

Medical Tourism in India-A Paradigm Shift

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Abstract *The health tourism Industry is witnessing a sudden paradigm shift in last five years. India has become a home of traditional medicine that has been practiced for several thousand years as a part of “manav dharma” to give relief to the needy and mostly free of cost. With modern diagnostic and treatment facilities, experienced surgeons, one of the largest pharmaceutical industries in world, and a tradition of caring, India provides world class surgical and healthcare facilities, with comparable success rates and prompt service levels. The potential of medical tourism is such that it can even surpass the revenue earned from IT sector. Recognising the pivotal contribution of medical tourism to the economic development, the Indian Government has initiated numerous measures to promote this very young industry to attract international tourism. This has motivated to identify recent trends and opportunities in India for the medical and healthcare tourism, and to explore the critical factors which can lead to success of initiatives taken by ministry of tourism for the development of medical tourism in India. Finally paper suggests measures to enhance medical tourism in the country.*

Keywords: *Tourism, Medical Tourism, Health, International, Medical, Services*

INTRODUCTION

The Indian health tourism Industry is witnessing a sudden paradigm shift in last five years. India has become a home of traditional medicine that has been practiced for several thousand years as a part of “manav dharma” to give relief to the needy and mostly free of cost. With modern diagnostic and treatment facilities, experienced surgeons, one of the largest pharmaceutical industries in world, and a tradition of caring, India provides world class surgical and healthcare facilities, with comparable success rates and prompt service levels. The potential of medical tourism is such that it can even surpass the revenue earned from IT sector. In recognition of the importance of the tourism sector and its importance to the economy, government of India has drawn a National Tourism policy and for marketing it has initiated “incredible India campaign”. Indian nurses are among the best in the world. There are about one thousand nursing training centres in India which are recognized by different government and non government agencies and are most of the times attached to the teaching hospitals and about fifteen thousand nurses graduate annually from these training centres. For some small surgical procedures

some small countries are viable as alternative but India is the main option where all medical needs can be catered by using world class facilities and high quality of care, moreover levels of service quality and professional skills are also very good. A complex transplant, a complicated procedure or a medical condition may cost very high in US but it may be achieved for very low costs here in India. Ministry of tourism has taken several steps to promote medical tourism, dedicated spaces for promotion of medical tourism in international fests, Road shows for medical tourism promotion, Ministry of tourism has also produced and recorded brochures, compact discs and other promotional material so that health and medical tourism can be promoted on international and national stage. Ministry of tourism has also taken initiative to provide market development assistance for the promotion of medical tourism internationally.

Bookman & Bookman (2007) have defined medical tourism as travel with the aim of improving one's health, and also an economic activity that entails trade in services and represents two sectors: medicine and tourism. Medical tourism according to Dhaene (2009) is looking for available quality combined with cost effective and low price health

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services while offering a similar level of safety to the patient. Medical tourism which is also called medical travel, health tourism or global healthcare is a term used to mention the recent and rapid evolving practice of travelling across international borders to get the healthcare services.

Services most of the times asked by medical tourists include elective procedures as well as complicated surgeries. India has got an advantage as a destination for medical tourism due to following factors:

1. Most of the clinicians, doctors, surgeons who are at present working with Indian hospitals and healthcare agencies have either work experience of working with medical establishments in United States, European countries or other developed countries or have taken some kind of training in these nations at some point of time.
2. Most doctors and nurses are fluent in English and have very good communication skills which are required for good patient care services.
3. The surgical instruments, diagnostic equipments and other latest machines required for telemedicine and other support services for world class facilities are available from top class companies in most of the Indian hospitals.
4. There are about one thousand nursing training centres in India which are recognized by different government and non government agencies and are most of the times attached to the teaching hospitals and about fifteen thousand nurses graduate annually from these training centres
5. Even if the medical tourist is budget conscious and cannot afford expensive treatment or other amenities like, accommodation, food and conveyance, in that case also healthcare tourism is affordable in India, as all these facilities are available at a very low costs in India.

