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CHAPTER – I

MEDICAL TOURISM – AN EMERGING CONCEPT

Concept of Medical Tourism

Medical Tourism is the concept of traveling to a particular destination to avail the opportunity of the world-class Healthcare services offered by the most qualified and experienced Healthcare professionals at the technologically most advanced medical centers in complete privacy and at an affordable costs. This sector has emerged resultant to the rapid growth of tourism industry. Due to this, people from across the world undertake travel to other countries to obtain medical, dental, and surgical care, besides touring, vacationing, and experiencing the attractions of the countries visited. International travel for private medical services, commonly known as medical tourism, is perceived as a growing international trade practice in terms of patient numbers, expenditures, and geographic scope.
Medical or Health tourism has become a common form of vacationing, and covers a broad spectrum of medical services. It mixes leisure, fun and relaxation together with wellness and healthcare\textsuperscript{ii}. Medical Tourism also refers to movement of consumers to the country providing the service for diagnosis and treatment. Medical tourism may well be one of the fastest growing ‘new’ businesses in the world\textsuperscript{iii}. This is facilitated by advancements in medical technology, more affordable travel, the availability of information to potential patients through the Internet and a rapidly growing medical tourism brokerage industry\textsuperscript{iv}. During the past few years, the number of people going out of their home country to consume health services has significantly increased. Medical tourism is a general term that describes patients traveling to obtain health services. As a concept it conveys both the \textit{willingness to travel} and \textit{willingness to treat} as core processes within the new global market of health travel\textsuperscript{v}.

\textbf{The Motivators}

The growth of medical tourism is due to a broad range of motivators. Specifically, the developing countries are seeking to capitalize on the increased volume of medical tourist traffic which is often linked with actual tourist activities. Such a commercial linkage between Medicare and tourism has become rapidly a developing and profitable industry which attracts more interest amongst health researchers. Due to hassle-free international travel and availability of cheap and best medical facilities and services, medical tourism has become a growing industry for international business.

Medical tourism occurs when consumers prefer to travel across international borders exclusively for receiving medical treatment. People are more proactively engaging themselves in acquiring health related knowledge. In developed countries, this knowledge has encouraged people to seek medical advice and intervention, resulting in increased demand for healthcare\textsuperscript{vi}. Medical tourism has become a major force for the growth of service exports worldwide, with India and Thailand
emerging as major markets; also it offers a financial valve for the growing burden of health care costs in mature markets like the USA°.

In addition, it provides an alternative for the almost 50 million uninsured adults of the USA in receiving affordable and accessible medical services°. Medical tourism might be one way to improve services while at the same time help to dampen the rise in overall spending on health care. It is an industry where people from all around the world are travelling to other countries to obtain medical, dental and surgical care while at the same time touring, vacationing and fully experiencing the attractions of the country they are visiting. Annual growth rate of medical tourism is 20% and worldwide medical tourism market at anywhere between $40 billion and $60 billion in 2012°. The total number of medical tourists has also increased, from 19 million travelers in 2005 to 25.8 million in 2007, which is an annual growth rate of 16.5%°.

However, a McKinsey study prepared by Ehrbeck, Guevara, and Mango°, suggests that the market is not as large as reported, and that most medical travelers seek higher quality and faster service instead of lower costs. Leisure aspect of traveling may be included on a medical travel trip. It includes medical services (inclusive of elective procedures and complex specialized surgeries) like knee / hip replacement, heart surgery, dental procedures and different cosmetic surgeries°.°

Many medical tourists from the United States are seeking treatment at a quarter or sometimes even a 10th of the cost at home. From Canada, it is often people who are frustrated by long waiting times. From Great Britain, the patient can’t wait for treatment by the National Health Service but also can’t afford to see a physician in private practice. For others, becoming a medical tourist is a chance to combine a tropical vacation with elective or plastic surgery°.

Medical Tourism is also known as Medical Travel, Surgical Tourism, Medical Value Travel, Health Care Abroad, Medical Overseas, Overseas Medical, Medical Outsourcing and offshore Medical. It is also
described as providing cost effective private Medical care in collaboration with Tourism Industry for patient needing surgical and other forms of specialized treatment. In simple words, Medical Tourism is the process of traveling to certain destinations, to avail superior medical or cosmetic care by highly skilled surgeons at the most modern and state of the art medical facility, where the cost of treatment is comparatively very less than their home country.

‘Old wine in the new bottle’

In the past decades the attempt to achieve better health while on holiday, through relaxation, exercise or visits to spas, has been taken to a new level with the emergence of a new and distinct niche in the tourist industry: medical tourism. Medical Tourism, a very old concept dating back to thousands of years, is where people who live in one country travel to another country to receive medical, dental and surgical care at a significant savings while at the same time receiving equal to or greater care than they would have in their own country. A combination of factors has led to the recent increase in popularity of medical travel: the high cost of healthcare in industrialized nations, the ease and affordability of international travel and the improvement of technology and standards of care in many countries of the world. The phrase “medical tourism” is usually reserved for trips involving diagnostic tests and medical procedures falling within the scope of biomedicine.

