



## AN ANALYTICAL STUDY OF HEALTH TOURISM INDUSTRY – A STUDY ON POTENTIALITY OF INDIAN HEALTH TOURISM PERSPECTIVE.

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### ABSTRACT

Health tourism is an emerging trend in tourism received greater attention from the health tourists. Health tourism industry has witnessed a steady growth in the recent decades globally. As the number of health seeking population becomes more aware of wellness center and healthcare options and as quality healthcare rises as a priority in the minds of the majority ages, patients are bound to pursue cross border healthcare. A significant and increasingly upcoming segment of this multibillion dollar health and wellness tourism industry which has recorded remarkable growth in India from past few years. Several features such as cost-effective and advanced healthcare systems, availability of specialized and skilled healthcare professionals, and increasing popularity of traditional healing systems and alternative medicine, have all positioned India as a favourable destination for wellness and health care in the global scenario. However, India enjoys less than two percent share of the global wellness market which was not so significant when the health resources are concern so this paper attempts to analyse the past and present health tourism growth in India. The comparisons of health tourism growth rate of India reveals that Indian health tourism is remarkably increasing and it has succeeded to receive attention from the global health tourists. This study is based on the secondary data collected from various reports and articles and analysis was made on every bit of secondary data to come in to conclusions.

**KEYWORDS :** Health Tourism, Wellness Tourism, Cost effectiveness and Traditional Healing systems.

### Introduction

Health tourism is a term involving persons who travels to various destinations to undergo various treatments, surgeries to seek better health which available on affordable prices and qualitative care with easy access. Health Tourism is one of the recent trends of tourism and has enlarged significant fame to India for motivating tourists to cater their health as well as recreation and relaxation desires. Even though a recent occurrence; it is almost became the most important source of income for the country. AYUSH has been the significant driven force of health tourism to offer a complete package of travel experiences with psychological, physical and spiritual wellbeing. Currently Ayurveda therapy and herbal treatments are broadly famous throughout the globe and made India as prominent tourist attractions. Hopefully, within few decades India will be the future destinations for quality health service destination for the health seekers. Thus, endorsing through AYUSH health tourism provides a new dimension to the travel and tourism industry in India itself. This paper attempts to analyse the past and present health tourism growth in India. The comparisons of health tourism growth rate of India reveals that Indian health tourism is remarkably increasing and it has succeeded to receive attention from the global health tourists.

### Literature Review

"Since from the human civilisation, medicinal herb have been used by mankind for its health value". (Lunt, et, al, 2011). People used to travel from place to place in search for medicine or cure for their illness. In the beginning, this movement was not an organised travel and middle men were not involved. "The international inflow of Patients across the globe has changed the patterns of demand and supply of medical services over the recent year" (Leong .T 2011). The movement of people in search for cure or medical treatment is often termed as wellness tourism or medical travel. (Wong K.M and Musa G, 2012). "Medical tourists are motivated to seek health care services outside their usual residence by many aspects including cost, time, regulation, medical preferences, quality, leisure tourism and information on availability" (Wendit K 2012). The industrialisation and commoditisation of medical treatment across the boards leads to hospitality and tourism companies as well as local governments and destination marketers are positioning themselves to capture share in global market. (Wong K.M and Musa G, 2012) In Asia the main medical tourism players include Singapore, India and Malaysia where these destinations are expected to control at least 80% of the Asian medical tourism market share by 2020.

### Statement of Problem

Travelling to different nations for either emergency or selective healthcare procedures are fast becoming worldwide and it made health tourism as multibillionaire industry. India is positioned as the prime

potential health tourism market in the globe. The countries like Singapore, Malaysia, Korea, India etc. have already emerged as most popular health tourism destinations of Asia. Singapore and India are ranked 4<sup>th</sup> and 5<sup>th</sup> respectively in overall ranking by global medical tourism index 2016. This signifies the potential global health tourism market. India is becomes the one of the major player in health tourism which receive maximum health tourists owing to financial benefits, quality healthcare infrastructure, zero waiting time, skilled doctors these four countries are attracting more number of medical tourists towards India. The following researchable issues are identified after a thorough literature review:

1. What is the current scenario of health tourism in India?
2. Who are the major players in health tourism in India?
3. What are the potentialities of health tourism in India?

### Objectives

1. To study the current scenario of health tourism in India.
2. To analyse the major players in Indian health tourism.
3. To know the potentialities of health tourism in India.

### Methodology

This research is a conceptual study based on application of secondary data analysis. The data has been collected from published statistics, reports, journals, previous studies and websites. Then it makes an assessment of the extent of social awareness, innovativeness and responsiveness of hospitality sector for understanding the potentiality of health tourism.

