

DRAFT National Strategy for Medical Tourism



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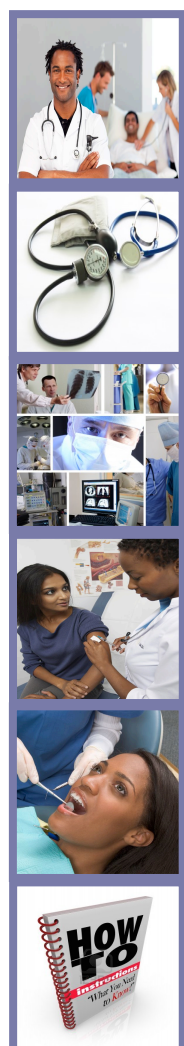
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Introduction

Objective

Services exports in Trinidad and Tobago currently amount to an estimated US\$ 861 million, of which the vast majority (75%) comprises tourism and transport. Therefore, commercial services exports (including financial, ICT, BPO, medical, yachting, professional services, education, creative industries, fashion) amount to an estimated US\$ 215 million.

However, there is no official data on the exact composition of commercial services exports. Estimates based on industry surveys indicate that medical tourism services in Trinidad and Tobago amount to US\$ million [to be inserted following survey results] based on fees and spending of thousand [to be inserted by segment] foreign patients for surgery, treatments, dental and ophthalmic.



The overall objective of the Strategy for Medical Tourism Services is to increase the number of foreign patients visiting Trinidad and Tobago by 6,500 contributing an additional US\$ 37 million to services exports and the economy as a whole after 3 years and then grow at of 20% per annum thereafter.

The Opportunity

NATIONAL CAPACITY

There are ten private hospitals in Trinidad and Tobago (all registered by law with the Ministry of Health under the Private Hospitals Act). The capacity of private hospitals is estimated¹ at 39,000 patients per year with estimated current utilisation of 31,000 per annum; meaning there is excess capacity.

Dentistry in Trinidad and Tobago is a wholly private sector area. There are several 1,000 dental practises, many of whom undertake surgery as well as more routine treatments.

According to the Ministry of Health, Trinidad and Tobago has excellent capability and track record (higher than average success rates) in 3 of the main market segments for medical tourism: joint replacements, cardiac surgery and dentistry.

Although some regional and diaspora medical tourists come to Trinidad and Tobago for treatment, the medical tourism sector is under developed and limited.

[Insert data on what services are currently exported, % surgery, dental ... and where the patients come from both in numbers and value – use pie chart]

¹ Private Hospitals Association Interview (2012)

GLOBAL MARKET

The global value of medical tourism in 2010 was over US\$ 40 billion² (although figures like these are highly contentious and subject to debate). This is further complicated by the lack of agreed definitions of medical tourism (and the wider health and wellness sector) but would cover general treatment/surgery including cosmetic surgery (although excludes dental treatments, but includes dental surgery).

Many developing countries are already benefiting from this new type of tourism, especially in Asia where Singapore and Thailand are estimated to receive around US\$ 900 million per annum from medical tourism with India and Malaysia growing quickly with earnings of US\$ 333 million and US\$ 400 million respectively.

The main sources of medical tourists are:

Table 1: Global Medical Tourists by Source and Destination

Country	Number of Medical Tourists	Principle Destinations
Germany	500,000 (2007)	Thailand, India, Turkey, Poland.
US	400,000 (2006)	Costa Rica, Mexico, Thailand, Philippines and India
Middle East	350,000 (2007)	India, Singapore, Thailand, United Kingdom, Turkey
Canada	230,000 (2007)	Cuba, Costa Rica, Hungary, India, Israel, Jordan, Lithuania, Malaysia, Thailand, Belgium, Poland and Singapore
UK	100,000 (2007)	India, Hungary, Turkey, Germany, Malaysia, Poland and Spain

With current costs of healthcare in home countries of most medical tourists growing, it is expected that the number of medical tourists from Europe, North America and the Middle East will grow significantly over coming years. Similarly, the number of “overseas” purpose built facilities is also expected to grow with this demand.

Emerging policies and trends are fuelling the demand for medical tourism:

- US Healthcare reform act has added millions of Americans to the Medicaid program, which does not cover the true cost of care
- Increased demand for outpatient surgery (75% of all medical tourism treatments)
- Increased access to low cost travel
- Shortage of physicians and primary care workers in the US and Europe
- Millions of baby boomers will be turning 65 in the near future, qualifying for Medicare
- Increase in numbers of Americans and Europeans with chronic diseases
- Governments of host countries setting up initiatives such as fast track visa and tax breaks
- Medical inflation at 3.6% outstrips retail inflation of 2.1% in the USA

The key to attracting foreign, and especially US, medical tourists is international accreditation such as JCI or Trent. There are currently more than 255 Joint Commission-accredited hospitals outside the USA, this is the same accreditation that more than 4,800 hospitals in the US receive and the same accreditation that Medicare recognises. According to JCI surveys, patient experience and satisfaction at

² Tourism Research and Marketing (TRAM) 2010

JCI hospitals abroad is generally more favourable than the USA; surgical complication rates compare favourably and; cost savings on most surgical procedures can exceed 50-80% of the US cost.