Medical Tourism as an Industry:

In many developing countries it is being actively promoted by the government’s official policy. India’s National Health policy 2002, for example, says: “To capitalise on the comparative cost advantage enjoyed by domestic health facilities in the secondary and tertiary sector, the policy will encourage the supply of services to patients of foreign origin on payment. The rendering of such services on payment in foreign exchange will be treated as ‘deemed exports’ and will be made eligible for all fiscal incentives extended to export earnings”. The formulation drawn from recommendations that the corporate sector has been making in India and specifically from the “Policy Framework for Reforms in Health Care”,

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According to ASSOCHAM, Indian medical tourism industry is floating around Rs 4,500 crore and is likely to be worth Rs 10,800 crore by 2015. With reference to its study on ‘Emerging Trends in Domestic Medical Tourism Sector’, movement of patients from abroad has accelerated sharply and is growing rapidly as India enjoys strategic advantage of essential resources like world-class medical technology, infrastructure and skilled medical workforce. Further it said that the inflow of medical tourists in India is likely to cross 32 lakh by 2015 from 8.5 lakh during 2011 and will not only earn foreign exchange but will also give huge push to the health sector across the country. The Chamber has estimated that approximately 1,80,000 foreigners visited India for treatment from various parts of the world in the first eight and half months of current fiscal (2009-10) and their number would increase by 22-25% in subsequent times. The Chamber has said that India provides world class medical facilities with hospitals and specialized multi speciality health centers providing their expertise in areas of cosmetic surgery, dental care, heart surgeries, coronary bypass, heart check up, valve replacements, knee replacements, eye surgeries, Indian traditional treatments like ayurvedic therapies and much more, practically covering every aspect of medicine combining modern treatments with traditional experience. As shown in the model below, medical tourists move from their originating regions (their countries of residence) to destination regions (those regions where the care is available).

The transit refers to both the actual mode and trajectory of the transportation utilized for this movement as well as any constraining and/or facilitating forces in the travel experience. A destination is a
medical tourism destination, not just because of the healthcare facility available there, but also because of the additional provision of destination attractions, both natural and cultural. The core product is the healthcare provided, but tourist comforts do form an important hygiene factor in medical tourism.

Source: George, B.P. and A. Nedelea, 2009.

Global recognition for medical tourism:

In the context of global health, the term ‘Medical Tourism’ is pejorative because during such trips health care providers often practice outside of their areas of expertise or hold different (i.e., lower) standards of care.

Greater numbers than ever before of student volunteers, health professions trainees, and researchers from resource-rich countries are working temporarily and anticipating future work in resource-starved areas. Popular medical travel worldwide destinations include: Argentina, Brunei, Cuba, Colombia, Costa Rica, Hong Kong, Hungary, India, Jordan, Lithuania, Malaysia, The Philippines, Singapore, South Africa, Thailand, and recently, Saudi Arabia, Dubai, South Korea, Tunisia, Ukraine, and New Zealand. Popular cosmetic surgery travel destinations include: Argentina, Bolivia, Brazil, Colombia, Costa Rica, Cuba, Mexico, Turkey and Ukraine. In South America, countries such as Argentina, Bolivia, Brazil and Colombia lead on plastic surgery medical skills relying on their experienced plastic surgeons.

In Bolivia and Colombia, plastic surgery has also become quite common. Colombia also provides advanced care in cardiovascular and transplant surgery. In Europe Belgium, Poland, Slovakia, and Ukraine are also breaking into the business. South Africa is taking the term "medical tourism" very literally by promoting their "medical safaris". However, perceptions of medical tourism are not always positive. In places like the US, which has high standards of quality, medical tourism is viewed as risky. In some parts of the world, wider political issues can influence where medical tourists will choose to seek out health care.
Health tourism providers have developed as intermediaries to unite potential medical tourists with provider hospitals and other organisations. Companies are beginning to offer global health care options that will enable North American and European patients to access world health care at a fraction of the cost of domestic care.

