

**INDIAN MEDICAL
TOURISM -
CHALLENGES,
OPPORTUNITIES AND
MEASURES**

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ABSTRACT

Medical tourism refers to people of one nationality going to a different nation for affordable healthcare. India is a popular such destination for medical tourism. India has some natural advantages which make it favorable for medical tourism: like low-cost medical treatment, skilled manpower, support from government and alternative therapies. It also has some challenges like limited number of accredited hospitals, infrastructural problems, perception of India as poor and unhygienic, as a hotbed of terror and communal violence, and lack of standardization. These challenges can be overcome by a holistic approach by involving all stakeholders to write and enforce policy and use marketing and PR as tools to portray India as a prime medical tourism location.

Keywords: health tourism, healthcare, low cost medical treatment, growth of medical sector

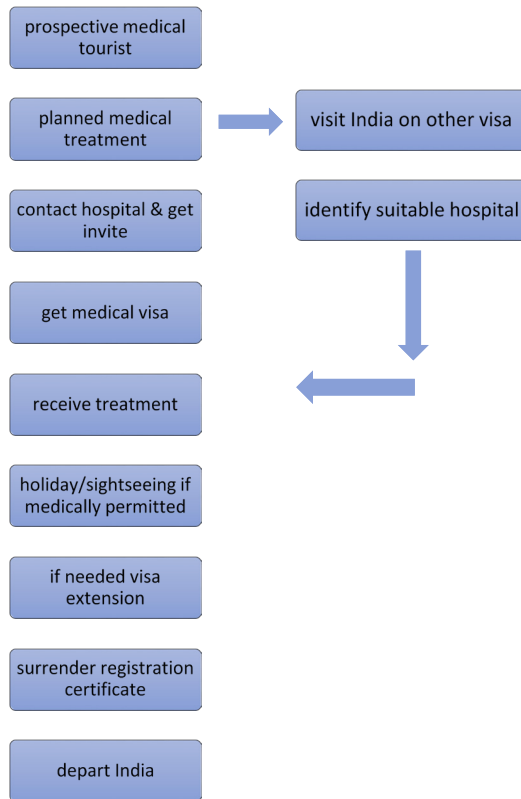
Introduction

Health tourism refers to the patients traveling from their nation to another for seeking affordable or superior healthcare. The travelers can be typically categorized as seekers of alternate medicine, elective procedures, essential procedures, complex surgeries, etc. Many countries are offering services of medical tourism. However, India among them has not failed to give head on competition by standing at 10th place in the popular medical tourism destination, according to the medical tourism association. In the year 1991, along with globalization and liberalization of our trades, India extended medical services to voluntary and foreign tourists. Rapid growth was accomplished by giving huge subsidies to allow this sector to flourish.

Literature Review

- Damaynati Datta (2009 December 28), 10 Medical Breakthroughs describes “the world's first traditional knowledge digital library ... With over 200,000 ayurveda, siddha and unani formulations across 30 million pages in five international languages”
- Geetanjali Nataraj, (2021 June), Medical Tourism in India: Challenges and Way Forward Post the Pandemic notes “one of the major reasons why India is becoming a popular hub for medical tourism is because it offers the perfect blend of both modern, alternative and traditional forms of medicine such as Ayurveda which is effective in various chronic diseases.”
- IMS Health India, (UNKNOWN), Medical Value Travel in India quotes “Medical tourism has evolved rapidly in the last two decades”
- Indian Medical Tourism Association (UNKNOWN), Indian Medical Tourism Association states “The Indian Medical Tourism Association® connects hospitals and countries with accreditation systems making the highest level of technology and healthcare information available to people from around the world in both the private and public sector. Medical tourism is a growing sector in India. In October 2017, India's medical tourism sector was estimated to be worth US\$4 billion. It is projected to grow to \$25 – 30 billion by 2020.”
- Junaid javed (2013), Healthcare tourism opportunities for India describes as “India has competitive edge in the healthcare tourism because of certain characteristics: healthcare professional availability, low-cost medical treatment, enhancing popularity of its traditional wellness systems and country’s existing reputation for treat of relatively advance healthcare segments (such as organ transplant, cardio-vascular surgery and eye surgery).”
- Larisa F (2017 August), Medical tourism market trends-an exploratory research quotes “The citizens from well developed countries are motivated to seek for medical tourism in developing countries by following reasons: the lower cost of medical services in developing countries (saving up to 30 % to 85% on the medical service), the health insurances none or partial coverage, the waiting lists, availability of medical services, the possibility to combine a leisure journey with satisfying medical needs, the geographical nearness, willingness to travel and tourism culture”
- Lorna Collier (2021 February 18), The Top 10 Medical Tourism Destinations notes “India is one of the most-visited countries for healthcare, perhaps due to its medical visa policy that lets patients stay up to 60 days. Family members can also join on a medical attendant visa. Procedures that attract medical tourists to India include multi-organ transplants, hip replacements, cardiac care, cosmetic surgeries, and gastrointestinal procedures. Medical costs in India are about a fifth of what Western countries, such as the U.S., charge, according to the Indian Department of Tourism.”

