

HEALTH TOURISM IN INDIA: ISSUES, CHALLENGES & MARKETING INTERVENTIONS

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ABSTRACT

The potential of the tourism sector to stimulate economic and social development thereby transforming economies is internationally acknowledged. In this globalized era, tourism has always been considered on top priority in India with the Governments at the centre as well as the states making highly focused efforts to exploit the tourism resources offered at the national and local level. It is the high-time for the stakeholders of Indian tourism sector to design strategies for exploring avenues in health tourism that the globalization has brought with it. It has become imperative for India to be sensitive to global changes and respond proactively to the changing international tourists perceptions. The present article studies the future of emerging health tourism in India. It then takes into account two 'benchmark' case studies, Kerala and Victoria's Spa industry, the analysis of which is aimed to help devise strategies for the Indian health tourism to grow and exploit its true potential. The article also gives some insights that can be used in forming a right strategy to promote India as an attractive health tourism destination on the international platform.

INTRODUCTION

India is one of the fastest growing tourism economies in the world with an estimated growth of 8.8% over the next 10 years¹. India's healthcare industry is worth \$23 billion or roughly 4% of GDP². Hospitals in India are estimated to treat 1,50,000 foreigners a year³. The medical tourism in India could become a \$ 2.3 billion business by 2012⁴. India's healthcare industry will grow by 13% per annum for next 6 years to become a worth of US \$ 17 billion. India's value proposition is 'First World Treatment At Third World Costs-Quality medical services at one-tenth costs clubbed with ancient Ayurveda and Yoga' (Angle,

2006). India is still not figured in top ten international destinations. India's share of tourism revenues in Asia & Pacific region stands at a mere 1.8%. These statistics clearly mention the potentiality and challenges before the Indian tourism sector in general and Indian health tourism in particular. It is a well known fact that the tourism sector has huge amount of potential to boost both economic and social development of a nation (Cherukara & Manalel, 2008). In Asian countries, it has been given top priority in all the major policies of the central and state governments (Ho, 2005). The authorities are directed to provide fund and required support to exploit the tourism resources available. In the quest for developing India as an international tourism destination, it is required that India adapts to global demands, changing international trends and tourist perceptions. Out of an attractive international revenue of US \$ 474 Billion in 2000, while the Asia Pacific region bagged 18.7%, India could attract merely 1.8%. And another major concern is that India could not find a place in the top 10 international tourist destinations⁵.

Main reason why the tourism sector needs analysis and attention is its capability to generate vast employment (Hazarika, 2010). According to an estimate, the tourism industry generates more jobs per million rupees of investment than any other industry or sector. The Tenth Plan estimates the total employment in the industry (both domestic and international) to be around 25 million, and hopes to create 3.6 million jobs a year. India's market share in tourist arrivals from abroad was 0.34 per cent in 2002 and it increased to 0.40 per cent during 2003. This trend continued in the year 2004, with international tourist arrivals touching 3.37 million, an increase of 23.5 per cent over arrivals in 2003⁶. The government

plans to increase India's share of international arrivals to 0.62 per cent by the end of 2007 which appears to be an achievable task with domestic and international tourism booming up.

INTERNATIONAL TOURISM SCENARIO

The international tourism scenario is very attractive (Nagarajan, 2004). It is going to be one of the vast employment generating sectors creating more than 5.5 million jobs world wide in the next decade. Every tourist directly or indirectly creates 1 job and according to estimates, for every 1 million of rupees invested, the agricultural sector creates 45 jobs, manufacturing only 13 jobs whereas tourism can create 89 jobs⁷. Let us have a look at the international tourism scenario. Chart 1 shows tourism details of few selected countries by the end of 2006 and categorization of the tourism destinations.

TYPES OF TOURISM

Various types of tourisms include Spiritual, Nature, Health & Medical, Sex and Adventure. Recently many other types of tourisms have emerged across the world including, Fun & Entertainment (E.g.: Disney Land, Amusement parks, etc.), Food, Business Tourism, Education Tourism, Religious Tourism & Space Tourism being the latest. Some of these are discussed below in brief:

