



A STRATEGIC LOOK AT FLORIDA'S MEDICAL TOURISM OPPORTUNITIES



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A STRATEGIC LOOK AT FLORIDA'S MEDICAL TOURISM OPPORTUNITIES:

Report to Medical Tourism Taskforce



5 TRENDS FUELING GROWTH OF MEDICAL TOURISM

Growing global wealth

Globalization of medicine

Unique medical advances

Aging global population

Millennials seeking care

Demographics, technology and the globalization of medicine are conspiring to give rise to more medical tourism and Florida is well positioned to capitalize on this trend. In addition to robust healthcare options and opportunities for health and wellness, our natural attributes and world-class hospitality lend themselves to “health and hospitality.”

This report is intended to provide a strategic look and assessment of the opportunity in Florida.

Our findings conclude that:

- **Florida is already engaged in extensive medical tourism activities.** Traditional definitions of medical tourism do not adequately account for the real impact of medical tourism in Florida which more appropriately would include economic activity from medical travel, health and wellness, participatory events, medical migration, and medical meetings.
- Growing our medical tourism market is best accomplished **through specialized marketing and collaboration**, focused on Florida’s competitive excellence (physicians, facilities, tools, trials and hospitality). While activities Florida currently engages in to recruit visitors and companies are similar to what is needed for medical marketing, the differences in the “choice models” for health decisions mean that new structures and systems will be needed at the state and local level to fully realize our potential.
- Much of Florida’s current medical tourism marketing is driven by healthcare providers and prior efforts to collaborate and expand medical tourism are instructive. Joint ventures have struggled when they intrude into the internal operations, marketing or patient referrals of providers. Fortunately, we find that **growing Florida’s market and impact is possible without this market intrusion**. Community-level collaboration, grants or support for branding and medical meetings, and broader systems for marketing can serve as value-added funnels for medical tourism, without compromising the competitive or proprietary processes of providers.
- **Medical meetings provide a particularly powerful tool for growing our market and potentially for solving future healthcare challenges.** Inbound meetings, conferences, training activities, preceptor opportunities and outbound medical presentations, demonstrations, and field work provide unique opportunities to connect with physicians and facilitators outside of Florida which in turn provides a pipeline for referrals and future patients. Leveraging Florida’s teaching hospitals and medical training centers, world-renowned providers and unique clinical trials, simulation and life science industries, medical device manufacturers, and our well regarded meetings and conventions industry has tremendous potential to increase the brand and opportunities for Florida’s

medical excellence. Notably, bringing health practitioners to Florida to witness both our medical excellence and quality of life has the very real possibility of opening the door for future relocation of healthcare providers, something we will need to meet future demand for healthcare services.

- Finally, the **virtuous cycle of expanded medical tourism** leading to enhanced medical services and the recruitment or expansion of the growing medical device, pharma and life science industries moving to Florida which in turn further improves our health care capacity, our attractiveness to medical tourists and practitioners, and our broader economic diversification and quality of life points to this as a strong opportunity for Florida's future.

To grow medical tourism, Florida should continue to focus on quality, affordable, timely and accessible care; develop skills in the unique nature of medical marketing; pay attention to connected community experience (from pre-visit to post-care); highlight our centers of excellence (physicians, facilities, tools, trials and hospitality); build Florida's health and wellness brand; and take advantage of related economic development opportunities.

In 2014, the Florida Legislature funded a medical tourism marketing grant pilot. The appropriation provided support for competitive medical tourism marketing grants, the development of statewide resource program and portal, www.DiscoverFloridaHealth.com, and broader research on medical tourism. VISIT FLORIDA, the state's tourism marketing corporation, established a Medical Tourism Taskforce comprised of health and hospitality experts from across the state to advise on the grants and provide guidance on the portal and research. This report was developed in response to this initiative and was made possible by a grant from VISIT FLORIDA. The Florida Chamber was charged with taking a look at the state's strategic opportunities related to medical tourism. The independent findings were developed after input and advice from the Medical Tourism Taskforce and more than 50 hours of interviews, focus group discussions with health and hospitality professionals across the state, and a broad review of literature discussing trends and issues related to global medical tourism. This report is the second in a series and focuses on strategies to expand our market share. The Florida Chamber Foundation contracted with Global Healthcare Resources to produce a preliminary report, released in April 2015, summarizing trends, challenges, and practices. The interim report, our final report and other items related to medical tourism can be found at www.FloridaChamber.com/MedicalTourism.

