A VISION FOR THE TAMPA BAY INTERNATIONAL HEALTH PROGRAM

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Purpose of the Study

The scope of this study is to analyze the region's strengths and weaknesses in delivering traditional medical services - including rehabilitation and/or wellness, along with medical meetings, sports medicine, and human performance.

The Study will provide sound and conclusive recommendations about establishing Tampa Bay as a medical tourism destination.
It will present a strategic action plan with specific steps to develop a medical tourism model that benefits the entire region.

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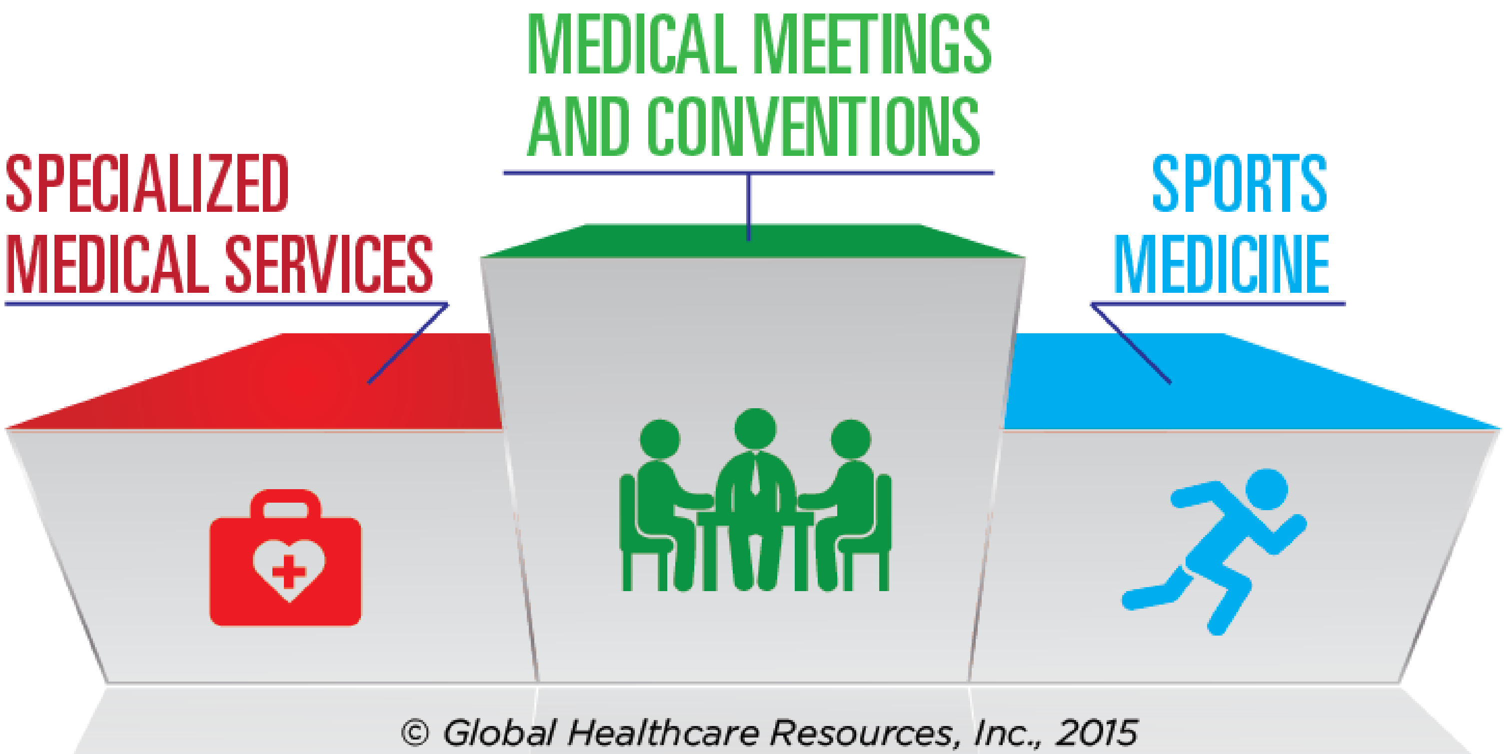
Objectives and Context