1. SPIRITUAL TOURISM

With its world famous pilgrim and spiritual centres, India has become one of the most favoured spiritual tourism destinations for the tourists across the world. The spiritual tourists are attracted to temples, mosques, monasteries and Churches that are spread across the country and are architectural wonders of ancient world. This is also known as pilgrimage tourism where people look for the divine goal or simple life. India is known for its culture and places of worship. The most popular spiritual destinations in India are Badrinath, Kedarnath, Haridwar, Gangotri, Jagannath temple at Puri, Konark, Rameshwaram, Mahabalipuram, Meenakshi temple in Tamilnadu and Tirupati in Andhra Pradesh. Every year large amount of tourists visits these temples and shrines. In addition to this there are pilgrim centers of Satya Sai Baba in Andhra Pradesh, Osho Ashram in Pune and Shirdi. The power of spiritual tourism has also been recognized by the neighboring country Pakistan where an ancient Hindu temple site is being developed by the Pakistan government. This so far neglected complex is called Ketas (also called as Ketas Raj) dates back to 16th century A.D. Pakistan government is investing millions of rupees into conservation, restoration and renovation of Ketas and in the process

aims to attract "a million of pilgrims" from India per annum or at least a minimum of 50,000 from those who visit Pushkar every year (The Hindu, 18/2/2007)⁸.

2. ADVENTURE TOURISM

It is also called as Youth tourism which attracts tourists who are in search of adventure and thrill. Adventure tourism includes Water sports, skiing, yachting, gliding, sailing, mountaineering and trekking. Trekking has the greatest potential in terms of numbers and it requires little infrastructure.

3. NATURE TOURISM

Nature tourism appeals to travelers who want to experience the unexplored flora and fauna and the natural beauty of a country. The peaks of the Himalayas, Thar Desert, coastal areas, bird sanctuaries and forests attract these tourists most. Examples of nature tourism spots in India include, Sunderban forest, the Jim Corbet National park in the Andaman & Nicobar Islands. Countries like Thailand attract more nature tourists per year with natural under sea beauties.

4. SEX TOURISM

Rio de Janeiro in Brazil is a popular tourist place for its Carnival (Rio Carnival) and music (Samba & Tango). Recently, this place has appeared in news for emerging as a hot sex tourism destination. The US soldiers while returning to their parent country on leave from Iraq⁹ wanted to stop at Rio de Janeiro for having sex¹⁰ along with participating in the Rio Carnival. Sex tourism is not a new phenomenon, many destinations like, Argentina, Dominican Republic, Costa Rica, Cuba, Thailand and many more countries have been named as sex tourism destinations¹¹. Sex tourism is a part of huge tourism sector where men or women travel to a particular destination to engage and enjoy sexual intercourse.

5. MEDICAL & HEALTH TOURISM

The term Medical Tourism can be described as people traveling to another place or country to obtain medical or health care services (Rajagopalan, 2006). Though medical tourism and health tourism can be used interchangeably, in this article the author has differentiated these two terms as below:

Medical tourism: A tourism destination that possesses ultra-modern medical facilities like super-specialty hospitals and provides medical services like surgeries and curing of diseases, etc. Medical Tourism refers to tourists of one country moving to another for availing the medical services for diagnosis and treatment including general surgeries, transplantations, organ replacements, cosmetic

surgeries, joint surgeries, etc.

Health tourism: Health Tourism refers to tourists arriving at a particular destination not for modern medical services as mentioned above but for availing the traditional health services like, alternative medicine, yoga, spas and other medical services mostly offered in the traditional form by specialized providers who mostly have inherited their expertise and specialization rather than acquiring qualifications. These health tourism destinations are born few centuries ago and the specialized services offered cannot be so easily transferred to any other part of the world as there is a close relationship between the services offered and the natural setup of that particular place (Ravikanth, 2006). For example Panchkarma Centres in Kerala provide health solutions in the ancient form through ayurveda as a major treatment method (Fernandes, 2003). Usually, a health tourism destination will have locational advantage. For example, natural springs in New Zealand and Australia. Though the service providers use modern facilities like lighting, A/C rooms, hair driers, etc, the basic services are provided mostly using traditional tools, age old medicines and also in the traditional form.

INTRODUCTION TO HEALTH TOURISM

Health tourism is the act of traveling to other countries to obtain health care. Health tourists are generally residents of the industrialized nations and the countries they travel are typically the less developed ones with lower cost of health care. WHO defines health tourism as a destination providing majorly following three services: Medical care, Sickness & Well-being and Rehabilitation & Recuperation. For a place to be named as Health Tourism Destination, essentially it should provide health related services in the traditional form backed by centuries of experience, knowledge and history. Health tourism destinations offer age old tried and tested formulas which offer calmness to the body and soul without any side effects¹².

INDIAN HEALTH TOURISM

The priority areas of the Indian Government changed from Roti, Kapada aur Makaan meaning, Food, Clothing & Shelter to Paani, Bijli aur Sadak meaning, Water, Power and Road. The Governments' shift in emphasis to develop infrastructure in the country has provided a major boosting for the development of tourism in India. Indian Health Tourism offers Ayurveda, Naturopathy, Yoga, Meditation and many other treatments that are beneficial for health and rejuvenation¹³. People from 55 countries visit various

Ayurveda Shalas, Meditation centres, Spa Resorts and Rejuvenation centres spread across the country as a part of their health tourism to India. Figure 1 presents the pillars of Indian Health Tourism.

