

Research Paper

Tourism



Medical Tourism : Building the India Brand Abroad (An Analytical Study of Potential of Medical Tourism in Gurgaon)

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ABSTRACT

Medical tourism is a new form of a niche tourism market which has been rapidly growing in the recent years. The term medical tourism is the act of traveling to other countries to obtain medical, dental and surgical care. Connell (2006) describes medical tourism as a popular mass culture where people travel to overseas countries to obtain healthcare services and facilities such as medical, dental and surgical care whilst having the opportunity to visit the tourist spots of that country. In this mode, customers (patients) leave their home country to obtain health care services with high quality and affordable prices. Present paper highlights the potential of Medical Tourism industry in Gurgaon. It also helps in introspecting the Hospital Accreditation system for Medical Tourism, examining the role of Insurance Companies in Medical Tourism, analysing the latest trend to increase the flow of Medical tourism. For analyzing the potential and significance of medical tourism in Gurgaon the data has been gathered through secondary sources which includes Books, Magazines, Journals, E-Journals and websites etc. After analyzing all the facts it can be concluded that India is in an advantageous position to tap the global opportunities in the medical tourism sector. The government's role is crucial to the development of medical tourism. The government should take steps in the role of a regulator and also as a facilitator of private investment in healthcare. Mechanisms need to be evolved to enable quicker visa grants to foreign tourists for medical purposes where patients can contact the Immigration Department at any point of entry for quick clearance.

Keywords : Medical Tourism, Medical Tourist Management, Medical Care, Rejuvenation Centres

Medical Tourism in India

Medical tourism in India has emerged as the fastest growing segment of tourism industry despite the global economic downturn. High cost of treatments in the developed countries, particularly the USA and UK, has been forcing patients from such regions to look for alternative and cost-effective destinations to get their treatments done. The Indian medical tourism industry is presently at a nascent stage, but has an enormous potential for future growth and development.

Medical tourism is a growing sector in India. India's medical tourism sector is expected to experience an annual growth rate of 30%, making it a Rs. 9,500-crore industry by 2015. Estimates of the value of medical tourism to India go as high as \$2 billion a year by 2012.

India's international medical tourism industry is now well known, but the first ever figures on domestic medical tourism are simply staggering. Indians made 126 million domestic trips for medical purposes, spending over Rs 23,000 crore on such trips, over the span of one year (2008 - 09) alone. That, incidentally, is about 30% more than the Union health budget for the same year. But just as international migration into India largely reflects a choice of greener pastures while domestic migration is more as a result of the lack of economic opportunity in rural areas, domestic medical tourism too is largely the outcome of poor health infrastructure in rural areas and small towns. 86% of all trips taken for medical purposes are by rural Indians and the poorest spend much more proportionally. The data is part of the National Sample Survey Organisation's (NSSO) 65th round on tourism which estimates the number and purpose of "trips" taken by persons in its representative sample of seven lakh persons as well as the expenditure on them.

The survey defines a "trip" as the movement - for a period of not more than six months - by one or more household members traveling to a place outside their usual environment and return to their usual place of residence for purposes other than migration or employment and which is outside their regular routine of life. The survey data shows that trips for 'health and medical purposes' form 7% of overnight trips for the rural population and about 3.5% for the urban population. While "social" purposes were the main reason for travel for both rural and urban residents, holidaying and leisure accounted for even less than medical travel - 2% and 5% for rural and urban India respectively. Similarly, 17% of same-day trips for in rural India and 8% in urban India were for health reasons. While calculating the expenditure on a trip, the NSSO includes all goods and services bought or consumed by the traveler. The high cost of healthcare is borne out by the fact that trips for health and medical purposes were four times as expensive as the average trip for both rural and urban populations. Medical trips were much more expensive for the family than even shopping trips, where the money spent on purchasing goods is included in the total cost of the trip.

Trips for health and medical purposes were the most expensive of all types of trips in both urban and rural sectors. Expenditure on medical trips accounted for 30% of all overnight trip expenditure for rural India and 15% for urban. In addition, a breakdown of expenditure by Monthly Per Capita Expenditure (MPCE) classes shows that in rural India, the poorer the person, the higher the proportion of all travel expenditure that goes to medical trips.