VALUE PROPOSITION

The impact on the economy of medical tourists can be significant. First there is the cost of the treatment. In addition, medical tourists also spend in the economy as any other tourists (usually higher per day spend) and have a companion. Therefore, each medical tourist can be worth much more than the average US\$5,000 per treatment spent. Medical tourists and companions have been seen to spend US\$200 per day for 14 days (or approximately another US\$5,000 per trip). Therefore, an average mainstream medical tourist could contribute US\$ 10,000 to the economy of Trinidad and Tobago.

In addition, diaspora and existing tourists (both vacation and yachts people for example) could also be targeted for medical tourism. Although contribution to the economy would be restricted to the fees as these tourists would likely be in Trinidad and Tobago already and treatments are likely to be lower value as they may be seen to be taking advantage of the facilities rather than travelling for medical tourism explicitly.

Overall Approach

Specific targets **by end of 3 years:**

	Foreign Patients	Contribution to the Economy
Total increase per annum	6,500	US\$ 37 million
Mainstream Medical Tourists	1,500	US\$ 15 million
Diaspora Medical Tourists	4,000	US\$ 20 million
Vacation Medical Tourists	1,000	US\$ 2 million

In order to achieve these targets, a number of strategic goals and associated activities need to be undertaken:

1. Sector Wide Awareness and Promotion

- Awareness Raising and Destination Branding
- Lobby Government for Support and Legislative Changes
- Facility Upgrading and International Accreditation
- Development of Medical and Malpractice Insurance Market

2. Promotion of Mainstream Medical Tourism

- Advertising and Awareness in Target Markets
- Inward Trade Missions from the US
- Regional Events/Expos

3. Promotion to of Medical Tourism Diaspora

- *Advertising and Awareness in Selected Markets*
- *Diaspora Events*

4. Promotion to Vacation Medical Tourists

- *Integrate with National Advertising/Promotion of Tourism*
- *Advertising and Awareness Raising*
- *Discussions with Travel Agents*

Strategic Goal 1: Sector Wide Awareness and Promotion

Specific Targets

Cooperation, coordination and awareness raising within Trinidad and Tobago and development of a national brand and identity for Trinidad and Tobago as a medical tourism destination are essential to realising the potential of the sector. Therefore, the initial strategic goal should focus on ensuring the sector works together to promote their collective interests both within Trinidad and Tobago and globally. Although no quantitative target can be set as these activities will not directly generate incomes or patients, the activities under this goal are necessary prior to implementation of other activities under the subsequent Strategic Goals – that is, the target is a necessary condition:



The specific target for Strategic Goal 1: Sector Wide Awareness and Promotion will be to bring together medical stakeholders and collectively improve the standards and quality of service to internationally recognised levels.

Cooperation is essential in the medical tourism sector as the national reputation is more critical to export development than the reputation of individual hospitals or practices. One poor incident of care will affect the prospects of all.

In order to achieve this target, a number of Activities are proposed

- ➔ Awareness Raising and Destination Branding
- ➔ Lobby Government for Support and Legislative Changes
- ➔ Facility Upgrading and International Accreditation
- ➔ Development of Medical and Malpractice Insurance Market

Awareness Raising and Destination Branding

AIMS

- To promote awareness of the sector nationally, including the benefits to the economy so as to gain widespread support and understanding of the sector
- To develop an international reputation for Trinidad and Tobago as a medical tourism destination

OUTPUTS

1. National Awareness Campaign
2. International Branding Campaign

3. Awareness raising events such as advertisements in international press (industry and non-industry), media coverage, participation in international conferences, editorials

ACTIONS

Task 1 – National Website and Portal: In order to be able to adequately promote the sector, it is important that it is understood fully. This would also involve creating and maintaining a database and directory of practitioners to be promoted and referred to by potential patients and partners on line and link directly to practitioners. In addition, related facilities would also be included such as hotels catering to recovery, rehabilitation centres, spas, transport and complimentary therapies.

Task 2 – Building a National Brand: Prior to promotion of the sector, both nationally and internationally, the core elements of a Trinidad and Tobago Medical Tourism Brand need to be defined and elaborated. This will become the focal point of promotion of the sector, delivering constant, consistent key messages of the Brand, including image, strengths, niche markets and USP. Whilst this brand would not be static, it should evolve slowly rather than having dramatic changes and so the initial branding is a key element of the strategy.