Ayurveda¹⁴

The earliest mention of Indian Ayurveda can be found in the Vedas and Samhitas of Charaka, Bhela and Shusruta. Indian Sages and Monks used to practice Tapasya or Dhyana means 'Meditation' in the deep pockets of Himalayas rich by herbs and natural medicines. Over a period of time they have developed a systematic approach for treating various health ailments by using those herbs and naturally available sand, clay and mineral/herbal water and named the methodology as 'Ayurveda'. Ayurveda is a proven approach to treating human body. The greatness of Ayurveda lies in removing the cause of illness and not just curing the disease itself and that too without having side effects. Ayurveda offers treatments for ailments such as arthritis, paralysis, obesity, sinusitis, migraine, premature aging and general health care. Chart 2 presents the details of type of Ayurvedic medical facilities provided in India.

Yoga

The word yoga means to join together. The ultimate aim of yoga is to unite the human soul with the universal spirit. Around 5000 years ago Patanjali, the propounder explained eight types of Yoga. Chart 3 illustrates different types of Yoga exercises and subsequent benefits.

Spas

A 'Spa' or a Rejuvenation centre¹⁵ is a health centre that combines the best Indian health practices with the west thus offering the best of the two worlds. In a Spa the western therapies are clubbed with meditation, Yoga and Pranayama and are highly useful in benefiting the visitors in controlling blood pressure, insomnia, depression, paralysis and a number of other deadly diseases. Few of the Spa's in India are, Ananda Resort in Rishikesh, Angsana Resort, Golden Palm Spa and Ayurgram in Bangalore.

HEALTH TOURISM – INDIA'S COMPETITIVENESS¹⁶

Indian Health Tourism enjoys a highly competitive position vis-à-vis her international counterparts. Following points illustrate the competitiveness of Indian Health Tourism:

- Cost competitiveness: Medical Treatment in USA or UK = A tour to India + Medical Treatment + Savings. India offers quality treatment at one-fifth of the cost abroad.
- Investments: About £50 million has been

invested by private healthcare companies in India in the past decade. About 75 per cent of healthcare services in India are now in the private sector that provides better services. Various state governments are increasingly aiding the health tourism projects in their respective states.

- Availability of quality and qualified service personnel: The quality of medical facilities and staff in India is increasingly rated internationally. The service personnel in health care destinations are well-versed with various regional cultures across the world and possess acceptable English language skills.

Chart 4 showcases the Indian competitive position vis-à-vis its competitors in Health Tourism Sector. It becomes evident from the above table that in the areas of skin care, beauty care and spa's only the India's competitive position is low and in all other areas, India stands bravely before the international community with high competitive position. Not only the competitive position is high but in some aspects like Yoga in Wellness and Sidha in Alternative medicine, India has a monopoly as such services are not offered elsewhere in this world.

HEALTH TOURISM – INDIA'S CONCERNS

Though the health tourism sector promises major revenues for the stakeholders in future, unless the areas of concern are addressed properly, the anticipated benefits may not be enjoyed (Chinai & Goswami, 2005). 44,29,915 tourists visited India in 2006. Though the number is encouraging, if one looks at the type of tourism that the tourists visited India, certainly it will be a major concern for a stakeholder of Indian Health Tourism. It is clearly depicted in Table 1 that very few tourists only 4.40% visited India on Health and Medical grounds. It is a major challenge before the sector to increase this proportion. Chart 5 illustrates other major concerns for the stakeholders of the Indian health tourism.

CROWDING OUT¹⁷

Some of the concerned stakeholders opine that in countries like India, the scarce resources that can be better utilized to provide health services to the nationals are utilized to provide health services to the visitors. As a result, availability of health facilities becomes costlier for the nationals. This effect is known as 'Crowding Out'. Crowding out will occur when the public funds are used to develop international trade in the areas where the development is not achieved at the national level itself.

PROMOTION OF INDIA AS HEALTH TOURISM DESTINATION - INCREDIBLE INDIA CAMPAIGN

The 'Incredible India' ad campaign, used health tourism as one of the major promotional aspects in promoting India. The campaign promoted India as the 'original yoga land' and encouraged people across the world to use yoga to make their lives better and happier. The promoters thought that the erstwhile heritage monuments like the Taj Mahal, Red Fort and places in Rajasthan (though popular) have become very common. Hence while searching for a USP to promote herself on the international platform, Yoga came to the rescue. Grey Worldwide¹⁸ the official media agency behind the conception and implementation of 'Incredible India' campaign has decided to promote India on four aspects: Yoga, Ayurveda, Wildlife and Festivals. However, Incredible India campaign became highly successful, Port-trust Authority has given a 6-S Framework which was extensively used in designing till implementation of the Incredible India campaign. The framework is presented in Chart 6.