The main reasons for the growing popularity in medical tourism in India are:

- The long waiting lists in the developed countries.
- The low cost of medical treatments in India than the other

- developed countries. In India, complicated surgical procedures are being done at one-tenth of the cost as compared to the procedures in the developed countries.
- (c) The affordable international air fares and favorable exchange rates.
 - (d) The Internet; with the development of communications, new companies have emerged who acts as middlemen between international patients and hospital networks, giving patients easy access to information, prices and option.
 - (e) The state-of-art technology, specialist doctors, nurses and para-medical staffs that has been adopted by the big hospitals and diagnostics centers in India. In India, the medical education system also caters to the ever increasing demand for the delivery of the quality health care services all over the country.

OBJECTIVES

Following are the objectives of the research study.

1. To study the functioning of a hospitals and facilities provided to patients.
2. To do geographically comparison from where (Origin) the tourist come.
3. To explore the potential for Medical Tourism industry in Gurgaon.
4. To introspect the Hospital Accreditation system for Medical Tourism.
5. To examine the role of Insurance Companies in Medical Tourism
6. To study the latest trend to increase the flow of Medical tourism.
7. To examine the role of Alternative Therapies in Medical Tourism

A. RESEARCH METHODOLOGY:

The study consists of the primary and secondary data.

Primary Data: - The facts pertaining to the organization and management of Medical Tourism products and Tourism Destination will be collected from the authorities/personnel of the various tourist departments of government, the Medical Tourists and the local people. To know the functional and behavioural aspects of hospital's staff with the patients, a field surveys was carried out at various hospitals located in Gurgaon. These information have been carried out through the Questionnaire and personal interview.

Secondary Data: - The secondary data includes the newspapers, books, magazines, trade journals, various publications of the government, organizational bulletins, N.G.Os, and environmentalists etc.

B. RESEARCH TOOLS:

The appropriate tools / techniques would be used to both primary and secondary data. These tools shall be statistical devices or techniques, mathematical equations, Questionnaire etc.

In this work an attempt has been made to make an in-depth study of various hospitals located in Gurgaon city, which are playing a vital role to promote Medical Tourism in India from Internationally & Nationally for doing extensive surveys, various popular hospitals were selected as:-

- Medanta Medicity.
- Artemis Hospital.
- Max Multispecialty hospital.
- The Fortis Memorial Research Institute.
- Paras Hospital
- Columbia Asia

SCOPE OF THE STUDY

- I. Geographical: The study pertains to the Scope of Medical Tourism with Special Reference to Gurgaon.
- ii. Operational: The study is limited to tourist destination having Medical Tourism resources like Super Specialty Hospitals, Rejuvenation Therapy Centre, and Health

Spas etc. at Gurgaon Only.

- iii. Special Area: Super speciality Hospitals & Rejuvenation Centers in Gurgaon

Research Questions:

- I. Does the production of an authentic monograph might be helpful for tourism planners to take suitable steps in planning and the management of appropriate medical tourism in near future?
- II. Does the Government efforts for the development of medical tourism can alert the planners and decision makers to ensure the local people participation in medical tourism development?
- III. Does this study will help to identify major thrust areas where tourism planners can pay extensive attention to develop and promote medical tourism from national and international point of view?

Limitations:

- I. This research paper is basically based on secondary data which may not be reliable.
- II. Preparation of a research paper takes too much time that's why I have to spent a lot of time in preparing this paper.
- III. Organization of data is itself a very tough task.

Literature Review:

S.L Goel / R. Kumar, in their Book named "Medical Tourism and hospital Services, Published in year 2010, have stated that Health and medical tourism is fast emerging as a big opportunity for India with its low cost advantage, high quality health care and an English speaking populace. Greater research and development in medical field tourism and reversal of brain drain, some of the examples are- visitors, especially from the west and the Middle East find Indian hospitals a very affordable and viable option. Karnataka, Andhra, Tamilnadu, Maharashtra and Gujarat are in the forefront of medical tourism promotion. Kerala is God's own health paradise. However, the country would have to improve its health and hospital care infrastructure, connectivity between major cities and streamline visa procedures for medical visitors.

Renée-Marie Stephano, Esquire – President Medical Tourism Association, have prepared a guide, named "Medical Tourism ~ An International Healthcare Guide For Insurers, Employers and Governments, This is a definitive guide for any international insurance company, multinational employers, health insurance agent or government who is involved with patients and insured who travel to other countries for healthcare. It explains why patients are traveling for healthcare, what medical and dental procedures they are traveling for and what countries patients are traveling to. It will provide an understanding of the medical tourism and international healthcare marketplace and teach you what you need to understand in order to implement a successful international healthcare plan.

