

Auspiciado por:



Taller de Perspectivas Económicas: Oportunidades y Riesgos



miércoles, 10 de febrero de 2010

8:00 a.m. - 2:30 p.m. | Conrad San Juan Condado Plaza

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Medical Travel a New Model in Puerto Rico's Healthcare Industry and its Economic Development Impact

Puerto Rico Chamber of Commerce
Economic Perspectives - Emerging Markets
February 10, 2010



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The Market

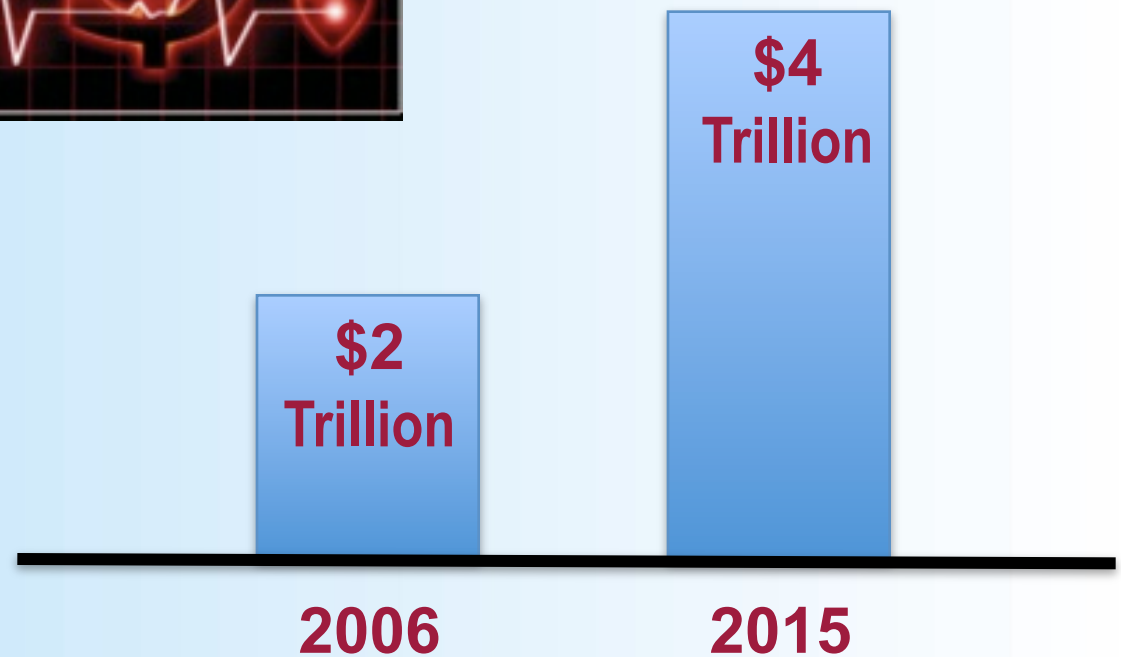
American healthcare system is now a \$2.4 trillion industry

Source: Deloitte Center for Medical Solutions



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U.S. Healthcare Costs Will Continue To Rise



Source: National Coalition on Health Care



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The Problem For U.S. Patients

- 45 million Americans are uninsured
- 90 million are self-insured
- 120 million are underinsured
- 79 million have medical bills or medical debt problems

Source: Commonwealth Fund and US Census Bureau

The Solution



Americans Are Taking Charge –
Going Global for Medical Care



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Current Top Choices for Off-Shore Medical Care

