Abstract

There is an interest in India as a prospective tourist destination and the main focus needed is a unique strategy to market India. Marketing of tourism is a specialized skill and Indian tour-operators and the government together must take this up with the assistance of well-known international tourism marketing agencies.

India needs to create a brand image of its own. Also, clean and cheap hotels at tourist places must set up to cater to the budget tourists. Other supportive infrastructure, like information counters, and reservation booths for rail, air and road transport need to be made available round the clock so that the tourists should get adequate and required information at any time.

From that, we should market India as the attraction that offers not a remote forest or a heritage site, but a modern and well-equipped urban facility—the hospital. With India's well known and received medical expertise, and advantages of costs, medical tourism is emerging a major area, with a potential of Rs 8,000–15,000 crores by 2013 end.

As medical tourism and wellness tourism are growing and garnering increasing attention in countries around the world, both businesses and governments are grappling with how to define, organize, and promote these sectors. Medical tourism is referred as travelling to different countries for healthcare purposes. The tourism industry (both private and government) and medical sector are working together in aiding this process. In western countries, Medical tourism is rapidly catching on as they need to put up with outrageous healthcare charges and long waiting lists. Also, with the air tickets getting cheaper, international travel has become easier and affordable and with improvement in infrastructure across the world, medical tourism is fast becoming a preferable way to mingle leisure with health and wellness. The tourists coming to India are attracted because of its low cost treatment as compared to western standards. About an average of 40 to 60 percent cost is lower in India as compared to United States and United Kingdom. It is well known around the world that, India offers “First World Treatment at Third World prices.” India is a country that makes around 30,000 doctors and nurses every year and is known worldwide for its eligible and capable professionals in this field.

The government must take advantage of the opportunities and implement the improvement of the general and medical infrastructure for boosting medical tourism. The tourism industry is wedged by a number of various factors, and the most vital one is currency movements. With the rupee falling against the dollar or vice-versa, it was feared that visitors bound for India would put on hold their programs on hold or there will be a rush in incoming visitors. The hospitality industry, which transacts in US dollars in most of the cases, will certainly feel the pinch. According to industry sources, there is an expectation of about 3–4 percent growth in the arrivals in the coming year.

Brand image of India is essential and it is necessary to build this image. Proper policy framework, good infrastructure and professional marketing are required to be initiated and then there is no reason that India cannot be amongst the world’s favourite destinations.

Keywords: India, Brand Image, Medical Tourism, Healthcare, India, Economy.
1. Prospects in Medical and Wellness Tourism - India

1.1 Objective
The objective of this research paper is to explore the methods to develop the Medical & Wellness Tourism strategies for Indian tourism so as to position India on the top list of tourist destinations in the said field.

1.2 Research Methodology
Secondary data was accumulated through various sources like internet, reference materials, newspapers, magazines etc.

2. Literature Review
Home to the ancient Indus Valley Civilization and a region of historic trade routes and vast empires, the Indian subcontinent was identified with its commercial and cultural wealth for much of its long history (Stein 1998, pp. 16–17). Four world religions—Hinduism, Buddhism, Jainism, and Sikhism—originated here. With the advent of modern technologies, Medical Science has also leaped manifolds and Medical & Wellness Tourism has been a new entrant in the up-liftment of the economy of the country.

3. Introduction
India is home to various tourist attractions and destinations which provides healing abilities and are competent of providing rewarding experiences of life. India is a destination of all seasons and is home to the Himalayan ranges in the north, a long coastline surrounded by mesmerizing seas in the south. In addition, India boasts of landscapes, historical sites and royal cities, clean beaches, calm mountain retreats, rich cultures and festivities to stimulate.

All around the year, India offers distinct range of destinations and experiences. There are lovely retreats amidst the beauty in the Himalayan ranges or the lush-heights of the Western Ghats with cool trekking options, tall peaks, or stretches of white water for the adventure lovers in summer season. Winter season in India comes alive with cultural feasts of music and dance. To refresh in winter season, sun-clad beaches are the best locations.

