CHAPTER 5

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5.1 Introduction

This research study entitled “a study on co – branding of medical tourism with traditional Indian therapies” was undertaken to study the scope for co – branding of medical tourism with traditional Indian therapies in Karnataka. Co-branding is “the practice of using multiple brand names together on a single product or service. It is a type of branding wherein the firm partners with another cause in the form of its designation as a sponsor or supporter”. Co – branding with an existing cause is a means for firms to complement their existing brand image with specific associations that are borrowed or transferred from a cause.

This study was undertaken in the context of boom for medical tourism in India from 2000. The increased scope for medical tourism in India in general and the state of Karnataka in particular has popularized the image of Karnataka as “healthcare destination”. Medical tourism is an industry which combines two major service industries, vis healthcare services and tourism to a foreign destination.

New economic policy of 1991 has lead to the globalization of healthcare services. On the one hand, the number of foreign medical tourists visiting India increased and on the other hand, the healthcare organizations with world class super speciality services and Ayurvedic spas started realizing the potential of the same. The information technology revolution , fading of the domestic boundaries, free movement of goods and services, changing lifestyles of people, increase in the purchasing power, availability of first class treatment for third world price have all contributed for the growth of this industry.

Healthcare organizations in Karnataka have tough competition from countries like, Malaysia, Thailand, and Singapore in the international arena. Further, it is facing competition from other states of India, like, Maharashtra, Tamilnadu and Kerala and Delhi. This has made the healthcare organizations to indulge in aggressive marketing.
Major players in medical tourism in Karnataka are, Narayana Hrudayalaya Institute of Cardiac Sciences, Hosmat Hospital, Apollo Hospital, Wockhardt Hospital, Manipal Hospital in Bangalore, KMC Manipal, M S Ramaiah Memorial Hospital, Columbiaasia Hospital, Mallige Nursing Home, Mallya Hospital, KLE Hospital, Belgaum. Major healthcare organizations in traditional therapies are, Soukya Spa, Ayurvedagram, Leela Spa, Angsana Oyasis Spa, Jindal Naturopathy Centre, Indus Valley Ayurvedic Center in Mysore, Chaitanya Centre in Shimoga, Prakruti Kuteera, Radiant Retreat, etc. All these organizations have derived their own Unique Selling Propositions regarding service delivery.

Branding and co – branding is an innovative marketing strategy which can create synergy for both super speciality hospitals and Ayurvedic spas. What is the present state of medical tourism industry in Karnataka? What kind of international marketing strategies are used by healthcare organizations? What is the scope for co – branding between modern hospitals and Ayurvedic spas? And what are the benefits of undertaking co – branding are some of the questions that prompted to take up this detailed study.

In order to have a thorough knowledge of the medical tourism industry and the scope for co – branding, a detailed survey of literature was undertaken. The literature survey revealed that there was no research work carried out in the area of co – branding of both the types of healthcare services during the period 2003 to 2009. Hence, it was felt that there is a need to conduct research in this area.

This study was conducted by selecting thirty major healthcare organizations in Karnataka which are the pioneers in medical tourism. The period covered is six years from 2003-04 to 2008-09. The main reason to conduct this study is to benchmark these companies for focused international marketing strategies and to propose the extension of the same to malnad and coastal areas in Karnataka. However, the following objectives and hypotheses were formulated for this study.
The methodology adopted for this study comprises both survey and analytical methods. The primary data has been collected from four hundred foreign medical tourists and thirty business development heads from healthcare organizations. For this purpose, two sets of structured questionnaire were used. One set was distributed among the business development heads of thirty healthcare organizations. The other set of questionnaire was distributed among foreign medical tourists in thirty selected healthcare organizations in Karnataka. Later, these were analysed with a number of statistical tools. To assess the applicability of the findings with respect to the selected healthcare organizations, two hypotheses were formulated and tested for relevance. The statistical tools such as, SPSS, Anova, Chi- square, co-efficient of correlation are used to test the hypotheses.

5.2 Summary of findings:

The summary of findings of the study for each of the objective is as under:

5.2.1: Present status of medical tourism in Karnataka

a) Structure:

Medical tourism industry in Karnataka comprises of about twenty super speciality hospitals in Bangalore, one in Manipal, one in Belgaum. It also includes as many as fifteen spas providing traditional Indian therapies. All these are private corporates.