In popular cities like London, New York, Paris, Zurich and Amsterdam hoardings were placed in prominent places like airports, on buses and busy streets carrying simple messages like 'Get to know Yoga from its mother'. The ad campaign proved successful¹⁹ and contributed several benefits like, an increase in tourist traffic by 15% as against a target of 10% and also an increase in foreign exchange by 19%. More details are presented in Table 2.

It appeared imperative to conduct SWOT analysis of the Indian Health Tourism to understand the concept in a holistic manner. Chart 7 presents the SWOT of the Indian Tourism. Few critical issues include, Yogic background as a strength, poor infrastructure as a weakness, globalization as an opportunity and threat from other Asian (particularly Far East Asian) countries.

CASE STUDY - I

KERALA – THE PIONEER HEALTH TOURISM MARKETER

Kerala, popular as the 'God's Own Country', is the pioneer state in marketing health tourism in India. With a strong focus on Ayurveda, Kerala has promoted itself as a most favourable health tourism destination along with improving the facilities on par with the international standards. Firstly, the Kerala government has taken up the task of promoting inland by establishing Panchakarma centres in various metro cities and also at various other tourism destinations.

With the growing demand and sincere marketing attempts by the stakeholders, it is estimated that Kerala will attract one lakh health tourists by 2010²⁰ with an increase of 20 to 25 percent annum. Fully aware of the Crowding Out effect, the Tourism Ministry has declared that the revenue generated from the health tourism would be used to provide concessions in treatments for the economically backwards people in the country. Kerala attracts tourist from North America, UK, Spain, France, Germany, Italy and Gulf countries like Saudi Arabia and the UAE (Hasan, 2003).

Government's role in promotion of health tourism in the state

The state run Kerala Tourism Development Corporation (KTDC) is tied up with health services providers²¹ for giving a corporate and industry status to the health tourism sector in Kerala. Table 3 highlights the state government's support for the marketing and promotion of health tourism in Kerala²²:

Promotional attempts

With a worldwide recognition as one of the must-see destinations and fully developed health care destinations, Kerala attracts tourists from around 16 countries. Following are the sincere attempts for marketing and promotion of health tourism in Kerala:

- Holding seminars and conferences throughout India
- Promoting Pachakarma as the USP of Kerala in all its promotional campaigns²³
- A tie-up with Vodafone formerly known as Hutch, Citibank, and ICICI Prudential to provide not only valuable information but also to offer various concessions and special packages to their customers and visitors
- Holding exhibitions, outdoor promotions, road shows and presentations abroad and at various international platforms like World Travel Mart, London.
- Kerala recently participated in the Information Technology Business (ITB), 2006.
- Print and distribute brochures, CDs and other publicity material.
- Local business groups the Kairali Group and the Focuz Group have entered into agreement with Vietnam and Canada respectively to promote health tourism in Kerala.

CASE II

LEARNINGS FROM MARKETING OF VICTORIA SPA IN AUSTRALIA²⁴

A study of how health tourism is promoted in Australia by the Australian Spa Association (ASA)

will be helpful the promoters of Indian health tourism, as ASA's marketing approach has been highly professional and proven. The marketing started with gathering facts and conducting in-depth analysis of the spa industry, segmenting various services offered by the industry, identifying the right profitable target customer base and effectively promoting their services.

Victoria is a natural health destination in Australia with over 100 springs and unique mineral water resources. Constant new product developments like Hot Stone Massage over the past decade backed by the rich experience have contributed to the success of the spa industry in Victoria (85 different therapies are available²⁵). Victoria was successful in Australia first and only then worldwide. It is evident from the fact that Victoria's market share of domestic spa visitors is 29% as against its market share of total domestic visitors at 24%. The service providers effectively perform e-marketing in the form of circulating e-brochures, mailing health material through e-mails, etc. The service providers also have developed packaged health food and promoting to the health tourists. ASA has fixed few main goals of marketing health tourism in Victoria:

- Increase visitation to Victoria
- Enhance the length of stay and expenditure by spa and wellness visitors
- Encourage further investment in health tourism particularly in developing spa and wellness products and infrastructure
- Improve professionalism and excellence among the service providers