Various tourism themes are being promoted in India, which are listed below:
- adventure tourism
- sun and sand – coastal tourism
- the backwaters
- eco-tourism
- architectural treasures
- forts and palaces
- hill delights
- the deserts
- the jungle
- island attractions
- pilgrimage
- north-east region

4. Healthcare Tourism - Initiatives in India
Around USD 333 million was estimated as the market of Medical Tourism in India which was accounting for around 1.5 Lakh patients and the patients were mainly from United States, United Kingdom, Gulf, Africa and the South Asia Association for Regional Cooperation (SAARC) nations and growing at the rate of more than 25% annually.

A-Grade cities boasts of around 2500 hotels that provide an accommodation of approximately 1,10,000 rooms, that caters to the requirement of the customers who come for Medical Tourism.

Medical Tourism industry is dependent on the following three players:
(a) Tour Operators,
(b) Hotels,
(c) Integrated hospitals cum hotels.

For the success of medical tourism, mutual understanding between Tour Operators, Hospitals and Hotels is required. To guarantee a steady stream of patients, the public and private medical fraternity as well as the tour operators and agents need to have proper and efficient coordination with the insurance companies in the European and American markets.

If the patients feel that they might be facing some problems while in India then the tour operators are the connectors that help in getting the remedies for the problems. The package cost of the tour operators differ as they charge for around 15 to 20% of the total cost of the service offered as their commission in the package.
Exotica is the word that the tour operators and hospitals use to market the product of Medical tourism and wellness tourism in India. Package cost is the main area of concern while choosing the wellness or medical tourism product. Open heart surgery in India and in United States or United Kingdom has huge difference and India has a plus in this as the cost of treatment is far low and reasonable in India (Table 1).

Wellness tourism/Medical Tourism is a new entrant for India and all interested stakeholders whether they are hospitals or tour operators are en-cashing this opportunity. India as an ideal healthcare destination is being developed and marketed by the Tourism industry and Indian Government (central and state governments) either independently or jointly.

As defined by Goodrich and Goodrich medical tourism is “the attempt on the part of a tourist facility or destination to attract tourists by deliberately promoting its healthcare services and facilities, in addition to its regular tourist amenities.”

The health system of India can be categorized into three distinct phases:

(a) In the initial phase between 1947 and 1983, the health policy was assumed to be based on two broad principles:

(i) that denial of healthcare for anyone for want of ability to pay, and
(ii) that the healthcare should be provided to people and it was the responsibility of the state.

This phase saw average achievements.

(b) In the second phase between 1983 and 2000, in the year 1983, a National Health Policy was announced for the first time, which pronounced the need to encourage private opening in healthcare service delivery and promoted the private sector to invest in healthcare infrastructure through discounts and subsidies. The policy also promoted the access to publicly funded primary healthcare, facilitating expansion of health facilities in rural areas through National Health Programmes (NHPs).

(c) The third phase which started from year 2000 is witnessing a further shift and broadening of focus; the current phase addresses key issues such as public-private partnership, liberalization of insurance sector, and the government as a financier.

Wellness tourism is a field of healthcare focused on improving everyday health and state of wellbeing, rather than treating a disease or curing illness (Table 2). Medical tourism—an integration of medical pathology and surgery as well as wellness services, is a relatively new segment with a market potential estimated at US$200 billion with the scale of growing into a global market. (Aljazeera.Net, June 18, 2006 Nov 11, 2006).

It is clear that medical and wellness tourism is the buzz term across various countries trying to convert it to attract larger number of foreign tourists and thereby enhance their economic growth.