The objective is to evaluate through SWOT the current state of Tampa Bay three county region and to create a strategy for Tampa Bay to offer specialized services in the following areas:



Visits and Interviews

Visits to Hospitals and Clinics: 12, with a total of 52 people participating from International Departments, Marketing Departments and Leadership

Phone Interview with Hospitals, Clinics and Sports Medicine Providers: 14, participants participating on the interviews totaled 28, including Marketing Directors, Business Development and CEO/Leadership.

Visits and Phone Interviews to Hotels: 8, for a total of 18 people including Sales & Marketing Directors and General Managers.

Gaps & Barriers

Widespread lack of knowledge by the community about the quality of the Tampa Bay healthcare system and services offered.

Accessibility to the region from important domestic and international markets is limited to a few direct flights, coming from markets of demand.

Lack of ancillary services, such as high quality restaurants and hotels catering to patients seeking 5-star services that elevate the region to a top tier destination

Too many healthcare providers offer similar services, and do not focus on service segmentation of most sought after treatments.

Fragmentation of promotional efforts at the regional level.

Gaps & Barriers

Large competition from other destinations within the state, primarily Miami, Orlando and Jacksonville.

Fear of not being price competitive when compared to other destinations and general lack of understanding of competitiveness.

There is a low inventory of hotel rooms in the region to support the current tourism and corporate business sectors.

Training to enhance patient experience is needed for medical staff.

Expansion of medical tourism is not part of the economic models for the majority of government entities or businesses in the region.

Opportunities

Expand Existing and Build New Channels of Service Revenue

THERE ARE SIX MAIN MEDICAL AREAS THAT PRESENT IMMEDIATE OPPORTUNITY FOR DELIVERY ON A NATIONAL AND INTERNATIONAL SCALE:

- ONCOLOGY
- CARDIOLOGY
- ORTHOPEDICS AND SPORTS MEDICINE
- NEUROLOGY
- OPHTHALMOLOGY
- PEDIATRICS

SECONDARY SERVICES CONSIDERED ARE:

- COSMETIC
- FERTILITY
- UROLOGY
- GENERAL SURGERY

The reason for this is the fact that other destinations in the U.S. and abroad offer these procedures. Attracting patients for them present a greater challenge, outside of a few specialists that have their own following of patients through word of mouth referral.

Sample Focus Areas

Market Opportunities – Specialized Medical Services

Medical Centers and Services	
Veteran's Affairs Hospital, St. Petersburg College	Prosthetics and medical device manufacturing.
All Children's Hospital, Shriners Hospital for Children	Pediatrics: neurology and cancer treatments for children and adolescents
Laser Spine Institute, Tampa Orthopedic & Sports Medicine Group	Orthopedic and spine treatments
USF Heart Institute, Tampa General Hospital, Bayfront Health, Pepin Institute Florida Hospital	Cardiovascular services
Moffitt Cancer Center	Cancer research and cutting edge treatments

ESTIMATED PATIENTS ORIGIN:

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Gaps, Barriers, Opportunities

WILLKOMMEN

Global Referral Network

欢迎

BIENVENIDA

A “Welcome to the Destination” system should be implemented for those with different cultural backgrounds or language barriers.

At the institutional level marketing and international departments must work jointly in reaching out to international partners, thus increasing patient volume through referrals. Relationship building will be essential in achieving these objectives.

ترحيب

BEM-VINDO

Methods for Strategy Success

Develop programs focused on education of medical tourism best practices, training of IPS and cultural competency.

Develop and implement a program at the destination level, where patients/consumers are engaged, as a tool to increase satisfaction.

Implement targeted marketing campaigns and regional brand awareness at all levels of the patient/consumer experience.