Companies that focus on medical value travel typically provide nurse care managers to assist patients with pre- and post-travel medical issues. They also help provide resources for follow-up care upon the patient’s return. Over the last two decades, there have been a number of forces driving increases in medical travel\textsuperscript{xxvi}. They are raising costs of healthcare in industrialised countries; differences in quality and accessibility of health services; information technology advances easing the access to information and knowledge transfer; lower transport costs; reduced language barriers and Trade liberalisation. Asia is the region receiving major number of medical tourists. In 2008, McKinsey and Company interviewed providers of medical travel and studied patient-level data. Their analysis of medical travelers by point of origin is shown in Figure below. The figure shows that Asia captured over 99% of medical travelers from Oceania, 95% from Africa, 93% from other countries within Asia, 45% from North America, 39% from Europe and 32% from the Middle East.
Also of note were their findings that 26% of medical travelers from North America travel to Latin America and 58% of medical travelers from the Middle East travel to North America and 33% of medical travelers from Europe travel to North America. Within Asia, Thailand, India, Singapore, Malaysia and South Korea are strong participants in the medical tourism domain. In 2006-07, Thailand, Singapore and Malaysia alone earned over $US 3 billion from treating an estimated 2 million medical tourists. Latin America also receives large numbers of medical tourists, with Costa Rica being a popular destination for North American patients seeking cosmetic procedures such as ‘tummy tucks’ due to its lower prices and close proximity.

There is no consistent worldwide data available regarding the actual numbers of medical tourists; however country specific data from various studies outlined below indicate increasing numbers. Other countries are known for their specific specialties, such as South Africa – where cosmetic surgery is combined with luxury accommodation packages and safari tours. Hungary is also known for its high quality dental and cosmetic procedures and these procedures can be obtained for 40-50% of the price paid in the US.

In total, there are at least thirty countries competing in this sphere, with Dubai recently entering the market through the development of the Dubai Healthcare City. Rapidly improving technology and standards of care are the results of the globalization that has produced a consumerist culture and the ability to buy any service, such as medical care, at any destination. An entire new global industry is now facilitating movement of patients to regions where they can receive low-cost health care. International trade agreements such as General Agreement on Trade in Services (GATS) foster this cross-border traffic in patients. The internet, low-cost telecommunications and economy air travel all facilitate movement in search of affordable health care.

**Emerging Trends in Medical Tourism**

Emerging trends that could fuel the demand for medical tourism are:
• Increased globalization of the workforce
• Increased access to low cost global transportation
• Increased demand for out-patient surgery
• Increased sophistication of medical tourism operations
• Increased coverage/demand for dental surgery
• Increased demand for cosmetic surgery
• Increased demand for surrogacy

1. Increased globalization of the workforce

As health professionals travel across the world for employment, the opportunity to work in facilities that treat globally mobile patients will grow.

The occurrences of expatriate planning elective surgery in their ancestral home countries, for more culturally accepting health care, are predicted to increase as insurance plans and employers pursue this workforce.

2. Increased access to lower medical costs and low-cost transportation

Low-cost air fares will augment medical tourism opportunities. Lower costs for procedures, such as open heart surgery and bone marrow transplant, are key drivers. The combination of tourism and treatment make an appealing package.

3. Increased demand for outpatient surgery

In the United States from 1996 to 2006, the number of outpatient surgical procedures tripled. In 2006, approximately 35 million patients had outpatient surgery. Since outpatients comprise almost 75% of medical tourism, consumer out-of-pocket payments are highxxiii. The options of medical tourism will appear increasingly attractive.

4. Increased sophistication of medical tourism operations

The medical tourism industry is evolving within increased attention to surgical coordination, transparency, and risk, safety and
outcome management. Benefit programs will become more sophisticated as medical tourism options are added to them.

5. Increased coverage/demand for dental surgery

As the population ages in developed countries, the demand for dental surgery will continue to grow. Also, greater focus on preventative services will likely to increase the number of visits to the dentist each year. For example, the American Dental Association expects a significant proportion of dentist to retire during the next 25 years. Medical tourism could help ease this supply / demand mismatch.

6. Increased demand for cosmetic surgery

The American Society for Aesthetic Surgery estimates that in 2007, Americans spent almost $13.2 billion on cosmetic surgeries.

The UK reports that from 2005 to 2007, the number of cosmetic procedures nearly doubled. The growing demand for these procedures could potentially be alleviated by medical tourism.

7. Increased demand for surrogacy

Reproductive medical tourism and outsourcing include networks of in-vitro fertilization, surrogate pregnancy, donor insemination, other reproductive technology treatments, physicians, psychologists and attorneys. International surrogacy programs are a specialized subset of reproductive medical tourism. Women may apply to become surrogate mothers or egg donors to help others become parents. Surrogacy costs and compensation vary greatly depending on the procedures and services required for each individual case.