MARKETING INDIAN HEALTH TOURISM – LEARNINGS FROM THE CASE STUDIES

With the international tourism booming up, it is the high-time for devising effective marketing strategies for promoting and rightly positioning Indian Health Tourism sector on the international platform. The above cases of marketing health tourism by Kerala and Victoria Spa provide wonderful insights which can help us to design a communication program to promote health tourism in India. While the study of Victoria Spa's promotion programs introduces us to a methodical approach in designing the communication program, Kerala case guides us as how to adapt it to Indian scenario. There are some similarities in both the cases in terms of the product bundling, like combining health services with the other popular local options of nature tourism, spiritual tourism etc. Also, it's very evident from both the cases that there is a need of high degree of coordination

between government or tourism department and private players like hotels and Ayurvedic centers. Along with this the support of the intermediaries like the travel operators cannot be undermined. These operators have their own branches or alliances with foreign players. This provides a direct medium for the health care tourism industry to reach among its target segment in different countries.

The following section of the paper discusses various approaches that can be effectively adopted by the health tourism industry to promote itself on a global scale:

1. Building world-class infrastructure, private partnership an imperative: India may require an investment of Rs.1,40,000 Crores by 2012 for achieving its full potential²⁶. But this will not be possible only by the government alone. The private players have to play a significant role in this. For example, in Hyderabad, world class international airport is being built in PPP (Public Private Partnership) with GMR Group.
2. Marketing collaborations: It has become imperative for players of Indian health tourism to enter into alliances with one another. For example KTDC has opened an Ayurvedic resort called, 'Thanneermukkom Ayurvedic Lake Resort' in association with Keraleeya Ayurveda Samajam, with Appollo multi-specialty hospital to open spas and with the Cochin based Amrita Institute of Medical Sciences (AIMS) to provide complete health care solutions to the patients and tourism options for both the patients and bystanders. Further more, there a need for sincere attempts by hospitals like Workhardt, Hinduja, etc. to form alliances with the tourism players.
3. Communication: It is the responsibility of all the stakeholders to develop an effective system of communication for promotion of health tourism in India. All traditional and modern methods of communication viz, advertising in print media and electronic media, designing and launching websites, e-brochures, etc. should be used not only to disseminate information about various products, services, accommodation, addresses of the competent authorities and clarifications. This will not only benefit the target customers but also increase awareness about the health tourism industry in India (Gupta, 2008).
4. Structured marketing approach to marketing health tourism: Taking a clue from the Victoria

Spa case, a structured and systematic approach must be followed for marketing of Indian Health Tourism.

- a. SWOT: The marketing campaign should essentially contain an in-depth situation analysis. It should include identification of the strengths, weaknesses, opportunities & threats of the health tourism industry in India. An attempt of SWOT is made in Table 10.
 - b. Systematic approach to marketing: The marketing programme must follow a fact based professional approach considering various practical aspects like infrastructure, segmentation, profile of the target customers, etc.
 - c. Data Base Management: An effective database management system must be put in place for effectively tracking the trends and profiles of the tourists.
 - d. Visibility in the national & international Trade Fairs: These activities comprise presentation meetings at hotel chains, discussions with eco-consultants, presentations at tourist fairs, talking with key players like tour operators, travel agencies, tourist associations, and authorities in tourism of other countries. The services of organisations like IBEF (The Indian Brand Equity Foundation) can be better utilized for such purposes.
 - e. Marketing goals: A very important part of any marketing communication plan is to set up realistic and measurable targets/ goals through effective identification, allocation and implementation of the available resources. There are two kinds of targets that are required to be looked into – short term and long term. Marketing goals of tourism are presented in Chart 8.
5. Promote in land: ASA could successfully promote Victoria inland and achieve a domestic market share of 29%. This clearly indicates that is a huge market untapped in India itself which is presently not fully explored by the health tourism destinations. However, attracting international tourists is important but more than that, revenues can be generated through attracting NRI's²⁷ and Indians nationals.
 6. Segmentation: The Australian Spa Association

(ASA) has segmented its market into various segments namely, Socially Aware, Look at Me's, Young Optimism and the Traditional Family. A major learning from marketing of Victoria would be categorizing various services offered by the health tourism into Health Services (Massages), Grooming Services (Facials) and Personal Fitness Services (Training individuals for maintaining health and fitness).