What is known about the effects of medical tourism in destination and departure countries? A scoping review – By Rory Johnston, Valorie A Crooks, Jeremy Snyder, Paul in the year 2010. In this review they have highlighted the potential of Medical Tourism, to serve as a powerful force for the inequitable delivery of health care services globally. It is recommended that empirical evidence and other data associated with medical tourism be subjected to clear and coherent definitions, including reports focused on the flows of medical tourists and surgery success rates.

According to J Connell - Tourism Management, 2006 - El-sevier

Medical tourism, where patients travel overseas for operations, has grown rapidly in the past decade, especially for cosmetic surgery. High costs and long waiting lists at home, new technology and skills in destination countries alongside reduced transport costs and ...

MD Horowitz, JA Rosensweig - Physician Exec, 2007 in his work, "Medical Tourism- Health Care in the Global Economy" have stated that although physician executives are certainly aware that some patients bypass their hospital, clinic or am-

bulatory surgery center on the way to the airport to have care in other cities, they may be some what surprised to learn that an increasing number of patients are traveling to worldwide.

Medical Treatment in India Advantages & Growth Factors

Medical tourism in India is projected to grow by six times from US\$ 350 million now to an over US \$2billion-industry in 2012. Hence, hospitals in India have a very bright future. India is the largest democracy in the world, is one of the fastest growing economies that is projected to more than double in the next five years. India is one of the most attractive medical tourism bargains for someone in the West who is looking for high-end medical procedures or surgery overseas at a low cost.

Some of the unique advantages that India provides for medical tourists from the West are:

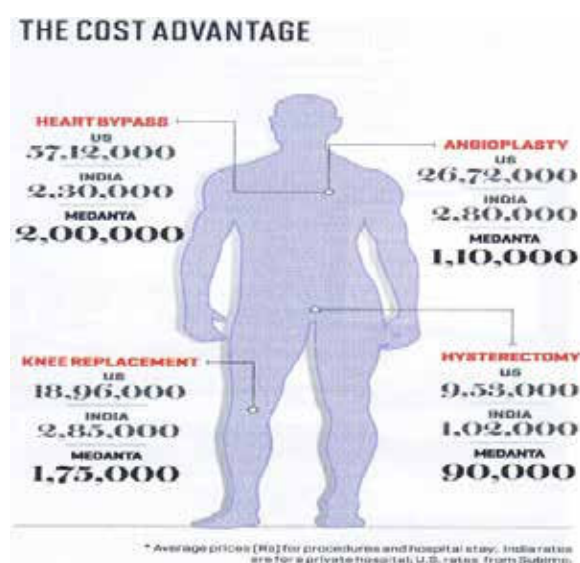
Low cost of medical treatment:

Prime Driver of Medical Tourism in India is that in India is comparable to much that is available at the best hospitals in the world and at a far lower cost. Even considering the cost of air travel and luxury hotel accommodation (if required), the cost savings comes out to be 40-80% of what is in the USA.

✓ Experienced and talented pool of Medical Professionals

With a long history of subsidized medical education and high investments in medical research, India has one of the biggest pool of medical professionals and scientists in the world.

Figure-1



Many Indian doctors have learned their trade and practiced it in the US and UK and now serving in India.

Due to the sheer volume of patients and less bureaucratic delays in acceptance of new medical procedures, surgeons have more experience in some of the new medical techniques are now providing there services in Indian hospitals. For example: Hip resurfacing surgery was introduced in USA by the FDA in 2006, whereas it had already been in practice in India for many years.

Strong Private Hospital Infrastructure.

India has one of the biggest private hospitals in the world. Many of them are affiliated with top world medical institutes like Harvard Medical and John Hopkins.

A number of these hospitals are also accredited by JCI, USA, or ISO

These medical centers have the infrastructure, experience and the set up for quality conscious medical tourism patients from the West.

English is widely spoken

It's the medium of most public conversations and the preferred language of communication in hospitals and medical centers. English is also the medium of instruction in schools and professional training.

A Government that is favorable to medical tourism

Indian government has a special visa for medical tourist's that allows them to stay for long periods in the country. Also, the government has an investment of US\$6.5 billion in the pipeline for medical tourism. This is for setting up affordable hospitals in India and budget hotels for patient's relatives.