Thus, this paper aims to identify recent trends and opportunities in India for the medical and healthcare tourism, and to explore the critical factors which can lead to success of initiatives taken by ministry of tourism for the development of medical tourism in India

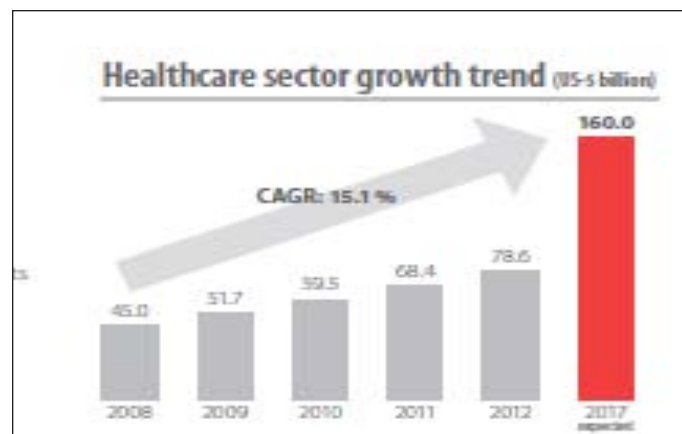
India as a Growing Market For Medical Tourism

For the past two decades, the infrastructure and medical facilities in India for the purpose of Medical tourism has developed up to such an extent that it matches and even excels the very best of western medical care facilities and this has happened due to the economic boom which came in India, even during the recession during last decade the

healthcare industry in India was booming, this has put India in a leading position in the field of medical tourism.

For some small surgical procedures some small countries are viable as alternative but India is the main option where all medical needs can be catered by using world class facilities and high quality of care, moreover levels of service quality and professional skills are also very good. A complex transplant, a complicated procedure or a medical condition may cost very high in US but it may be achieved for very low costs here in India. Longer post operative care is also included in this lower cost and it becomes a positive point as post operative care is must required for patients who are travelling far distances for purpose of treatment. These costs are even lower than the discount given by most of the leading insurance companies in western countries and rebate given by them can be of an additional value to the traveller.

A very important aspect of medicine is the recovery phase. It has been statistically shown that patients recover more quickly and with a much higher success rate when they incorporate practices that enhance physical, mental, and emotional well being. Mental, social, physical and emotional well being enhancement can lead to fast and speedy recovery of the patient from illness and it is also important in recovery after the treatment, the success rate of this recovery has been seen to be very high In India as apart from world class services India is also hub for the Ayurveda, Yoga and meditational activities. All these activities enhance the physical, mental and emotional well being of medical travellers, It also relieves them from tension of being in some other country and the strain suffered due to long travelling. According to government estimates the health sector in India will grow to \$158.2 billion in 2017 from \$78.6 billion in 2012, a report has said. "The healthcare sector is growing at a 15% CAGR and jumped from \$45 billion in 2008 to \$78.6 billion in 2012 and expected to touch \$158.2 billion by 2017 (see fig. 1).



Source: <http://www.medicalfair-india.com/>

Common Medical Care Facilities Sought By Foreign Patients In India:

Interventional Cardiology: Minimal invasive, non surgical procedures where with help of imaging cardiac problems are diagnosed and treated.

PTA: Percutaneous transluminal angioplasty is a minimally invasive procedure used to open narrowed arteries of legs, to kidneys and Carotid arteries.

Bone Marrow Transplant: In India it costs one tenth of what it costs for bone marrow transplant in west, so it is one of most popular procedures sought by foreign patients.

Coronary Angiography and Angioplasty: It is finding out the blockage or obstruction in the blood vessels of heart and removing it with or without help of stents.

Gynaecology: Leading Indian hospitals have all the facilities for early detection and treatment of all major disorders related to female patients in an effective and efficient manner.