SELECTED OBJECTIVES IDENTIFIED BY MEDICAL TOURISM TASKFORCE

“How do we attract more people to come here for services? How do we best differentiate this state? What can we offer that is new, better or different? How do we consolidate a fragmented industry across the state, bringing all our assets together to help raise all tides? How do we network our health care providers and communities and bring them together as a holistic, whole-system so that no matter where you are in Florida you are assured to receive a rich treatment and experience? How do we get institutions to play together better in Florida? We are trying to create alignment with possible medical tourism opportunities. While some of our institutions are behind in institution-specific outreach, I think our state overall is ahead in national conversation thinking about a state-wide system, beyond the institution or region.”

VISIT FLORIDA MEDICAL TOURISM TASKFORCE FOCUS GROUP, 2014



“Every community and region has to ask, “What is our medical product?” Even in those parts with limited medical offerings, we have strong hospitality capabilities.”

INTERVIEW RESPONSE, 2015

What is Medical Tourism?

Medical tourism is a misnomer. The term conjures images of patients engaged in our traditional sun, fun, attractions and more. While this certainly applies in many cases, medical tourism is different than Florida’s typical tourism market.

Medical tourism has no universally accepted definition, though most definitions build around the notion of travel outside of a patient’s home region with the intention of seeking health care services. The nature of those services (critical care, elective procedures, cosmetic or general health, recuperation) and the distance traveled (across a political jurisdiction, such as a state line, or some distance beyond the traditional catchment of a health provider) are often cited as determinants, though the only universally accepted notion seems to be the intentionality of the act (emergent care while traveling outside of home medical region is not generally regarded as medical tourism, though it may not get unbundled from tracking statistics).

Estimates of medical tourism suggest that this is a growing \$100 billion global market and a recent study finds that Florida generally sees between 300,000 to 400,000 medical tourists a year, generating almost \$6 billion in medical services activity in Florida.¹ A well-organized and integrated promotion program is projected to increase patient flow in Florida between 3 and 5 percent above the projected 15 percent industry-wide growth.²

While these estimates focus on the economic impact to health centers, **transactions beyond the institution — by patients or accompanying travelers — reverberate across the community** with local economies benefiting not only from direct revenues to hospitals, medical centers and providers of healthcare services but also revenues for such things as hotel nights, visits to local attractions and cultural events, retail and restaurant transactions, transportation and related housing and commercial construction and activities.

These are the traditional measures of medical tourism in many communities across the country. However, our interviews and research suggest that **Florida is actively engaged in more robust medical tourism and traditional measures underreport real economic impact and potential.** To understand the value proposition, we should consider the following which make up Florida’s real medical tourism value stream:

► **Medical Travel (traditionally coined “medical tourism”):** intentional travel to secure health services from a Florida physician, whether at a hospital, ambulatory surgical center, or private practice. Treatments that medical tourists often pursue in Florida include oncology, neurology, radiology and diagnostics, gynecology and fertility, cardiovascular, transplants, orthopedic, sports medicine, pediatrics, rehabilitation, cosmetic and reconstructive surgery, dental surgery and treatments, and second opinions for many specialties.³

► **Health and Wellness:** intentional travel to Florida for such things as executive physicals, performance enhancement, diagnostic information, nutrition, drug and alcohol treatment, rehabilitation, regenerative care, recuperation and spa services (especially when paired with other health services) build on Florida’s long history as a place for youth and vigor.

► **Medical Migration:** intentional travel for long term care or to position oneself for unique, critical and/or excellence in care drive a portion of Florida's population growth. From the patient and family who moves here for weeks, months or years for continuing care or to be close to one of our renowned physicians, facilities, tools, or trials, to the retiree or part-time resident that selects Florida as his or her home because of the system of care and healthy living options we provide, there are a number of undercounted medical migrants that make up Florida's unique market.

► **Healthy Living Experiences:** intentional travel to participate in recovery, recuperation or regenerative activities in Florida's year-round health, wellness or competitive activities contribute to Florida's 100 million annual visitors. Florida's network of parks, springs, beaches and trails as well as our robust calendar of races, challenges and participatory sporting events attract athletes and visitors of all skill and interest from across the globe and Florida's accommodating weather, focus on outdoor experiences, and integrative community and natural design lend themselves to engagement and recovery. While admittedly it would be easy write this off as traditional leisure or nature travel, we shouldn't ignore the oft heard refrain when visitors and residents engage in the Florida experience, "this is just what the doctor ordered."

► **Medical Meetings:** intentional travel to participate in conferences, workshops, preceptor programs, simulation training, medical device demonstrations or other medical education events bring health professionals to Florida regularly. While many of the events held at our hotel and convention centers are often counted in tourism numbers, many other short and long trips affiliated with medical training centers or teaching hospitals are often not included in tourism counts. Delegations and visitors participating in these programs may be visiting for as short as a day but often for weeks or months at a time.

