

MEDNET Marketing Research Center



MEDIBUS 2020

Barometer of the private medical services market

The most
comprehensive
study on consumers
of the private
medical services
in Romania

About MEDIBUS



- Annual Research on Private Medical Services Market
- Since 2004
- Comprehensive view on how population relates to and uses medical services
- Only study which estimates the value of the private medical services market
- Quantitative research on the private medical and insurance services
- Bucharest and urban towns +100.000 inhabitants
- General population: 18 – 65 y.o.
- Respondents: 1.600 – 800 in Bucharest, 800 rest of country

You can include your own questions into the study. Results are proprietary to you!
Get in touch to find out more:
office@romednet.com

MEDIBUS objectives

PRIVATE MEDICAL SERVICES

- ✚ Performing periodic medical check-ups, frequency of checks
- ✚ Willingness to access private medical centers (all-time and during last year)
- ✚ Identifying the main decision drivers in choosing a private medical clinic
- ✚ Identifying the preference of resorting to a medical center for different medical services – state vs. private
- ✚ The amount of money spent in the past year for private medical services
- ✚ Willingness of resorting to the services of a private medical center (for those who did not access these services up to now) and also the reasons behind their decision (“Why YES/NO”)



STATE VS. PRIVATE HOSPITALIZATION

- ✚ The degree of resorting to state and privately owned hospitals
- ✚ Average length of stay in a hospital – state vs. private

PRIVATE MEDICAL LABORATORIES

- ✚ Unassisted notoriety degree of private laboratory analysis (Top of Mind, Sum of Mentions)
- ✚ Identifying the way of choosing the private analysis laboratory (on physician recommendation / out of respondents own initiative)
- ✚ Identifying the criteria for choosing the analysis laboratory, when it is chosen from their own initiative

MEDIBUS objectives (II)

PRIVATE MEDICAL CLINICS*

- ✂ Spontaneous, unassisted notoriety degree of private medical clinics (Top of Mind, Sum of Mentions)
- ✂ Spontaneous, unassisted appreciation degree of private medical clinics (Top of Mind, Sum of Mentions)
- ✂ Assisted notoriety degree of the most important clinics from Bucharest and other +100.000 inhabitants cities*
- ✂ The degree of resorting to the analyzed medical clinics and requested services
- ✂ Assessing the satisfaction degree regarding visited medical centers in general and the professionalism of physicians
- ✂ NPS (Net Promoter Score) value calculation for the analyzed medical clinics
- ✂ Intention of resorting in the future to private medical services, targeted services from the analyzed clinics
- ✂ Brand association for medical clinics from Bucharest

*Note: *the complete list of the medical centers that are analyzed can be found in the next slide*

MEDIBUS – Clinics (database is updated each year)