India naturally is enriched with a rich cultural heritage, tourism potential and reputation for age-old medicines. Therapies such as ayurveda, homoeopathy, unani, naturopathy, and yoga are a haven for wellness tourism. However, in terms of market share the country enjoys only two percent of the global wellness market which evidently points at the under-utilization of the potential and wellness quotient that India treasures. Fortunately, with regard to medical tourism, India has been successful to a large extent in positioning itself as a viable destination for

### Table 1. Treatment Cost Comparison

<table>
<thead>
<tr>
<th>Medical Treatment Offered</th>
<th>In United States</th>
<th>In India</th>
<th>Price Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bone Marrow Transplant</td>
<td>2,50,000</td>
<td>69,200</td>
<td>28%</td>
</tr>
<tr>
<td>Liver Transplant</td>
<td>3,00,000</td>
<td>69,350</td>
<td>23%</td>
</tr>
<tr>
<td>Heart Surgery</td>
<td>30,000</td>
<td>8,700</td>
<td>29%</td>
</tr>
<tr>
<td>Orthopaedic Surgery</td>
<td>20,000</td>
<td>6,300</td>
<td>32%</td>
</tr>
<tr>
<td>Cataract Surgery</td>
<td>2,000</td>
<td>1,350</td>
<td>68%</td>
</tr>
<tr>
<td>Metal Free Bridge</td>
<td>5,500</td>
<td>600</td>
<td>11%</td>
</tr>
<tr>
<td>Dental Implants</td>
<td>3,500</td>
<td>900</td>
<td>26%</td>
</tr>
<tr>
<td>Porcelain Metal Bridge</td>
<td>3,000</td>
<td>600</td>
<td>20%</td>
</tr>
<tr>
<td>Porcelain Metal Crown</td>
<td>1,000</td>
<td>100</td>
<td>10%</td>
</tr>
</tbody>
</table>

### Table 2. Dimensions of Medical & Wellness Tourism

<table>
<thead>
<tr>
<th>Tourist motivation</th>
<th>Typical activity/location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical/cosmetic</td>
<td>Hospitals, clinics</td>
</tr>
<tr>
<td>Physical</td>
<td>Spas, massage, yoga</td>
</tr>
<tr>
<td>Relaxation</td>
<td>Beaches, spas, mountains</td>
</tr>
<tr>
<td>Experiential</td>
<td>Festival spaces</td>
</tr>
<tr>
<td>Psychological</td>
<td>Holistic centres focused on self-development and philosophical</td>
</tr>
<tr>
<td>Spiritual</td>
<td>Pilgrimage, new age events, yoga retreats</td>
</tr>
<tr>
<td>Community</td>
<td>Voluntary work, charity treks</td>
</tr>
</tbody>
</table>

However, we should not forget the keenness and speed with which countries such as South Africa, China, Malaysia, Thailand and Indonesia are increasing and marketing their medical facilities to garner larger market shares and revenues. Therefore, it is important for India to rethink the marketing plans on medical and wellness tourism in terms of the services offered in the country. What is also very crucial is how the country is positioned to the world as a unique destination.

5. Significance of Medical and Wellness Tourism

Wellness evolved about 4200 BC when the Sumerians recuperated their health by bathing in thermal springs and fountains located in temples. Medical care can be dated back to 1500 BC with the Greeks laying a foundation stone in a temple in honor of their God of Medicine. Ever since, history has evidence of man travelling out of his country to avail himself of suitable medical treatment. Currently more than 50 countries are engaged in medical tourism with various developing nations.

The reasons for growth in medical and wellness tourism evolve from the following: One, high levels of uninsured population (as in the case of USA); two, lack of private participation and high waiting times (as in UK); three, pressures of aging population and over-hospital stay (as in Japan); four, dearth of sufficient and cost-effective healthcare facilities across various parts of the world; five, elective surgery with privacy (such as Botox treatment, rhino plastic, liposuction, etc); and six, inefficient healthcare systems in developing and under-developed world.

