

An Overview of Medical and Wellness Tourism in India

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I. Historical Background

Historically India has been a regional healthcare hub for neighboring countries such as Afghanistan, Pakistan, Nepal, Bangladesh, Bhutan, Maldives and the Middle-East. India has a strong background for developing a unique medical treatment which had been patronized by the kings and merchants and others during the historical periods. Ancient Indian literatures like *Upanishads*, *Bahamians* and others strongly advocated the supremacy of medical treatment and medicines used were prepared mostly using herbs and shrubs collected from nature. This wonderful country is a treasure trove of health, as it had been for thousands of years. India's history in medicine dates back to the Atharva Veda — the first Indian text dealing with medicine. India's medical history is truly awe-inspiring with its traditional treatment therapies such as the Ayurveda and Yunani, which have been passed down through hundreds of generations.

Historical accounts as narrated by different foreign travelers disclosed that free medical treatment was offered to the foreign patient. Such facility was also provided to the courtiers, Brahmins, and needy people at free of cost. During early mid—Mughal period Delhi was emerged as an well-known centre for conclaves of physicians and surgeons. Traditionally some unique treatment methods was developed starting from Ayurveda, Yoga, Unani, Siddha and Homeopathy (AYUSH) in our country. Such system has been evolved through an evolutionary phases.

India was one of the first Asian countries to recognize the export potential from medical tourism. Since 2002, after the Confederation of Indian Industry (CII) produced a study on medical tourism in collaboration with Mc Kinsey management consultants, the Indian Government has strongly supported the development of the sector. This support included the improvement of important airport infrastructure and the marketing of Indian medical treatment abroad. Between 2009 and 2011, the number of medical tourists seeking treatment in India increased by 30%. Based on past growth, the number of medical tourists going to India is estimated to grow to nearly half a million annually by 2015.

II. About Medical Tourism

Medical tourism can be broadly defined as provision of 'cost effective' private medical care in collaboration with the tourism industry for patients needing surgical and other forms of specialized treatment. This process is being facilitated by the corporate sector involved in medical care as well as the tourism industry - both private and public.

In many developing countries it is being actively promoted by the government's official policy. India's National Health Policy for example, says: "To capitalize on the comparative cost advantage enjoyed by domestic health facilities in the secondary and tertiary sector, the policy will encourage the supply of services to patients of foreign origin on payment. The rendering of such services on payment in foreign exchange will be treated as 'deemed exports' and will be made eligible for all fiscal incentives extended to export earnings". The formulation draws from recommendations that the corporate sector has been making in India and specifically from the "Policy Framework for Reforms in Health Care", drafted by the prime minister's Advisory Council on Trade and Industry, headed by Mukesh Ambani and Kumaramangalam Birla.

III. Scope

India's major attraction is "value for money", the low cost for medical procedures, the availability of mostly USA trained physicians and state-of-the-art technology due to the emergence of several private players in the hospital industry. Mattoo and Rathindran (2006) cite India as the biggest nationality block of foreign medical students in the United States. Many Indians who have practiced for years in the United States have returned home, attracted partly by the improved income prospects from the growth in Indian medical tourism. Now, the Medical Tourism in India has further expanded in its scope. Medical Tourism is regarded much as clinical, whereas Wellness Tourism encompasses both spiritual and clinical needs of the tourists to keep them in a right frame of health and mind. There is a great potential to further expand the Wellness Tourism framework in India. The Naturopathy, Yoga and Meditation can be promoted as tourism products. Besides India, there are

several Asian destinations like Singapore, Malaysia and Thailand that are offering medical care facilities and promoting medical tourism. India excels among them for the following reasons:-

- State of the Art medical facilities
- Reputed healthcare professionals
- Quality nursing facilities
- No waiting time for availing the medical services

IV. Importance

Medical tourists in India tend to go for surgical treatments, especially cardiac procedures, orthopedic procedures, neurological and spinal surgery, as well as cosmetic surgery. Dental treatment is another popular service availed of by medical tourists in India. For wellness tourism, key attraction is the alternative medication such as ayurvedic spa. India is also focusing on the advancements of cord blood bank facilities as cord blood promises to become a critical input for many surgical treatments. Cord blood is the blood that remains in the umbilical cord after a baby is born and is a rich source of stem cells. The development of cord blood banks is expected to be a major boost for India's medical tourism.

V. Prospects of Growth

India, naturally endowed with a rich cultural heritage, tourism potential and reputation for age-old medicines and therapies such as ayurveda, unani, homeopathy, naturopathy and yoga is a heaven for wellness tourism.

However, in terms of market share the country enjoys a meager part of the global wellness market which evidently points at the under utilization of the potential and wellness quotient that India treasures.

Fortunately, with regard to medical tourism, India has been successful to a large extent in positioning itself as a viable destination for cost-effective and qualitative advanced healthcare.