Experience in Medical Tourism

Medical tourists from South Asia and Middle East have been coming for medical treatment to India for many years now. Also, Medical tourism from UK to India has become quite common. It's only Medical Tourism from North America (USA, Canada) to India that is a relatively new phenomenon.

Medical decisions by Doctors, not by rules made by Non-Medicos

Unlike many countries, doctors have most of the say in medical treatment in India, unlike many countries where doctors are afraid that what they say or do might be used against them in a lawsuit.

Many Western patients have had previous experience with Indian doctors.

One in 20 physicians in the USA is from India; a large number of Indian physicians practice in the UK, too. To summarize it, the future of Medical Tourism in India is very bright. In the next few years, Hospitals in India are going to expand and new hospitals will open. Medical Tourism Corporation facilitates medical treatment to top Hospitals in India. The major purpose to come in India is social gathering, treatment and tourism.

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Medical Travelers Clusters to INDIA

1. The first is made up of the SAARC countries.
2. The second major group the African (Nigeria ,Nambia ,etc)
3. The third big group of medical travelers comes from the Middle East (Saudi Arabia , Oman , Muscat , etc) .
4. The last group of medical travelers from a motley lot (South American Sub continent)

GURGAON: - A HUB FOR MEDICAL TOURISM

Gurgaon, is one of the commercial cities of India by being geographically situated in the northern Indian state of Haryana, and is a suburb of the Delhi metropolitan area. It is also a part of the National Capital Region of Delhi. It is located in Gurgaon District.

Gurgaon has emerged as a major destination for individuals seeking medical treatment not only in India but globally. Medical facility is an integral part of this well established city and its

proximity to New Delhi International Airport act as a catalyst for providing the Medical Tourists with the best in medical facilities in India. In Gurgaon, there are a number of super-specialty hospitals offering world class health care facilities to the citizens and patients coming from international destinations. A world class and internationally acclaimed city, Gurgaon offers a splendid treat to one and all.

Bringing comfort and luxury to the lives of many, Gurgaon has everything to make it a complete satellite city. Gurgaon, the commercial capital of Haryana, is one of the most sought after destination for MNCs, Corporate, residents and Investors as it offers world class standard of living and globally comparable business address in the form of IT parks and Business Centers but also for its world class super-specialty medical center's that offer state-of-the-art treatment for:

- Cosmetic surgery
- Coronary Artery Bypass Graft or CABG Heart Surgery
- Infertility Treatment
- Arthroscopy
- Dental Surgery

1) Renowned hospitals in Gurgaon

- I. Medanta Medicity
- II. Artemis Hospital
- III. Max Multi Specialty Hospital
- IV. The Fortis Memorial Research Institute
- V. Paras Hospital
- VI. Columbia Asia

In Gurgaon hospitals offer World class Medical Facilities which are equipped with the best infrastructure and the best qualified Doctors. Gurgaon is home to some of the leading multinational corporations in India. It offers a growing infrastructure, close proximity to Delhi and superb connectivity. Delhi airport is less than a 20 minutes drive from the hospital. After treatment Post Surgery Holidays are being suggested as to rejuvenation and recovery as soon as as possible by going into the lap of "Mother nature".

QUALITY POLICY AT GURGAON HOSPITALS

- Deliver world class patient care through medical excellence.
- Create a patient-centric environment
- Ensure high standards and safety of treatment during the patient's stay.
- Continuous Quality Improvement through implementation of robust clinical and non-clinical process and protocols.
- Having world-class infrastructure and cutting edge technology utilized by highly skilled employees.

SWOT ANALYSIS OF GURGAON HOSPITALS

Figure-2



Scenario of Medical Tourism

Figure-3



Source: Report of Ministry of Tourism

THE KEY FINDINGS :

- Inbound tourist expenditure per head in India, is third highest in the world and even more than the global average tourist spending.
- Healthcare tourism is on the rise in India. Visitors can avail several private healthcare facilities. The number of tourists visiting India for medical treatment is expected to reach one million by 2012, representing a Compounded Annual Growth Rate (CAGR) of 28.09% since 2007.
- During 2001-2006, disposable income grew at a CAGR of 10.11%, which led to an increase in domestic as well as outbound tourism.
- More than 50% of the revenue earned by the Indian hotel industry comes from room rents. Over the five-year period spanning 2007-2011, Indian outbound tourist flow is expected to increase at a CAGR of 12.79%. It is expected that the tourist influx to India will increase at a CAGR of 22.65% between 2007 and 2011.

