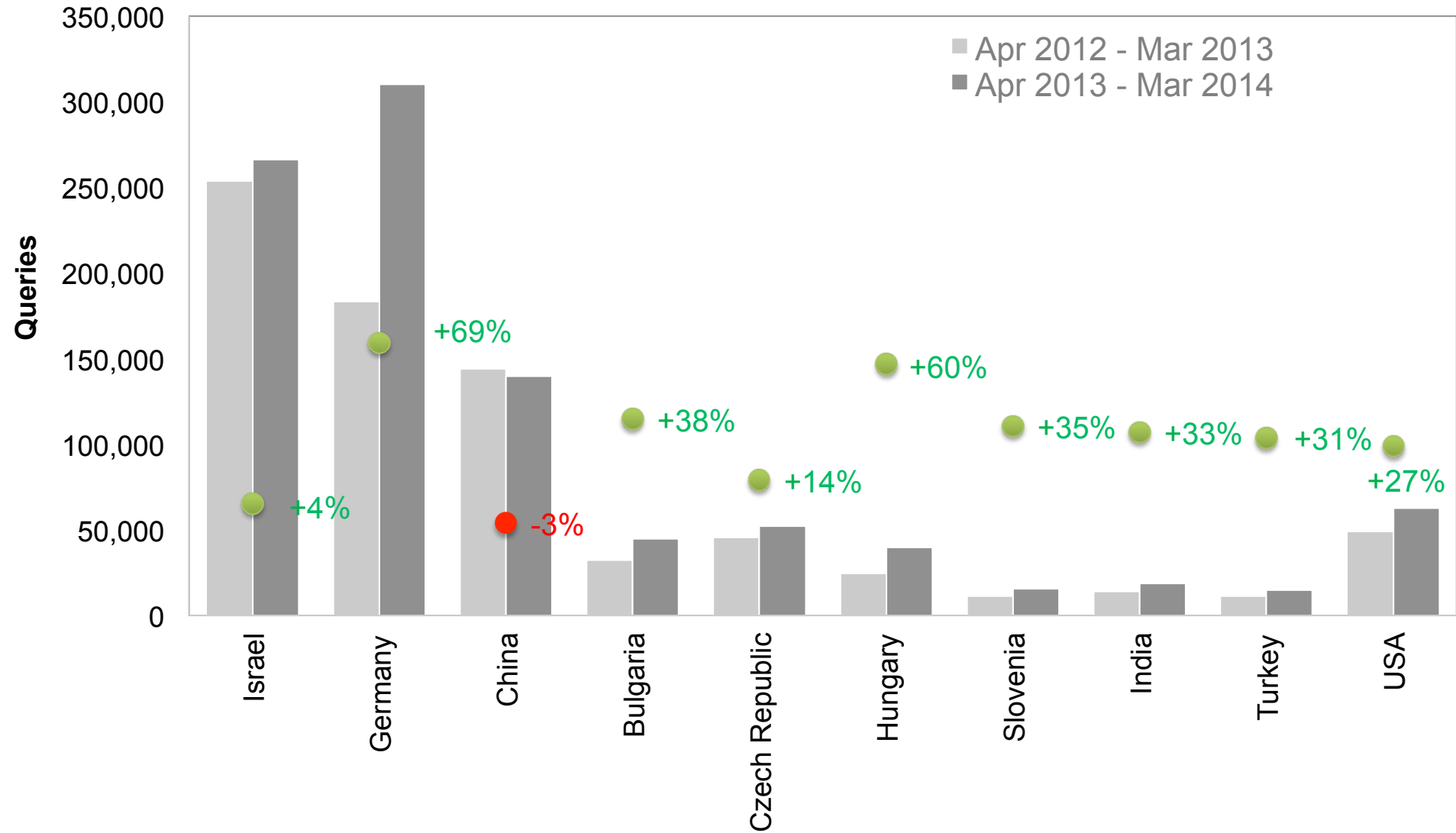
# Health Treatment Abroad: Top Countries