However, one must not forget the keenness and speed with which countries such as South Africa, China, Malaysia, Thailand and Indonesia are accentuating their medical facilities and strategizing rapidly to garner larger market shares and revenues. Therefore, it is pertinent for India to rethink the marketing plans on medical and wellness tourism in terms of the services offered in the country. What is also crucial is how the country is positioned to the world as a unique destination.

India's main target markets are the developed countries, especially the United Kingdom and the United States. Patients from neighbouring South Asian countries such as Pakistan, Bangladesh and China also visit India for treatment.

Having identified the growing potential of medical and wellness segments, several medical tourism companies / facilitators promising end-to-end medical tourism services have sprung up across the country. Inarguably, medical tourism is an economic tool for a nation like India to boost its economy through direct benefits such as increase in revenue, employment opportunities, investments in tourism avenues, etc. and indirect benefits that include spillover effects leading to growth in other industries. Though the benefits may apparently be micro-faced, the ripple effect is capable of touching innumerable spheres in the economy, namely, rise in living standards of people associated with tourism, need for education, demand for related educational courses, growth ancillary industries and so on.

Advantages of Visiting India for Medical Treatment

- Internationally accredited medical facilities using the latest technologies
- Highly qualified Physicians/Surgeons and hospital support staff
- Significant cost savings compared to domestic private healthcare
- Medical treatment costs in India are lower by at least 60-80% when compared to similar procedures in North America and the UK
- No Wait Lists
- Fluent English speaking staff
- Options for private room, translator, private chef, dedicated staff during your stay and many other tailor-made services
- Can easily be combined with a holiday/business trip

Need of Improvement

There is an utter need of improvement in ensuring world-class services to medical tourists in India. It needs to travel a long mile to harness the opportunities available and equip itself to address the strategic challenges that include:-

- Poor brand perception of India.
- Shortage of qualified workforce.

- Delays and inefficiencies due to inadequate legal and regulatory infrastructure.

Moreover, poor services in power and water supplies, road and rail connectivity, lack of hygiene awareness, and bureaucratic support and absence of tourist-friendly approach are some of the critical operational issues facing the industry. Overall, the biggest challenge is the lack of government vision and clear-cut futuristic policies with regard to medical tourism industry.

Promotional Measures taken by the Central Government

To promote growth in the Indian medical travel industry, the Central government has plans to improve health infrastructure. The National accreditation Board for Hospitals and Healthcare Providers (NABH) does its own accreditation of hospitals to guarantee service quality and has so far accredited several of the hospital members. It is currently in the process of increasing the number of hospitals, clinics and clinical laboratories in urban as well as rural parts of the country. Incentives and tax holidays are being offered to hospitals and dispensaries providing health travel facilities. The Indian medical travel and healthcare sector offers plenty of opportunities for businessmen, medical equipment manufacturers, healthcare service providers, and tourist agencies and the government is encouraging them to invest in therapeutic and preventive health services so as to increase medical travel to India. The overseas offices of India's Ministry of Tourism market medical tourism by stocking up and disseminating informations about Indian hospitals for potential foreign patients. They advertise the sector's expertise in cardiac surgery, oncology treatment, orthopedic and joint replacement, holistic healthcare in hospitals that they promote as centers of excellence.

The government also provides special M-visas for patients and their companions that have longer durations of stay (usually one year) than ordinary tourist visas. The government improved airport infrastructure to smoothen the arrival and departure of medical tourists. It has championed a public-private sector partnership (PPP) model at both central and state level to improve healthcare infrastructure to provide efficient services and innovative delivery models.

VI. Promotional Initiatives of State Tourism Boards

At the state level, several initiatives are taken by the industry in association with the state governments.

Kerala

Since 1990s, Kerala Tourism Development Corporation (KTDC) is promoting health tourism to cater to the requirements of the visitors. Tie-up with various Government and Private Ayurveda Centers has also increased the quality of treatment provided to the visitors.

Karnataka

This state is in the process of setting up of a Bangalore International Health City Corporation, offering patients with a wide variety of healthcare products and treatments. The Government of Karnataka is also in the process of leveraging the state's IT prowess to tap business in the healthcare outsourcing services. IT skills would help enhance Karnataka's position in associated services to the growing healthcare sector such as medical billing, disease coding, forms processing and claims settlement. It is also bidding high on Telemedicine, a concept by which patients can be treated even when the doctor is geographically placed in a different area.

Maharashtra

In Maharashtra, the Infrastructure Development and Support of Maharashtra (MIDAS) has granted the tourism activity with an industry status, with the objective of granting all the benefits and incentives that are given to other industries. This Act would also empower the Maharashtra Tourism Development Corporation (MTDC) as a special planning authority, to procure and provide land available at various tourism estates without needing approval from the Maharashtra Industrial Development Corporation (MIDC). The industry in association with the state government has set up a Medical Tourism Council of Maharashtra (MTCM).