Highlight specialized treatments and services that meet the needs of the target markets.

Develop a system that monitors the quality of medical services as they grow to meet increased flow of inbound patients/consumers.

Create medium and long term plans for the development and enhancement of physical infrastructure to meet service demand.

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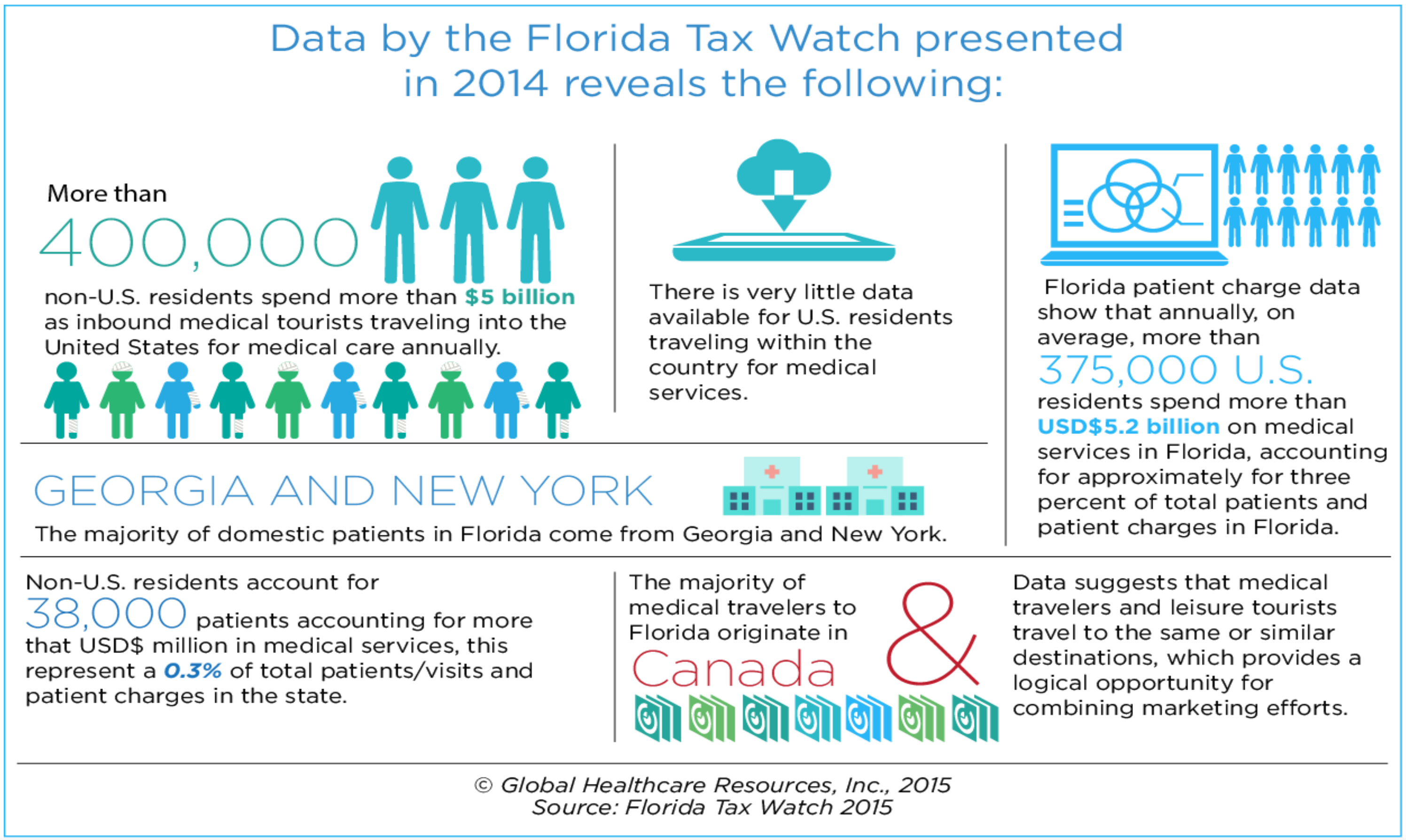
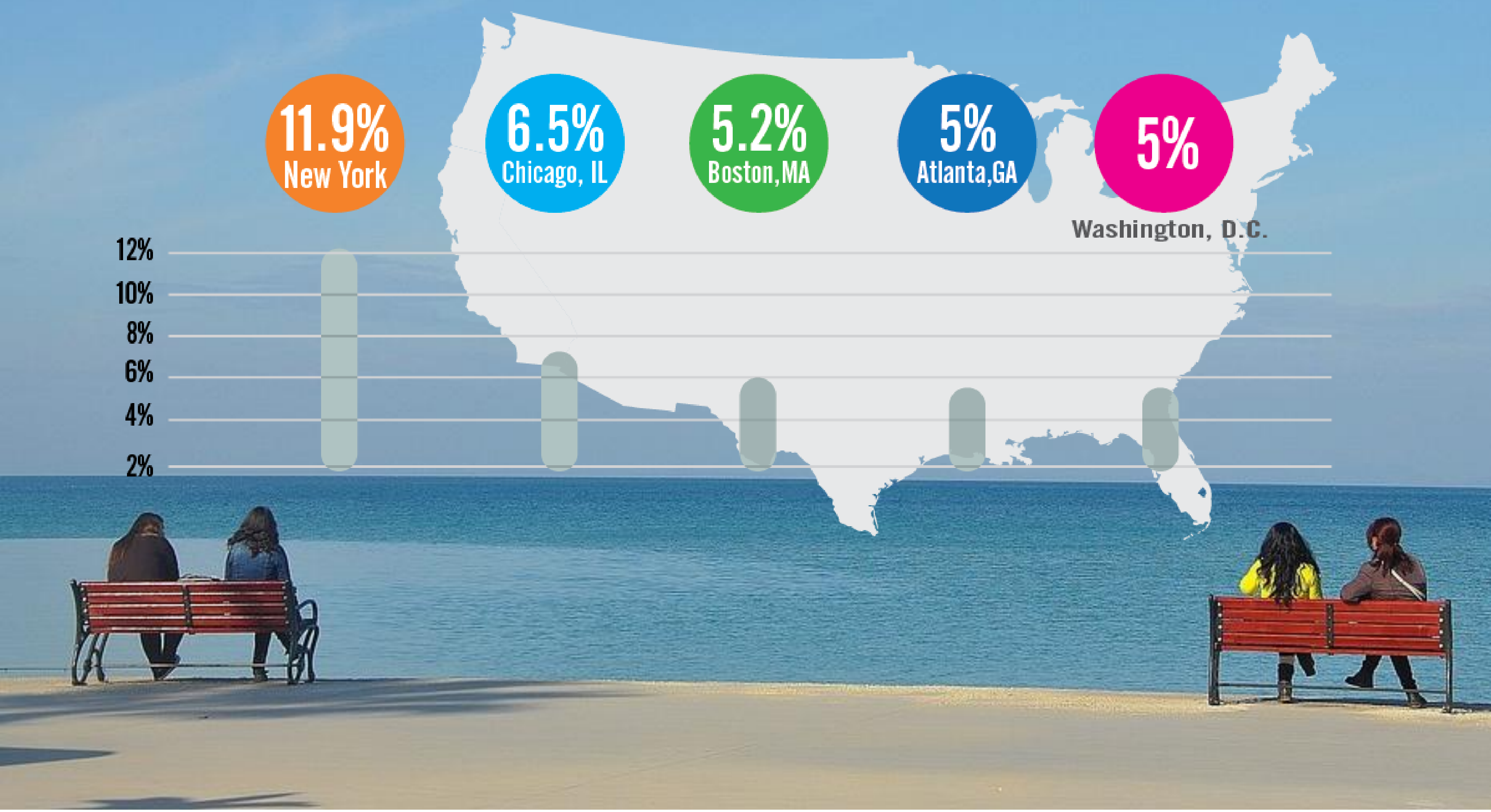
Inbound Patients in Florida