- India
- Singapore
- Costa Rica
- Brazil
- Thailand
- Dubai
- Mexico



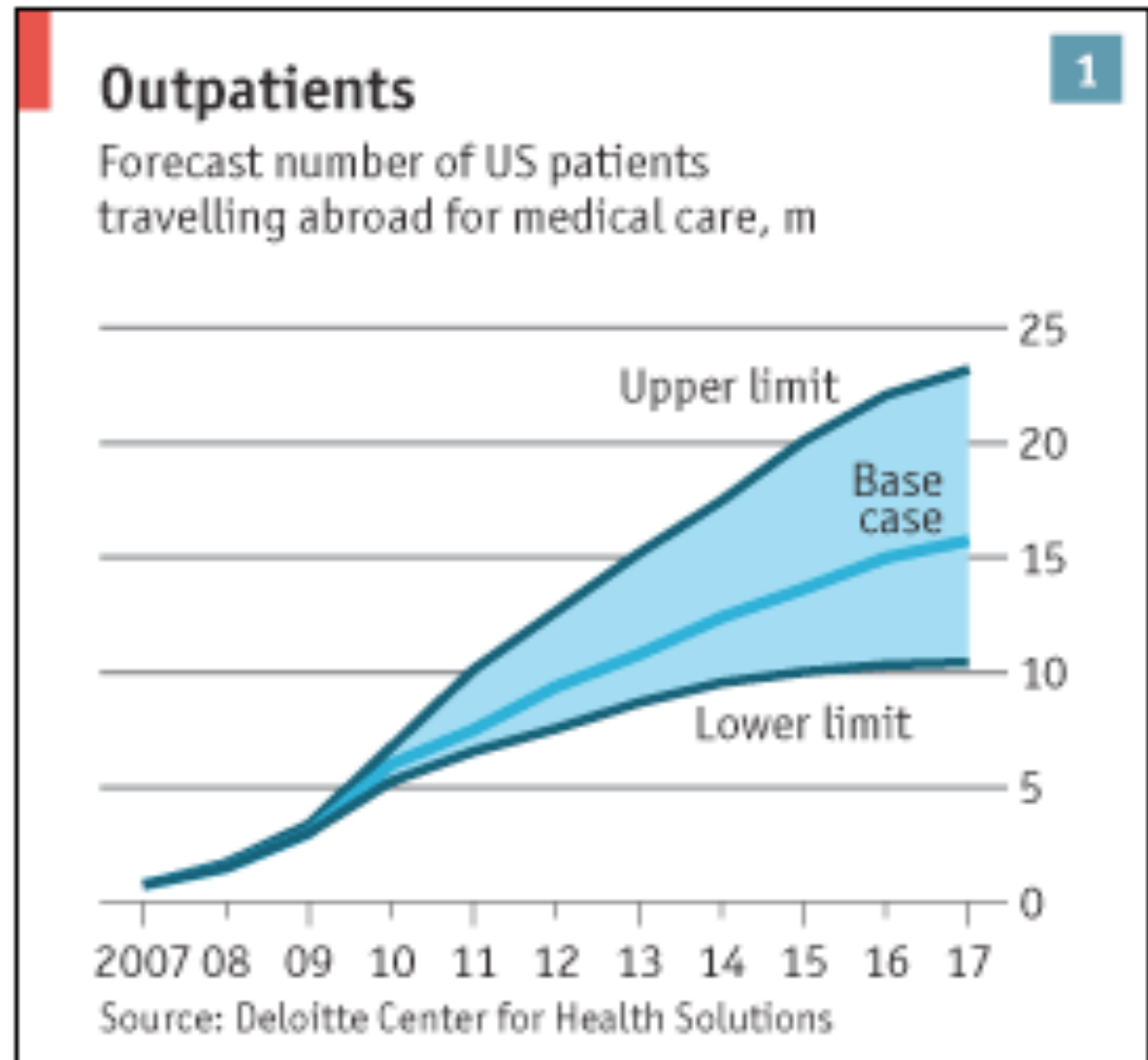
Bumrungrad hospital in Thailand alone treated 64,000 Americans last year - up 11 percent from 2005

Source: Joint Commission International (JCI)



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The Market Will Continue To Grow



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Why Puerto Rico?

- Joint Commission
- Board Certified Physicians
- U.S. Quality Standards and Outcomes
- State of the Art Technology
 - Cyberknife ®
 - DaVinci ®
 - Aquilion One ®
- All travel advantages as a U.S. territory
- Local and Federal laws






**Our costs are
50-70% lower than U.S. mainland**

Procedure	Average U.S. Cost	Average HIMAHEALTH Cost
Aortic Valve Replacement	\$100K - \$160K	\$25K - \$35K
Coronary Artery Bypass Surgery	\$80K - \$120K	\$25K - \$35K
Total Hip Replacement	\$33K - \$64K	\$14K - \$18K
Total Knee Replacement	\$30K - \$59K	\$12K – \$16K
Gastrointestinal Endoscopic Procedures	\$10K - \$12K	\$2K – \$3K



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Potential Economic Impact

- 
- 2 Million Potential US patients by 2011
 - Capture ratio 2%
 - 40,000 Visitors to Puerto Rico
 - 80,000 Including One Family Member
 - Average Daily Expenditure - \$350
 - Average length of Stay: 10-14 days
 - Potential Economic Impact: \$140 – \$196MM
 - Healthcare Industry Impact: \$600 - \$800B



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Source: Smith Travel Research, Deloitte, Puerto Rico Convention Bureau



Medical Travel Opportunities for Puerto Rico Hemodialysis Market



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What is Dialysis?