### Indian Health Tourism Industry

India has evergreen destination for health treatment because of its diverse and rich medicinal heritage and has ample potentiality to offer for health seekers. The Indian health tourism sector is one of the fast growing segments of leisure and recreation industry. India offer quality health care with traditional knowledge.

### Highlights of Indian Health care (Indian Brand Equity Foundation -2015)

- USD 100 billion in health market size in 2015.
- Hospital bed for every 1050 patients
- 196312 number of hospitals, 156926 sub centres, 3601 AYUSH Hospitals.
- 2760 blood bank, 515 organisations registered for eye bank.
- 189 Government medical colleges, 404 medical colleges for MBBS, 215 private medical colleges with 25346 postgraduate students per year.

Fast few decades, India Has grown to become a top – notch destination

for health value travel because it stands high over arrange of factors that determines the overall quality of care complex surgical procedure being done with international standard hospital by acclaimed medical specialists at a modest price with zero waiting list. The health sector, in India, has become one of India's largest sectors, both in terms of income and job creation. The Industry comprises Hospitals, medical equipment's and devices, clinical trials, out sourcing, telemedicine, medical insurance. Indian medical industry is growing rapid pace due to it strengthening coverage, services and increasing expenditure by government as well as private players.

### Prime Health care Service Providers in India

The public sector share in the medical industry market is 20% while 80% market the private sector. Private players have investing majorly in setting up state-of- art private hospitals in prime cities like Delhi, Bengaluru, Mumbai, Chennai and Hyderabad. The following are the prime private health care providers in India.

**Apollo Hospitals:** Apollo Hospitals has appeared as the single largest private hospital group in South Asia. The Apollo hospital recognised as the best multi-speciality private hospital in India by The week- Nielsen best hospital survey 2015. The Apollo has over 60000 dedicated caregivers in 69 hospitals over 15+ million preventive health checks with 9500 beds and over 7000 clinicians across the country and abroad. It has tied up with insurers like BUPA (UK), Vandreda (Belgium), and Mondial (France). It has a joint venture with Singapore based Parkway group healthcare PTE Ltd.

**Fortis Hospitals:** Is one of the prime leading integrated health care service provider in India with 10000 beds and 314 diagnostic centres in India, Dubai, Mauritius and Srilanka with an 45 health care facilities. In a Global study of the most technologically advance hospitals in the world Fortis memorial research institute was ranked no 2 by topmastersinhealthcare.com.

**Max health Care:** This hospital founded in 1985 fully owned by max group, with a chain of 14 hospitals in 29 specialities and 2300 doctors with over 37000 share holders. it has a bed capacity of 1200 and treats an average of 30000 patients every month. It has tied up with Singapore general Hospitals in the field of medical practitioners, nursing, research and training.

**Wockhardt:** Is the India's 5<sup>th</sup> largest pharmaceutical and health care company with a presence in 20 countries across the globe. It has 9 hospitals with its operation in the western part of the country they have operations in Mumbai, Nagpur, Rajkot, Nasik and Surat. Few of the hospitals have accreditation of the national accreditation board of hospitals and health care.

**Manipal Group:** Its having 11 hospitals including 8 teaching hospitals, making it one of the Asia's largest multi- stream facilities covering the fully spectrum from secondary to super specialty health care.

**Vasan Eye Care:** In 2002 the group setup its first eye care hospital in Trichy currently it has 170 super specialities e care hospitals in PAN India and abroad with more than 750 Ophthalmologists and over 7500 staff. Hospitals spread across Delhi, West Bengal, Maharashtra, Gujrat, Madhya Pradesh, Uttar Pradesh, Odisha, Jharkhand, Rajasthan, Bihar, Goa, Tamil Nadu, Andhra Pradesh, Kerala, Karnataka and Pondicherry. They also had hospitals in Dubai and Colombo.

### Potentiality of Indian Health tourism Industry

The Globalisation driven the demand for health tourism and raised the patient choice, which includes the aspects like familiarity with medical services providers, availability of quality and quantity services, perceived advanced quality of care, price and mode of payment etc. it is gradually observed that price saving option and low price quality services will motivate the patients to select particular medical tourism destination.