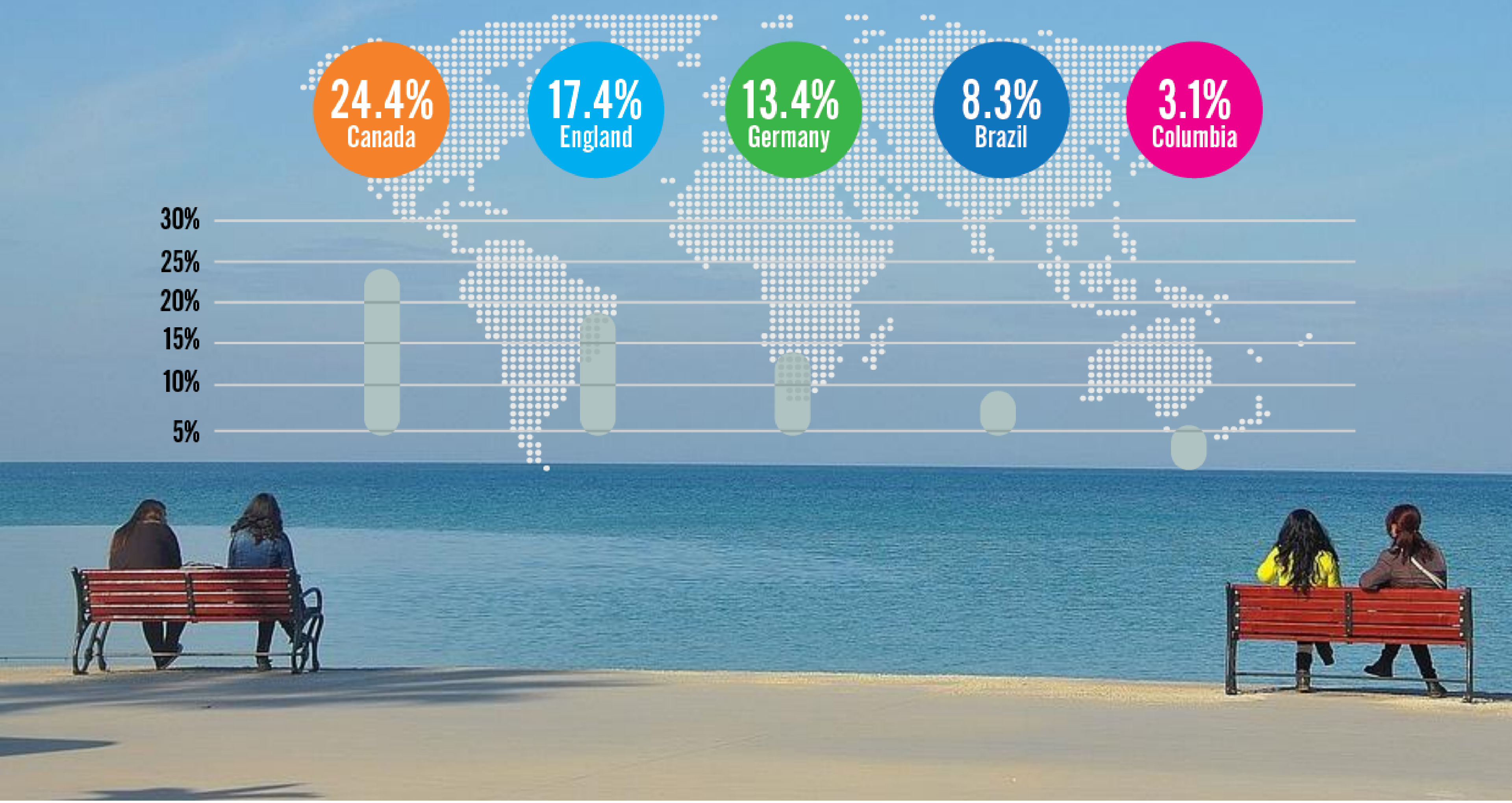


Based on the data collected for this project, it is estimated that 11 centers receive between 75 to 525 inbound patients annually.

