

An evaluation of medical tourism in India

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Abstract

Medical tourism is a fast growing multibillion-dollar industry around the world and it entails trade in services of two major industries i.e. medicine and tourism. India is currently promoting medical tourism aggressively. The present study presents an overview of medical tourism in India and presents a SWOT analysis and concludes with some valuable suggestions to develop India as a global Medical Tourism destination. The research is descriptive in nature and the data used includes interviews and discussions with various stakeholders as well as a literature review based on secondary sources. The research reveals that the key competitive advantages of India in the medical tourism arena arises from the following: low cost advantage, strong reputation in the advanced healthcare segment (cardiovascular surgery, organ transplants, eye surgery etc.) and the diversity of the many and unique tourist destinations available in the country. The key concerns facing the industry include: absence of government initiatives, the lack of a coordinated effort to promote the industry, the lack of an accreditation mechanism for hospitals and the lack of uniform pricing policies and standards across hospitals throughout India.

Keywords: SWOT, marketing, medical tourism, cardiovascular disease, organ transplants

INTRODUCTION

With the advent of globalization and the growing culture of consumerism, people are beginning to travel globally so as to make use of a wide variety of alternatives that bring them personal satisfaction and which promote healthy living. They are conscious in maintaining a healthy body, mind and soul. Currently millions of people are travelling to tourist destinations seeking healthcare. They are called medical tourists as their main purpose of travel is for healthcare reasons. Medical tourism thus emerges and offers inter-alia numerous options for touring, sight- seeing, shopping and exploring healthy diets (Jyothis, 2009).

The need for better healthcare has grown significantly in recent years, which has led to an increasing number

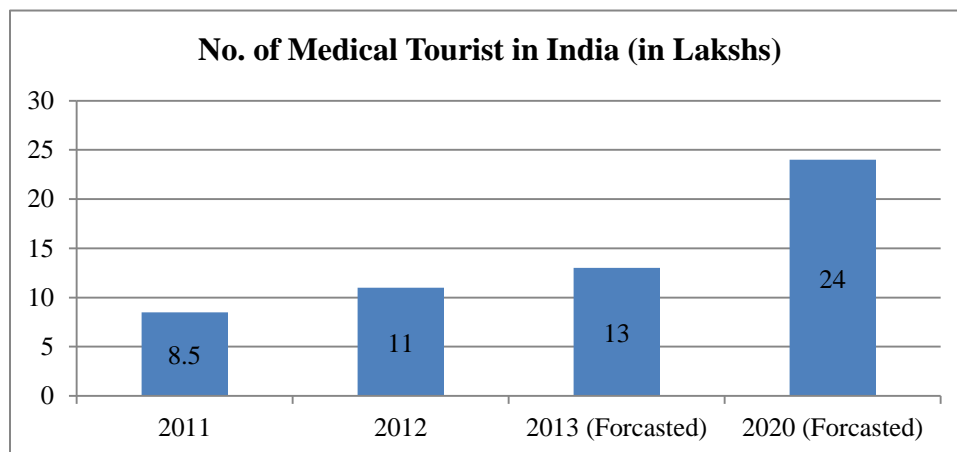
of countries starting to promote medical tourism as an option to boost tourism derived income. Consequently, the popularity of medical tourism has increased significantly in recent years (Pafhausen et. al. 2010). A combination of several factors has led to the recent increase in popularity of medical tourism. People from industrialized nations seek health tourism because of high costs of treatment in their home country. Medical tourism destinations provide high quality treatment at low cost, that is the Medical tourist gets treatment at a fraction of cost that he has to spend for the same procedure in his home country. Moreover they get an opportunity to visit a new country and enjoy its tourism products during the recuperative period (Jyothis, 2009). Medical tourism is a new form of a niche tourism market which has been rapidly growing in