Gujarat

This is one of the few states which has announced a separate policy for medical tourism, with the objective of creating integrated medical tourism circuits based on the location of specialty hospitals, heritage and culture. In addition, Gujarat is in the process of setting up a Healthcare Tourism Council in association with the healthcare and tourism industry.

West Bengal

Kolkata is, slowly but surely, regaining its rightful place in the healthcare firmament in not just India but this part of the world. Several latest healthcare facilities have been set up by the private sector even as the State Government has been proactive in encouraging public private partnerships (PPP) in this sector.

In the last few years, West Bengal has zeroed in on its strategy for the healthcare sector. A health policy has been formulated towards this end. Among other things, the policy focuses on the importance of PPP in healthcare and its delivery mechanism. Reforms have been initiated to ensure that the poor have access to quality healthcare. The PPP model pursued by the State Government does not involve only the private sector but also non-government organisations and community-based organisations. In the last 10-15 years, several new healthcare facilities have come up in the city. They include hospitals such as Kothari, Peerless, Ruby, Wockhardt, AMRI, Rabindra Nath Tagore International Institute of Cardiac Sciences, and so on. These have augmented the city's healthcare offerings in addition to older institutions such as The Calcutta Medical Research Institute, Belle Vue Clinic, Woodlands Nursing Home, and so on.

Another area where a lot was found wanting was diagnostic facilities. An attempt to bridge the crucial gap between the growing need for diagnostic facilities and outlets engaged in the same was first made on December 1988 with the setting up of the Medinova Diagnostic Services. Says Mr Rupak Barua, Chief Operating Officer, the Calcutta Medical Research & Research Centre: "The healthcare sector in Kolkata did not grow because body corporates were disinclined to invest in the sector. Things have changed now and the healthcare segment is among the fastest-growing industry segments in India. As such, the corporate sector is keen to partake in the growth opportunities that exist in the healthcare segment today". According to him, in the last few years, many NRI doctors, paramedics and nursing staff have come back to their roots in Kolkata.

Challenges

There are several issues which are hindering factors for the growth of medical tourism in our country, they are:-

- No strong government support/initiative to promote medical tourism.
- Lack of proper insurance policies for this sector.
- Lack of uniform pricing policies across hospitals.
- Customers perception as an unhygienic country.
- Lack of international accreditation- a major inhibitor.
- Strong competition from countries like Thailand, Malaysia and Singapore.
- Under-investment in health infrastructure.
- Middlemen with little or no knowledge and training to manage patients are playing havoc.
- Low coordination between various players in the industry like airline operators, hotels and hospitals.

Opportunities

India is attracting an ever increasing number of tourists predominantly from the Middle East, Iran, Pakistan, Afghanistan, Bangladesh, Turkey, Europe and the USA. The states that are fast emerging as India's best medical tourism centers are Telengana, Karnataka, Tamil Nadu, Maharashtra and New Delhi. The medical services in India that attract international tourists predominantly include dental and eye care treatment, orthopedics and trauma, cardiac care including surgery, urology, neurosurgery, plastic and cosmetic surgery, laparoscopic surgery, gastroenterology, kidney transplant and knee/hip surgeries.

The alternative medicine services available in India namely unani, ayurveda, homeopathy, naturopathy and wellness services including yoga and meditation are increasingly becoming popular among foreign patients as non-surgical treatments for various ailments.

Kerala for ayurveda and Kairali massage, Uttarakhand 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. Furthermore, the country is also renowned for its unique travel experiences on an emotional, intellectual and spiritual level. Thus, the key competitive advantages of India in medical tourism arise from the following:-

- Doctors and nurses with work experience from USA and Europe.
- Strong reputation in advanced healthcare segments.
- English fluency of the medical team.
- Top-of-the-line medical and diagnostic equipment from international conglomerates across many hospitals in India.
- Indian nurses among the best in the world.
- World-class yet affordable treatment.
- Diversity of tourist destinations available in the country.

Suggestions to the Government and the Industry

- A consultative meeting with all the key officials should be organized to address the gaps and challenges and their solutions.
- With multiple players in the field, the Ministry of Health and Family Welfare together with the Ministry of Tourism should set up a Task Force.

- The Task Force should evaluate the opportunities in the industry and formulate a policy for accrediting healthcare institutions in the country.
- To adopt standardized procedures and facilitate foreign patients in selecting the best hospitals.
- To provide for brighter prospects for the industry, the hospitals can also acquire international accreditation, integrate traditional and clinical treatments and offer end-to-end value-added services.
- To better the connectivity with the target patients' home country.
- To enhance competitive advantage with lesser waiting time for treatment.
- To understand the problems and challenges faced by medical tourists visiting India.
- To map the Indian medical tourism geographies and value of network of facilitators serving medical tourists.
- To focus on language training for select countries from where tourists are coming in large numbers.
- The government should also initiate capacity building programmes to train paramedical and non-medical staffs of the service providers for cross-cultural sensitivities.

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