The sector's performance over the past decade has been quite promising as is evident from the following figures.

Table-I

Foreign Tourist Arrivals (FTAs) in India between January and June, 2000 –2011

	FTAs (in million)	% change over the previous year
2000	2.65	6.7
2001	2.54	-4.2
2002	2.38	-6.0
2003	2.73	14.3
2004	3.46	26.8
2005	3.92	13.3
2006	4.45	13.5
2007	5.08	14.3
2008	5.28	4.0
2009	5.17	-2.2
2010	5.58	8.1
2011	2.92	10.9

Source: Indian Tourism Industry Forecast (2007-2011) - RNCOS

Table-2

Foreign Exchange Earnings (FEE) (in Rs. crores) from Tourism in India between January and June, 2000 –2011.

YEAR	FEE from Tourism in India (in INR Crores)	% change over the previous year
2000	15626	20.7
2001	15083	-3.5
2002	15064	-0.1
2003	20729	37.6
2004	27944	34.8
2005	33123	18.5
2006	39025	17.8
2007	44360	13.7
2008	51294	15.6
2009	54960	7.1
2010	64889	18.1
2011	35163	12.1

Source: Indian Tourism Industry Forecast (2007-2011) - RNCOS

STEPS FOR TAKING IMPRESSIVE MEDICAL TOURISM BUSINESS

a) Building the India Brand Abroad:

Classify the target consumer segments based on their attractiveness and position the India Brand based on the three main value propositions – high quality service, value for money and destination diversity. An integrated marketing Communications campaign using print, media and road shows should be developed.

b) Travel Desk in Hospitals:

Hospitals that want to sell medical tourism services should have a dedicated travel desk in the hospitals. Such a travel desk should act as a comprehensive marketing arm of the hospital w.r.t medical tourism. It shall coordinate the in-house services as well as services provided by other players like local tour operators. It can also think of providing services like ticketing, visa-extension assistance, foreign exchange, etc.

c) Staff Trainers:

Medical tourists expect top-class hospitality from the hospital service staff. Providing customer relationship-training inputs for doctors, nurses, pharmacists, technicians, and hospital front office staff is vital in this regard. For this, the trainers have to first identify the factors that generate patient satisfaction and loyalty and the corresponding behaviours of the service staff. Then, suitable employee training programs and management development programs can be designed, developed, and delivered.

d) Medical Tourist Management Software Developers:

If one has the competence in software development and sufficient domain expertise in medical tourism (or, if both of these can be harnessed from external individuals or firms), there exists demand for customized software solutions. Software can be for online booking, for automating the hospital administration, etc.

e) Medical Tourism Consultants:

Medical tourism is a sunrise sector where many problems are not well defined and answers not readily available. Thus, there requires trouble-shooters and one who has creative insights and academic training with ample exposure to the industry can excel in the role of a consultant.

f) Starting Alternative Medical Care/Rejuvenation Centres:

In a country like India which has for so long been known world over as a seat of learning in a range of alternative therapies, there exists abundant scope in promoting the same. Ayurvedic health centres spread across the country are among the first to capitalize upon this unmet demand. It requires relatively less expenditure to start an alternative health centre for Ayurveda, Homoeopathy, Yunani, Siddha, etc. The governmental regulations constraining the operations of healthcare centres are less for these compared with that existing for allopathy, too.

g) Medical tourism brokers:

Across the world, demand for private health care has created a cottage industry of sorts for medical brokers, who specialize in helping patients jump the queue by negotiating reduced rates for elective surgeries such as knee and hip replacement. They get a big commission, which they partially pass on, to the customer who is also benefited thus.

h) Promoting Inter-Sectoral Coordination:

The NABH should take up the responsibility of aligning the activities of various players – Tourism Department, Transport Operators, Hotel Associations, Escorts personnel etc.

i) Integrate vertically:

Various added services may be offered to the patients. For example, hospitals may have kiosks at airports, offer airport pickups, bank transactions, or tie-ups with airlines for tickets and may help facilitate medical visas by the government. With more Arab patients coming in, some hospitals may have hired

Arabic interpreters, stocked up on prayer rugs and opened up a kitchen serving the food preparations in corporate hospitals in India.

j) Anti/Alternative-Medical Tourism NGOs:

Of course, this is also a possibility. If one believes that promoting medical tourism as it is being done now is dangerous, he can join an NGO resisting it, or, start an independent NGO himself. Such NGOs are likely to attract funding from international donors. In any case, if one wants to understand the exception, he has to understand the rule first.