Top Domestic Markets



Top International Markets



Top Target Markets

Canada
Latin America
China
Middle East – Mainly UAE
United Kingdom – Mainly England
France
Switzerland
Germany
Sweden

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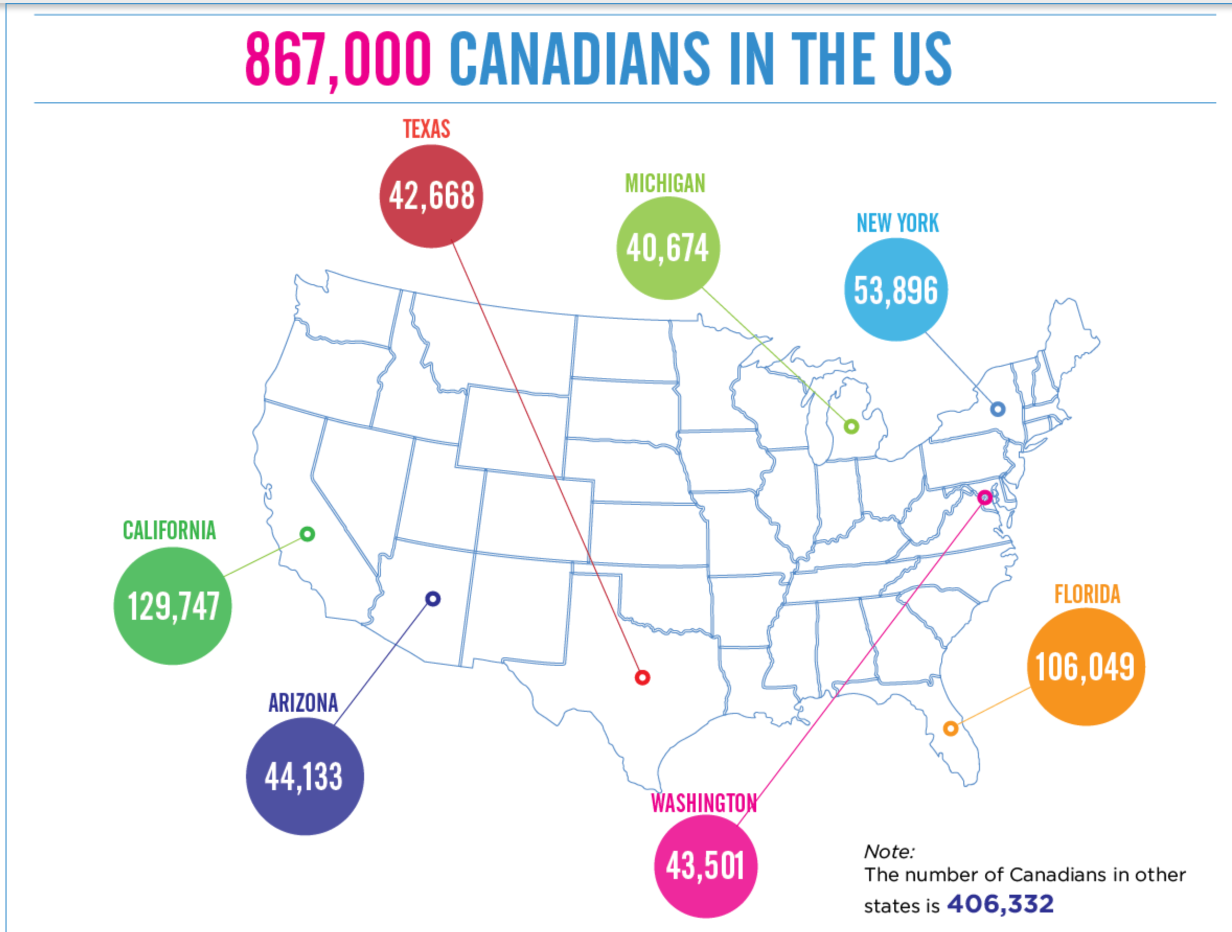
Market Prioritization