- Is a type of renal replacement therapy which is used to provide an artificial replacement for lost kidney function due to renal failure.
- a life support treatment and does not treat any kidney diseases.
- may be used for very sick patients who have suddenly lost their kidney function (acute renal failure) or for quite stable patients who have permanently lost their kidney function (end stage renal failure).



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Market Size

- In the United States, over ten million Americans have seriously reduced kidney function and over 400,000 have complete kidney failure.



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The Rationale

- Medical treatment in Puerto Rico is of the same quality standards to the U.S.
- All U.S. citizens in dialysis treatment are insured and covered by Medicare.
- Dialysis Centers Network in Puerto Rico.





Business Model

Niche Market

- Hemodialysis patients and family members.

Product Development

- Existing destination packages enhanced with niche market specific needs.

Media Outreach

- Marketing and Public Relations Initiatives in conjunction with destination partners (Hotels, Airlines, Travel Agents, Wholesalers, .com's, PRTC, PRHTA).

Media Target

- Top Associations websites, newsletters, and magazines
- Dialysis centers
- Physicians and patients mailing lists
- Health publications
- Social Media

Tactical programs

- Press Trips; Fam trips for key social workers; Trade shows; Incentive Programs for groups; Possible conventions to be host in Puerto Rico



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Business Model - continued

Distribution
channels and
Call to action

- **Destination partners
(LibGo, Expedia, Orbitz, Delta Vacations, etc.)**

Concierge
Services

- **All special requirements, transportation, and medical appointments handled by HIMAHEALTH Call Center**

Travel

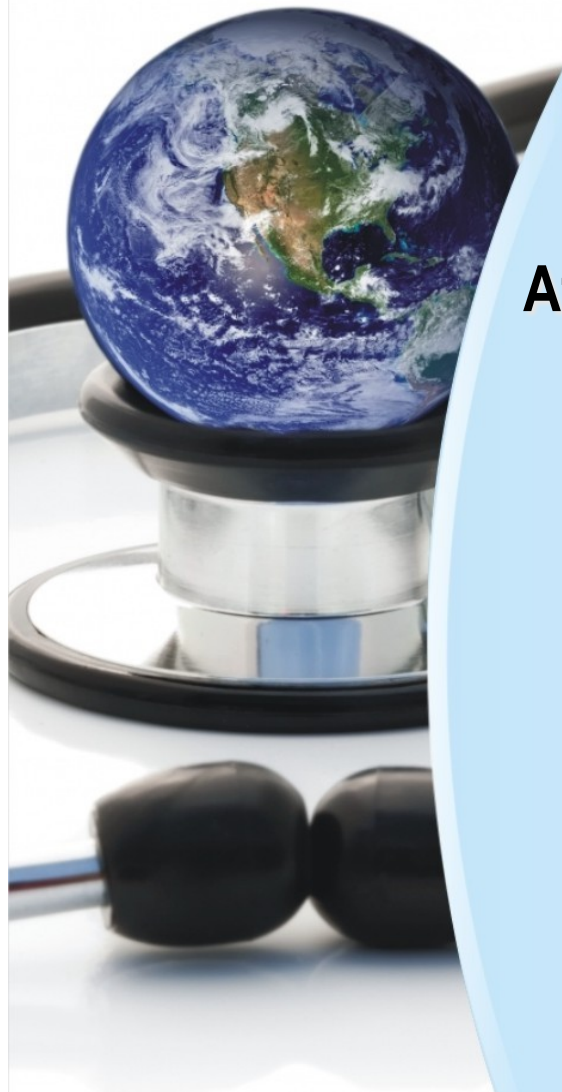
- **Visitors enjoys vacation in Puerto Rico
(normally 7 – 10 days)**

Dialysis
Centers

- **Pre-arranged appointments in one of the Atlantis Dialysis Centers through out the Island**



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Business Model - continued

Atlantis Dialysis Centers Network

- Guaynabo
- Carolina
- Fajardo
- Caguas
- Mayaguez
- Ponce
- Aguadilla
- Isabela
- San Sebastián
- Lares
- Manatí
- Toa Baja





Concierge Program

One to One Patient Coordination Program through the Grupo HIMA•San Pablo Call Center (all patients).

- Care Coordinators will assist patients with all travel logistics and healthcare logistics (fully bilingual).
 - Transportation
 - Facility and Clinical Staff Information
 - Medical Appointments
 - Emergency Services
 - Personalized Assistance
 - Technology Information
 - Concierge Service
 - Care Coordination Protocols



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¡Gracias!

Q & A



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