### Affordable Prices for health treatments

Medical procedure	USA	India	Thailand	Malaysia	Singapore
Heart Bypass	\$123,000	\$7,900	\$15,000	\$12,100	\$17,200
Angioplasty	\$28,200	\$3000	\$5,200	\$8,000	\$13,400

Heart Valve Replacement	\$170,000	\$12000	\$19,200	\$15,500	\$16,900
Hip Replacement	\$40,364	\$10000	\$18,000	\$10,800	\$13,900
Knee Replacement	\$35,000	\$6,600	\$14,000	\$7,900	\$16,000
Spinal Fusion	\$110,000	\$10,300	\$9,500	\$6,000	\$12,800
Dental Implant	\$2,500	\$900	\$1,720	\$1,500	\$2,700
Gastric Bypass	\$25,000	\$7,000	\$16,800	\$9,900	\$13,700
Gastric Bypass	\$25,000	\$7,000	\$16,800	\$9,900	\$13,700
Face Lift	\$11,000	\$3,500	\$3,950	\$3,550	\$440
Tummy Tuck	\$8,000	\$3,500	\$5,300	\$3,900	\$4,650
LASIK (both)	\$4,000	\$1,000	\$2,310	\$3,450	\$3,800
Cataract surgery (per eye)	\$3,500	\$1,500	\$1,800	\$3,000	\$3,250

Source: Various reports of Medical tourism board of India, Thailand, Singapore and Malaysia

The above show that cost of selected medical treatments is lower in India. Health care services provided to international patients are done in JCI and NABH accredited hospitals to ensure clinical excellence with international standard and advanced technology.

### Cost Saving

SL.NO	Country	Average Price Savings
1.	India	65% - 90%
2	Malaysia	65% - 80%
3	Singapore	25% - 40%
4	Thailand	50% - 75%

Source: www.patientsbeyondborders.com

Health care services available in the Asian counties by using US Prices across a variety of specialities and health regulations/ medical travel as a bench mark, average range of savings for most medical travelled destination. India is the highest cost saving destinations for the health tourist with quality health care services.

### Growth in Medical Tourism

SL.NO	Country	Index Rating	Overall Ranking
1	Singapore	73.56	04
2	India	72.10	05
3	South Korea	70.1608	08
4	Japan	68.00	12
5	Thailand	66.60	18
6	Philippines	66.40	19
7	Taiwan	66.28	20
8	China	64.78	24

Source: Global Medical Tourism Index 2016.

Indian Medical tourism ranked 5<sup>th</sup> in overall ranking of global medical tourism market index which shows that India is having ample potentiality in the field of medical tourism.

### Results and Discussion

India was one of the prime nations to identify the prospectus of health tourism and presently it is the leading destination for international medical tourists. India has attracted 150000 health tourists in 2004 and this tourist inflow rising year by year with a credible growth rate. Even though there is a bottle neck competition from Asian countries, India managed potential growth rate in health tourism the reason behind this as follows:

### International standard Approved Facilities

The high end medical facilities are available in India and the health care system as feasible as the best in the globe. When compare to other countries India not only maintains a robust accreditation system but also ample number of accredited facilities. India has 27 of JCI accredited hospitals. These approved hospitals will provide health care at global standard.

### Price Savings

Global standard quality of health care is what motivating medical tourists towards India. However, quality health care should not beyond the affordability of the medical traveller who needs it. If quality health care comes at an affordable price it is an unbeatable advantage. This convergence of global quality and price benefits is unique for India. The financial advantage is unimaginable when it comes to major treatments like heart bypass, heart valve replacement where the difference in price is 10 to 20 times. For other health care services it could be anything from five to ten times. When compared to the USA and UK. 80 to 90 percent of price advantages will be given to the patients in India. The estimated 600000 patients who comes to India from other nations do not come only for cheaper prices alone and most of them are not compromising at any level they came to India to regain their health at a fraction of the price and quality services with financial benefits.

### **Zero Waiting Time**

Immediate and quick considerations for healthcare treatments are assured in India. Getting an appointment for heart by pass treatment or planned angioplasty in few countries takes 3-6 months and also are costly too. It's zero waiting time in India for all the health care services.

### **Qualified Doctors**

India is having skilled world class doctors and health care personnel. The nation has the largest pool of doctors and medical staff in south Asia around 1.2 million allopathic doctors, 0.17 million dental surgeons, 2 million nurses available in India. Some of them have recognised as global leaders.

### **Conclusion**

The potential of health care systems developed through centuries of wisdom of Indian civilisation would be fully tapped for the economic growth. This can be done by positioning India as a medical tourism hub. In the globalisation era all the nations want to tackle the medical tourism market for their economic growth. India is also facing a bottle neck competition from the other Asian Countries like Singapore, Thailand and Malaysia, but still India is managed to keep a health growth rate in the field of medical tourism. The concepts of AYUSH and world class facilities, finest doctors, advanced technologies are the few factors behind the robust development of India's medical tourism market.

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