

# Marketing to the United States Cultural Aspects

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MEDESALUD 2011  
CONGRESO INTERNACIONAL  
Turismo de Salud  
Medellín - Colombia



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Medellín Ciudad  
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Medellín  
**Health City**  
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CLUSTER SERVICIOS DE MEDICINA  
Y ODONTOLÓGIA  
MEDICINA Y ODONTOLÓGIA



Alcaldía de Medellín

# The Agenda

- What are we selling?
- To whom are we marketing & selling it?
  - If you want to sell to Americans
- Who are Americans?
  - To which Americans?
  - How can we target & reach them
- Structure
- Culture

# Marketing to the United States

## Cultural Aspects

Presentation available at

**[www.StackpoleAssociates.com](http://www.StackpoleAssociates.com)**

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# Where is Medellin??

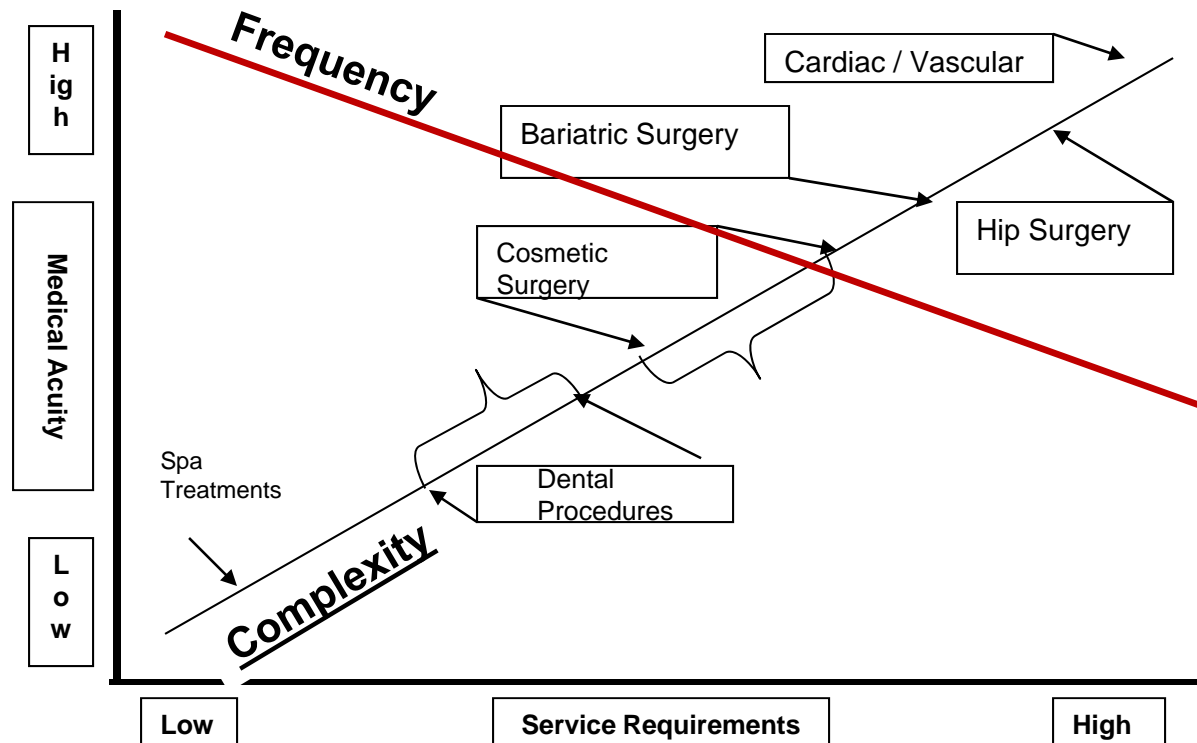


# What is the product

- Cosmetic Surgery, Treatments & Procedures
- Dental / Orthodontics
- Higher Acuity Medical / Surgery
- Treatments unavailable in the US