6. Prospects in Medical and Wellness Tourism in India

Of late the Indian medical and wellness tourism sector has been witnessing remarkable growth. Based on surveys conducted by The Associated Chambers of Commerce and Industry of India and National Sample Survey Organization, the market size is likely to double from Rs 4500 crore in 2011 to Rs 10,500 crore (US$ 2 billion) by 2015; the inflow of medical tourists which stood at 3 lakhs in 2009 rose to 8.5 lakhs in 2011 and is likely to touch 32 lakhs by 2015. The tourists predominantly from Iran, Afghanistan, Bangladesh, Turkey, Pakistan, Middle East, Europe and the USA come to India for Medical purpose. Andhra Pradesh, Karnataka, Tamil Nadu, Maharashtra and New Delhi are the states that are fast emerging as India’s best medical tourism centres. Dental and eye care treatment, cardiac care including surgery, urology, neurosurgery, plastic and cosmetic surgery, laparoscopic surgery, gastroenterology, kidney transplant and knee/hip surgeries are the medical services in India that attract international attention predominantly.

Unani, ayurveda, homoeopathy, naturopathy and wellness services including yoga and meditation are the alternative medicine services available in India which are increasingly becoming popular among foreign patients as non-surgical treatment for various ailments. Kerala is worldwide famous for ayurveda and kairali massage, Uttarakhand is known for yoga and meditation, Goa is famous for holistic living, Rajasthan is in world map as spas and heritage living destination. These are some of the world-renowned places in India for alternative medicine (The Chicago Tribune, March 28, 2008).

‘Destination Branding’ gained visibility in the late 1990s. There are some countries which have an edge over other countries and have developed themselves as the Medical Tourism Destinations such as Singapore, Malaysia and United Arab Emirates. India is looking forward to market its services and products for other platforms, for example, Ministry of Commerce, Government of India has created the ‘India Brand Equity Fund’ which helps in providing support to exporters to promote the India Inc. label.

For India to become a unique destination for medical and wellness needs, primarily it is imperative to build ‘Brand India’ through the five stages:

Stage One: Brand Appraisal
Stage Two: Brand Definition
Stage Three: Brand Articulation
Stage Four: Brand Measurement
Stage Five: Brand Execution

There are many hindrances in the development and providing unique experience for the visitors. The Tourism Ministry has provided these gaps and glitches in its annual report which are the problems and really an eye opener for the tour operation business as Medical Tourism is the money spinner for the tour operators. The Indian tour operators and medical fraternity is targeting
for the clients who come from African and West Asian countries as more than 80 per cent of the total target medical tourists in the country is estimated to be contributed by these countries and they were not tapped to its full potential.

As most of the tourists come from African and West Asian countries, therefore, the incapacitate begins right from the initial stage as these tourists are the prospective medical tourists and are mostly non-English-speaking people. Communication is the main problem as the non-medical staff employed to target these groups are not able to communicate properly. Use of interpreters is an option but this option is neither comfortable nor efficient. Documentation and inefficient boarding facilities are also the hindrance that the tourists have complained about the competence of the medical and paramedical staff.

“The concern on settlement of bills and lack of clear instructions and post procedure monitoring is the vital facility that a tourist needs”.

A lot of South Asians register in India as ‘domestic patients’ because they come on tourist, not medical visas because of price consciousness. The government needs to reassess the policy of medical visa without any delay, suggests the government. According to visa rules and regulations, medical visa allows three entries per year and a gap of two months should be there in between two entries. A medical tourist, who travels for consultation with doctors, has to wait two months for treatment. “Because of unmanageable visa rules and regulations, India is losing a big chunk of potential medical tourists to Thailand”.

7. Industry Initiatives

Healthcare centres are establishing world-class infrastructure (both medical as well as patient-handling infrastructure) in order to attract international patients. The hospitals are also constantly upgrading technology by acquiring state-of-the-art equipments. The players are setting up comprehensive diagnostic centres, imaging centres and world-class blood banks.

Some hospitals have established special wards for international patients as also special desks to handle international patients. Such special desk will have officials to handle translation, travel requirements and food and beverages needs. Some hospitals are also tying up with travel/tour operators to offer healthcare tourism as a single service package.