Task 3 – Development of National Awareness Campaign: A national awareness campaign for the sector should be developed and revised periodically. The content will depend upon the resources available but would stress key statistics, benefits (actual and potential) of the sector to the economy and encourage political and policy prioritisation and attention.

Task 4 – National Awareness Events: Activities based on the campaign must be implemented and managed. The actual activities will depend both on the campaign design and available resources but could include advertising, editorials, press conferences, awards, sponsorships, newsletters and social media.

Task 5 – International Branding Campaign: Key to long term success is international awareness, branding and reputation as a destination and so implementation of the branding campaign will be important in establishing and maintaining reputation. Key messages such as quality of care (success rates, infection rates etc.), and cost will need to be conveyed to a broad based audience. Again, the actual activities will depend both on the campaign design and available resources but could include advertising (eg Medical Travel Authority magazine in USA), editorials, press conferences, participation in international conferences (World Medical Tourism & Global Health Congress and The Health Care Globalization Summit) and social media.

Lobby Government for Support and Legislative Changes

AIMS

- To create a policy, legislative and regulatory environment that supports and encourages the medical tourism
- To provide adequate government support for marketing promotion and incentives

OUTPUTS

1. Changes or creation of policy, legislation and regulations

2. Budgetary commitment and allocation to export development of the sector

ACTIONS

Task 1 – Review of Legislation and Regulations: There is a need to constantly review the prevailing policies, legislation and regulations to ensure consistency and alignment with the needs to promote the sector. For example, licensing and recognition of qualifications for foreign staff, especially those needed urgently.

Task 2 - Analysis of the Needs of the Sector: Examination of the needs of the sector including business treatment ensuring exporters are treated as such with appropriate fiscal incentives. Also ensure that adequate resources for the promotion of the sector, including prioritisation by government Agencies of medical tourism as an export sector.

Task 3 – Communications: articulate needs to government providing impact on the economy to justify changes in legislation and/or support. This should be based, as much as possible, on a working relationship between the private sector and government and could include establishment of a committee to work on these issues on an on-going basis.

Facility Upgrading and International Accreditation

AIMS

- To improve the international competitiveness of the private medical sector

OUTPUTS

1. Provision of information and awareness of international accreditation (JCI and/or Trent)
2. Audit assessments of facilities
3. Medical facilities certified to international standards

ACTIONS

Task 1 –Promotion of International Standards and Accreditation: A programme of awareness raising on the benefits of accreditation to JCI and/or Trent for hospitals and other practitioners wanting to attract medical tourists. This would include production of information sheets, seminars, editorials and other promotion providing practitioners with various levels of information on both the benefits (need for accreditation) and the content of the standards themselves.

Task 2 - Training and Technical Assistance in Accreditation and Adoption of Standards: Provision of introductory and advanced courses on compliance with international standards. As part of the assistance, audits and inspections of facilities could be undertaken, including detailed reports on what work that needs to be undertaken to comply with accreditation.

Task 3: Upgrading of Facilities: Consideration should be given to providing a subsidy from government (or long term discounted loan) for private practises upgrading and complying with international standards, (including medical and quality assurance schemes).

Task 4: Certification: In order to encourage certification, group schemes for inspection and certification should be arranged to reduce costs. Government should also consider subsidising

such certification to ensure a high quality and good reputation of Trinidad and Tobago's medical tourism product.

Development of Medical Liability and Malpractice Insurance Market

AIMS

- To ensure an adequate medical liability and malpractice insurance system is in place to protect medical tourists

OUTPUTS

1. Changes or creation of appropriate legislation and regulations
2. Availability of adequate medical liability and malpractice insurance

ACTIONS

Task 1 – Review Laws and Regulations relating to Medical Liability and Malpractice Insurance:

Undertake a full review of the legal and regulatory situation as regards medical liability insurance in Trinidad and Tobago with a view to ensuring adequate protection for both practitioners and medical tourists.

Task 2 – Analyse the Insurance Requirements of Target Markets: Research the levels and type of insurance expected by medical tourists and their insurance providers and compare with existing provisions and products offered by local insurance companies.

Task 3 – Adopt and Implement Laws, as required: All stakeholders (practitioners, insurance companies and regulators) work together to develop legislation, regulation and procedures that will provide a conducive environment for medical tourism.

Task 4 – Develop Appropriate Medical Liability and Malpractice Insurance Products: Working with insurance companies to develop products specifically designed for medical tourism to meet the needs of potential clients and protect practitioners. Where possible, group and/or government backed/subsidised schemes should be considered.