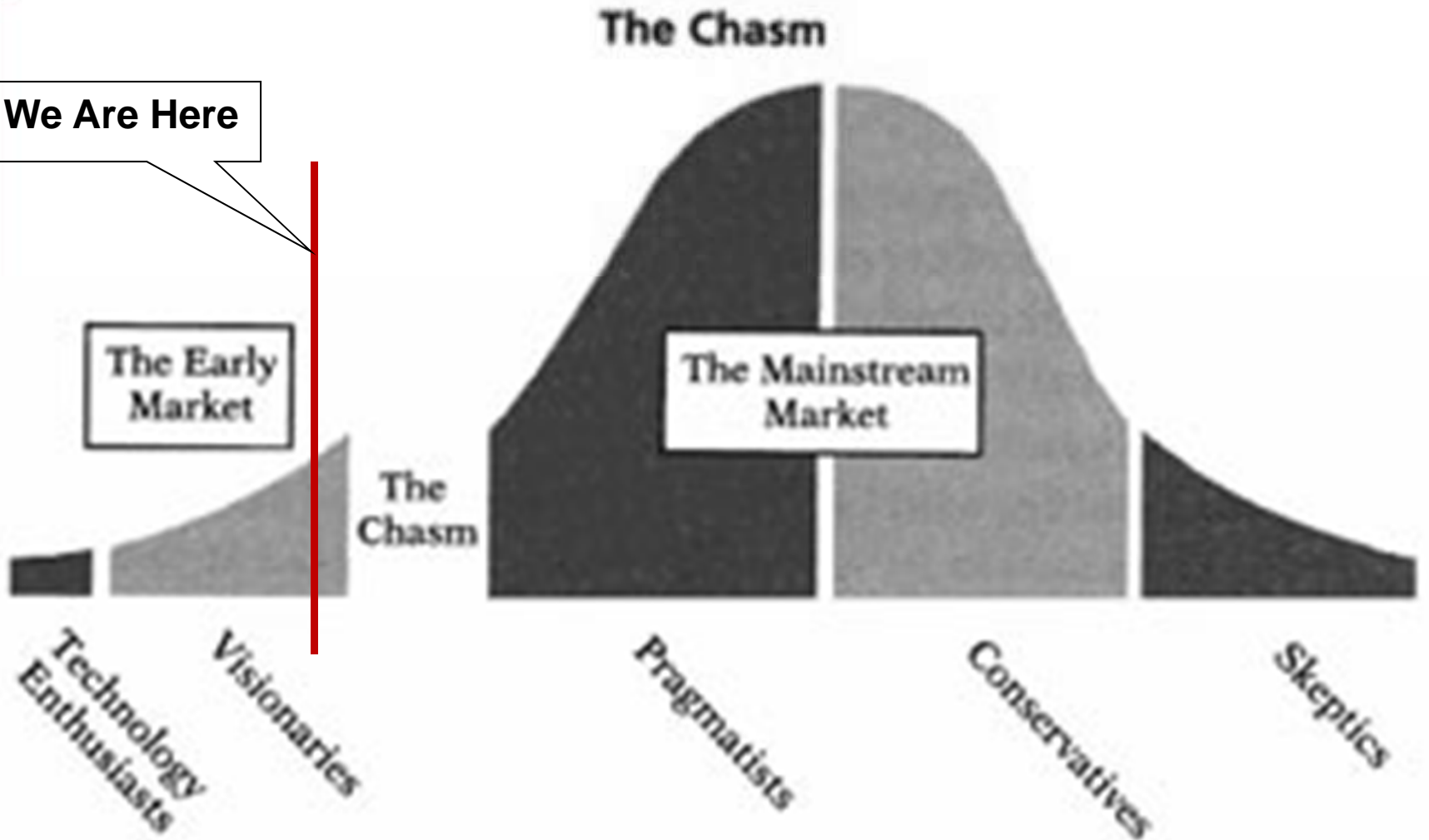
# The Product Array

- **Low acuity is the largest part of market**



## The US outbound healthcare market

We Are Here



# Market Structure

- US Healthcare Markets
  - Business to Business
  - Consumers

- **Business to Business**
- Providers
- Hospitals
- Doctors
- Associations
- Insurers / issuers / payors
- Employers

# Market Structure

- **B-2-B**
- Providers
- Hospitals
- Doctors
- 
- 



# Associations



# Insurance Markets

- Highly complex B-2-B market
- Even more complex post Affordable Care Acts (ACA) health reform legislation
  - ACA up for grabs
  - ACA threatens both
    - Agents who sell health insurance
    - Limited Medical Benefits plans – “Mini Meds”
- Insurance markets uncertain