recent years. The term medical tourism is the act of traveling to other countries to obtain medical, dental and surgical care (Dawn & Pal, 2011). According to Goodrich & Goodrich (1987), medical tourism is the attempt by nations to attract tourists by deliberately promoting health services and facilities, in addition to its regular tourist amenities. Medical tourism is becoming a preferred form of vacationing as it covers a broad spectrum of medical services and mixes leisure, fun and relaxation together with wellness and healthcare. Asia has become a prominent destination for global medical tourists because of its cost efficiency by offering a business opportunity and better value for money (Reddy & Qadir, 2010). The number of medical tourists to Asian countries is increasing rapidly each year. The four main countries involved in this trade are India, Singapore, Thailand and Malaysia. (Confederation of Indian Industry-McKinsey, 2002). India is perceived as one of the fastest growing medical tourism destinations. In recent years, government support, low cost, improved healthcare infrastructure, and its rich cultural heritage, have taken

Indian medical tourism to the new heights. Overall, its emergence as one of the world's most cost-efficient medical tourism destinations has helped India to attain a position among the global leaders (Patel et al 2013). A large variety of opportunities exists in tourism in India. It is a highly desirable destination for tourists because of its tourism resources. Niche tourism must be developed for the optimum utilisation of tourism resources. Medical tourism is consequently gaining huge importance now. It is also non-seasonal in nature which bodes well for tourism growth annually.

The potentials of India in the area of health tourism may be identified by evaluating the health tourism products and providers of the country and the competitive advantage of India over other countries in attracting health tourists (Jyothis, 2009).

Figure I: Number of Medical Tourist Arrivals & Future Forecast in India



(Source: North India Management Association Report, 2013)

Realizing the rich potential of Medical tourism, the Indian government has also played an important role in promoting the growth of medical and wellness tourism in India. The "Incredible India" campaign included special sites on Ayurveda and yoga. The Indian Government has also created medical Visa facilities for medical tourists as well as also extending the Marketing Development Assistance (MDA) to accredited hospitals, under which financial support to approved medical and wellness tourism centers will be given for participation in approved Medical/tourism fairs, medical conferences, wellness conferences, wellness fairs and its allied road shows (Rudra, 2011). Realizing the growing importance of Medical tourism in India also requires a need to carefully review existing medical tourism. This study is thus an attempt to meet this requirement and concern by focusing on "AN EVALUATION OF MEDICAL TOURISM IN INDIA".

BACKGROUND OF THE STUDY

'Destination India' is well known for its tourism offerings and she is now emerging as a favoured medical tourism destination because of her ability to provide high quality treatment at low cost. India is unique as it offers holistic medicinal services such as yoga, meditation, Ayurveda, Allopathy and other systems of medicine. Health and Medical tourism is perceived as one of the fastest growing segments in marketing destination India today (Jyothis, 2009).

Mohanty and Madhav (2006) are of the opinion that the Indian health care industry began to recently emerge as a prime destination for medical tourists by upgrading its technology, gaining greater familiarity with western medical practices and improving its image in

terms of quality and cost. Baxi (2004) stated that the Confederation of Indian Industry (CII) in India has the potential to attract 1 million tourists per annum, and this could contribute up to \$5 bn to the economy. India offers a unique basket of services to an individual that is difficult to match by other countries.

Datt (2006) also provides a picture of medical tourism in India. The current drive to improve facilities and the huge makeover is striking. Hospital floors are squeaky clean and interiors compete with those of five star hotels. Many hospitals also have prayer rooms, translators, visa extension and currency exchange services. Some hospitals are also tying up with travel agents and insurance agencies in lucrative deals. Mukherjee and Mookerji (2004) mentioned that after Singapore and Thailand, India may be the next multimillion dollar Asian medical industry. The Apollo Hospitals Group, Wockhardt, Escorts, Fortis, Hinduja and Breach Candy are some of the names in healthcare that have come forward to tie up with tourism industry players like Hyatt, Kuoni, Indian Airlines and the Bangladeshi carrier GMC which offers discount-laced customized packages to international medical tourist to India.