BUCURESTI	<i>Academica – Affidea – Anima – Gral Medical – Hiperdia – Hipocrat – Medas – Medcenter – Medcover – Medlife – Medsana – Polisoano – Ponderas – Provita Centru de Diagnostic si Tratament – Regina Maria – Romar Medical – Romgermed –Sanador – Bioclinica (laboratory) – Clinica Sante (laboratory) – Synevo (laboratory)</i>
BACAU	<i>Centrul Medical Micromedica - Clinica Palade – Gral Medical (Oncofort) – Luxor "Dr. Olinic" – Medical Top – Medicaltest – Regina Maria – Medisense (laboratory) – Medlife (laboratory) - Clinica Sante (laboratory) – Synevo (laboratory)</i>
BRASOV	<i>Centrul Medical Hipocrat – Centrul Medical Medo – Centrul Medical de Vest – Clinica Sante Vie – Clinico – Hiperdia – Medcover - MedLife – Regina Maria – Spitalul Sf. Constantin – Clinica Sante (laboratory) – Bioclinica (laboratory) - IDS laboratoryies (laboratory) – Synevo (laboratory)</i>
CLUJ NAPOCA	<i>Affidea – Centrul Medical Medexpert – Centrul Medical Medsan - Hiperdia – Interservisan – Medcover – Medlife – Medstar - Policlinica Grigorescu – Regina Maria – Blue Life Medical Center – Centrul Medical Transilvania – Bioclinica (laboratory) – Synevo (laboratory) – Clinica Sante (laboratory)</i>
CONSTANTA	<i>Centrul Medical Artemis – Affidea – Spitalul Privat ISIS – Medcover – Centrul Medical Cermed – MedLife - Medstar General Hospital – Ovidiu's Clinical Hospital – Pozimed – Provita 2000 - Regina Maria - Romar Medical - IDS laboratoryies (laboratory) - Synevo (laboratory) – Bioclinica (laboratory) – Clinica Sante (laboratory)</i>
CRAIOVA	<i>Centrul de Diagnostic si Tratament Medsan – Medlife Sama - Centrul Medical Camen - Gral Medical – MogosMed – Centrul Medical Phoenix – Policlinica Centrala Dr. Vlaescu – Policlinica Elga - Policlinica Medaura – Policlinica Top Med Bunavestire - Policlinica Tommed - Prima Medical - Regina Maria – Policlinica M&M - Synevo (laboratory) - Clinica Sante (laboratory) – Renamed (laboratory) - Bioclinica (laboratory)</i>
GALATI	<i>Centrul Medical Sanavita - Centrul Medical IRINA – Hiperdia - Romar Medical – Medcover - Medlife – Centrul Medical Saturn - Clinica Sante (laboratory) – Medicotest (laboratory) - Synevo (laboratory)</i>
IASI	<i>Arcadia - Centrul Medical Transmed Expert – Elytis Hospital – Helicomed – MedicalTest – Medcover – Medlife - Regina Maria - Romar Medical - Spitalul Providența - Clinica Sante (laboratory) - Bioclinica (laboratory) - Biodev Medical Center (laboratory) - Synevo (laboratory)</i>
ORADEA	<i>Medlife - Policlinica Avrona - Spitalul Pelican - Bioinvest Medical Center – Clinica Medicala Medetil - Clinica Sante (laboratory) - Bioclinica (laboratory) - Medlife (laboratory) - Synevo (laboratory)</i>
PLOIESTI	<i>Alfa Medical Center - Centrul Medical MEDIURG - Clinica Medicala Panaceea – Gral Medical – Hipocrat – Medcover – Medlife - Medsana – Regina Maria – Romar Medical – Spitalul LOTUS – Clinica Sante (laboratory) – Synevo (laboratory)</i>
SIBIU	<i>Clinica Paltinul – Clinica CARPE DIEM – Misan Med – Policlinica Astra – Policlinica Medica – Gral Medical – Policlinica Visa Medica – Polisoano – Centrul Medical Intermedica – Clinica Sante (laboratory) – Bioclinica (laboratory) – IDS laboratoryies (laboratory) – Medlife (laboratory) – Synevo (laboratory)</i>
TIMISOARA	<i>Regina Maria – Hiperdia – Medcover – MedLife – Profilaxis – Policlinica Promedica – Medici's – Bioclinica (laboratory) – Clinica Sante (laboratory) – Synevo (laboratory)</i>

MEDIBUS objectives (III)

SUBSCRIPTION TO A PRIVATE MEDICAL CLINIC

- ✎ Identifying medical subscription owners and contributors
- ✎ Chosen clinics for contracting a medical subscription
- ✎ Identify the extent to which subscriptions cover respondents' healthcare needs and the services that their current subscription does not include and he finds are necessary (completely or in part)
- ✎ Identifying situations when laboratory tests were accessed from another clinic / another laboratory, although these services are included in the current medical subscription of the respondent
- ✎ Intention of resorting in the future to private medical services and amount willing to spend
- ✎ Identify the services desired to be included in the subscription in correlation with the amount previously mentioned