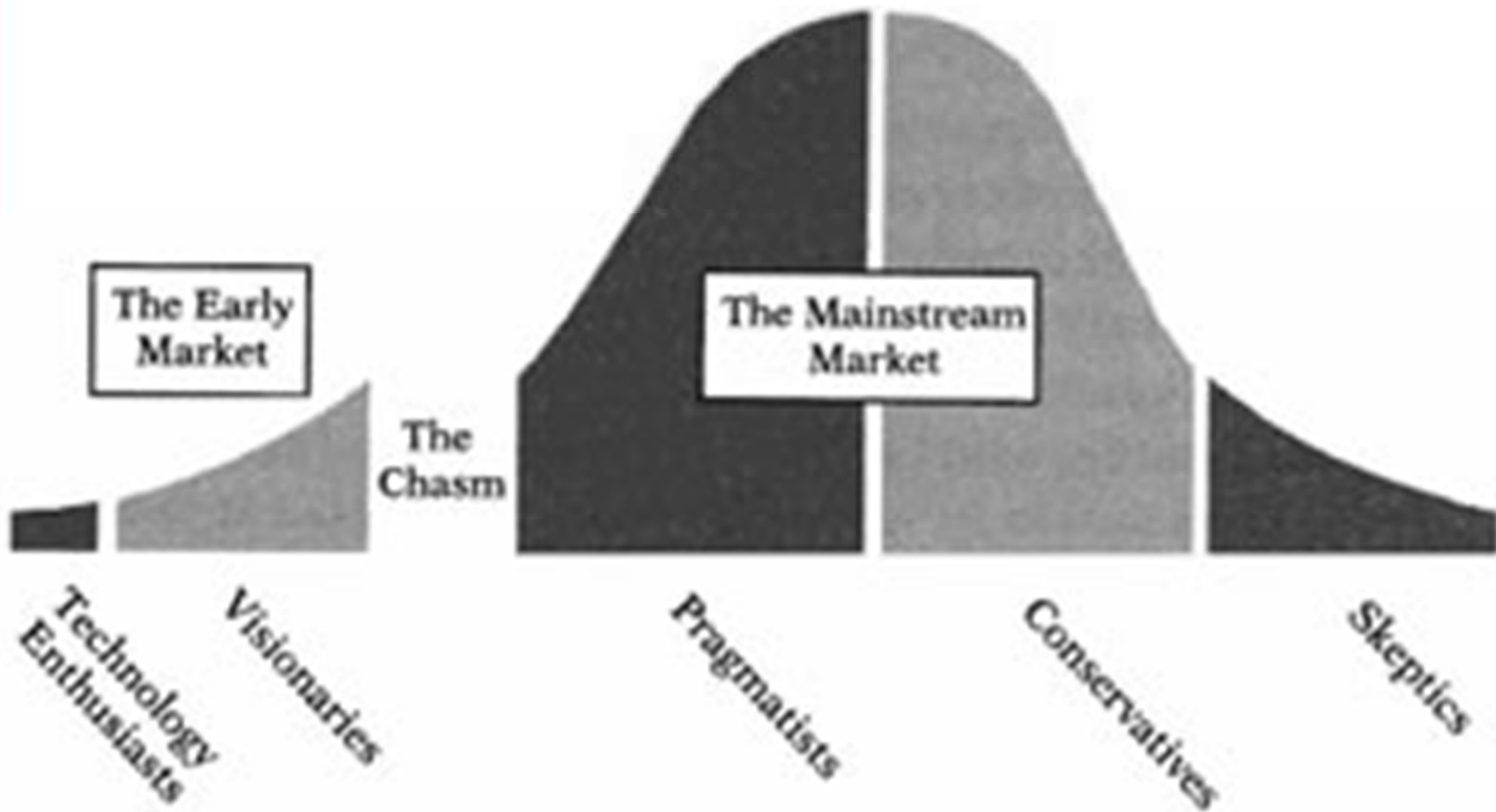
# Employer Market

- Complex B-2-B market
- Some Employers “self insure”
  - Use “third party administrators”
  - Before ACA, TPAs and large employers - OK
  - After ACA – no one knows!
- Employer market uncertain

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## Uncertainty + ACA: Remember the Chasm!