Figure: 1. Process of medical tourism in India



India’s Advantage in health tourism:

As India is densely populated country with a huge percentage of youth expendable for services gives an added advantage to the country's health tourism to offer a holistic treatment at most affordable cost.

Global outlook

Short supply of national health systems and underdeveloped healthcare facilities – are few of the factors creating a huge demand for affordable healthcare from first world countries. India is perfectly positioned to deliver quality healthcare for such customers.

The below data obliges the fact.

Table 1: Growth of Foreign Tourist Arrivals (FTAs) per year

Year	FTA’s on medical grounds
2014	~125000
2015	2,33,918
2016	4,27,014
2017	4,95,056
2019	6,97,000

Skilled Manpower:

Array of services, from Ayurveda to yogic healing, cosmetic to dentistry, heart transplant to IVF. Indian medical science has progressed in every specialty to cater to the world health needs. All this is possible only due to highly skilled and trained medical team India has nurtured over decades. India has over 2 million doctors of conventional and traditional medical practice and 2 million nurses which is a considerable workforce.

Cost Advantage:

Easy availability of medical supply and manpower has given an edge to India in offering cost effective services to the patients. The cost of treatments is almost one third cheaper when compared to other countries. Below are the percentages of saving on treatments and are the most recent available and calculated in comparison to the average US. cost.

Table 2: Saving in medical costs per country compared with US

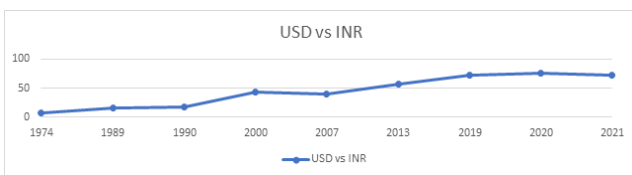
Country	savings in % (Compared to USA)
Brazil	20-30%
Singapore	25-40%
South Korea	30-45%
Spain	30 - 70%
Taiwan	40-55%
Mexico	40-65%
Costa Rica	45-65%
Turkey	50-65%
Thailand	50-75%
Malaysia	65-80%
India	65-90%

The following are some of potential savings and services in USD (\$) that can be acquired in various medical tourism destinations using the most recent data.

Table 3: Cost of medical procedures in various countries

Procedure	US	UK	India	Singapore
Angioplasty	57000	21000-27000	11000	18500
Angiography	2500 – 3000	3000	600	1000
Hip replacement	43000	43000-46000	9000	12000
Knee replacement	40000	36000-38000	6000-9000	12000
Open Heart (CABG)	100000	43000	7500	9600
IVF	10000-15000	7000-10000	3000-6000	7000
Face lift	20000	21000	3100	6250
Heart valve Replacement	160000	150000	9000	12500
Breast Reduction	10000	11000	2200	8000
Bone Marrow Transplant	250000	215000	60000	80000-100000
Liver Transplant	250000	215000	60000	80000-100000
Kidney Transplant	250000	215000	60000	80000-100000
Dental Implants	250000	215000	60000	80000-100000

Also helpful is the fact that the rupee has been dropping steadily against the dollar for almost four decades now, which provide favorable exchange rates.



Holistic Healing Services:

People entering India to avail medical support can be broadly classified into 4 categories:

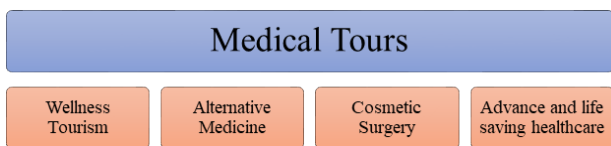


Figure: 2. Medical Tours Model

India is well known for its holistic approach of healing many studies have proved the recuperation is quick and effective with holistic

approach, the paramedic services like physiotherapy, alternate medicines like ayurvedic rejuvenation, yoga meditation and naturopathy have shown great deal of demand in patients visiting for health tourism. Even as standalone health service alternate medicine attracts 2-3% of medical tourism in India.