Strategic Goal 2: Promotion of Mainstream Medical Tourism

Specific Targets

Long - term growth and development of the medical tourism sector in Trinidad and Tobago will be based on mainstream medical tourists. Given its proximity to the US, which is estimated to now have the largest number of patients travelling for medical treatment with a projected 1,000,000 medical tourists by 2012 (McKinsey & Company 2008), this market should be the long - term target and focus for the Strategy (less than 1% of this market would exceed the current capacity of Trinidad and Tobago). How, these medical tourists can be amongst the most demanding. Therefore, this should also be combined with attracting medical tourists from the region, who currently travel to the US for treatment.



The specific objective of Strategic Goal 2: Promotion of Mainstream Medical Tourism, is to increase the number of foreign patients travelling for treatment to Trinidad Tobago by 1,500 per year – sourced from US (1,000) and Caribbean (500) after 3 years

This target would represent capturing less than 0.1 per cent of the US market and less than 10 per cent of regional market. On this basis, 1,500 additional medical tourists would contribute US\$ 10,000 each to the economy each year totalling US\$ 15 million.

In order to achieve this target, a number of Activities are proposed:

- ➔ Advertising and Awareness in Target Markets
- ➔ Inward Trade Missions from the US
- ➔ Regional Events/expos

Advertising and Awareness in Target Markets

AIMS

- Increase awareness amongst stakeholders in target markets of Trinidad and Tobago's medical tourism capabilities
- Generation of leads from advertising

OUTPUTS

1. Advertising for medical tourism undertaken in all target markets

ACTIONS

Task 1 – Development of an Annual Publicity Plan: Each year, an annual publicity plan should be drawn up. Trinidad and Tobago's publicity strategy should include advertising on the internet (sites to be identified such as healthbase.com, medicalnewstoday.com and other consumer health sites), brochures and videos, and consumer health magazines. Part of the

plan would be identification of appropriate media in each target market based on research. For regional advertising, due to the limited specialist segment, more general media and press coverage would be developed such as radio, news print, professional and business magazines and TV would be considered (also regional airline magazines).

Task 2 – Development of Publicity Materials: Once the publicity plan is in place and selected media identified, appropriate materials will need to be designed and produced. This would include print advertisements with key messages, videos, patient testimonials, brochures and editorials.

Task 3 – Implementation and Enquiry Processing: It is vital that during the implementation of the publicity campaign, adequate communication systems are in place to process incoming enquiries – this could either simply be reference to a national website and directory or a physical office to answer enquiries in a more comprehensive way and follow up effectively.

Inward Trade Missions from the US

AIMS

- To have permanent representation in US through medical tourism travel agents
- To develop relationships with medical insurance companies to extend coverage for treatments in Trinidad and Tobago

OUTPUTS

1. US Medical Travel Agencies list Trinidad and Tobago practitioners
2. US Insurance companies cover treatments in Trinidad and Tobago
3. Agents organise at least 1,000 patients to Trinidad and Tobago

ACTIONS

Task 1 - Identification of Potential Agents in Target Markets: This will involve internet research to list medical travel agents in the US (such as International Medical Travel Journey Database and Medical Tourism Companies.NET). A set of criteria for reducing the list to a manageable number is needed (such as patient testimonials, specialisms in specific treatments offered by Trinidad and Tobago etc.).

Task 2 – Identification of US Medical Insurance Companies: Internet research to identify medical insurance companies that allow travel for treatment and would be willing to consider other destinations. Examination and contact with trade associations such as America's Health Insurance Plans (AHIP) and Blue Cross Blue Shield Association would be a source of initial research.

Task 3 – Industry Approach to Agents and Insurance Companies: Initially, trips by sector wide representatives to visit potential agents and insurance companies will be needed during the vetting process to decide on a short list of interested parties to be invited to Trinidad and Tobago.

Task 4 – Inward Mission: Once interested US agents and Insurance companies have been identified, an inward mission to Trinidad and Tobago would be organised to tour facilities,

meet potential practitioners and develop a framework for approval, appointment and representation of individual practitioners to promote in the US. Such a mission would be paid for to encourage US participation with sufficient numbers to represent all interested practitioners.

Regional Events/expos

AIMS

- To actively promote Trinidad and Tobago's medical tourism facilities regionally

OUTPUTS

1. Undertake awareness events in at least 5 regional countries
2. At least 500 medical tourists attracted

ACTIONS

Task 1 – Selection of Venues in the Target Markets: The target markets will be identified by research in terms of numbers of people travelling for medical care, national facilities average incomes etc. Following this, logistics for the planned events will be organised and would typically be a hotel conference room with a number of stands or tables for each participating medical practitioner or institution.

Task 2 – Selection of Participants: Participants in the awareness fairs will be based on capabilities and assumed demand locally (meeting the national needs). Training and other support will be given to participating institutions including marketing materials (brochures, pens, plastic bags etc.) together with stand design and registration forms for use at the fair and follow up. Costs and financing of participation will depend upon available resources.