# Consumers

- Demographics

144,760,000	Pop'n w/o HI
62%	Adults
89,751,200	Adult Pop'n w/o HI

Adjust un-insured population for  
poverty, age and miscellaneous

33%	Pop'n - poverty
60,133,304	Adj. for poverty
13%	Pop'n over 65
52,376,108	Adj. for age

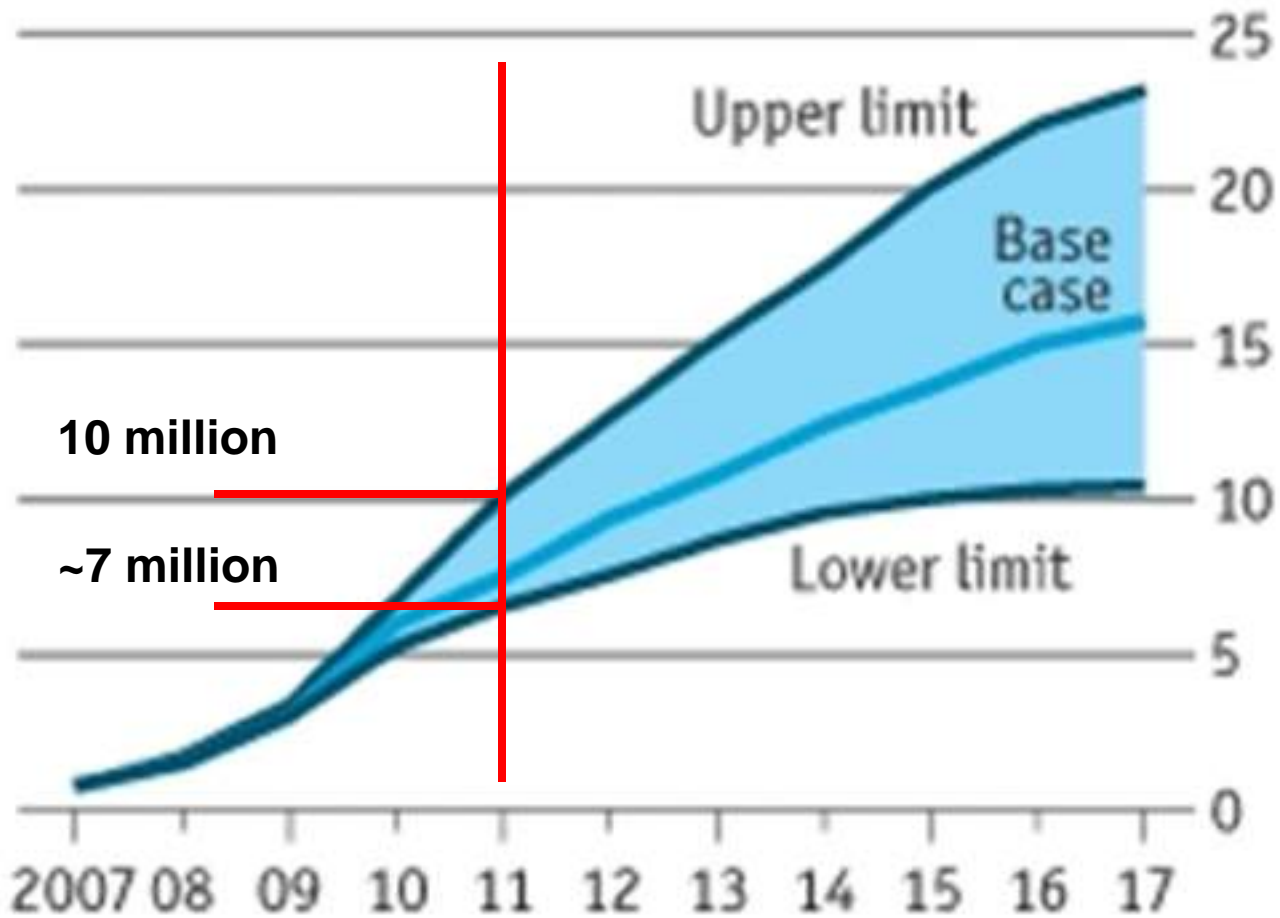
## A few more adjustments

25%	Passport
13,094,027	Adj. for Passport
29%	Willing to travel
3,797,268	Adj. for Willingness