The Five Key Drivers of Medical Tourism

a) Technology:

Efficient global transportation and communications systems are some of the technological improvements that drive medical tourism. Transportation is one of the more ubiquitous global economic sectors and its growth shares synergies with growth in tourism. Moreover, artificial intelligence techniques can provide support in many areas relevant for tourism, like promotion, information access, decisions and actions,
preparation for the visit, the visit and even after the visit. The flattening of the world through the internet and technology in the medical industry are improving the quality of services.

b) Cost:

When patients’ health insurance does not pay for the care they need, or they do not have insurance at all, then the cost of the care is automatically shifted to those patients who actually have one. This is known according to Jagyasi as ‘cost shifting’. The focus should not be to gain from the economy of other countries or build the tourism sector from needy to sick patients, but rather on providing care for patients. It is a fact that the cost of medical care in developed countries is extremely high. Hence, private, social and corporate health schemes are very expensive.

c) Need:

The emergence of new consumer needs, like avoiding long queues to getting medical treatment or the possibility to have the latest available treatment, requires new solutions which are not always available in a consumer’s home country.

d) Demographics:

Demographic drivers such as an ageing population due to baby boomers causing significant strain on national healthcare systems are a driving factor as well.

e) Change:

Hospitals are adopting the more luxury hotel concept rather than traditional unexciting general wards. After the surgical procedure, there is the opportunity to engage in attractive tourism, which is certainly a better change for the patient. An understanding of motivation is the key to understanding tourist behavior, and to answering the question of why and where people travel. Many texts associated with tourism utilize the concept of motivation as a major influence upon consumer behavior, taking into consideration general theories such as that of ‘Maslow’s hierarchy of needs’.
The five ‘A’s of Medical Tourism

According to Jagyasi, there are five major factors involved in the decision making process of medical tourism. He calls them the “5 A Factors”: affordability, accessibility, availability, acceptability and additional factors. Medical tourism is a direct result of globalization of health care. This health care sector is emerging up in vigorous speed. But this rapid development is the result of interplay of several factors which are not clearly known. There are several questions tagged along with this rapid development, such as – Why do patients travel abroad for medical care? What are the key factors responsible for the development of this industry? Primarily the success of this industry is attributed to the following five-"A" factors.

Affordability

If the medical procedures are becoming so unaffordable, then it is very difficult for a financially average person to opt for such treatments. People feel that bearing medical disorders is one big discomfort but treating it is more unbearable because of the rising price. This situation is more prevalent in developed countries. Millions of uninsured patients look for affordable treatments; this search was fulfilled with the growing popularity of medical tourism. Providing affordable treatment was the major key factor that guided the way to rapid development of medical tourism.

Availability

One more reason for patients to travel so far for a medical treatment is the non-availability of the required medical procedure in one’s own country. This type of travel is called “need factor travel” where a person goes in search of his needs for better health care.

Accessibility

Anything available is worth, only when it is accessible to the needy. Similarly, many developed countries have all medical care available for the people but because of high demand the treatments are not accessible. This high demand makes patients to wait for almost 6-12 months for a
surgery. Waiting for such long period in case of emergency may prove fatal; therefore, people look for places where the treatment is available and accessible with no waiting time.

**Acceptability**

At times the decision of travelling abroad might be very sensitive as it is related with lots of religious, social, ethical and political issues. Finding an affordable, available and accessible treatment might be easy but acceptance based on religious, ethical and social concern is very difficult. Defining the ethical values of such services is very difficult.

**Additional Factors**

It’s quite natural that everybody seeking medical treatment abroad expects the best quality of service.

The most important factor of all the above said is receiving additional benefits like better care, latest medicines, modern technology, better hospitality, personalized care. This additional benefit which a patient receives abroad makes his choice of medical tourism very easy. These factors actually motivate, encourage and drive people in seeking medical treatments abroad.
Differentiating - Medical, Health and Wellness Health Tourism

Smith and Puczko\textsuperscript{xxxvi} argue that health tourism is composed of medical tourism and wellness tourism, meaning that ‘medical tourism is a subset of health tourism’. In order to recognize medical tourism within health tourism, it is important to understand that the aim of health tourist movement is a treatment in order to improve health, by relaxing in spa or alternative treatments, whereas medical tourism implies diagnosis, hospitalization and surgical operations to improve or restore health in the long term. Therefore, the difference between health and medical tourism is in the level of the intervention on the body of a visitor\textsuperscript{xxxvii}. Connell\textsuperscript{xxxviii} points out that a distinction must be made between health tourism and medical tourism, whereby medical tourism is the correct term to use in cases in which medical interventions are required. Medical tourism involves not only going overseas for medical treatment, but also the search for destinations that have the most technical proficiency and which provide it at the most competitive prices\textsuperscript{xxxix}. Health tourism represents a wide range of activities, from wellness and spa treatments to all kinds of cosmetic services and most complicated medical operations\textsuperscript{xl}.

The combination of medicine, i.e. providing complex medical services and tourism is a relatively new type of tourism showing a high rate of growth. Therefore, this type of tourist movement, so called medical tourism, many authors see as a separate niche of health tourism. Mugomba and Caballero\textsuperscript{xi} pointed out that, “Health care tourism encompasses both wellness tourism and medical tourism and is thus on the top tier, while medical tourism and wellness tourism are both on the second tier”. Likewise, wellness tourism is a sub-sector of health care
tourism, although unlike medical tourism, wellness tourism doesn't include elective surgery.