Task 3 – Event Planning and Preparation: This would involve logistics, budget and financing, and effective follow up systems. This phase would be expected to take at least 6 months to be effective.

Task 4 - Event Promotion: A comprehensive advertising campaign including banners around the city, newspaper and radio advertising to generate interest in the fair.

Task 5 – Follow up: The majority of people visiting the fair will not necessarily need treatment imminently, and so there is a need for effective and consistent follow up after the fair to convert interest into future patients.

Strategic Goal 3: Promotion of Medical Tourism to Diaspora

Specific Targets

There are an estimated two million diaspora from the Southern Caribbean (mainly Trinidad and Barbados) living in UK, USA and Canada. In most Caribbean countries the estimate is that there are the same number of diaspora as population nationally and with the population of the Southern Caribbean (Trinidad and Tobago, Barbados, St Lucia, St Vincent, Antilles, Aruba and Grenada) of 2.1 million, this estimate follows the trend. Therefore, it is reasonable to assume that the diaspora of Trinidad and Tobago is around 1.3 million people plus their offspring (sometimes two generations).

Given that the 1.3 million diaspora (first generation) are now aging, the need for medical care (and expenses it involves) is growing, medical facilities in Trinidad and Tobago could explicitly target this segment.

Therefore, the specific objective for diaspora medical tourism will be:

The specific target for Strategic Goal 3: Promotion of Medical Tourism to the diaspora will be to attract 4,000 new diaspora patients per year – 2,000 from USA, 1,500 from Canada and 500 from UK after 3 years.

This target would mean less than 0.3 per cent of first generation diaspora travelling to Trinidad and Tobago for medical treatment and if second/third generation were included, less than 0.1 per cent. The impact of 4,000 diaspora patients, spending on average US\$ 5,000 per treatment would generate US\$ 20 million of revenue for private healthcare in Trinidad and Tobago. In order to attract Diaspora medical tourists, a number of Activities are proposed

- ➔ Advertising and Awareness in Selected Markets
- ➔ Diaspora Events

Advertising and Awareness in Selected Markets

AIMS

- Increase awareness amongst Trinidad and Tobago's diaspora in target markets of the available treatments and benefits of medical tourism

OUTPUTS

1. Advertising to diaspora in target markets
2. Enquiries from diaspora to medical practitioners

ACTIONS

Task 1 - Identification of Diaspora Marketing Channels: This will involve internet research to identify associations of diaspora in target markets (US, Canada, UK) such as Trinidad and



Tobago: United Cultural Association (New York), Business Association (New York), Association of Ontario (Canada), Association of Hamilton (Canada), Seniors Association of Canada, Association in the UK. Coordination with the Ministry of Foreign Affairs would also be required

Task 2 – Discussions with Associations: Initial contact with the association to better understand how the diaspora maintain contact including magazines, newsletters, internet and events. If possible, obtain contact details of diaspora to create a direct mail database.

Task 3 – Development of Communications Strategy: Based on the information gathered, an awareness raising strategy will be developed to advertise medical tourism services in various media in target markets, including adverts and editorials in newsletters and magazines, direct mailings and participation in association events. It could also include sponsoring a Carnival troop to major Carnivals such as Notting Hill giving out leaflets on medical tourism and would target diaspora, other Caribbean Diaspora and mainstream medical tourists.

Task 4 – Development of Publicity Materials: Once the publicity plan is in place and selected media identified, appropriate materials will need to be designed and produced. This would include print advertisements with key messages, videos, brochures, directory of services and editorials.

Task 5 – Implementation and Enquiry Processing: It is vital that during the implementation of the publicity campaign, adequate communication resources are available to process incoming enquiries – taking them and passing them onto appropriate practitioners in Trinidad and Tobago and also, with effective follow up to ensure queries are addressed and enquires answered.

Diaspora Events

AIMS

- Increase awareness amongst Trinidad and Tobago's diaspora in target markets of the available treatments and benefits of medical tourism

OUTPUTS

1. At least 12 diaspora events in target markets
2. Enquiries from diaspora to medical practitioners

ACTIONS

Task 1 – Selection of Venues in the Target Markets: Based on research on diaspora organisation in each target market, discussion with diaspora organisations and liaison with Embassies/High Commissions in the target markets, a plan of at least 12 events in US, Canada and UK will be drawn up. The events could include mini-expo's, seminars, parties and "more fun" (national theatre group tour sponsorship with brochures distributed) events to attract diaspora participation. Following this, logistics for the planned events will be organised.

Task 2 – Selection of Participants: Participants in events will be based on capabilities and readiness of practitioners (such as accreditation and insurance). Training and other support will be given to participating practitioners including marketing materials (brochures, pens, plastic bags etc.). Costs and financing of participation will depend upon available resources.