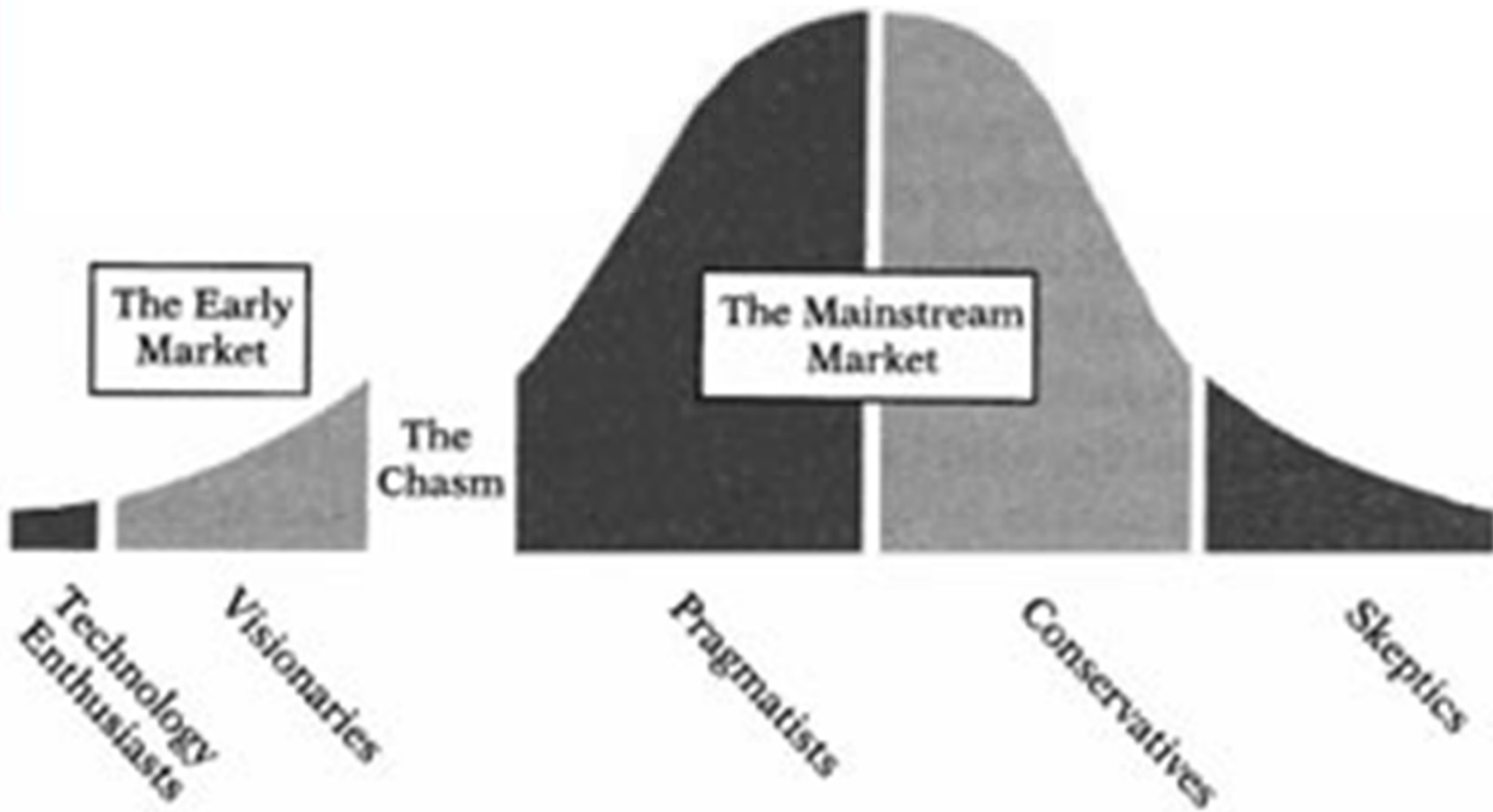
# Outpatients

Forecast number of US patients travelling abroad for medical care, m



Source: Deloitte Center for Health Solutions

## Uncertainty + ACA: Remember the Chasm!



# US Market

- If we get ACA
  - The US market of uninsured ~ 21
  - Much more “willing”
  - More financially motivated
  - Access will be a BIG problem
  - More time for Medellin to establish its brand

# A few bright spots #1

Few w/ dental insurance; dental not part of “Reform”

Out of pocket costs will be high after “Reform”

Demand for Dental, Cosmetic and Non-Traditional, Lifestyle Treatments and Services will grow as population ages

**(Millennials have perfect teeth)**

# A few bright spots #2



[www.StackpoleAssociates.com](http://www.StackpoleAssociates.com)

# And a few more thoughts

- Transactions – American Style
  - Focus, focus, focus
- How Do We Look? Your Web Sites
- How Are We Tweeting You?

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➔ Presentation

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