Carrera and Bridges\textsuperscript{xliii} defines medical tourism as a subset of health tourism, whose broader definition involves "the organized travel outside one's local environment for the maintenance, enhancement or restoration of the individual's wellbeing in mind and body". Importantly, their definition of medical tourism takes into account the territorially bounded nature of health systems, where access to healthcare is often but not always limited to national boundaries. Borman\textsuperscript{xliii} and Jonathan\textsuperscript{xliv} defines health tourism as attracting tourists with the unique attractions of the destination combined with facilities for healthcare services.

**Defining Health Tourism**

Health tourism was defined by the International Union of Tourist Organizations (IUTO)\textsuperscript{xliv} as, ‘the provision of health facilities utilizing the natural resources of the country, in particular mineral water and climate’. Goeldner\textsuperscript{xlv} in a review of the health tourism literature, defined health tourism as staying away from home, health [as the] most important motive, and done in a leisure setting. Goodrich and Goodrich\textsuperscript{xlv} (1987) and Goodrich\textsuperscript{xlvii} (1993) defined health tourism in terms of the narrower concept of health-care tourism as the attempt on the part of a tourist facility (e.g. hotel) or destination (e.g. Baden, Switzerland) to attract tourists by deliberately promoting its health care services and facilities, in addition to its regular tourist amenities.

Most frequently used terms to describe Health Tourism are ‘wellnesses’ and ‘medical’ stood out, with almost exactly the same frequency\textsuperscript{xlix}. Bennett et al.\textsuperscript{1} acknowledge a liberal definition of health tourism would be any pleasure-orientated tourism which involves an element of stress relief, which mean that it is an enjoyable and relaxing activity. Henderson\textsuperscript{ii} views health tourism as a travel where the primary purpose is treatment in pursuit of better health that may involve hedonistic indulgences of spas and alternative therapies, while medical
tourism incorporates health screening, hospitalization, and surgical operations.

Similarly, Carrera and Bridges and Connell identify health tourism with general health and wellbeing, while medical tourism combines tourism with medical, surgical or dental intervention to improve or restore health in the long term. Therefore, health and medical tourism are differentiated by the level of surgical and physical intervention on the tourist’s body. However, much confusion arises in these definitions when considering the practices and reality of health and medical tourism. Pollock and Williams described health tourism as follows: “Rest, recreation and training away from the routine home or work environment based on the tourist products and services, which provide an opportunity for customers to improve and sustain their health and well-being”. Ross said that any type of travel which capable of making oneself or their family members healthier. The services that leads to improve health and enhance the morale of the individual and is in the place of residence which takes more than 24 hours and less than a year. Health tourism as a niche market has rapidly grown to become an industry where people travel long distances to other countries to obtain medical, dental and surgical care while simultaneously having a holiday. The words “medical” and “wellness” are equally predominant, indicating that respondents generally associate health tourism with both terms. Words that stand out as secondary in importance include: “treatments,” “spa,” “healthy,” and “improve.” The word “Medical” means treatment of illness, disorder or injuries. In general, “Tourism” means traveling for pleasure. According to World Tourism Organization (WTO), the word “Tourism” compromises of “the activities of persons traveling to and staying in place outside their usual environment for leisure, business and other purposes”. For purpose of clarity with such terms like health tourism, medical tourism and wellness tourism – it is proposed to use the term HEALTH TOURISM as an umbrella under which Medical Tourism and Wellness Tourism are being sheltered. But according to Kaspar, health tourism is “the sum of all the relationships and phenomena resulting from a change of location and residence by people.
in order to promote, stabilize and, as appropriate, restore physical, mental and social well-being while using health services and for whom the place where they are staying is neither their principle nor permanent place of residence or work”.


Medical Tourism

Medical tourism involves people who travel to different places to receive treatment either for a disease, an ailment or a condition, seeking for less cost of care, higher quality of care, better access, besides personalized care, which normally not available in the home country. This category also includes cross-border travel by persons seeking cosmetic enhancements. It involves conventional medical approaches, performed by licensed medical professionals. Frequently used terms in Medical Tourism are “procedures,” “surgery,” “health,” “care,” “procedures,” and “treatments,” in that order. Sometimes it is also referred to as health tourism, or health tourism services - a niche that is identified as medical tourism when travel involves specific medical treatments.

In the opinion of Connell, Hume & DeMicco, the problems like long waiting lists, high costs, and lack of insurance are the few reasons for seeking alternative sources for medical care like medical travel. Medical tourism has become a new and distinct niche in the tourist industry and it is the result of an attempt to achieve better health while simultaneously enjoying a vacation. Several factors of tourist demand, as well as tourist supply have influenced the change of the direction and
intensity of these tourist movements. Modern medical tourism is encouraged and generated by the population of developed countries, who are, for certain reasons, unable to obtain health service in their own countries.