Rao (2005) describes that a substantial number of foreigners are coming to India to avail themselves of quality medical treatment at a cost much lower than that of other countries of the world, particularly in the field of cardiology, cardiac surgery, joint replacement, ophthalmology, pathology and Indian systems of medicine etc.

Jain (2006) states that most patients from countries like the USA and UK travel to developing countries such as India for treatment because India offers some of the cheapest pricing options of treatment, offers a good holiday, and

there are no waiting lists or queues to stand in. Additionally, the doctors are comparable to anyone in the world and finally, language does not pose a problem as most people speak English. The destinations for medical tourism in India are world class medical treatment centers as well as famous tourist spots. Also, it is believed that the facilities in India are more suited for International patients. Sujatha and Kumar (2006) claim that globalization has really opened many vistas for India to emerge as a centre of excellence in medical tourism. Irrespective of the country from which the medical tourists originate, they feel at home in India. Indian doctors are well-versed in English and when this is combined with Indian hospitality, Indians are second to none in the care industry.

Ernst and Young (2007) reported that the Indian healthcare industry is poised to grow at a compounded annual growth rate of 15 percent. Nearly 90 percent of this growth will come from the private sector. Further, private hospitals in the country are expected to rake in \$35.9 billion (Rs 147,154.1 crore) in 2012 compared to \$15.5 billion (Rs 63,534.5 crore) in 2006. Correspondingly, along with a shift in emphasis from socialized to privatized healthcare, the share of the private sector in India's healthcare industry is set for a quantum increase in the coming decade.

Chacko (2006) highlights certain issues that need attention in medical tourism such as the upgrading of basic amenities and hospital infrastructures, coordination between the health care and tourism sectors, creation of a resource pool of highly skilled and cordial staff, manpower standardization of services and accreditation of hospitals as well as a more positive impact on the domestic healthcare services. The number of medical tourists

is increasing, which means demand for private healthcare services will increase. Private hospitals will need more medical professionals to meet the increasing demand and the lucrative offers made by partners and if the work environment is favourable, this will attract many more professionals to serve in India. The public healthcare sector that is disadvantaged *vis-a-vis* the private hospitals on these counts will be put under further strain. If more subsidies are given to private hospitals and changes in regulations are made to suit them, their value and involvement in the sector will certainly increase.

OBJECTIVES

The prime objective of the study is to study Medical Tourism in India and to present a brief SWOT analysis thereon. The study also focuses on making some important suggestions to promote India as a global medical tourism destination.

RESEARCH METHODOLOGY

This research work is primarily based on secondary data published in various research journals, leading newspapers, websites and government reports. It is descriptive in nature.

RESULTS & DISCUSSION

Emergence of Medical Tourism in India

The national government's commitment to providing comprehensive healthcare to the citizens, irrespective of their paying capacity, as part of its welfare policies was given up after 30 years of independence when the Sixth Plan opened up medical care to the voluntary and private sectors. The rapid growth of the private sector during the 1980s, and the emergence of a corporate health

sector in the 1990s was a part of conscious policy that chose to promote these segments (Baru 2000).

The Eighth and Ninth Five-Year Plans emphasized primary healthcare for the underprivileged and the importance of involving the private, corporate and voluntary sectors in provisioning of medical care (Government of India 2002). The acceptance of the new economic policy and within it, the health sector reforms included by 1992, legitimized cutbacks in public sector investments in health as well as the commodification of health services (Baru and Nundy 2008).