Task 3 – Event Planning and Preparation: This would involve logistics, budget and financing, and effective follow up systems. This phase would be expected to take at least 6 months to be effective.

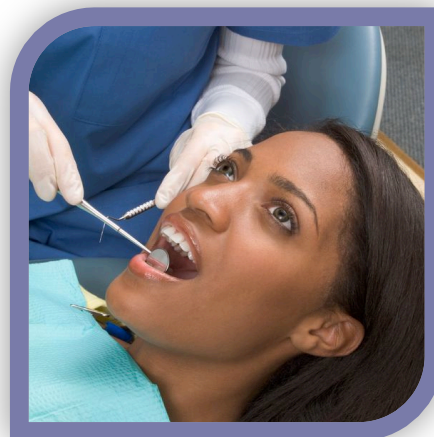
Task 4 - Event Promotion: A comprehensive advertising and direct mail campaign to ensure high levels of diaspora participation.

Task 5 – Events: It is important that sufficient practitioners attend events to enable serious queries to be addressed. The majority of patients visiting the fair will not sign up on the day, and so need effective follow up after the fair to convert interest into patients.

Strategic Goal 4: Promotion to Vacation Medical Tourists

Specific Targets

Trinidad and Tobago receives over 500,000³ stay-over and cruise tourists each year. These tourists mainly come from countries where medical treatments (including dental, optometry, annual medicals and diagnoses) attract large, sometimes prohibitive, fees and/or with long waiting times. Therefore, there is an opportunity for the sale of such services to these tourists. The type of medical services would likely be limited so that it does not interfere too much with the vacation (the prime reason for travel) but could include corrective eye surgery, teeth whitening, MRI scan and annual medicals.



Therefore, the specific objective for vacation tourists will be:

The specific target for Strategic Goal 4: Promotion to Vacation Medical Tourists will be to attract 1,000 tourist to take up medical services after 3 years.

Based on 1,000 tourists receiving medical services in Trinidad and Tobago per year, an additional US\$ 2 million of medical fees will be derived. This target would require 0.2 per cent of tourist visitors electing to seek out and receive treatments. Initially, this will come from vacation tourists who take advantage of the cheaper medical services available but later, Trinidad and Tobago could attract people who want medical treatments or even surgery and want to link this to a vacation.

In order to achieve this target, a number of Activities are proposed:

- ➔ *Integrate with National Advertising/Promotion of Tourism*
- ➔ *Advertising and Awareness raising*
- ➔ *Discussions with Travel Agents*

Integrate with National Advertising/Promotion of Tourism

AIMS

- To increase awareness amongst vacation tourists of the Medical services available in Trinidad and Tobago

OUTPUTS

1. Integration of Medical Services into main national tourism strategy and promotion

ACTIONS

Task 1 – Review of Existing Tourism Promotion Strategy: Review the existing tourism strategy and advertising campaign to examine whether medical tourism promotion can be

³ Calculated from TDC published Statistics (2012); data for 2010.

integrated and form a part of its implementation. For example, if attending trade exhibitions or conferences, include medical tourism and services offered, as part of the range of products being exhibited and/or promoted.

Task 2 – Training of Tourism Policy and Promotion Staff: To increase awareness of the potential demand by vacation tourists for medical services, what is on offer in Trinidad and Tobago and additional value to the economy, a number of training and awareness activities (seminars, leaflets, brochures, meetings) will be undertaken with Ministry of Tourism and TDC staff.

Task 3 – Mainstreaming Medical Tourism: Based on the review, ensure government commitment to include medical services into all promotion of tourism. For example, on websites include links that could also be included in particular segments such as Carnival (promote Carnival and provide details of cosmetic improvements in preparation such laser eye correction, botox, teeth whitening, dental implants etc.).

Advertising and Awareness Raising

AIMS

- To increase awareness of availability of medical treatments to vacation tourists
- To increase the number of vacation tourists seeking medical services whilst in Trinidad and Tobago

OUTPUTS

1. Advertising Medical services nationally and internationally
2. At least 500 vacation tourists seek medical services whilst on holiday

ACTIONS

Task 1 – Development of an Annual Publicity Plan: Each year, an annual publicity plan should be drawn up. This would promote medical services directly to vacation tourists through advertising on incoming planes, posters and information at airport arrivals; posters and other advertising at tourist hotels and other tourist destinations (including tourist offices).

Task 2 – Development of Publicity Materials: Once the publicity plan is in place and selected media identified, appropriate materials will need to be designed and produced. This would include print advertisements with key messages, videos, patient testimonials, brochures and editorials. Part of the selling point will be the cost difference of treatments which must be researched and form part of the marketing materials.