In developed countries, since health care has gradually moved from the public into the private sector, as a consequence, the price of such services has significantly increased, especially in the USA. The growing interest in aesthetic surgery, dental services and the like, are seldom covered by health insurance in developed countries. Such a situation led towards the increased demand for this type of services in other places. Also, long waiting periods for immediate medical interventions and therapies for cases of hip surgery or sterility treatments are not considered as urgent in the developed countries.

They led to the increased demand for such services at clinics in certain developing countries of the world. For instance, in Great Britain, the waiting list for non-urgent operations such as knee surgery is up to 18 months. The waiting periods for infertility problem is also very long, compelling many couples seeking the sterility cure abroad.

**Wellness Tourism**

Wellness tourism involves people travelling to places, so as to proactively pursue therapies which will maintain or enhance their personal health and wellbeing, and those seeking unique, authentic or location-based experiences / therapies not available at home. These experiences may, but typically do not involve, medical doctors / facilities. In this context, the consumer is seeking an integrated wellness and preventive approaches to enhance their health/quality of life. In so far as Wellness Tourism is concerned, frequently used terms are “health,” “spa,” “services,” “travel,” “destination,” “relaxation” and “treatments.”

Mueller and Kaufmann define that, “Wellness tourism is the sum of all the relationships and phenomena resulting from a journey and residence by people whose main motive are to preserve or promote their health. They stay in a specialized hotel which provides the appropriate
professional know how and individual care. They require a comprehensive service package comprising physical fitness/beauty care, healthy nutrition/diet, relaxation/meditation and mental activity/education. Wellness Tourism aims to promote a healthy style of living, encouraging good attitude to the surrounding world, the desire to stay young and energetic, besides preserving the harmony of the body and soul in any age. This notion includes physical exercises, awareness about one’s appearance, and nutrition with exclusively ecologically clean and healthy products. The slogan of wellness is “Enjoy life but not at the cost of health”.

Therapies and Services

Wellness therapies energies the people making them realize to choose a march forward towards more successful and happy life.

National Wellness Institute (USA) distinguishes six aspects of good health: physical, spiritual, intellectual, social, emotional, and professional. Wellness industry includes cosmetology, spa, fitness, healthy nutrition, etc. Wellness tourism is distinct from medical tourism, wherein people travel for the purposes of maintaining or promoting their health and wellbeing. Wellbeing services may include: beauty, such as body and facial treatments; lifestyle, such as detoxification and rejuvenation, Spiritual, such as meditation and yoga retreats, whereas Voigt observes that medical and wellness tourism are complementary and together form a broader health tourism sector.

Wellness and Medical Tourism – An illustration
The Market Spectrum

The above illustration clarifies certain very real distinctions between the too-often-conflated medical and wellness tourisms, stressing that while both of these industries’ products/services exist upon a continuum from generic to location-based, wellness tourism models tend to fall squarely within the “authentic, location-based” quadrant. The graphic also helps to remind us that medical and spa/wellness cultures are significantly different: with the medical arena characterized by rules and regulations and a serious, corporate and authoritarian structure, while the spa/wellness arena is less regulated, more entrepreneurial, collaborative and often focused on subjective, intangible, even whimsical experiences. The medical world obviously uses the term “patients” and prides itself on expertise — while spa/wellness businesses use the term “guests” and focus on ambience/experiences.

Distinction between Medical and Wellness Tourism

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<th>Wellness Tourism</th>
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Travel has been undertaken to receive Treatment for a disease or a cosmetic
Travel has been undertaken as situation
Location for Medical Tourism are Hospitals, Clinics, Cosmetic
Location for Wellness Tourism is Spas, Hotels, Resorts and Ayurvedic clinics.
Clients are called as ‘patients’
Medical Tourists are interested in 1. Massage 2. Health assessments & consultations
3. Recovery from surgery programs 4. Medical testing

Travel has been undertaken to maintain or enhance personal health.
Travel has been undertaken as per wish of the tourist
Location for Wellness Tourism is Spas, Hotels, Resorts and Ayurvedic clinics.
Clients are called ‘guests’
Wellness Tourists are interested in 1. Massage 2. Body treatments

**Difference between Medical Tourism and Wellness Tourism based on the acceptance by government and the tourists**

- Organizational structures for developing, supporting and promoting medical tourism and wellness tourism vary widely from country to country, and tend to be closely linked to each nation’s overall governing structure (e.g., a centralized national government versus federal/state system, etc.)
- Governments in developing countries typically play a much more active role in guiding, supporting and promoting all tourism sectors, while in developed countries, tourism sector development and
promotion are typically more private sector-driven or collaborative in nature.

- Medical tourism data is more widely available than wellness tourism data; however, research data for both sectors (at both the country and global level) is spotty, unreliable and inconsistent.