Some hospitals project themselves operating in specialty fields, such as cardiology, ophthalmology, dentistry. Some of them have even set up specialty centres focusing on areas such as transplantation surgery. Few hospitals are organizing international conferences in such specialties, and invite medical fraternities from different countries with the objective of showcasing Indian skills in various healthcare segments. Such conferences also facilitate interactions with specialists and help enhance knowledge transfers.

Few hospitals have established international collaborations—both with developed and developing countries. Such collaborations are with hospitals, healthcare institutions, Government departments of health and family welfare, which would facilitate participation in healthcare delivery, treatment of their patients, and training of their medical/paramedical professionals. Such tie-ups have facilitated flow of patients from select countries to Indian hospitals, the treatment of which would be covered under the respective country’s national health programmes.

Few hospitals are in the process of continuous innovation of products, services and facilities so that to give better value to the customers as also to stand ahead in the competition. While doing so, some hospitals are focussing on cost-effective-customer oriented technology. Quality, standardisation and accreditation are associated strategies followed by some Indian players. Indian healthcare institutions are increasingly going for international accreditation of hospitals and clinical laboratories.

Indian healthcare establishments are also adopting marketing and promotional strategies. These are through participation in international trade fairs/ exhibitions, international medical symposia/conferences (Table 3). Internet is being used as an effective media of communication with international healthcare travellers. Indian Healthcare Federation (IHCF) was formed by the healthcare industry in India with the objective of collectively promoting healthcare industry in the country.

The concept of telemedicine is also being promoted by Indian corporates while providing healthcare services. Some hospitals use the concept of telemedicine to undertake their social obligations of supporting Rural Health Mission of the Government, and some of them use the concept to provide distance consulting and treatment advice to the patients abroad.
8. Government Initiatives

The Ministries of Health and Family Welfare, and Tourism, Government of India are evolving an approach to give a strategic push to open the Indian healthcare sector to foreign tourists. The Ministry of Health and Family Welfare, Government of India has set up a National Accreditation Board for Hospitals, under the Quality Council of India for accreditation of hospitals. The policies adopted by other countries for accreditation of their hospitals are also being examined to gain from their experiences in taking this forward in India. The patients and their relatives who come for the treatment in India face many problems as they get tourist visa which is non-convertible, non-extendable and valid only for a period of six months. Medical Visa is a new concept which Government of India has introduced to resolve this specific problem so that the tourists who come from other countries do not face any problem while in India. Keeping in mind the emergency of this sort of tourism, government has initiated for the no hindrance clearance for these type of visitors at the airport.

At the national as well as state level, Governments are participating in healthcare tourism expos abroad (Table 3). Such activities are being used as a platform to meet international experts from the medical fraternity and brief them about the competence of Indian healthcare industry in general, and the healthcare sector in the state, in particular. Further, at the state level, several initiatives are taken by the industry in association with the state governments.

Kerala, a state in Southern India has made itself world renowned by regular efforts and upgrading the quality of services to promote wellness and healthcare tourism, in a big way, which has resulted in a considerable increase of visitor arrivals into the state. Since 1990s, Kerala Tourism Development Corporation (KTDC) is promoting Health Tourism to cater to the requirements of the visitors. Tie up with various Government and Private Ayurveda centres has also increased the quality of treatment provided to the visitors. Ayurvedic centres are divided in two categories namely Green Leaf and Olive Leaf which are a sort of star category or grading of centres.

In Karnataka, the state is in the process of setting up of a Bangalore International Health City Corporation, offering patients with a wide variety of health care products and treatments. The Government of Karnataka is also in the process of leveraging the state’s IT prowess to tap business in the healthcare outsourcing services. Leveraging IT skills would help enhance Karnataka’s position in associated services to the growing healthcare sector such as medical billing, disease coding, forms processing and claims settlement. Karnataka is also bidding high on Telemedicine, a concept by which patients can be treated even when the doctor is geographically placed in another area.