Joint Replacement Surgery: Knee, shoulder and hip joints displacement or wearing out is common due to old age or due to accidents, Indian hospitals provide world class facilities and minimal access surgeries for both partial and total replacement of these joints.

Urology: Many super speciality hospitals in India provide comprehensive care for urologic services to diagnose and treat stones, urologic cancer, infertility, impotency and other problems related to urology.

Neurosurgery: Spinal and brain surgeries are performed with great precision and latest technology in most of the super speciality and tertiary care hospitals at affordable prices.

Refractive Surgery: Eye care for cornea, cataract, glaucoma and squint of highest quality is available in India; it is one of the fields in medical tourism facilities which is very popular in India among the medical tourists.

Preventive Healthcare and other Surgeries: Apollo hospitals have introduced preventive healthcare in hospitals in metro cities along with lifestyle clinics, plastic and cosmetic surgeries, dental surgeries are other surgeries which cost quite low in India as compared to western countries.

Changing Paradigm in Medical Tourism

According to Industry chamber Assocham estimates that India's medical tourism sector has grown to more than double between 2011 and 2015, from \$980 million to \$1.8 billion. Similarly, According to the Ministry of Tourism, which governs India's medical tourism industry, the percentage of foreign tourists who came to India for medical reasons

increased from 2.2 percent in 2009 to 2.7 percent in 2010 and 5.6 percent in 2014.

A study has revealed that due to its low cost of treatment, highly skilled doctors, well trained nurses and good quality of healthcare infrastructure India has placed itself among the three top destinations for medical tourism in Asia. Because of low cost of treatment, highly skilled doctors, well trained nurses and good quality of healthcare infrastructure India, Thailand and Singapore are among the top three countries in Asia which are most preferred for medical tourism. During the year 2012, the 59 percent of the revenue which was generated from the medical tourism in Asia was generated from these three countries only, this was disclosed in a report generated by FICCI. Chief executive officers, administrators, domestic company heads of renowned hospitals and public sector stakeholders of hospitals were interviewed in India and other Asian countries between June and September 2014 to conduct this research. Estimated at \$78.6 billion as of 2012, the sector has emerged as one of the largest sectors in India and is poised to grow at an annual rate of 15 per cent to reach about USD 158.2 billion by 2017, it said. It mentioned that to attract the medical tourists various Asian countries are adopting different types of branding and marketing strategies.

India and Asia has taken lead as preferred locations for the medical tourism in past few years because of following reasons:

Good and attractive locations for relishing time after treatment for the attendants, for recovery of patients.

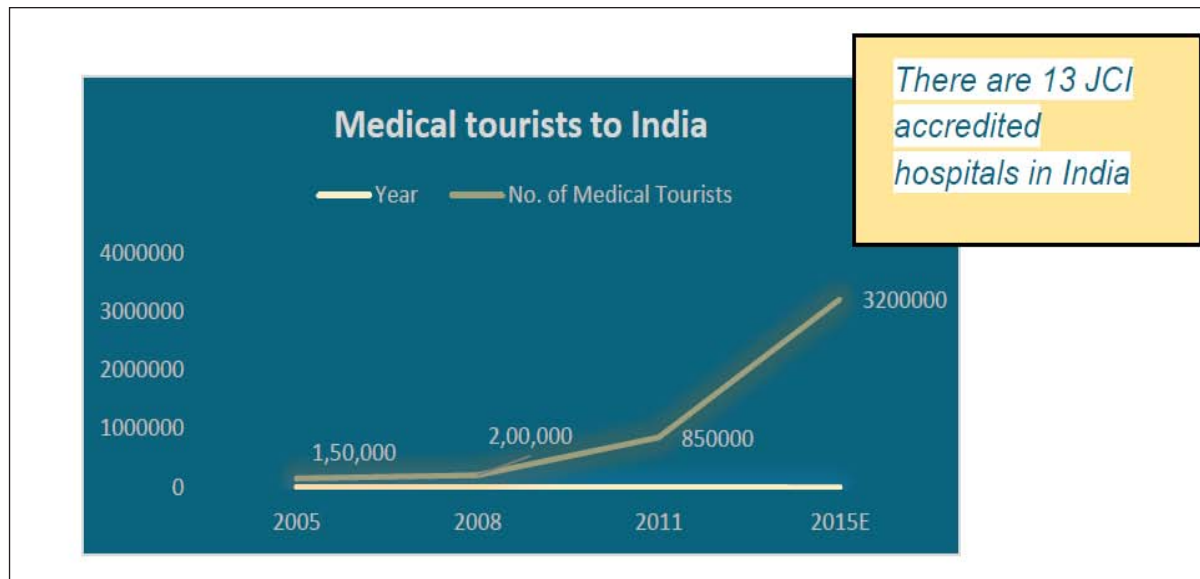
Various types of treatments are available.