► **Medical Research and Markets:** intentional travel to engage in training programs sponsored by medical device manufacturers as well as activities and the cash infusions from grants and investments related to medical research, testing and product development are not normally counted toward medical tourism's impact. However, Florida's bio and life sciences, simulation, pharma, and medical device manufacturing clusters, to name a few, provide a unique opportunity for leveraging health and medical market growth and continuing to strengthen and diversify Florida's economy.

Purists may not attribute each of these economic impacts to medical tourism or may choose to ignore their contribution as they are hard to unravel statistically from other activities but choosing to overlook them means that Florida fails to capitalize on our true potential.

This broad umbrella of medical tourism opportunities benefit Florida through a stronger, diversified economy with investments in local amenities, enhanced health care services for local residents, more recognition for Florida's medical facilities, greater opportunities for healthy travel and more.

"They move here for good and then we have the tourism of their families coming back and forth to visit. We also get them from Central and South America because it is absent in those communities, a relatively new phenomena to them. We have beautiful facilities that they don't have."

SOUTH FLORIDA FOCUS GROUP, 2015



"The concern I have is that people are so medical care focused that people are missing this broader context of what differentiates medical tourism from another visit to a hospital...Hospitality in recovery."

INTERVIEW RESPONSE, 2015



"Medical tourism is something that should ultimately drive a better product for our citizens. What is good for medical tourist is good for all Florida residents."

INTERVIEW RESPONSE, 2015

Medical tourism affords Florida a great opportunity to extend its global reach and competitiveness, all the while capturing more of the global jobs in the related sectors and providing vibrant and sustainable communities and economic growth for our state. As both international and domestic medical tourism grows, Florida stands to benefit if a concerted effort is made to properly understand, prepare for, market and capitalize on the opportunity.

Florida is well-positioned to capture more of the medical tourism market

As demographics and consumers change, trade grows, global connections increase, tourism evolves, and medical assets expand, Florida is likely to realize more opportunities. Competition from other states and countries will intensify Florida's industry, location and hospitality advantages it can build on.



“Do you have the calming, therapeutic waters and ocean breezes to continue the healing process of your patients?”

FROM EMAIL AFTER
10/15 TASKFORCE BRIEFING

Florida's mix of quality healthcare products; developed health, wellness and leisure markets; and year-round opportunities to recover and regenerate provide a ready platform for robust medical tourism marketplace. The crossroads and connections in Florida from its trade, tourism, international migration and part-time residents position us for success.

A look at the pattern of current Florida medical travelers reveals that familiarity drives opportunity. Communities and countries from which we attract the most visitors, immigrants and part-time residents seem to correlate with the majority of current medical travelers.⁴ With projections for population and tourism growth to continue well into the future and for new trade opportunities with the expansion of Panama Canal and increasing global trade lines, Florida should focus on continued marketing to prime domestic and global markets in order to realize increase medical traveler activity.

To maximize branding and marketing investments, Florida should leverage its five **Factors of Competitive Excellence:**

- ▶ **Physicians** — recognized health providers, specialists and leaders in care;
- ▶ **Facilities** — renowned hospitals, specialty care centers, networks, and clusters of medical facilities and research institutions;
- ▶ **Tools** — unique medical devices, equipment or procedures used and advanced here;
- ▶ **Trials** — research studies or experimental treatments in Florida which provide patients access to cutting edge interventions; and
- ▶ **Hospitality** — network of amenities, culture of service, and favorable climate and environment which contribute to health, wellness and recuperation.

The first four factors define any medical tourism cluster but pairing our hospitality with Florida's unique health and wellness assets helps explain why medical tourism has bright future in Florida.

Florida is already the most regular destination for visitors and a premiere state for healthy living, working, learning, and playing. The same things that make us the top tourism market in the world make us an attractive destination for medical tourism. There is unique opportunity to market **“health and hospitality”** together as differentiating asset.

Very few U.S. markets have the level of amenities and ability to contribute to recovery that we do. Marketing Florida as a destination for quality health care services, medical procedures, and health and wellness training and activities builds on this. As consumers look beyond their immediate community for care and wellness, details such as quality of care and amenities at the provider destination matter and Florida’s natural, cultural and medical assets offer us a chance to be competitive in a growing market for care.

In many ways, most communities with medical tourism destinations ultimately have “medical” as the reason for the travel. Florida’s premier providers afford the same opportunity for quality care but an accessible natural environment and favorable climate coupled with all types of lodging, attractions and entertainment plus cultural competence gained from international hospitality market distinguish us. Experience helps set Florida apart.

Keys to successful expansion of medical tourism

Quality, accessible, timely and affordable care.