Majority of Foreign Tourists visiting India for medical tourism are men in the age group of 35 to 55 years and are from Europe and our neighboring countries.

Majority of the tourist visiting India for Medical tourism have annual income ranging from Rs.5 Lakhs to Rs.15 Lakhs and it is the first time they are visiting India for medical tourism.
b) Growth of Medical Tourism:

Size of the industry was estimated at Rs. 1,500 crore and it would grow to a Rs. 9,500 crore business by 2015, with an annual growth rate of 30%. About 1.8 lakh foreigners visited India for treatment in the first eight and half months of 2008 – 09 and their number would increase by 22% to 25% in the coming years. India is expected to emerge as the second fastest growing (8.8%) tourism economy in the world over 2005 – 14 according to the WTTC. Medical Tourism market has been growing at the rate of 15% for past 5 years (2003 – 2009) and by 2012, Rs. 10,000 crore will be added to revenues of the private players.

c) Motivators for medical tourism in Karnataka:

The main motivators of foreign medical tourists visiting Karnataka is for curative and rejuvenative treatment and the normal duration of their stay in Karnataka for medical treatment as well as for tourism is for a minimum period of 30 days.

Low cost of treatment and availability of both modern and traditional Indian therapies are the main reasons for attracting foreign medical tourists to Karnataka. Moderate weather in Karnataka and Karnataka’s exquisite culture and tourist places are the other reasons for the foreign tourists to visit Karnataka.

Quality of doctors and food services in Karnataka Health Care organizations are the high satisfactory factors that attract medical tourists to Karnataka. They all feel that the infrastructure facilities available in these organizations are not up to the International standards and personalized care of patients are missing in these organizations.

The prominent reasons for choosing Karnataka by these medical tourists for medical treatment are high success rate of special surgery, quality treatment, availability of traditional Indian therapy and lesser cost of treatment.
d) Demand for Medical Tourism:

Foreign medical tourists from 35 countries have visited Karnataka for various kinds of treatments. They are:

a) United States of America, Canada,

b) European countries like, England, France, Italy, Germany, Portugal, Denmark, Switzerland, Spain

c) Middle East countries like, Qatar, Saudi Arabia, UAE, Oman, Iran, Iraq, Quwait, Bahrain

d) African countries like, South Africa, Zimbabwe, Cameroon, Tanzania, Kenya, Uganda, Nigeria, Trinidad,

e) Australia, and

f) Neighbouring Asian countries like, Sri Lanka, Bangladesh, Nepal, Pakistan, Mauritius, Burma, Bhutan.

e) Supply of Medical Tourism in Karnataka:

The state is endowed with a combination of high – tech super - speciality hospitals on the one hand, and, it has a number of natural beauty spots and ayurvedic spas. However, the major medical tourism destinations in the state are, Hosmat Hospital, Narayana Hrudayalaya Institute of Cardiac Science, Sagar Hospital, Apollo Hospital, Columbia-Asia Hospital, Wockhardt Hospital, Soukya Spa for Natural Healing, Jindal centre of Naturopathy, Ayurvedagram, Leela Spa, Golden Palms Resort, Angsana Ayurvedic Spa and Resorts, Indus Valley Ayurvedic Centre, Mysore, Columbia-Asia Hospital, Mysore, KLE Hospital, Belgaum, Prajna Kuteera, Mysore, Orange County Resorts, Coorg, Kasturba Medical College, Madhava Nagar, Manipal, Manipal Hospital, Old Airport Road, Bangalore, St. John's Medical College Hospital, Vijay Mallya Hospital, Mallige Nursing Home, M S Ramaiah Memorial Hospital, Sai Dental Care.
The foreign medical tourists are highly satisfied with the quality of medical services rendered by these organizations and their do not fall short of their expectations.

f) **Players in the medical tourism process:**

Agencies involved in the medical tourism process are, super speciality hospitals, Spas providing traditional Indian therapies, travel agents, Department of Tourism, hotels, international insurance agencies and foreign governments.

g) **Types of treatments sought by foreign medical tourists:**

Cardiac treatment, Bone marrow transplant and knee replacements are the main medical treatment preferred by the foreign tourists.
5.2.2: **International marketing practices in relation to medical tourism.**

1. The main source of their information about Karnataka’s healthcare Organization is from Internet as well as from friends and relatives.