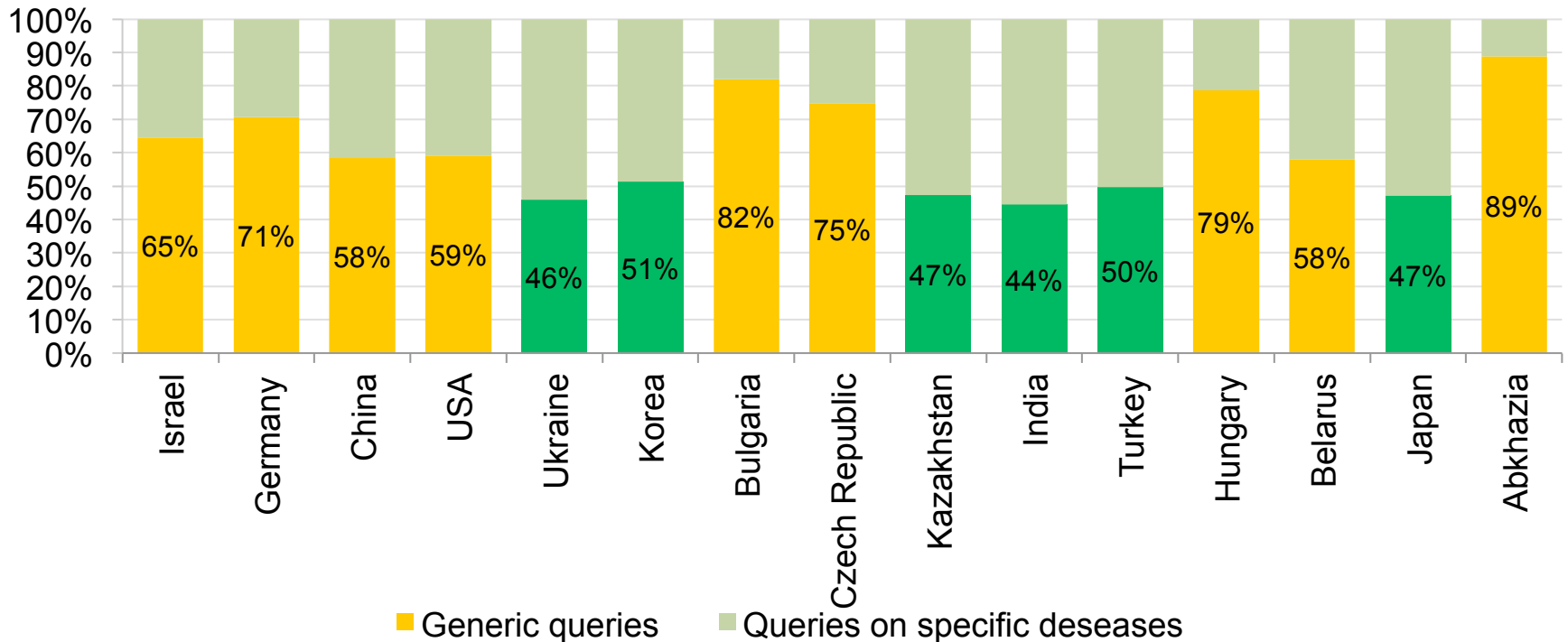
# User Interest Dynamics: Top-10 Destinations