Affordability is a driver in medical decisions but not the only driver. Given the forces that constrain price differentiation, competition in healthcare turns to quality, timeliness, and unique abilities. Much attention therefore is given to quality, prestige and outcomes of physicians, facilities and procedures that provide prospective medical travelers the greatest opportunity for cure and care.

Reputation and brand.

Ensuring that patients and the medical community are aware of our offerings and expertise matters. Consistent and uniform branding as a healthy place with enhanced outcomes matters. Increasing awareness of Florida’s assets and the medical tourism market yields dividends. Brand development initiatives should speak to patient experience as well as quality of care and outcomes.

Audiences to target include:

- ▶ Domestic and global patients;
- ▶ Payers, intermediaries and facilitators;
- ▶ Physicians and researchers; and
- ▶ Florida residents and visitors who provide word of mouth referrals to global networks.

“It is easier to get healthier in a place like Florida because of the other assets. You can go outside and walk. You can enjoy our trails and parks or attractions. You can enjoy amenities with your family.”

INTERVIEW RESPONSE, 2015



“Our unique selling point can be the unified experience, a service development across the state in healthcare, hospitality and tourism that speaks to the needs of healthy lives.”

ORLANDO FOCUS GROUP, 2015



“The healthcare facilities tell their stories well, about the physicians and the patients, but the experts in telling the destination story are the DMOs and the local economic development offices but their audiences are different so we have to help get those messages aligned...VISIT FLORIDA’s co-op marketing strategy can serve as a good model for medical tourism marketing across Florida. A broad umbrella discussing health options with communities and providers customizing message about their regional assets has been successful.”

INTERVIEW RESPONSE, 2015

“The medical tourism experience that we are talking about is not just at the hospital and the centers of excellence. It is not just the tourism experience. With medical tourism there is a component of experience that occurs before the patient even comes to Florida. There is an entire set of interactions that happens for the medical tourist before they come into the hospital. Does the hospital have the capacity to handle the concierge services, through the staff training, through telemedicine, the aftercare process as well? The sum of the patient experience is part of medical tourism, not just their stay in Florida. The capacity isn’t only about the doctors and the medical staff, it is the sum total.”

VISIT FLORIDA MEDICAL TOURISM
TASKFORCE FOCUS GROUP, 2014



“When someone is diagnosed, they are out there looking for information. So we want to make sure that when they go on the internet to do their search, Florida pops up. And having that unified approach will help.”

INTERVIEW RESPONSE, 2015

A uniform message of health and wellness across Florida is important but, as with most things here, the state’s size and diversity makes it difficult to have one unique message that can apply to every community. Differences in level of health services and community assets and amenities are a strength, though, not a weakness, offering more options to medical travelers.

A uniform brand of health, wellness and hospitality across the state, coupled with ability to differentiate regions, assets and opportunities, highlighting diversity of offerings. To succeed there needs to be consistency in message and collaboration with local marketing professionals.

Easy to find and use online information.

The medical tourism experience begins before a patient arrives for care. Web presence is essential as many patients and facilitators will use it for information and referrals. Users must be able to function in environment that spans distance, time, culture, varying degrees of need and capability, and differing stages of care (e.g. from the moment someone begins investigating symptoms, treatments, locations and options; to during visit, when they are looking for health and amenity options; to after care, when tracking and communications can enhance outcomes and facilitate transactions).

Patients, families, intermediaries, facilitators and physicians must be able to find reliable information about the doctors, facilities and protocols for their needs. They must also be able to access information about such things as transportation, housing, post-treatment opportunities, attractions, and support for themselves and traveling companions.

It is worth remembering that the medical traveler often has specialized needs for food, religion, language and culturally specific services. Care and attention must be given to understanding of needs, health and cultural issues.

Keys to success include ease of use and clarity, privacy, reliability and honesty. Multinational demand implies round-the-clock “one stop” information and assistance, available in multiple languages. It is essential that sites have cultural and global sensitivity. Showcasing supportive services and amenities yields higher conversion rates.

Broadly speaking, medical tourism information and marketing is similar to other communications and marketing efforts. Messaging must be consistent, intentional, orchestrated, integrated, across multiple platforms, and targeted toward clear audiences and stakeholders.

However, the differences between medical marketing and other tourism marketing is significant, from content knowledge and approaches to the constraints from federal guidelines related to marketing medical and health issues. A health language overlay is essential. Veracity of information and familiarity with care models, regulations, privacy and other health related issues is important. Expertise beyond typical destination marketing is required.

Relationships with intermediaries such as facilitators, payers, governments and personal referrals.

Healthcare decisions are not exclusively the purview of patient. For success in medical tourism, one needs better outreach to brokers, insurers and self-funders, and health-care “facilitators” (travel and logistics coordinators who research and manage care, arrangements and experience for medical traveler). Given the evolving nature of medical contracting, a diversified B-to-B [business to business] and B-to-G [business to government] marketing strategy is also essential.