7. Luxury: Emphasise on luxury as most of the visitors would be coming from the well-off nations and are used to luxury and comfort.
8. Promote specific tourist benefits: Instead of promoting Yoga as a whole, it would be appropriate to promote specific health goals like quitting smoking, recovery from grief, achieving mindfulness and spiritual awareness.
9. Online marketing: However, different websites like, www.tourisminindia.com and www.medicaltourismindia.com are fully operational for effective e-marketing of health tourism, more services can be provided online like, circulating e-brochures, distributing health material online, online counseling, etc.
10. Supporting service providers: Develop professionalism among the service providers. The ASA has designed quality training and development courses the employees of the service providers, introduced various business models like the Queuing Techniques for effective management of the organisation and also has been encouraging them with excellence awards.
11. More: For promoting the Indian Health Tourism, much more dedicated efforts are needed in the following areas:
 - a. Highlight the traditional and rich Indian heritage
 - b. Promote Yoga on the international platforms as Yoga is gaining significance world wide
 - c. Provide enough emphasis to promote India as a favourable health tourism destination in 'Incredible India' campaign
 - d. State governments to take interest in aiding and promoting their respective local areas as health tourism destinations
 - e. Price and cost advantage to be highlighted in promotion campaigns
 - f. Infrastructure development
 - g. Develop the concept of health and

promote health tourism destinations within the country

CONCLUSION:

Dear stakeholder of the Indian Health Tourism, hear carefully and you will hear the developed world overstressed with the modern medical system knocking your door. The opportunities are plenty as the Indian Health Tourism sector has many advantages over its counterparts across the world. The need of the hour is favourable policy making and implementation on the part of the Government(s) and innovation by the various players of the sector. Viewed from a long term perspective, the Indian Health Tourism sector can integrate with different other sectors like hotel industry and aviation industry to provide huge employment, generate attractive foreign exchange and contribute on a larger scale to the growing India's GDP.

Hail Indian Health Tourism!

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CHARTS, TABLES & FIGURES

Chart 1: Nations and tourism details

Country	No. of Visitors	Service specialization	Type of tourism (tourism category)
Thailand	11 Million	<ul style="list-style-type: none"> Cosmetic Surgery, Transplantation of organs, Joint replacement Sexual services 	<ul style="list-style-type: none"> Medical Sex
Jordan	6.6 Million	<ul style="list-style-type: none"> Cardiac care, Organ transplantation & Fertility treatment 	<ul style="list-style-type: none"> Medical
India	4.4 Million	<ul style="list-style-type: none"> Cardiac care, Joint replacement & Eye care Health & Beauty care Yoga & Meditation services Nature & Heritage 	<ul style="list-style-type: none"> Heritage Health Nature Spiritual
Malaysia	17.5 Million	<ul style="list-style-type: none"> Nature & Lifestyle Theme parks & adventure 	<ul style="list-style-type: none"> Nature Adventure
America	80 Million	<ul style="list-style-type: none"> Nature & Heritage Modern medical services Higher education & Research Theme parks 	<ul style="list-style-type: none"> Nature Lifestyle Adventure Medical Education
Brazil	6.5 Million	<ul style="list-style-type: none"> Festivals & Carnivals Sexual services 	<ul style="list-style-type: none"> Fun & Entertainment Nature Sex
China	124 Million	<ul style="list-style-type: none"> Nature & Heritage Spas, Natural Health care Martial arts knowledge & practice 	<ul style="list-style-type: none"> Health Heritage Spiritual
Japan	6.4 Million (2004)	<ul style="list-style-type: none"> Theme parks Education 	<ul style="list-style-type: none"> Adventure Nature
Cuba	2.2 Million	<ul style="list-style-type: none"> Addiction rehabilitation Niche service – Night blindness Cosmetic surgeries Sexual services 	<ul style="list-style-type: none"> Medical Sex
Australia	5.5 Million	<ul style="list-style-type: none"> Theme parks Spa & wellness services Education 	<ul style="list-style-type: none"> Nature Adventure Health

Compiled from various sources

Chart 2: Type of Ayurvedic medical facilities provided in India

Name of the service	Process of service	Health benefits
Sirodhara	Medicated oils, butter, milk etc. are used for the treatment. Applied on the nerves and problematic parts of the human body	Healing of neurological disorders
Udwarthanam	Therapeutic dry massage with herbal powders	Removal of excess fat from the body
Virechana	Oral intake of herbal purgative drugs	Curing skin & urinary disorders etc.
Abhyangsanamam	An oil bath and rejuvenating oil massage	Preserves youthfulness, tones the body and prevents skin diseases
Dhanyamaladhara	Warm herbal liquid is poured over the body	Treatment for paralysis & rheumatic diseases
Njavarakizhi	Application of medicated rice packs on the body	Induce perspiration & good for rheumatism, pain in the joints
Tarpanam	Application of medicated ghee on the eyes	Prevents cataract and strengthens the vision