Bureaucratic Support:

Less waiting time or no waiting time is one of the important criteria for patients to decide on country as many ailments are life threatening, painful to endure and critical. Postponing things may worsen the situation. Government of India along with tourism association and hospital are playing a great role in creating a healthy health tourism ecosystem. Mitigating unnecessary restriction to ease the process to avail treatment. As compared to earlier easy foreign exchange policy, visa on arrival including attendants, multiple entries, long term stay are helping a lot in increasing Indian health tourism popularity. Apart from above policy changes government has made on exceptional 5000cr funding to boost the growth of this champion sector and an additional 2,970cr for ministry of Ayush.

Challenges/opportunities For Growth Infrastructure:

The main hindrance in patients is traveling to unknown place away from family for treatments which in many cases can be life threatening. India having 38 hospitals accredited by JCI and 513 national accreditation Board of hospitals (NABH) has put patients and their family members at ease promising them the best treatments. The corporate way of hospital running helps in orderly management from the identification of patients to post recovery consultation at home country. addressing all the grievances arising in between effectively. India has only 38 hospitals which are accredited by JCI, which a medical tourist can use as a destination for their treatment. For a country the size of India, this is woefully little, and there is huge scope to add more hospitals to our nation’s inventory.

Apart from the hospitals themselves, there is much room for improvement in all the peripheral infrastructure, viz. roads, electricity, water supply, etc. There is huge scope for investment in all infrastructure facilities.

Perception of India

The perception of India by people of other countries also matters; whether India is seen as a poor third world country with unhygienic conditions or as a country rife with terrorism and communal tensions, people will be much hesitant to choose it as a destination for advanced medical treatment. This perception must be overcome by PR campaigns in order to increase India's marketability as a medical tourist destination.

Lack of pricing policy

Heterogeneous pricing and a lack of uniform policy across policy presents unpleasant surprises to medical tourists which will make for a less than ideal experience. This will cause already treated patients to recommend against the same experience to other prospective medical tourists.

Standardization of process

The end-to-end process, from the point a patient enters India, to the point they leave after finishing treatment and recovery, should be standardized, and made easy to understand to the prospective medical tourist, so that they know what to expect and there are few unpleasant surprises to sour their experience. To accomplish this, we need cooperation between various stakeholders of the industry

Involvement of stakeholders

Promoting inter-sectorial coordination is very important to establish price parity, quality standards, dissemination of current communication and integrated marketing. An Apex body of health tourism should give the priority to align stakeholders like Government

bodies, Hospitals, Tourist board, Transport operators, Hotel associations, Investors and Insurance companies etc to standardize the process and portray brand India in international market.

Mismatch in skill-sets

The recommended ratio of doctors to nurses is 1:3. In India the ratio is estimated to be 1:1.7 based on NSSO data. In addition to the already lopsided ratio, every year more doctors are passing out of our medical colleges than nurses, further skewing the odds.

Marketing & Media

India lacks comprehensive marketing plan to showcase its services in potential global market. There is no single website giving end-to-end details of the medical tourism experience. A lot of work can be done in this sector, as the key to getting prospective customers lies in marketing. Indian hospitals can tie up with foreign hospitals, wherein those hospitals can recommend our hospitals as a cheaper alternative.

- Exclusive international websites on Indian medical tourism
- globalization of marketing activities by Indian travel agents
- Avoiding excessive glamorization.

Tying up with insurance companies abroad and media houses is the best way of tapping foreign customers. Like many countries, India should establish a 'Brand India' marketing, which will align tourism authority, chamber of commerce, ministry of health, private companies, etc. with a single shared objective of promoting India as a medical tourist destination.

R&D

"The knowledge economy is an innovation economy" Our doctors and researchers have certainly proved a roadmap for turning new ideas into long-term successes. From minimally

invasive robotic surgery to indigenous immunizations, to even the smallest part of hospital furniture, all parts of life saving technologies are possible only with research and development.

Some of the notable technological achievements of India in recent years are

- fifth gene found out for microcephaly.
- Fibrin glue in eye transplant surgery.
- Use of mobile phone and app to diagnose ROP (retinopathy of prematurity) in rural masses.
- Polypill – an all-in-one preventive pill to reduce many types of heart disease.
- Low-cost luxury hospitals for low-income clients
- Homespun hospital beds

As of the present typically only 12-13% is spent by companies on R&D, whereas by contrast, they spend almost 30% on marketing. There is a lot of scope to increase spending here, irrespective of public or private sector.