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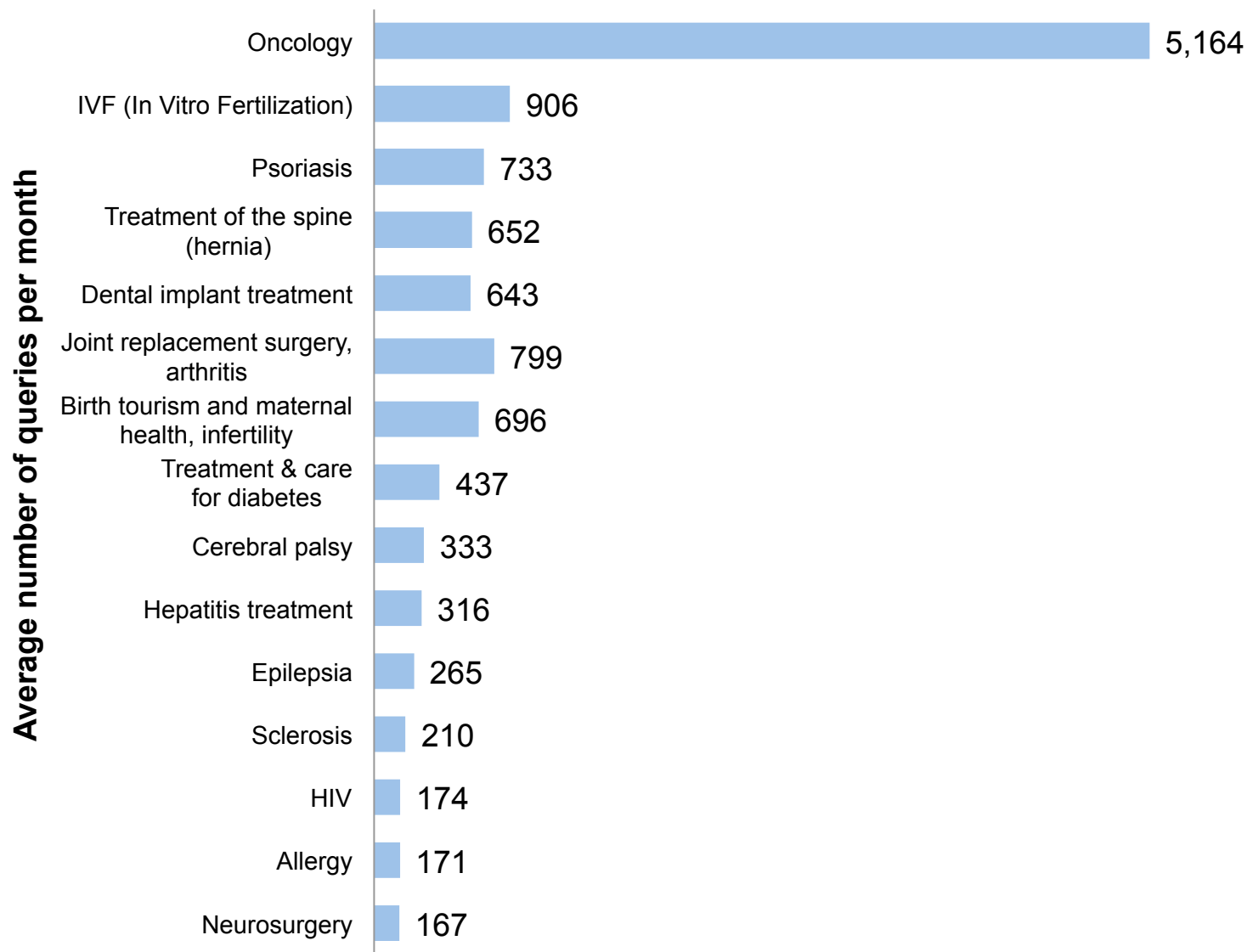