Healthcare decisions are also not exclusively the purview of physicians or payers. Personal referrals and online recommendations, especially from those that have experience with a patient’s issue, help inform the decision making process. Educating and engaging former patients as well as Florida residents and visitors about Florida’s medical opportunities, spreading the word through traditional and social media outlets, is helpful for reaching prospective medical travelers and more markets.

Coordination with Florida health centers.

Numerous hospitals and specialty care facilities in Florida have efforts in place to market their facilities, physicians and communities; increase recognition by training doctors or treating patients abroad; coordinate speaking engagements highlighting services, facilities, and research trials; and “triage” relationships for potential medical tourists. While it is a very competitive field and collaboration that jeopardizes patient referrals might not be well received, there are other leveraging opportunities to consider. Examples of opportunities to support and leverage existing efforts include grant support (such as that provided during the 2014 legislative session) and co-op marketing (such as that found in tourism marketing).

Collaboration throughout the state is needed and not just within the medical community. We should ensure Florida’s successful transition from local mavericks to a broader medical and community cluster which focuses on wide ranging health and hospitality opportunities.

Coordinated Community-level Connectivity.

Medical facilities have many strategies and market forces driving them to focus on quality of care, competitiveness and marketing. Real opportunity to distinguish Florida lies “outside the hospital doors.” Communities should focus on comprehensive connector “concierge-type” services and continuum of care and experience into the community, leveraging assets and making patients and traveling companions welcome.

Medical tourists travel for care but great opportunity for Florida to leverage its natural, health and wellness, and hospitality assets is to coordinate at the community level.

The medical experience is much more than the procedure. It is an experience that starts before someone arrives and continues through the onsite and after care.

Some areas in Florida are better equipped for medical procedures due to higher concentrations of medical facilities and providers but the varied nature of recovery and health provides opportunities for all regions.

“Absent [coordination] it might be more about driving patient into the system rather than the community, without having that service attached.”

INTERVIEW RESPONSE, 2015



“Treating this cancer or this problem is institution-centric and medical tourism is really about the community coming together for the experience that someone will get when they are here for direct health-care or meeting or wellness event, that is special to them and different than what they would have received at their home facility.”

INTERVIEW RESPONSE, 2015



“A strategic marketing plan is critical. But ultimately the destination must deliver. Top-notch medical care, incredible hospitality and a seamless patient experience door to door, not only for the patient but his or her family.”

FORWARD FLORIDA,
August/September 2014

“I would hope that coming out of this we have a medical tourist center framework for care, education and training- which may be a better category than medical meetings because it incorporates medical meetings, technical skills training as well as some of the preceptorships — and health and wellness.”

VISIT FLORIDA MEDICAL TOURISM
TASKFORCE FOCUS GROUP, 2014



“To create competitive advantage, pair quality medical areas with academic development to provide unique selling point, utilizing research and training facilities to attract physicians, investors and broader recognition.”

GLOBAL HEALTHCARE RESOURCES
REPORT, APRIL 2015



“If you can build a device anywhere, why not choose Florida where we have robust health market, patient population, recuperation opportunities?”

INTERVIEW RESPONSE, 2015

In the end, a seamless medical travel experience, with no gaps between hospital and hospitality is important for patient’s proper care and reduces the risk of complications.

Expanding Medical Meetings.

Medical meetings expose healthcare practitioners to local health and community assets; provide insights into the medical expertise, tools and technologies, and resources available which in turn can lead to referrals; and provide opening for recruiting future practitioners.

Meetings, live and virtual, have ability to brand us as healthcare destination. Inbound meetings—activities which bring health practitioners in to Florida—lead to a greater understanding of our quality of life and medical resources.

Many Florida communities are already recognized as strong, positive destinations for medical meetings. Our network of convention centers, hotels, training facilities, teaching hospitals, preceptor programs, public and private labs, medical device manufacturer demonstrations, and our advanced simulation and tele-health technologies provide opportunities for comprehensive training and academic collaboration. Experiences here help to highlight our centers of excellence (physicians, facilities, tools, trials); create connections that drive patient referrals; and open the door for future relocations of physicians, providers and researchers.

Outbound meetings—events and presentations outside of Florida, traveling doctor activities, and onsite training—provide different yet valuable opportunity. By supporting doctors and stakeholders to take message on the road, we “export Florida,” highlight our resources and excellence, and build broader brand.

Targeted economic development strategy.

Certain targeted economic development investments can help grow medical tourism market and diversify Florida’s economy. Medical device manufacturers; bio, life sciences and pharma investments; research and clinical trials; simulation and telehealth technologies; and other medical and health investments provide an opportunity to develop medical tourism and economy. Medical advances and unique tools and trials attract those seeking specialized medical care.