Infrastructure in terms of medical services has improved.

Treatment available is provided at a very low cost.

Ayurveda, Siddhastha, Unani, Yoga, Meditation and traditional healing are widely available in this part of world.

India is known mostly for its cost-effective medical treatments along with high standards in cardiology, orthopaedics, nephrology, oncology and neuro surgery, the country is also known for its alternative treatment options such as yoga and ayurveda. As the general tourism all over the world is increasing day by day, there is an estimate that the total number of medical travellers will grow more than 67 million by 2017 worldwide and this will lead to an increase in the medical visitors to India, with the help of good communication, by increasing the awareness and improving the healthcare infrastructure, India can look forward to cater to the needs of these visitors effectively. According to Assocham India's medical tourism sector is expected to grow at an annual rate of 30% to become a INR 9,500-crore industry by 2017 as foreign arrivals will increase to avail treatment at lower costs. India provides



Sources: ASSOCHAM, CII, Sphere Thoughts

world-class medical facilities with hospitals and specialised multi-specialty health centres providing their expertise in areas such as cosmetic surgery, dental care, heart surgeries and coronary bypass.

10 Benefits India Provides In Healthcare Facilities To Medical Tourists:

1. **Cost Benefit:** State of the art infrastructure is present with most of the Indian hospitals which are catering to the need of international patients, highly qualified doctors and best quality services are there for them but at a cost which is par below the price charged in developed countries.
2. **Timeliness:** Doctors are always available in Indian hospitals and there are no complicated insurance issues, hence foreign patients need not wait in line or there are no delays. Immediate medical attention is given to medical tourists.
3. **Better Quality of Medical Facilities:** medical staff and paramedical staff in most of the Indian hospitals catering to the needs of international patients are well trained and well qualified and most of them have got either work experience or have got training in some of the hospital or healthcare organisation abroad at some point of time.
4. **Personalized Care:** It is very convenient and easy to find quality personalized care for aged or terminally ill patients in India as the nursing care is easily and abundantly available in Indian hospitals.
5. **Advanced Technology:** technological sophistication is one of the factors which give upper hand to Indian hospitals in field of medical tourism, best equipments and good infrastructure is available with most of big corporate hospitals.
6. **Government Initiatives:** Tax incentives by government for hospitals and providing the medical visas to international medical travellers has positively provided India an upper hand in Providing world class health care facilities at lower costs.
7. **Communication and Travel Ease:** Introduction of private airlines has led to faster and cheaper travelling to India, good communication facilities are easily available in India and internet facilities in India are said to be one of the cheapest in world. Travel agents can offer you packages which include travelling, boarding, food and treatment at lowest possible costs.
8. **Drugs and Medicines Easily available in India:** Certified and genuine medicines are easily available in India at lower costs.
9. **Traditional Therapies:** Along with the latest technology and best medical procedures India is also a hub for the old and traditional therapies such as ayurveda, yoga, meditation, unani, siddhastha etc.
10. **Potential for Tourism:** Every part of India is rich in heritage, history and diverse in culture and geography, so along with the quality medical care tourists can also enjoy different tourism destinations, this can act as an add on for the medical travellers.