The Americas - Canada



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Market Prioritization

The Americas – Central and South America

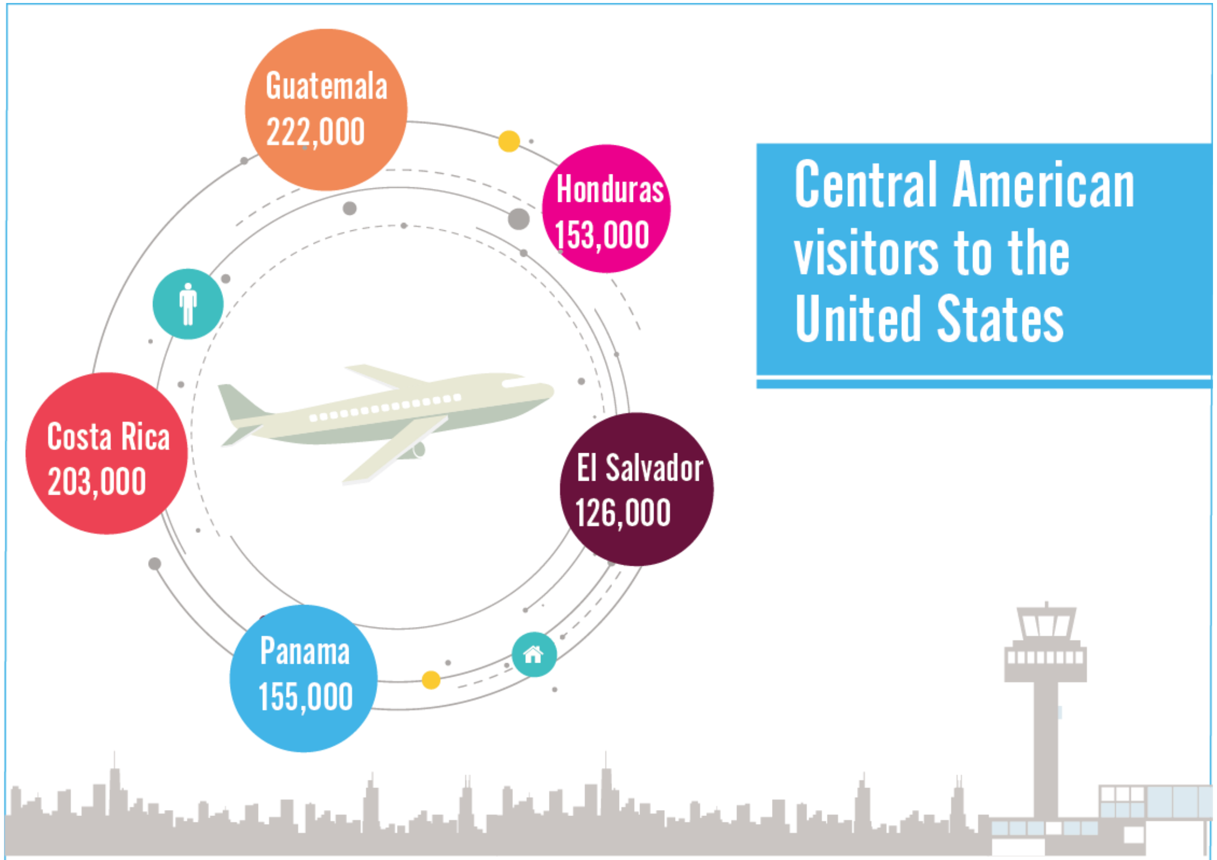
Latin America: Healthcare Spending (US$ per head)