Source: Compiled from various sources

Chart 3: Different types of Yogic exercises and benefits

Name of Yoga exercise	What is done	Benefits
Yam	Universal moral commands	<ul style="list-style-type: none"> Control cholesterol level Reduce weight Normalize blood pressure Improve cardiac performance Release tensions Develop relaxed state of mind And relaxes both physiological and psychological systems.
Asana	Posture	
Prathyahara	Withdrawal of mind from external objects	
Samadhi	State of super-consciousness	
Dhyana	Meditation	
Niyam	Self purification	
Pranayama	Breathing control	
Dharana	Concentration	

Compiled from various sources

Chart 4 : Indian competitive position Vis-à-vis competitors

Category	Services	Competitors	India's competitive position
Wellness	Spa	Thailand & Australia	LOW as the competitors have captured a major share of the market
	Rejuvenation & Stress relief	Thailand, South Africa & China	
	Yoga	NO	HIGH as Yoga is known to be originated from India
Alternative medicine	Treatment for diseases	NO	HIGH as Kerala is popular in this service
	Sidha	NO	HIGH as the concept is unique to India
	Skin & beauty care	Jordan & Malaysia	LOW as competitors enjoy a major proportion of western & middle-eastern market

Compiled from various sources

Chart 5: Major concerns of Indian Health Tourism

Areas of concern	Details	Solutions
Negative Perceptions	<ul style="list-style-type: none"> Hygiene Pollution Backward & Bureaucratic 	<ul style="list-style-type: none"> Positioning India as a desirable health tourism destination. E.g.: Emphasis in 'Incredible India' campaign Stringent laws relating to ecological issues particularly in the health tourism destinations which are considered to be natural spots on the earth The governments should frame laws and policies aiming at contributing to the smooth functioning of various activities in health tourism
Connectivity	<ul style="list-style-type: none"> No Flights Bad Roads Backward 	<ul style="list-style-type: none"> Develop the infrastructure not only in the country but also more specifically in the health tourism areas Connect the identified health tourism destinations with effective telecom and internet facilities
Insecurity	<ul style="list-style-type: none"> Terrorism Prone Communal Unrest 	<ul style="list-style-type: none"> Take steps to maintain harmony in the tourism pockets and provide high security for the travelers
Other issues	<ul style="list-style-type: none"> Becoming costlier 	<ul style="list-style-type: none"> Control costs and increase the operations. Some of the reasons like high airport charges should be given a consideration The service providers should aim at attracting national tourists as well along with the international tourists

Compiled from various sources

**Chart 6: Promotion of India as a health tourism destination
Port Trust Authority's 6-S framework**

Each S	Emphasizes on	Description
Swagat	Hospitality	Health Tourism destinations to be provided proper facilities of welcoming the international tourists in the Indian traditional and royal way so that it remains as a memorable experience for them. The tourism offices at the arrival points like airports & ports are equipped with trained personnel to welcome and treat the tourists to their delight
Soochna	Information	All touch points like the hotels, tourism offices and health care centres are provided with and instructed to provide complete information about the Indian health tourism, destinations, type of health services, benefits, costs and other tourism related information to the visitors. The information dissemination centres not only supply required information but also perform marketing and promotion activities.
Suvidha	Facilitation	The government has taken steps to improve accommodation and stay facilities for the visitors in the health tourism areas. The 3 rd S Suvidha calls for the stakeholders' commitment towards providing world class accommodation with proper amenities and conveniences.
Suraksha	Security/Protection	With the increased operations of international terrorists in India, the government(s) have taken additional measures for providing security and proper protection for the tourists. Safety of the tourists is the priority aspect in improving the health tourism in India. Another important aspect is pollution control measures. Tourists expect pollution free environment at the health tourism destinations. Hence, government(s) are passing stringent laws to protect the environment from vehicle and industrial pollution.
Sahyog	Cooperation	The health tourism department cannot perform as an individual entity. The success of the industry depends upon the effective coordination among all concerned industries like hotels, coordination among various state governments and also the Central Government has called for Public Private Partnership for the development of the Indian health tourism.
Sanrachna	Infrastructure	The government is committed to develop the infrastructure (roads, ports, airports, railways, private transport, telecom, etc). The Golden Quadrilateral is a major move in this direction.