Medical Tourism Market is Estimated to be Valued at \$ 4 billion.

India is growing as a strong destination for medical tourism not only because of various types of facilities it provides but its support mechanism for the sustainable development of medical tourism is also very strong, all these include low

Top 10 States	Foreign Visits (in lakh)	%
Maharastra	5.1	28.5
Tamil Nadu	2.8	15.7
Delhi	1.9	10.6
Uttar Pradesh	1.7	9.4
Rajasthan	1.3	7.2
West Begal	1.2	6.7
Kerala	0.7	3.7
Bihar	0.6	3.6
Himachal Pradesh	0.5	2.5
Goa	0.4	2.5
Total: Top 10 states	16.1	90.3
Others	1.7	9.7
Total	17.9	100.0

Source: Madras School of Economics

cost of international travel, strongly growing pharmaceutical industry, day by day growing insurance market and strong government initiatives for growth of tourism industry. This market is estimated to be valued at 4 billion dollars and because of this big corporate hospitals like, Fortis, Tata, Alchemist, Max, Apollo and others have started setting up tourism related services and providing modern facilities so as to cater to the needs of these travellers and this has led to a significant investment in the health tourism industry

Tourists come to India for Economic Reasons and Market Attractiveness.

Diversified geographical locations and world famous tourist destinations or English as second most preferred language after Hindi are not only the reasons for choosing India for certain procedures but it is economically feasible to get it done here in India, a heart bypass surgery which costs \$ 150000 without insurance coverage in US, same procedure costs about \$7500 in India at any leading surgery centre, 20 times less than in US. Procedures which are very costly in developed nations like, TKR or Knee replacement, face lift, gastric bypass surgery are very affordable in India. Indian organizations are very well aware of quality perceptions of its visitors from United States and other western countries so many of them make it sure that they meet the requirements of Joint commission International Accreditation, and that of food and drug administration also. India has got an upper hand over Malaysia, Thailand, Singapore, China etc. because of its practices in Ayurveda, Siddhastha, Unani, Yoga, Homeopathy and acupuncture as they are quite popular among medical tourists.

Top 10 states in India for Medical Tourism.

According to government's statistics of foreign tourists for 2012, Maharashtra, Tamil Nadu and Delhi are the top three states where most number of foreign tourists visited, about 10 lakh foreign tourists visited these three states for medical tourism, that means more than 54 percent of visitors went to medical centres in these three states alone. But after 2014 Goa government has started several initiatives to attract foreign tourists and it has started replacing Delhi as third most preferred destination for medical travelling. Good quality hotels, additional tourism ventures, English speaking and friendly people, better infrastructure and high-quality healthcare facilities are the biggest reasons for this trend.

WHAT CAN BE DONE TO INCREASE AWARENESS AND ACCEPTANCE OF MEDICAL TOURISM IN INDIA?

Consumer Awareness

Out of the all potential medical tourist all are not aware of the facilities and services which are available here in India. The rest who are aware of these product and service offerings have some misconceptions like facilities will be of low quality, cultural and language barriers will be there, people will not be friendly. To create awareness and acceptance of medical tourism it is very important and necessary to communicate the benefits with emphasis on safety and quality and the ministry of tourism is the best medium to communicate the message.

Professional/Institutional Awareness

Another challenge in this aspect is that medical travellers are not aware of the medical professionals or the hospitals/labs/clinics which will provide them the facilities, for this the individual clinics and hospitals must provide all information related to their relative field of specialization, qualifications and past record related to the medical tourism on the authentic web sites, and ministry of tourism should also focus on this aspect by updating the latest information regarding this.

Taking Advantage of Globalization.

Industry experts expect that the medical tourism industry will grow at a rate of about 20 percent per annum and in future there will be an increased demand of medical tourism in India in future, because of globalization and more liberalization in trade and India's increasing friendly relations with most of the countries worldwide will result in hassle free visas and less paper work for the medical travellers.