Year	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Argentina	694	731	740	899	948	921	903	864	896	949
Brazil	735	757	1,011	1,142	1,041	1,095	1,168	1,242	1,312	1,388
Chile	761	743	955	1,107	1,187	1,279	1,330	1,416	1,516	1,656
Colombia	399	384	465	538	575	601	631	670	693	734
Mexico	587	516	579	672	686	782	866	920	979	1,057
Venezuela	615	794	794	621	765	670	818	983	881	839

Source: 2015 Economist Intelligence Unit

Market Prioritization

The Americas – Central and South America



Source: U.S. Department of Commerce 2014

Market Prioritization

China

OVER
2.1 Million
Chinese tourists visited the United States in 2014

In 2013
266,000
vacationed in Florida ranking them as the twelfth top visitor to the State

$253.5 Million
They were ranked eleventh in spending with **$253.5 million** in sales

90 Percent
1 per cent of all high net worth Chinese traveled abroad for healthcare creating **90 percent** of inbound patient volume into the U.S.

Source: Sources: US Department of Commerce, Visit Florida

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Market Prioritization

Middle East

1.23 million

In 2014, it is estimated 1.23 million Middle East visitors traveled to the U.S.

2%

Two percent claimed Health Treatment was the main purpose for their trip.

27.2 nights

Their average Length of Stay was 27.2 nights, and the average Travel Party Size was 1.4 persons

6.77 million

In 2013, this group spent $6.77 million on travel and tourism in the U.S.

Source: Source: US Department of Commerce

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Market Prioritization

Europe

2014 top European arrivals and visitor spend to the United States.		
Country	**Arrivals to the US**	**Visitor Spending**
United Kingdom	3.97 million	$13.2 billion
Germany	1.97 million	$7.4 billion
France	1.63 million	$5.7 billion
Italy	934,000	$3.62 million (2013 statistics)
Sweden	543,000	$1.72 million (2013 statistics)
Switzerland	487,000	$2.5 million (2013 statistics)

Arrivals and total spending of Core European Markets that visited Florida in 2012		
Country	**Arrivals to Florida**	**Visitor Spending**
United Kingdom	1.6 million	$955 million
Germany	403,000	$284 million
France	300,000	$211 million

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Market Prioritization

Europe

In 2014, there were 13.7 million Europeans who visited the United States, with Florida receiving 3 million, and Tampa Bay getting almost 10 percent of that number.

According to the U.S. Department of Commerce, the top three incoming European countries to the U.S. were the United Kingdom, Germany and France. Collectively they spent $26.3 billion.

The National Travel and Tourism Office's 2014 Market Profiles asked travelers their purpose of his/her trip. Less than 0.1 percent of the travelers from the European countries listed, answered affirmatively that is was for health treatment reasons.

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Recommendation: Healthcare

Consulting and Advisory Services

Super specialization of areas of expertise for each of the participating health centers should be highlighted

Consumers are driven by niche areas of medical expertise and “Rock Star” doctors at the top of their field.

Recommendations: Tourism

Regional Brand Identity and Strategy

Greater communication between CVB's in terms of determining a cohesive regional brand identity and marketing strategy should be encouraged to avoid duplication of efforts.

This will reduce redundancy in promotion of the region, increase effectiveness in expanding existing and new markets, and provide greater efficiency in communicating the benefits and services offered at the regional level, instead of at the county level.

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Recommendations: All Sectors

Expand Existing and Build New Channels of Service Revenue

Providers have been working in "Silos" in the three counties, which has created a void in understanding support services needed to deliver the best service to patients from other cultures, inhibits information gathering, and sharing or development of services.

A system "hub" where all sectors are seamlessly integrated should be developed. This must be done though a collaborative effort between all willing providers. Modifications to operations of facilities may be required, from internal communications, services provided to customers, and technology systems to track progress and ROI.

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