Besides these, an entrepreneur with an innovative bend of mind could think of other possibilities as well. This exercise will often than not yield good results since the industry has just taken-off and many opportunities are remain hidden from the direct eye.

k) Joint Ventures / Alliances:

To counter increasing competition in medical tourism sector, Indian hospitals should tie-up with foreign institutions for assured supply of medical tourists. Specifically they may tie-ups with capacity constrained hospitals and insurance providers.

l) Medical Visas:

A simplified systems of getting medical visas should be developed in order to make travel across borders smoother. Visas can be extended depending on the condition of the patients. The procedures for obtaining medical visa, the subsequent registration and visa extension procedures are complicated and time consuming. There is a need to simplify and speed up these procedures to make India a more attractive medical tourism destination.

m) Role of Government

The government of India must act as a regulator to institute a uniform grading and accreditation system for hospitals to build consumers' trust. It also acts as a facilitator to encourage private investment in medical infrastructure and policy-making for improving medical tourism. The government should actively promote FDI (Foreign direct investment) in healthcare sector as well as also enacts conducive fiscal policies - providing low interest rate loans, reducing import/excise duty for medical equipment It also facilitates clearances and certification like medical registration number, anti-pollution certificate etc. The government should reduce barriers in getting medical visa and institute visa-on-arrival for patients and also can create medical attachés to Indian embassies that promote health services to prospective Indian visitors.

Benefits of Medical Tourism

Tangible Benefits of medical tourism

- Foreign exchange earnings which enable economic wealth of nation.
- Cost advantage in tariff over the developed countries
- Improve information sharing
- Increase in efficiency of patient care process, cutting edge treatment.
- Improvement in hospital supply chain efficiency
- Strategic alliances with business partners within and outside the country.
- Technology and knowledge transfer
- Better logistics performance both in internal and external.
- Creation of employment opportunities in the industry
- Better utilization of infrastructure and skilled manpower.
- Opportunity for development in Infrastructure in Health, Tourism and Travel.
- Economies of scale. Connectivity with air, road, rail and information and communication industries.
- Clustering of medical Travelers.
- Health opportunities for foreign patients may lead to better standards at home.
- Scope for Research and Development to offer comprehensive medical solutions.

Intangible Benefits of Medical Tourism

- International acceptance of country as a global health-

- care provider ·
- Social and cross cultural experience·
- International customer relations·
- Global Marketing and Medical Trade relations·
- Brand image of nation as world-class healthcare destination· Competitive advantage·
- Better coordination among the partners i.e. hospital and hospitality industry.
- Public and Private Partnerships·
- Patient satisfaction

Conclusion

India is in an advantageous position to tap the global opportunities in the medical tourism sector. The government's role is crucial to the development of medical tourism. The government should take steps in the role of a regulator and also as a facilitator of private investment in healthcare. Mechanisms need to be evolved to enable quicker visa grants to foreign tourists for medical purposes where patients can contact the Immigration Department at any point of entry for quick clearance. Tax incentives to the service providers, import duty reduction on medical equipment, committees to promote and foster medical tourism are some of the initiatives that can be undertaken. There is also a need to develop supporting infrastructure such as transport services to facilitate tourism in India. The tourism, health, information and communication departments need to work in tandem for efficient patient care. This paper has recommended some of the medical tour-

ism strategies for further promoting medical tourism in India. These include building and promoting the image of India as high quality medical tourism destination, creating and promoting new combination of medical tourism products, keeping up the high standard of quality treatments at a reasonable price, providing informative online and offline materials and make them available to the potential customers. Also attaining the accreditation/standard to reassure the quality of treatments as well as emphasizing on the needs and demands of the existing target markets must be incorporated.

SUGGESTIONS

- The promoters should concentrate more on publicity of Medical Tourism as the awareness about Medical Tourism among people is very low.
- The health care centers can also dispatch membership card to their customers, this will result in retaining of the customers for a longer period of time.
- The promoters can encourage the tourists to recommend their health care centers to others as mouth to mouth information is effective and does not any money.
- The promoters should ensure that they cover all kinds of health insurance provided in different nations, and encourage customers to take up health insurance, as this will simplify the transaction process.
- The promoters should hold various campaigns in different nations and continents and offer better discount packages.

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