- Medical tourism has typically been more actively supported / promoted by governments than wellness tourism. Possibly because medical tourism is an older, more established concept. It has a growing international profile in recent years; is easier to define; and is oft perceived by governments as more “lucrative” than wellness tourism. Now this trend is changing: More countries and governments are increasingly paying attention to both sectors.

- Countries with well-developed public-private collaborative bodies (i.e., medical tourism or wellness tourism “cluster networks” or associations with broad participation) typically (and not surprisingly) function more effectively in development/promotion than those with fragmented, ad hoc structures.

- In countries’ promotional materials (such as national tourism websites), wellness tourism tends to be more heavily emphasized than medical tourism. Wellness tourism promotion also tends to be heavily dominated by spas (even if the country possesses many other wellness-related offerings). The degree of emphasis on unique/local offerings and traditions varies from country to country, but is broadly increasing over time.

- Medical tourism promotion tends to be more private sector-driven. The most widespread promotional/marketing approach is for a country to attempt to reach potential tourists through medical tourism facilitators, rather than engaging in direct online promotion or traditional tourism promotional channels.

- Many countries do not yet have a strong national brand image for either medical tourism or wellness tourism, even in countries considered to be leading market players. Too many “generic” or standardized products/services are on offer, and most countries are
not effectively capitalizing on their specialties for medical tourism campaigns – or their immense wealth of indigenous, traditional and natural asset-based wellness/healing traditions for wellness tourism. As medical tourism and wellness tourism markets become more crowded and competitive, it will become increasingly important for countries to differentiate themselves around factors other than cost and quality.

**Revenue through Medical Tourism**

Medical Tourism in the global context is at the emerging trend in the third world countries, due to affordability, cost factor, facility and expertise. Third world countries like Cuba, Argentina, Mexico, Hungary, South Africa, Thailand, Singapore and India - are the major players. Patients from developed countries look for cost savings for treatment outside their country, while developing countries are providing expertise with low cost factor. As technology and medical know-how disseminated to emerging market countries, a new model of medical tourism evolved over the last two decades from rich to poor countries. Today, one finds modern hospital facilities close to major tourist attractions in countries like India, Hungary, South Africa, Thailand and Turkey. Hospitals and dental clinics look more like star category hotels, which provides and promote tourist packages together with affordable medical services. Therefore, medical tourism is rapidly progressing along with the growing trend of general tourism.

**INDIAN SCENARIO**

Medical tourism is fast establishing itself as an evolving area of business in the global healthcare space. In which, India is fast emerging as one of the most preferred medical tourism destinations. This healthcare sector in India, despite being smaller in size, compared to the western world, is surging ahead both at the national, regional and inter regional levels with enormous potential for future growth. Of late, healthcare has become a global market, with stiff competition among – the emerging, developing and developed nations to receive more health tourists. Medical tourism is growing and diversifying on a global level. The worldwide revenue from medical tourism has been estimated at $60
billion in 2006, and is projected to reach $100 billion by 2012. In India, this industry has generated a gross revenue worth about US$2.3 billion for the year 2012. Available statistics indicate that developing countries which promote medical tourism, such as, Thailand, Singapore, Malaysia, and India among others, have reported a revenue growth from 20 percent to 25 percent annually.

Economic Times reported that, “Indian medical tourism will touch Rs 9,500 Crore (around US $ 2.1 billion) by 2015”. Yet another report by Business wire with a title "Booming Medical Tourism in India", has estimates that the medical tourism industry will generate revenues of around US$ 3 billion by 2013, although with a market share of just around 3% of the global medical tourism industry. Thus, India still remains a smaller player in medical tourism sector with enormous growth potential. To quote Connell (2006:1), “India is capitalizing on its low costs and highly trained doctors to appeal to these medical tourists”. India is promoting the “high-tech healing” of its private healthcare services as a medical tourist destination. Initially, India was drawing patients from South Asian and Gulf countries, but of late, it is aggressively targeting countries like Africa, Europe, and North America. Several studies point out that, countries close to the United States, such as Mexico and other Central and South American countries are attracting U.S. citizens. According to the World Travel and Tourism Council, India’s travel and tourism (T&T) industry has received a revenue which is 2.1 percent to Gross Domestic Product in 2006 (INR 713.8 billion or US$16.3 billion). During 2005-2006, the Ministry of Tourism has taken several initiatives in the field of infrastructure development and positioning Indian tourism as a major engine for economic growth. These include: Emphasis for developing the existing and new destinations to world class standards, Improvement of connectivity to important destinations, Identification of 10-15 new destinations / circuits by each state / UT for development to world class standard with all the required infrastructure components.
Many countries promoting medical tourism devise new strategies for this new type of travel. For ins., in Malaysia tourism has rapidly become a prime industry and medical tourism is the second largest income earner for its national economy\textsuperscript{LXXXII}. Similarly, India is also in the emerging front. To quote Connell\textsuperscript{LXXXIII}, that patients go to India for surgery and specialized services in areas such as neurology, cardiology, endocrinology, and nephrology. Thailand specializes in sex-change operations and cosmetic surgery and is now known as a destination for medical tourism\textsuperscript{LXXXIV}.