A notable comment made during interviews, and confirmed with additional inquiries, is that medical device manufacturers occasionally favor Florida as a preferred location for placing their tools into service, in part because of expertise of certain physicians but also because the environment is favorable to year-round recuperation.

KEY SWOT ITEMS LIKELY TO IMPACT FLORIDA'S MEDICAL TOURISM CAPACITY

STRENGTHS

- ▶ **Centers of excellence** including renowned physicians, facilities, tools and trials
- ▶ **Clusters** of health facilities
- ▶ Medical research **universities**
- ▶ **Clinical trials**
- ▶ **Health centers with concierge services** and dedicated traveling patients departments
- ▶ Network of effective partners to provide **support to patients** with visas, transportation, hotel, dining, concierge services and other needs
- ▶ Culture and systems for **interacting with international audiences** and understanding cultural and regional differences
- ▶ **Cultural diversity and connections** across Florida
- ▶ **Access to international markets**, Latin America
- ▶ Concentration of foreign **consulates**
- ▶ Strong **hospitality** infrastructure
- ▶ Recognized as **world class destination**
- ▶ Medical **device manufacturers**
- ▶ Robust **simulation** infrastructure
- ▶ **Telehealth** products in service
- ▶ **Health and wellness** focus
- ▶ Executive physicals, sports medicine, **performance** enhancement & rehabilitation
- ▶ **Year-round sun and healthy options**

WEAKNESS

- ▶ Weak uniform **brand ID** for medical tourism
- ▶ **Stand-alone stars** versus positioning as a unified medical community
- ▶ Lack singular **unified marketing message**
- ▶ **Connectedness** at the community level
- ▶ Fragmentation, synchronization and continuum of care **"outside hospital doors"**
- ▶ Lack statewide **leadership** or strategic plans
- ▶ No long term state commitment to fund initiative, so in & out before reach turning point
- ▶ Lack **systems or tools to analyze traveling patients** medical information to support sales cycle or evaluate and improve marketing
- ▶ **Limited strategic alliances** with global health partners, payers and facilitators
- ▶ **Ineffective or inconsistent communications** towards international patients or partners
- ▶ Limited expertise in **cultural or religious differences** to accommodate international patients especially outside of medical facilities
- ▶ Lower **linguistic competence**, other than Spanish
- ▶ Few hospitals with **established international programs**
- ▶ **Transportation**, especially direct flights to certain Florida communities

OPPORTUNITIES

- ▶ Marketing Florida's **"health and hospitality"**
- ▶ Build consistent medical destination **brand**
- ▶ Experience with state & local **co-op marketing**
- ▶ State and community level **web 2.0 portals**
- ▶ Create **collaborative ecosystem** for patients, facilitators, payers and other patient leads
- ▶ Recognized for patient-centered **continuum of care inside and outside of healthcare facility**
- ▶ Stream-lined approach to managing **patient experience from search to care to after care**
- ▶ Enhance **expertise with payers and facilitators**
- ▶ Develop **broader cultural competence**
- ▶ **Leverage** visitors, medical meetings, consulates, international ties from trade and residents
- ▶ **Recruit** doctors and healthcare professionals
- ▶ Capture more **health & wellness market**
- ▶ Even if medical care more expensive, we have **competitive and affordable tourism amenities**

THREATS

- ▶ **Regulatory environment** for healthcare, insurance, privacy, international travel, visas
- ▶ **Interference** in medical marketplace
- ▶ In-state competition leading to **noncollaboration**
- ▶ Poor **communication and coordination** outside of the healthcare facility
- ▶ Poorly synchronized or inconsistent handling of **patient experience**
- ▶ Not recognizing **differences between medical tourist and regular tourist**
- ▶ Poor **referral and sales processes**
- ▶ Passive or implied endorsement of **bad providers**
- ▶ Lack of long-term **government support**
- ▶ Language barriers and **cultural clashes**
- ▶ **Collectability** of payments or international debt
- ▶ Domestic and international **competition**
- ▶ At **peak times**, hospitality infrastructure strained

SUMMARY OF RECOMMENDATIONS AND NOTES

Impact of Medical Tourism in Florida

To appropriately gauge Florida medical tourism market and create baseline for return on investments, develop an inclusive model calculating the medical tourism value stream to include, but not limited to:

Medical Services Activity (non-Florida resident patient activity)

+ related travel, lodging and community based transactions for patient and companions

Health and Wellness Evaluations and Performance Enhancement Services (non-Florida residents)

+ related travel, lodging and community based transactions

Rehabilitation Services (non-Florida residents)