The climax was reached when the National Health Policy proclaimed urban medical institutions as service production units on a par with production units, and were therefore regarded as important sources of foreign exchange earnings (Government of India 2002). Cutbacks in the public sector no doubt lead to its shrinkage and the deterioration of public institutions. This has been used to rationalize the introduction of user fee, public-private partnerships (PPPs) and opening up the public sector to private investment. In the process, health services became an instrument for market expansion and financial gains rather than welfare. Medical Tourism is a product of this process. The government policy of merging medical expenditure and tourism was announced by Finance Minister Jaswant Singh in his 2003 annual budget speech when he called for "India becoming a global health destination". He glamorized the potential of hi-tech, complex technologies that offered relatively cheaper rates and yet earned profits. These could be invested in creating chains of such institutions, and in medi-cities (Reddy & Qadir, 2010).

The medical care infrastructure in India includes over 500000 doctors, 15000 hospitals and 875000 beds. In addition, semi urban and rural regions have over 23000 primary health centers and 132000 sub centers. Despite an extensive public healthcare infrastructure, the private sector now dominates the health care market. The Health administration of India is governed by the Ministry of Health and Family Welfare (MOHFW), which includes three departments such as the Department of Health, Department of Family welfare and the Department of AYUSH (Ayurveda, Unani, Siddha and Homeopathy). High quality treatment is offered at a fraction of the usual cost, in comparison to western countries, and this makes India an ideal healthcare destination for highly specialized medical care (Jyothis, 2009).

The medical services in India that attract international attention predominantly include dental and eye care treatment, orthopedics and trauma, cardiac care including surgery, urology, neurosurgery, plastic and cosmetic surgery, laparoscopic surgery, gastroenterology, kidney transplants and knee/hip surgeries. The alternative medicine services available in India namely unani, ayurveda, homoeopathy, naturopathy and wellness services including yoga and meditation are increasingly becoming popular among foreign patients as non-surgical treatment for various ailments. Kerala for ayurveda and Kairali massage, Uttarakh and for yoga and meditation, Goa for holistic living, Rajasthan for spas and heritage living, are some of the world-renowned places in India for alternative medicine (Begum, 2013).

The Indian Government is also launching various schemes and programmes to promote health tourism and inviting foreign and private investors

to invest in hospitals and also the accommodation sector. India is also granting various incentives and tax rebate to various pharmaceuticals industries to provide medicines, surgical-equipments, and other medical facilities to further encourage and promote medical tourism in India.

The Indian Ministry of Tourism has announced a number of incentives to give an impetus to the sector. It has identified 31 villages across the country to be developed as tourism hubs. The states in which these villages have been identified include Delhi, Haryana, Himachal Pradesh, Gujarat, Maharashtra, Bihar, Karnataka, Madhya Pradesh, Andhra Pradesh, Mumbai, Kerala, Tamil Nadu, Orissa, Assam, Sikkim, Rajasthan and West Bengal.

Specific Tour Packages for Medical Tourist in India

India is known as the ‘cradle for test tube babies’ and is popular for surrogacy services (Qadeer and John 2009). Other than these, India offers hi-tech cardiac, paediatric, dental, cosmetic and orthopedic surgical services as well as traditional healing systems. The services provided are largely knee joint replacement, hip replacement (mostly orthopedic), bone marrow transplant, bypass surgery, breast lump removal, haemorrhoidectomy, cataract surgery and cosmetic surgery, Dialysis and Kidney replacement, Heart surgery packages like Cardiac Surgery and Cardiology, Open Heart Surgery, Angiographies and Angioplasties, Treatments of different skin problems including skin grafting and so on etc. Hospitals also advertise for preventive health checkups for family members accompanying the patients in addition to alternate medicine services (Peacock 2009).