# Search Patterns: Generic & Specific Queries



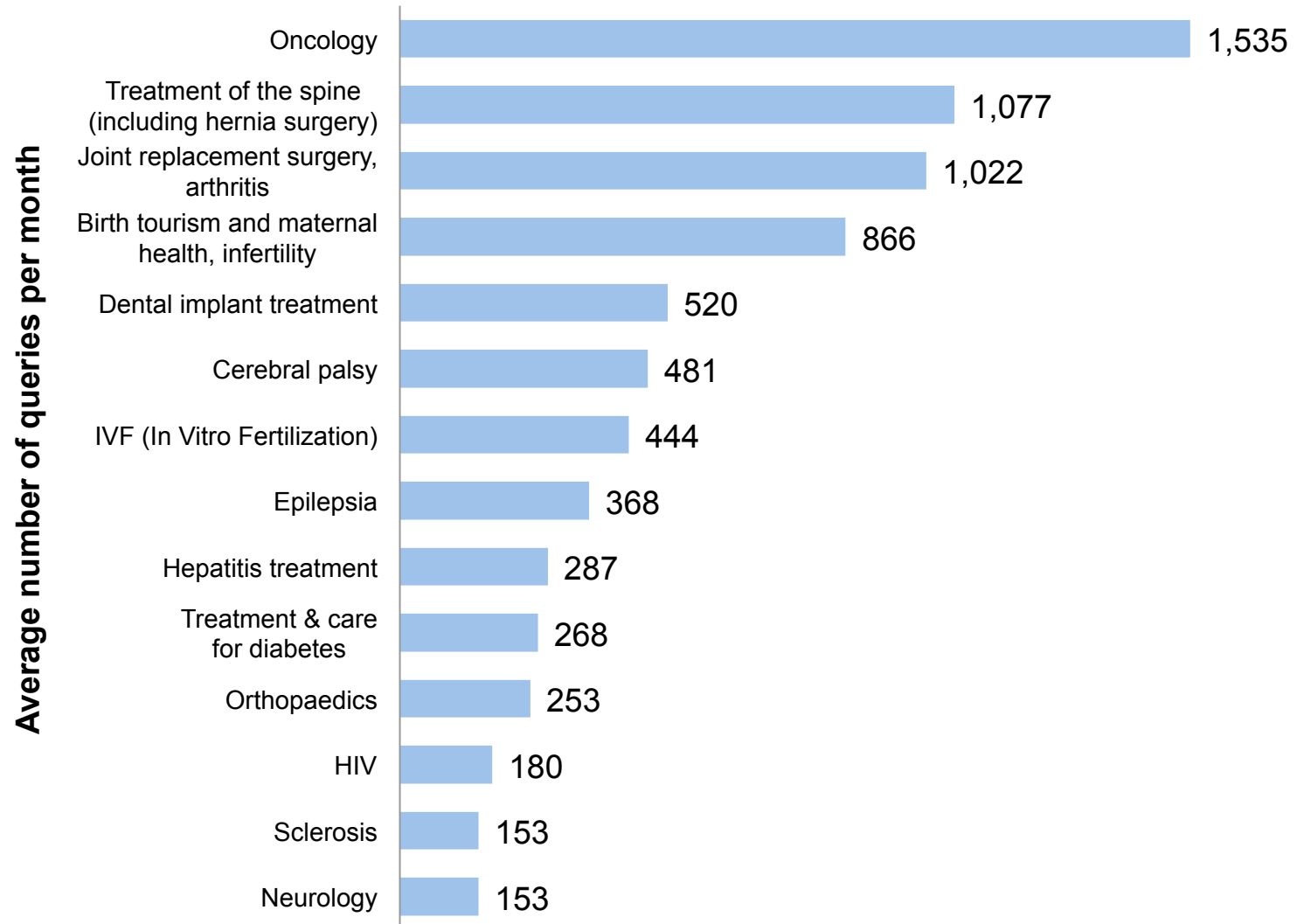
For Israel, Germany, Bulgaria, Czech Republic, Hungary, Abkhazia, user interest has a “universal” form for more generic queries including “clinics”, “hospitals”, “treatment” etc. For Ukraine, Korea, Kazakhstan, India, Turkey, Japan, user interest is more specific. For the majority of queries, users specify the type of operation or disease.

# Treatment in Israel: Top-15 Related Diseases





# Treatment in Germany: Top-15 Related Diseases





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Thank you!