Task 3 – Implementation and Enquiry Processing: It is vital that during the implementation of the publicity campaign, adequate communication resources are available to process incoming enquiries to facilitate and convert enquiries into firm business.

Task 4 – Development of Incentive Programmes: To encourage vacation tourists to take up medical services, practitioners could visit and provide some services at hotels and/or provide transport to and from hotels (or complimentary visits to facilities prior to booking any treatments).

Discussions with Travel Agents

AIMS

- To increase awareness of available medical treatments to travel agents and vacation tourists
- To increase the number of vacation tourists seeking medical services whilst in Trinidad and Tobago

OUTPUTS

1. Advertising Medical services internationally
2. At least 500 vacation tourists pre book medical services whilst on holiday

ACTIONS

Task 1 - Identify Major Travel Agents and Holiday Companies Active in Trinidad and Tobago: Working with Ministry of Tourism and TDC, prepare a database of major tour operators and travel agents selling Trinidad and Tobago holidays. Review the advertising of these holidays to see where medical services could be added as a feature of the holiday.

Task 2 – Mission to Tour Operators and Travel Agents: Undertake a trade mission to major operators to discuss how to include medical services as part of their selling points for holidays to Trinidad and Tobago. Provide information and marketing materials to operators for use, including POS materials if appropriate.

Task 3 – Develop System to Handle Pre-Bookings: Ensure an effective and efficient system to handle enquiries and allow for handling all logistics for facilitating treatments during vacations with minimal hassle and disruption. This could be collaborative with common facilities (such as transport) or privately arranged by Practitioners. With the later approach, training and advice should be given to practitioners regarding customer relations and handling to enhance the reputation of the country.



Action plan

Supervision and M&E

This strategy will require cooperation and actions by a broad range of stakeholders within the public and private sectors. Therefore, there is a real need for a strong supervisory and facilitation role for an APEX organisation that can coordinate and oversee implementation.

This role should be taken on by the Trinidad and Tobago Coalition of Services Industries (TTCSI) who will not only act as the driver of the strategy, but take responsibility for monitoring and evaluation. This will first require undertaking baseline studies of key indicators and publishing progress of the strategy (with appropriate media coverage to support the sector).

This is a crucial role and TTCSI will need to be given appropriate resources to monitor and facilitate implementation in the national interest, and will also need to develop appropriate skills for the task.

Institutional Arrangements

Implementation of this strategy will be undertaken by a broad range of stakeholders in both the public and private sectors. There are a number of options for implementation and lead agencies/organisations depending upon willingness, commitment and resources. During the initial discussion of this strategy amongst stakeholders, the exact modalities will be discussed and agreed, as well as completion of the Outline Action Plan (below).

Outline Action Plan

The following Action Plan provides an indicative schedule of activities to implement the strategy. However, the institutions involved in implementation should review and revise the Action Plan on an on-going basis to ensure its accuracy, relevance and reflect the changing dynamics of Trinidad and Tobago as well as the global market.

Stakeholders will first need to discuss and complete the Outline, assigning Lead Agencies, resources and budgets. Once these have been agreed, each component of the Action Plan must be elaborated into a individual work-plan. The Outline Action Plan and individual Work-plans will need to be revised periodically to take account of available resources, changing politics, commitment of the sector, international market dynamics and lessons from previous activities.



Outline Action Plan – To be Completed by Stakeholders

	Outputs	Result Indicators	Lead Agency	Duration (start-finish months)	Internal Resources	Budget Allocation
Overall objective	Increase the national income from medical tourism by US\$37 million pa after 3 years	Increase in foreign patients by 6,500 pa by Dec 2015	TTCSI	Jan 2013 – Dec 2015		
Strategic Goal 1: Sector Wide Awareness and Promotion						
Specific Target	To bring together medical stakeholders and collectively improve the standards and quality of service to internationally recognised levels					
Activity 1.1 Awareness Raising and Destination Branding						
Task 1.1.1 National Website and Portal	1. National Awareness Campaign 2. International Branding Campaign 3. Awareness raising events such as advertisements in international press (industry and non-industry), media coverage, participation in international conferences, editorials					
Task 1.1.2 Building a national brand						
Task 1.1.3 Development of national awareness campaign						
Task 1.1.4 National awareness events						
Task 1.1.5 International branding campaign						
Activity 1.2 Lobby Government for Support and Legislative Changes						
Task 1.2.1 Review of legislation and regulations	1. Changes or creation of policy, legislation and regulations 2. Budgetary commitment and allocation to export development of the sector					
Task 1.2.2 Analysis of the needs of the sector						
Task 1.2.3 Communications						
Activity 1.3 Facility Upgrading and International Accreditation						
Task 1.3.1 Promotion of international standards and accreditation	1. Provision of information and awareness of international accreditation (JCI and/or Trent) 2. Audit assessments of facilities 3. Medical Facilities certified to international standards					
Task 1.3.2 Training and technical assistance in accreditation and adoption of standards						
Task 1.3.3 Upgrading of facilities						
Task 1.3.4 Certification						
Activity 1.4 Development of Medical Liability and Malpractice Insurance Market						
Task 1.4.1 Review laws and regulations	1. Changes or creation of appropriate					