Table I: Medical Cost Comparison between India and other Countries (in USD)

Medical Treatment	USA	Thailand	Singapore	India
Heart Bypass	144000	24000	13500	8500
Angioplasty	57000	13000	11200	5000
Heart Valve Replacement	170000	11000	12500	9000
Hip Replacement	50000	12000	9200	5800
Hip Resurfacing	50000	16000	12100	8000
Knee Replacement	100000	10000	11000	6200
Spinal Fusion	2000-10000	7000	9000	5500
Dental Implant	30000	3000	2900	700
Lap Band	10000	12000	12000	7500
Breast Implants	80000	4500	5400	4500
Rhinoplasty	15000	3400	2700	3500
Face Lift	15000	6600	5000	5000
Hysterectomy	15000	4500	6000	6000

(Source: Indian Medical Travel Association, IMACS Research, Medical Tourism Website)

Services offered by Tour Planner to their patient

Medical tourism providers are organizations involved in the process of medical tourism and these include healthcare providers, travel agencies, tour guides, hotels and resorts. The services of health tourism providers are extensive and include inter-alia, their consultation with the relevant medical specialist prior to arrival by either email, telephone and if needed by video conference, flight arrangements & extensions / visa assistance, airport pick-up including ambulance transportation if required, hotel accommodation, appointments with medical specialists, clinical tests, scheduling of all medical appointments, coordination of the admissions process, cost estimates for anticipated treatment, special dietary needs /religious arrangements, providing news & information of patient's relatives back home, remote consultations via tele-medicine, local sightseeing, foreign exchange provision, insurance services, financial services, travel advice for local conditions, ticketing, spa, shopping, yoga, and beauty treatment (Jyothis, 2009).

Sharma (2013) makes an assessment of services offered by tourism marketers to their customers who are medical tourists. The services listed by him in are:-make an appointment with concerned specialist of a world known hospital, make arrangements for their escorting, transportation and accommodation as per the requirements of the patient. Try to accommodate patients near to their diagnostic centre, help them in obtaining a medical visa, help in preparing other documents as required by the health Centre, make arrangements for their treatment and other medical facilities, make arrangements for sightseeing, local transportation, and shopping, if required by the patient or his family members and so on.

Contribution of Medical Tourism in the Indian Economic and Social Development

Many hospitals in India are accredited by international institutions and are offering world-class treatment at that cost which is comparatively 40-50% less than that of any European country. Acknowledging the significance of medical tourism in India, the government is trying to persuade the international tourist traffic to make its way to India. As a result India is receiving a huge number of international tourists who are responsible for several benefits to the Indian economy. Medical Tourism in India is playing a vital role in improving the economic and social status of society. It also increases employment opportunities through the expansion of tourism, hotel and aviation industry operations as well as healthcare and the pharmaceutical and insurance industries. A large number of foreign patients come to India for treatment which results in growing avenues for foreign exchange earnings to the country. Such opportunities create greater demand for the development of infrastructural facilities in all the related sectors which pave the way for better utilization of infrastructure and skilled manpower. People from different countries of different cultures visit India and explore the rich culture; hence medical tourism is also responsible for social and cross cultural exchanges between guest and host.

Medical tourism provides an opportunity to promote the brand image of India as a world class healthcare destination by building international customer relations and linkages with foreign travel companies as well as medical associations. Medical tourism also opens the gateway for Public and Private Partnerships Investment so as to better cope with the growing demand of the burgeoning development in medical tourism. Medical tourism also provides opportunities to reach new heights in

Research and Development and to thereby offer comprehensive medical solutions

SWOT ANALYSIS

The SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis on the Indian medical tourism Industry is:

Strengths

- Strong healthcare and tourism potential.
- Quality Service at affordable Cost.
- Vast supply of qualified doctors, nurses and other staff.
- Strong presence in advanced healthcare e.g. cardiovascular, organ transplants – high success rate in operations.
- No waiting times in hospitals for admission and treatment.
- Availability of medical insurance facilities
- Easy access & connectivity to health care destinations.
- Availability of medical visa service.
- Better hospitality & courtesy.
- Better air connectivity with major medical tourism market such as Middle East, Europe and South Asia.