EMPLOYMENT BENEFITS

- ✎ Identifying the employments benefits the respondents receive at their working place

SOURCES OF INFORMATION

- ✎ Identifying the main sources of information regarding private medical clinics and services
- ✎ Evaluating the level of trust regarding the main sources of information

MEDIBUS objectives (IV)

THE MARKET OF PRIVATE MEDICAL SERVICES

- ✂ Total market of private medical services (excluding subscriptions and dental services) in Bucharest / Province
- ✂ Paid medical examinations market in Bucharest / Province
- ✂ Paid laboratory analyses market in Bucharest / Province
- ✂ Paid investigations market in Bucharest / Province
- ✂ Paid dental services in Bucharest / Province
- ✂ Medical subscription market in Bucharest





MEDIBUS PREMIUM PACKAGE

Comparative analysis for
the latest three years of the research

MEDIBUS PREMIUM

THE DEGREE OF RESORTING TO MEDICAL SERVICES

- ✂ The degree of resorting to private medical services (last three years)
- ✂ The degree of resorting to hospitalization – state vs. private (last three years)

THE NOTORIETY AND APPRECIATION OF THE PRIVATE MEDICAL CLINICS AND PRIVATE LABORATORIES FROM BUCHAREST

- ✂ Spontaneous notoriety TOM (Top of Mind), SOM (Sum of Mentions) and assisted notoriety private medical clinics from Bucharest (last three years)
- ✂ Spontaneous notoriety TOM (Top of Mind), SOM (Sum of Mentions) private medical laboratories from Bucharest (last three years)
- ✂ The degree of spontaneous appreciation of private medical clinics TOM (Top of Mind), SOM (Sum of Mentions) in Bucharest (last three years)
- ✂ The spontaneous notoriety-appreciation matrix (the top medical centers from Bucharest) (last three years)

RESORTING AND THE INTENT TO RESORT TO CLINICS SERVICES / MEDICAL LABORATORIES FROM BUCHAREST

- ✂ Types of services accessed at private clinics/medical laboratories from Bucharest (*analysis only for the top medical centers*): medical subscription, occupational medicine, examinations, laboratory analyses, investigations.
- ✂ The intent to resort to private clinics/medical laboratories services from Bucharest (*analysis only for the top medical centers*): medical subscription, occupational medicine, examinations, laboratory analyses, investigations.

MEDIBUS PREMIUM

PRIVATE MEDICAL SUBSCRIPTIONS

- ✂ The degree of owning a private medical subscription (comparison last three years)
- ✂ Identifying the payer of the private medical subscriptions (comparison last three years)
- ✂ The intent to contract a private medical subscription (comparison last three years)



CLIENTS PROFILE OF PRIVATE MEDICAL CENTERS

- ✂ Identify the clients profile from the top private medical centers.

BRAND ASSOCIATION

- ✂ Spontaneous brand association of medical centers from Bucharest to a series of analyzed dimensions (comparison last three years) – *only for the top medical centers.*

The dimensions are:

- The personal's amiability
- The private medical center aspect
- The organization of the private medical center
- The quality of the laboratory analyses
- The quality of the medical services
- The cleanliness
- The performance of medical equipment
- The prices of medical services
- The doctor's professionalism
- The services promptness
- The quality-price ratio of medical services
- Appointments compliance

MEDIBUS good to know

TIMELINE

February → review & update QNR;
clients can opt to include own questions

March → data collection

April → data processing & reports

May – June → final results

FEEES

As a syndicated research, costs are split between clients, so each of you get access to a wealth of information at a fraction of a price.

Promotional prices are available when purchased together with ASIBUS

CUSTOM QUESTIONS

If you want to find out your own insights beyond the objectives of this research, we are happy to provide you this opportunity.

All you have to do is to give us or work together on a set of questions, depending on your interests, and we further investigate for you.

Findings are proprietary to you.

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