+ related travel, lodging and community based transactions for patient and companions

Medical Migration, full- and part-time relocations associated with continuing care

+ related travel, lodging (including home purchase) and community based transactions

Healthy Living Experiences by non-Florida Residents

+ related travel, lodging and community based transactions

Medical Meetings, including conference, preceptor and medical device demonstrations

+ related travel, lodging and community based transactions for traveling participants

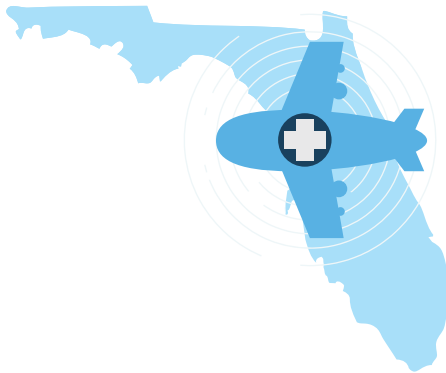
Research and Best Practices

To enhance planning and marketing efforts, support clearinghouse on trends, markets, and best practices through an ongoing, centralized research initiative that would develop market intelligence for Florida providers and communities including, but not limited to, information about:

- ▶ domestic and global medical tourism trends and patterns, with focus on target markets
- ▶ benchmarking and economic impact analysis
- ▶ best practices in medical communications and marketing
- ▶ state and community level asset maps of medical tourism infrastructure
- ▶ development of appropriate and reliable patient evaluation and tracking tools
- ▶ finance, payer, intermediary and facilitator trends
- ▶ trends and changes in regulations, logistics, technology, and industry performance
- ▶ emerging issues in travel, logistics or country risk

Several notes of caution were raised around this strategy:

- ▶ Lessons learned from past joint research and marketing initiatives in Florida suggest that market intelligence must be developed in such a way that it does not



compromise industry performance data which might adversely impact competitive structures of institutions.

- ▶ Institutions and communities that are already engaged in some level of medical tourism have a strategy. While some could benefit from additional support—financial, research, marketing or outreach—the key is to support, not supplant, positive market forces.
- ▶ Registration and reporting requirements designed to capture data to enhance possible referral and marketing efforts might sound appealing but they suffer from intrusiveness. The Health arena already has significant reporting and privacy issues it has to deal with. Consider focusing Florida market research on information already collected rather than adding new burdens.
- ▶ Avoid overburdening or compromising systems designed for one purpose with expectations for the other unless reasonable support, accommodation and funding are provided. For example, the current successful tourism marketing infrastructure has its processes and metrics which would be different and strained if they had to devote otherwise dedicated resources to medical tourism.
- ▶ Due to the nature of some complex or difficult cases found in medical tourism, outcome data may yield adverse incidents which could impact reputation or lead to knee-jerk policy responses. Advance planning for such scenarios is recommended.

Branding and Marketing

To promote Florida's recognition as a destination for medical tourism, support a coordinated statewide brand development and affiliated regional marketing strategy. A state-level focus on "health and hospitality" coupled with strategy to differentiate regions and highlight diversity of offerings, assets and local opportunities.

VISIT FLORIDA's successful tourism co-op marketing model provides one good example of how to manage the strategy. However, because of the unique nature of medical information and healthcare choices, it is unlikely that we can just hand this off to state's tourism marketing partners and expect same results. While the organization is experienced in researching markets, developing targeted messages, using multi-media to target audiences, and coordinating state brand and regional differences, VISIT FLORIDA does not have medical expertise. Given the specialized focus, a partnership with medical school or relationship beyond the typical tourism marketing network is recommended.

Medical Tourism Portals

To better meet the needs of medical tourists and decision makers, encourage the development and maintenance of robust state and local medical tourism portals. Given the nature of the patient and facilitator needs, strong portals with appropriate medical and logistics information can build brand and secure medical traveler for Florida.

Keys to success include ease of use and clarity, privacy, reliability and honesty. Multi-national demand implies round-the-clock "one stop" information and assistance, available in multiple languages. It is essential that sites have cultural and global sensitivity. Showcasing supportive services and amenities yields higher conversion rates.

CONSIDERATIONS FOR MEDICAL TOURISM PORTALS

DIVERSE AUDIENCES.

Need clear, consistent round-the-clock information suitable for multiple cultures, demographics and global markets. Address language and cultural barriers.

COMMUNITY

“CONCIERGE” SERVICES.

Highlight options and community amenities for audiences of various means and needs, sometimes on own but often traveling with others. Include details about health care and providers, transportation, lodging, leisure and attractions, translators, meals, religious services, childcare and other resources to accommodate short and long-term stays.

ONE STOP SHOP.

Shouldn't necessitate phone call or going to multiple sites.