	Outputs	Result Indicators	Lead Agency	Duration (start-finish months)	Internal Resources	Budget Allocation
relating to medical liability and malpractice insurance	legislation and regulations 2. Availability of adequate medical liability and malpractice insurance					
Task 1.4.2 Analyse the insurance requirements of target markets						
Task 1.4.3 Adopt and implement laws, as required						
Task 1.4.4 Develop appropriate medical liability and malpractice insurance products						
Strategic Goal 2: Promotion of Mainstream Medical Tourism						
Specific Target	US\$ 15 million	To increase the number of foreign patients travelling for treatment to Trinidad Tobago by 1,500 per year – sourced from US (1,000) and Caribbean (500) after 3 years				
Activity 2.1 Advertising and Awareness in Target Markets						
Task 2.1.1 Development of an annual publicity plan	1. Advertising for medical tourism undertaken in all target markets					
Task 2.1.2 Development of publicity materials						
Task 2.1.3 Implementation and enquiry processing						
Activity 2.2 Inward Trade Missions from the US						
Task 2.2.1 Identification of potential agents in target markets	1. US Medical Travel Agencies list Trinidad and Tobago practitioners 2. US Insurance companies cover treatments in Trinidad and Tobago 3. Agents organise at least 1,500 patients to Trinidad and Tobago					
Task 2.2.2 Identification of US Medical Insurance Companies						
Task 2.2.3 Industry Approach to Agents and Insurance Companies						
Task 2.2.4 Inward Mission						
Activity 2.3 Regional Events/expos						
Task 2.3.1 Selection of venues in the target markets	1. Participation in recruitment fairs in Target markets (if appropriate) 2. At least 200 students recruited from fairs					
Task 2.3.2 Selection of participants						
Task 2.3.3 Event Planning and Preparation						

	Outputs	Result Indicators	Lead Agency	Duration (start-finish months)	Internal Resources	Budget Allocation
Task 2.3.4 Event Promotion						
Task 2.3.5 Follow up						
Strategic Goal 3: Promotion of Medical Tourism to Diaspora						
Specific Target	US\$ 20 m	To attract 4,000 new diaspora patients per year – 2,000 from USA, 1,500 from Canada and 500 from UK after 3 years				
Activity 3.1 Advertising and Awareness in Selected Markets						
Task 3.1.1 Identification of diaspora marketing channels	1. Advertising to diaspora in target markets 2. Enquiries from Diaspora to medical practitioners					
Task 3.1.2 Discussions with Associations						
Task 3.1.3 Development of Communications Strategy						
Task 3.1.4 Development of publicity materials						
Task 3.1.5 Implementation and enquiry processing						
Activity 3.2 Diaspora events						
Task 3.2.1 Selection of venues in the target markets	1. At least 12 diaspora events in target markets 2. Enquiries from Diaspora to medical practitioners					
Task 3.2.2 Selection of participants						
Task 3.2.3 Event Planning and Preparation						
Task 3.2.4 Event Promotion						
Task 3.2.5 Events						
Strategic Goal 4: Promotion to Vacation Medical Tourists						
Specific Target	US\$ 2 million	To attract 1,000 tourist to take up medical services after 3 years				
Activity 4.1 Integrate with national advertising/promotion of tourism						
Task 4.1.1 Review of existing tourism promotion strategy	1. Integration of Medical Services into main national tourism strategy and promotion					
Task 4.1.2 Training of Tourism Policy and Promotion Staff						
Task 4.1.3 Mainstreaming medical tourism						
Activity 4.2 Advertising and Awareness Raising						
Task 4.2.1 Development of an annual publicity plan	1. Advertising Medical services nationally and internationally					

	Outputs	Result Indicators	Lead Agency	Duration (start-finish months)	Internal Resources	Budget Allocation
Task 4.2.2 Development of publicity materials	2. At least 500 vacation tourists seek medical services whilst on holiday					
Task 4.2.3 Implementation and enquiry processing						
Task 4.2.4 Development of incentive programmes						
Activity 4.3 Discussions with Travel Agents						
Task 4.3.1 Identify major travel agents and holiday companies active in Trinidad and Tobago	1. Undertake recruitment events in at least 5 regional countries 2. At least 1,000 students recruited from recruitment events					
Task 4.3.2 Mission to Tour Operators and Travel Agents						