Focus on Strategic Partnerships

The Indian organizations and hospitals can enter into strategic partnerships with organizations worldwide to provide world-class quality services to patients coming here. Mergers, joint ventures and strategic alliances can be done for referrals, diagnostic services, treatment, insurance, travelling and accommodation. This will increase the confidence of travellers seeking treatment here as the strategic alliances with there familiar organizations will impart confidence in them.

Government Should Focus on Local Economies

Government must focus on this aspect that the medical tourism not only helps to boost the national economy but it also provides benefits to the local economies also in form of giving boost to the hotel industry and the tourism industry. So any effort put towards promotion of the medical tourism will help in the promotion of local economies also.

Tourist Base Should be Diversified

Medical tourism can force a tourist to visit a place unwillingly which that tourist may not have thought of visiting even once. By providing good facilities for tourism like better

destinations, infrastructure and information centres the tourist can be made satisfied and later on the word of mouth publicity can help in development of that tourist destination.

Promotion of Medical Travel by Ministry of Tourism

Dedicated spaces for promotion of medical tourism in international travel exhibitions: Ministry of tourism has taken several steps to promote medical tourism, like dedicated spaces for promotion of medical tourism in international fests. To promote India and position it among one of the nations who are leaders in providing world class medical tourism facilities, tourism ministry started arranging for dedicated spaces in international travel and trade exhibitions, one example was India pavilion at ITB Berlin, where a space of four square meters was provided for India pavilion.

Medical Tourism promotion through road shows: The last road show was organised in West Asia (Dubai, Riyadh, Kuwait and Doha) in October 2012 which was led by the Minister of State for Tourism. They are the continuous part for the promotion of medical tourism and is done by taking along the stakeholders and are organized frequently.

Promotion through Publicity Material: Ministry of Tourism produces brochures, pamphlets, and compact discs containing promotional material and information related to medical tourism in India and continuously circulates among the target countries so as to attract more and more medical travellers.

Incredible India Campaign: Ministry of Tourism has started campaigning through print and electronic media to persuade and attract tourists for yoga and wellness tourism and it has been made an integral part of the Incredible India campaign.

Market Development Assistance: Ministry of Tourism has launched a scheme named "Market Development Assistance", In the year 2009, it provides financial assistance to different Medical Tourism Service Providers and Wellness Tourism Service Providers to participate in Fairs/Medical Conferences/Wellness Conferences/Wellness Fairs and Road Shows.

CONCLUSIONS

We can conclude that there is an increasing demand for healthcare services in India but there are certain factors which will decide if health tourism is going to be next big thing in India, as information technology industry became the crown jewel in India. :

Infrastructure Investment by the Government:

Government needs to step in for investment in basic infrastructure required for healthcare services so that quality services can be provided to patients coming from developed and developing nations from across the world, as till now the basic infrastructure was being provided by private players only and for this purpose government can seek the use of public private partnership also. Apart from infrastructure required for healthcare services the roads, airports and sea ports, hotels and tourist destinations should also be well maintained.

Reducing difficulties to visit India for Medical Tourism:

At present, patients from across the border need the “M-Visa” to visit India for medical tourism purposes. India should consider offering visa-on-arrival type of services so that the whole process becomes hassle free and less time is taken by the patients to reach destination, this will increase confidence of foreign tourists in healthcare tourism facilities being provided in India, as treatment required will be given in time.

Lift Quality Standards as Per Need of Western Patients:

Sticking to specifications and standards set by food and drugs administration, and joint commission international accreditation will help the patients from western countries to gain confidence in quality services being provided to them.

Market Health Tourism in Western Countries: As the healthcare at lower rates and simple insurance schemes are

always in demand in United States and United Kingdom, Indian hospitals can target the population which has been neglected previously and can offer them cheaper alternatives, this type of marketing in western countries can help India achieve the targets which can put India in number one position as far as medical tourism is concerned..

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