WEB 2.0 FEATURES.

Search engine optimization and tools and strategies that allow for the capture of user information and provide follow up marketing assist with market capture.

PRIVACY AND DISCRETION.

Even when healthcare privacy laws don't apply, patients don't want the sensitive nature of their needs disclosed.

In 2014, Florida created Discover Florida Health to help domestic and international patients discover information about the advantages of Florida health care services. The program launched www.DiscoverFloridaHealth.com to communicate the benefits of Florida as a medical destination to potential patients, referring physicians and those planning medical-based meetings and events.

While a strong start, suggestions for additional information and tools include:

- ▶ health and disease state information, including patient-centered information and support groups
- ▶ more health, wellness and leisure information, especially highlighting centers of excellence
- ▶ links to local sites that provide reliable information about supportive services like lodging, transportation, appropriate attractions and food, and language and religious services
- ▶ resources and dedicated pages for medical care decision makers, including patients, healthcare facilitators, payers and insurers
- ▶ Multilingual resources

Notes of caution submitted with these suggestions include:

- ▶ Veracity of information and familiarity with care models, regulations, privacy and other health related issues is essential.
- ▶ The differences between medical marketing and other tourism marketing is significant, from content knowledge and approaches to the constraints from federal guidelines related to marketing medical and health issues. A health language overlay is essential. Familiarity with care models, regulations, privacy and other health related issues is important. Expertise beyond typical destination marketing is required. For success, the site requires input and management from entity(s) with stronger medical focus. While the current host, VISIT FLORIDA, excels at marketing, the state might consider ties to medical entities to support the portal.
- ▶ Links, local sites, sponsorships and advertisers must meet rigor, standards and guidelines suitable for medical and health marketing. Beware of passive endorsement.

Medical Meetings

To highlight Florida's centers of excellence and healthcare capacity, provide support for inbound medical meetings, conferences, trainings, demonstrations and activities which bring in healthcare practitioners to learn and interact with Florida facilities and physicians.

To highlight Florida's exceptional doctors and programs, provide support for select outbound training, presentations and activities highlight our resources and excellence and build broader brand.

To ensure return on investments, develop metrics to evaluate success between medical meetings and patient referrals.

Several suggestions for specific leveraging opportunities were submitted, including:

- ▶ featuring medical tourism opportunities or exhibits at the many national and international meetings held in Florida
- ▶ partnerships with international organizations to meet traveling participant needs, for example arranging executive physicals or advance directive for emergency or specialized care
- ▶ strengthening relationships with consulates and participating in trade missions to highlight medical offerings and develop relationships and leads
- ▶ highlighting Florida's simulation industry

Medical Tourism Grants

If the legislature renews the grant programs, maximize impact by focusing investments on marketing and leveraging Florida's centers of excellence (physicians, facilities, tools and trials) and medical meetings as well as assisting communities with asset mapping and creating connected community concierge programs and portals.

Follow up mechanisms

To maximize word-of-mouth referral opportunities, develop tracking systems and mechanisms for follow up and regular communication with medical tourists and medical meeting participants, creating alumni networks, and converting brand ambassadors.

Community Concierge Services

To help communities prepare for medical tourism, support asset mapping of community resources, addressing the unique transportation, accommodation, amenities and cultural needs of tourists "outside the hospital doors." Communities should use the information to develop comprehensive connector "concierge-type" services and provide for continuum of care and experience into the community.

Connections to Economic Development

To capitalize on the opportunities for medical tourism afforded by medical advances and unique tools and trials, expand and leverage investments in medical device manufacturers; bio, life sciences and pharma investments; research and clinical trials; simulation and telehealth technologies; and other medical and health investments.



ENDNOTES

1 "Medical Tourism in Florida," Florida TaxWatch, October 2014.

2 "Discover Florida Health Feasibility Study," Global Healthcare Resources, April 2015.

3 "Discover Florida Health Feasibility Study," Global Healthcare Resources, April 2015.

4 "Medical Tourism in Florida," Florida TaxWatch, October 2014.

“Communities should conduct an analysis of their infrastructure and assets. They should measure and ensure a streamlined process that is simple for the medical tourist from start to finish; with cooperation between the medical, hospitality, and tourism industries; paying attention to transportation, translation, lodging, and care from start to finish; with amenities that cater to varying demographics and sensitive to the needs of recovering patients and their families. Don't forget about the importance of cultural needs such as food and religion, often important to patients and families seeking comfort in stressful times. And childcare is just totally avoided when people are talking about medical tourism and it is such a great piece where we can come in with a unique selling point.”

INTERVIEW RESPONSE, 2015

A STRATEGIC LOOK AT FLORIDA'S MEDICAL TOURISM OPPORTUNITIES



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