Source: Website of Incredible India campaign and other sources

Chart 7: SWOT ANALYSIS OF INDIAN HEALTH TOURISM

Strengths	<ul style="list-style-type: none"> World wide Yoga is gaining significance as 'the best' method of health management. Yoga is the monopoly service of India. The users prefer medication without side effects. Our health solutions and services are backed by Ayurveda, the medical science without any side effects. This is the major strength of Indian health tourism. Kerala is popular for successful treatment of neurological problems and paralysis. Specialised proven services like Panchakarma can be termed as the biggest strengths of India's health tourism
Weaknesses	<ul style="list-style-type: none"> Poor promotion: India not properly promoted as a health tourism destination. Low awareness among the target tourists Backwardness, poor infrastructure, increasing pollution, growing security concerns due to increased operations by international terrorists
Opportunities	<ul style="list-style-type: none"> Growing health concerns across the world Yoga gaining popularity across the world particularly developed countries Globalisation and Internet technology providing visibility to the service providers
Threats	<ul style="list-style-type: none"> From Malaysia, China & Australia who are providing similar health care services and promoting themselves on the grounds of health, heritage, spiritual and nature (Table 1) India's competitive position is LOW in Wellness (Spa & Rejuvenation) compared to Thailand, South Africa, China and Australia India stands LOW in competitive position in skin & beauty care compared to Jordan and Malaysia Though Yoga has been our monopoly area, China has become competitor and posing threat to India in offering Yogic services. China could achieve it due to strong practice and prevalence of Buddhism across the country (Table 5)

Compiled from various sources

Chart 8: Goals of marketing tourism

Short term marketing goals	<ul style="list-style-type: none"> Partnering with the experts players in the tourism industry as a whole to gain from their experience. Building media relations and an international and national PR and promotion system.
Long term marketing goals (The 6-S Framework suggested by the Port Trust Authorities is a step towards achieving long term marketing goals)	<ul style="list-style-type: none"> Increasing the awareness level of the various health tourism products available in India. Improving the perception towards the Indian health tourism industry. Increase in the annual revenue because of health tourism is a good indicator of this. Design appropriate communication strategy.

Compiled from various sources

Figure 1: PILLARS OF INDIAN HEALTH TOURISM

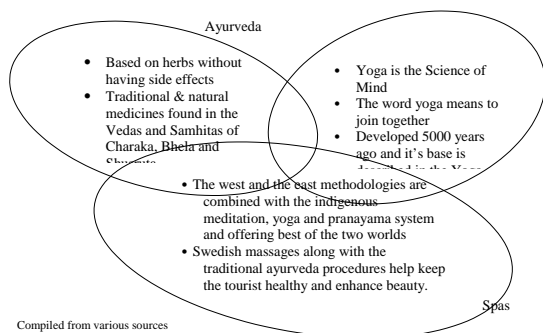


Table 1: Purpose of visits by tourists to India

Purpose of visit	Percentage
Leisure, Recreation And Holiday	45.45%
Business Purpose	23.00%
Religion And Pilgrimage	12.24%
Meet Friends And Relative	12.01%
Health And Medical Treatment	4.40%

Source: Official website of ministry of tourism www.tourisminindia.com

Table 2: Contribution of Incredible India campaign to the growth of tourism in India

Tourist traffic to India	Increased by 15% as against a target of 10%
Foreign exchange earnings	Increased by 19%
India's global tourism market share	Increased from 2.73% to 3.92%
Hits on Incredible India Website	Increased from 3.8 million to 7.1 million
Per capita foreign exchange earnings	Increased making India second to only US in this regard
Popularity	The campaign bagged the prestigious Euro Effie award for the first time for India in Services category as a happening destination

Source: Incredible India Website

Table 3: Kerala Government's support to the promotion of tourism in the state

Aid/Support Rs. Crores	Purpose
74.25	Development of tourism in the state
10.00	Additional allocation for the marketing of health tourism in the state
3.50	For conserving the state's heritage which is one of the main ingredients for the success of health tourism
47.39	For developing tourism infrastructure

Compiled from various sources

End notes:

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- 18 Grey India wins a bronze at Effies for Incredible India, www.agencyfaqs.com/news/stories/2006/09/29/16075.html
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- 21 KTDC is tied up with Keraleeya Ayurveda Samajam, a society formed by the Maharaja of Calicut in 1903 and Cochin based Amrita Institute of Medical Sciences
- 22 Kerala State Budget for 2006-07
- 23 www.health-tourism-india.com/panch-karma.html
- 24 www.tourismvictoria.com.au/spaandwellness/spa-and-wellness-plan-2005-2010.pdf
- 25 Victoria's spa and wellness plan, www.tourismvictoria.com.au/spaandwellness/spa-and-wellness-plan-2005-2010.pdf
- 26 CRISIL Young Thought Leader Series, 2004 Gowri Shankar Nagarajan, IIM- B, www.crisil.com/crisilyoungthoughtleaders2004/dissertations/GowriShankaNagarajanIIMBMedicalTourism.pdf
- 27 Non-Resident Indians
- 28 Average expenses per night of stay for a tourist in India are \$100 whereas it is around \$35-40 in the SE Asian countries. This hurt Indian tourism.