Legal Issues

Many medical procedures like organ transplants and surrogacy are inherently very susceptible to misuse – especially in case of economically disparate conditions, like an affluent foreign recipient and a poor local donor. This is one sector that needs stringent oversight by an authoritative body.

Other legal issues like medical negligence, fraud, overcharging brokers, misuse of visas, etc. should also be handled and transparently addressed to improve confidence in the Indian medical industry.

Measures taken to overcome the challenges

- Indian government issues e-visas to 166 countries currently. Earlier foreign nationals had to have a medical visa for treatment, but now a person on e-visa (business/tourist visa) can avail medical treatment without obtaining medical visa for up to 180 days. However, few treatments

compulsorily need medical visas to avoid misuse.

- Digital enablement: ministry of commerce and industry and service promotion export council (SPEC) has developed single-point information site that covers hospital related and travel related information. On advice of government of India, Indian healthcare federation affiliated to the confederation of Indian industry updates brochures and other publicity materials on the website of ministry of tourism under incredible India campaign.

- Indian medical tourism has been specifically promoted at international platforms like world travel mart London, ITP Berlin, etc.

- An independent non-statutory body, Indian healthcare federation, comprises of all private units of health ecosystem, viz. Hospitals, diagnostic centers, medical equipment manufacturers, pharmaceutical industries and tourism. The main agenda of the organization is to function as an interlink between each one and everyone.

- Union ministry of tourism has constituted a national medical and wellness tourism board, which has come up with national strategy and roadmap for medical and wellness tourism, which is on hold due to overburden on the medical industry due to COVID19. Soon it will be seeking suggestions for improvement from stakeholders. This organization aims to promote alternate medicine and wellness systems under the name AYUSH.

- Ministry of tourism provides financial support to approved wellness tourism services providers and medical tourism services providers.

- Government of India is undertaking deep structural and sustained reforms to strengthen the healthcare system :

- FDI is permitted up to 100% under green field projects, which means the non resident Indians or Indian company don't require approval from government of India for

investments. Similarly up to 74% in brown field.

- ◦ Even being a third world country India is very liberal in spending for healthcare. In the current year India has allotted 73932 Cr for healthcare in 2021-2022 budget, which is a 15% increase from the 2019 value of 64258 Cr.
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- ◦ Similarly, the expenditure for road transport and highways has been increased from Rs. 78249 Cr to 1Rs.18101 Cr in the same period of time.
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- ◦ Under AtmaNirbhar Bharat (self reliant India) performance linked incentives are given to pharmaceutical companies and medical equipment manufacturers.
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- ◦ In addition to reforming governance the government has taken complete overhauling of medical education system. Medical council of India was replaced by the national medical council act 2019 which will rate institutions on quality of education, ensuring uniform standards of medical education. It is also continuously increasing the number of medical and nursing colleges to meet doctor population ratio.

Table 4: Total Number of medical colleges:

Year	Total number of medical colleges
2015	404
2016	422
2017	472
2018	479
2019	499
2020	539
2021	558
2022	596

- Hospitals catering to health tourism have come up with in-house customer care centers to assist patients and also extend services of tele-consultation, etc.

Recommendations

- There is always a scope for improvement may it be managing the hospital to building guest houses, better sanitation, connectivity and power backup etc.
- Reducing the language and food barrier.
- Indian medical market must be made accessible to the foreign customer again. There are various ways of doing this, like promoting health tourism through international websites, doctors of India visiting other countries, promotion by domestic and international tourist companies.
- A user-friendly portal can be created and upgraded as and now with the use of Information and Communication Technology (ICT) and ICT enabled services like online reservation, online tracking etc. and act as a single window for all interactions
- Apex body for enforcing policy and regulations and easing process making it customer friendly.
- Stringent policies should be made to make sure full security and safety is provided to foreign tourists and hospitals throughout their stay in India even during emergency situations like riots etc.

Conclusion

Indian health tourism is a very promising economic sector for future India. With the proven capabilities of hospitals, and the scope of improvement in infrastructure, structural assistance by government in giving subsidies, tax benefits, reduced import duties on medical equipments, reformed investment policies, etc and special schemes like Atmanirbhar, and a focused effort to build and brand health tourism as– **Heal in India** . India is definitely heading

towards making a global mark.

The obstacle caused by the challenges are just the bump for the exponential growth ahead.

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