Weaknesses:

- Low coordination between healthcare and tourism industry players.
- No strong government support.
- Customer perception as an unhygienic country
- No proper international accreditation and regulation system for hospitals
- Lack of uniform pricing policies in hospitals across India

- Lack of customer oriented and skilled Staff
- Lack of funds and capital for investment in medical and tourism sector
- Language related problems in case of non-English speaking customers
- Poor infrastructure i.e. roads, sewage & sanitation, public utilities etc.
- Improper waste management system.

Opportunities:

- Increased demand for healthcare services from developed countries.
- Increased demand for wellness tourism and alternative cures due to fast-paced lifestyle.
- Reduced cost of international travel and tourism facilities.
- Availability of alternatives such as yoga, meditation, ayurveda, allopathy, and other systems of medicines
- Higher cost of medical treatment in developed world.
- Long waiting list for treatment in developed countries.
- Growing privatization and investment opportunities (FDI) in Tourism and healthcare sector in Indian economy.
- Foreign patients can get package deals including flights, transfers, hotels, treatment & postoperative vacation for their visits.
- Fluent English speaking hospital staff
- Increasing joint ventures like health insurance, tour operators, hospitals, resorts etc.

Threats:

- Strong competition from countries like Thailand, Malaysia, Singapore, Philippines.

- Lack of international accreditation
- Lack of proper insurance policies for this sector.
- Under-investment in healthcare sector.
- Lack of institution tie-ups between hospitals, insurance companies and travel companies
- Growing customer expectation and reasonability.
- Unavailability of proper safety & security facilities.
- Poor infrastructure as well as information & communication facilities.
- Increasing environment pollution from hospital waste.
- Possibility of spread of serious diseases from foreign patients.

SUGGESTIONS FOR DEVELOPING INDIAN MEDICAL TOURISM

The research and SWOT analysis has drawn some valuable suggestion from the discussions with various stakeholders as well as observing other nations medical tourism conditions. These suggestions lay down the future path for India to achieve a unique leadership position in medical tourism.

- Arranging financial support Medical Tourism Service Providers and Wellness Tourism Service Providers under the MDA Scheme is provided to approved medical tourism service providers, i.e. Hospitals, Travel Agents/ Tour Operators etc.
- The Government of India should simplify the medical visa service for backing medical tourism in India.
- Fix uniform pricing strategies in Indian hospitals.
- Production of publicity material such as web, popular magazines, tourist guide books, business

magazines and journals on tourism is needed and should be circulated in target markets.

- Formulation of suitable medical tourism packages to each category of tourist such as wellness tourist, business tourists, leisure tourists, medical tourists and so on.
- Set information centers and improve online information system of medical tourism facilities of India.
- Holistic medical facilities such as yoga, meditation, naturopathy, herbal medicine, acupuncture and homeopathy etc. should be provided.
- Setting up National Level Bodies such as NABH, CRISIL, ICRA, and JCI for ensuring inter-sectoral coordination, information dissemination using technology, standardization of services and so on.
- Raise the quality standards to benchmark India for international quality accreditation standards.
- Support the Public-Private Partnership (PPP) system to tap the medical tourism potential of India.
- Establishment of Travel Desks in Hospitals to coordinate the in-house services as well as services provided by other players such as local tour operators, ticketing, visa-extension assistance, foreign exchange, etc.
- Providing unique experiences to the patients with sightseeing, local handicraft items, food items, textile products and so forth.

CONCLUSION

India has enormous potential to emerge as one of the world's sought after and best Medical tourism destinations. Its splendid tourism attractions and healthcare facilities have the ability to lure more and more

tourists. It is capable of becoming a 'heave' for medical tourists by highlighting holistic treatments such as Ayurveda, Spa, Yoga, Medication, Wellness, Unani, Sidha, Naturopathy etc. The emergence of accredited multi-specialty hospitals will undoubtedly boost medical tourism in India. Satisfied medical tourists will recommend India as a preferred destination. Hence medical tourism providers should try to maintain service quality and vigorously strive to make India the world leader in medical tourism, a path it is certainly on.

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