The Deloitte Centre for Health Solutions estimated that 750,000 Americans travelled abroad for medical care in 2007 and predicted that this would increase to 1.6 million by 2012 with a sustainable annual growth rate of 35\%\textsuperscript{LXXXV, LXXXVI}. Regarding the cost of availing medical facilities, many Indian hospitals charge one-tenth the price of procedures available at U.S. For an example, a coronary artery bypass graft that costs more than $55,000 (U.S. dollars) for insured patients at hospitals in California can cost $5,000 to $10,000 at hospitals in India\textsuperscript{LXXXVII}. Cardiac procedures priced at $200,000 to uninsured Americans are available for $10,000 in hospitals in India. Marketing initiatives emphasize price differentials and cost savings obtained by traveling to comparatively inexpensive health care facilities\textsuperscript{LXXXVIII}. A recent trend shows that people from developed countries such as the United States or the United Kingdom prefer the developing countries such as Singapore, Thailand, Malaysia, and India, seeking an affordable and accessible healthcare\textsuperscript{LXXXIX}.

To quote the National Center for Policy Analysis\textsuperscript{XC}, an estimated 500,000 Americans went across the border for treatments in 2005 and about 250,000 Americans sought care in Singapore. The Deloitte Center for Health Solutions (2008)\textsuperscript{XCII} study reported that as many as 750,000 Americans received offshore medical care in 2007 and this number is projected to increase to 23 million by 2017. For Malaysia, health tourism, implemented in 1998 has become the second largest income earner for the national economy\textsuperscript{XCII}. In India, medical tourism has become a US$
billion dollar industry during 2012 or it could become as much as a $2.2 billion dollar per year industry. Out of a number of corporate hospitals, the Apollo Hospital Enterprises has treated around 60,000 patients between 2001 and 2004. Statistics indicate that 150,000 medical tourists visited India during 2003, mostly from Middle East and South Asian countries.

Specialties of India in Medical Tourism:

India offers open-heart surgery, pediatric heart surgery, dentistry, bone marrow transplants and cancer therapy along with the technological sophistication and infrastructure to maintain its market. Nigerians spend about US$1 billion dollars per year abroad. The American Baby Boom generation, about 220 million people, are increasingly seeking health care outside their nation’s borders. 50,000 people from the UK traveled for medical reasons in 2003. In Thailand during 2004, 247,238 Japanese, 118,701 Americans, 95,941 British, and 35,092 Australians sought medical care. Waiting lists for certain treatments are also getting longer and longer.

In Canada and Britain, the waiting list for a hip replacement can be a year or more, but available immediately on demand in Bangkok. Regional and national governments in India, Thailand, Singapore, Malaysia, the Philippines and Indonesia regard the ‘medical tourism’ trade as an important resource for economic and social development. In these countries revenue generated from tourism is a significant part of the national economy. Also they try to integrate the tourism industry with the health care sector as a progressive vehicle for diversifying their economies, attracting foreign investment, promoting job creation, building the health services industry and using regional strengths to benefit from the doctrine of comparative advantage.

Medical Tourism in India during 2013

According to a new research report by RNCOS, “Booming Medical Tourism in India”, the medical tourism market in India has witnessed a rapid growth over the past few years. India has become a hub for medical
tourists due the growing popularity of traditional alternative therapies, such as ayurveda, therapeutic massage, yoga, and meditation among the tourists. Moreover, improvements in the medical infrastructure with a growing pool of qualified specialists, is attracting medical tourists from all across the globe.

**Research Analysis & Highlights:**

The report, “Booming Medical Tourism in India”, by RNCOS, provides an in-depth research and rational analysis of the medical tourism market in India. It provides forecasts for the medical tourism market along with the medical tourist arrivals in the country till 2015. Additionally, it provides a brief comparison of top Asian medical tourism market to show India’s position in the region. An insight on cost comparison of various medical procedures with other major countries has also been given in the report. It also covers various government initiatives and major trends of the market to generate an overall understanding of the industry. Further, the report included the prominent industry players covering their business overview, key financials and industry activities. Some of the report’s key highlights include:

- The medical tourism market in India is growing at a commendable pace.
- Alternative medical therapies are becoming popular among the medical tourists.
- Government is increasingly focusing on developing the medical tourism industry.
- Cosmetic surgery is one of the most sought after treatments by the medical tourists.

**END NOTES**

**CHAPTER - II**

MEDICAL TOURISM THROUGH THE AGES

**Introduction**