In Maharashtra, the Infrastructure Development and Support Act (MIDAS) of Maharashtra has granted the tourism activity with an industry status, with the objective of granting all the benefits and incentives that are given to other industries. This Act would also empower the Maharashtra Tourism Development Council (MTDC)

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**Table 3.** List of Medical Tourism Fairs/Events covered under MDA in year 2011

<table>
<thead>
<tr>
<th>Sl. No.</th>
<th>Name of the Medical Tourism Fairs &amp; Events</th>
<th>Date</th>
<th>Places</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Arab Health</td>
<td>24th–27th January, 2011</td>
<td>Dubai</td>
<td>Middle East</td>
</tr>
<tr>
<td>2</td>
<td>ATM</td>
<td>2nd to 5th May, 2011</td>
<td>Dubai</td>
<td>Middle East</td>
</tr>
<tr>
<td>3</td>
<td>Moscow Medical and Health Tourism</td>
<td>16th–19th March, 20011</td>
<td>Moscow</td>
<td>CIS</td>
</tr>
<tr>
<td>4</td>
<td>Destination Health, Health &amp; Medical</td>
<td>15th–16th April, 2011</td>
<td>London</td>
<td>UK</td>
</tr>
<tr>
<td>5</td>
<td>Namaskar Africa</td>
<td>October 15–16, 2011</td>
<td>AddisAbaba, Ethiopia</td>
<td>Africa</td>
</tr>
<tr>
<td>6</td>
<td>World Travel Mart 2009</td>
<td>7th to 10th Nov, 2011</td>
<td>London, U.K.</td>
<td>Europe</td>
</tr>
<tr>
<td>7</td>
<td>ITB Berlin 2010</td>
<td>9th to 13th March, 2011</td>
<td>Berlin, Germany</td>
<td>Europe</td>
</tr>
<tr>
<td>8</td>
<td>European Medical Travel Conference</td>
<td>27th to 29th April, 2011</td>
<td>Barcelona Spain</td>
<td>Europe</td>
</tr>
<tr>
<td>9</td>
<td>Medcon 2011</td>
<td>10–12 May, 2011</td>
<td>Muscat, Oman</td>
<td>Middle East</td>
</tr>
<tr>
<td>10</td>
<td>MediTour Expo</td>
<td>23–24th May, 2011</td>
<td>Las Vegas NV</td>
<td>USA</td>
</tr>
</tbody>
</table>

as a Special Planning Authority, to procure and provide land available at various tourism estates without needing approval from the Maharashtra Industrial Development Corporation (MIDC). In Maharashtra, the industry in association with the State Govt. has set up a Medical Tourism Council of Maharashtra.

In India, Gujarat is one of the few states which has announced a separate policy for medical tourism, with the objective of creating integrated medical tourism circuits based on the location of specialty hospitals, heritage and culture. In addition, Gujarat is in the process of setting up a Healthcare Tourism Council in association with the healthcare and tourism industry.

Goa, which has been for long attracting tourists for its beaches and exotic cuisine, has fine-tuned the hospitality skills into an art, and is now attracting healthcare tourists with focus on cosmetic treatments.

9. Conclusion

In order for marketing India as a unique destination for medical and wellness tourism, primarily it is important to identify the macro and micro issues facing the industry. It is essential for the Central and State Tourism Boards to coordinate and collaborate on the standards internationally required. As per the unanimous opinion of all the experts and facilitators, the time has come that the authorities attached signify to this issue. Immediate attention is required to overcome the loopholes in the administrative system and in the process of tourism services.

It is the responsibility of the respective agencies to work out an effective and productive marketing exercise so that India is branded as a world renowned Healthcare and wellness destination. 'Brand India', a national advertising campaign must be advertised both domestically and internationally to invite most number of tourists looking for wellness/medical tourism. To achieve the target it is mandatory that whatever the promises are made, they are delivered without fail and this is possible only with the common efforts from all persons/organisations involved with the industry.

10. References

2. Indus health (October 18, 2009).
3. JCI—Joint Commission International (October 20, 2009).