2. Preventive check up packages for the entire body, having eminent personalities from industries as their board trustees, discussing the success of crucial operations in health magazines, TVs and newspapers are the various international strategies preferred by healthcare organizations in Karnataka to promote their hospitals for medical tourism.

This study reveals the following international marketing practices of healthcare organizations. They are:

1. Branding
2. Website presence and internet marketing
3. Travel desk to cater to foreign patients and their relatives
4. Tie – ups with travel agents
5. Co – branding with spas providing Ayurvedic therapies
6. Establishment of the entire floor for foreign medical tourists
7. Participation in the medical tourism expos and seminars abroad
8. Tie-up with the state tourism boards

At Narayana Hrudayalaya, 24 cardiac surgeries are performed a day and 20 per cent of their patients are foreigners. Although majority of them come from Bangladesh, Pakistan, Middle East and Africa, they have treated patients from 22 different countries so far. Manipal’s flagship hospital on Airport Road, Bangalore received close to 3,000 patients from 29 foreign countries last year In 2009, out of the 3.5 lakh patients treated by Wockhardt, 890 were foreigners primarily from the US and UK. It has grown up to 1,100 in 2010. To support the domestic and foreign demand for healthcare, huge capital expenditure to the tune of Rs 800-1,000 crore has been planned in the next three years, by most of the hospitals in Bangalore.
HOSMAT Hospital even has a building within its campus to accommodate relatives of patients. Airport drops and pick-ups for patients and relatives are all rendered by the hospitality division of the hospital.

5.2.3: Need for co-branding of medical tourism with ayurveda and other traditional Indian therapies.

Majority of the medical tourists visiting Karnataka feel that there is a vast scope for co-branding medical tourism with traditional Indian therapies in Karnataka.

Majority of the medical tourists feel that they are able to avail the benefits of both surgeries as well as recuperate because of the existence of both traditional Indian therapies apart from allopathic treatment in Karnataka.

The health care organizations in Karnataka are of the opinion that foreign exchange earnings, wealth generation, employment generation, resource utilization and domestic health improvement are the major benefits Karnataka can derive from medical tourism.

Health care organizations in Karnataka feel that excellent treatment in traditional Indian therapies after surgery, reducing the average length of stay by medical tourists in hospitals and creating an USP for Karnataka as a tourist destination are the important factors that need greater attention for co-branding of medical tourism with traditional Indian therapies.
5.2.4: Feasibility of extending medical tourism as a venture in Malnad and coastal regions, with suitable package

Majority of the healthcare organizations feel that medical tourism can be extended as a venture in Malnad and coastal regions with suitable package.

They also feel that it can be suitable for foreign medical tourists coming for cosmetic or dental treatment where lesser rest is needed. A variety can be provided to them for recuperation far from the city. Suitable package for this group and attendants can be created in Malnad and coastal regions of Karnataka.

5.2.5: Factors determining the success of medical tourism.

The study reveals the following “key success factors” which contributes to a healthcare firm providing medical tourism. They are:

1. Health care organizations feel that the speed of response to the patient’s sickness, flexibility to accommodate changes and transparency in dealing with the patients are some of the important factors involved in making medical tourism process efficient.

2. Employing specialist doctors for surgeries, opening diagnostics centers, MOU with overseas health insurance companies, and agreements with hotels and banks are some of the ways through which co-branding of medical tourism with traditional Indian therapies could be made successful in future.

3. Establishing accreditations and regulatory bodies, defining quality standards, encouraging ethical practices in medicinal areas, and incorporating latest advancements in medical technology are the key factors for creating a road map for promoting medical tourism in Karnataka.
4. Easing grants of medical visa, treating medical tourism as an item of export, special programs by tourism boards and Incredible India Campaign are some of the most important encouragements shown by Governments in promoting medical tourism in India.

5. Majority of the healthcare organizations feel that they are able to offer high level of satisfactory services to the foreign tourists because of user friendly health information system, medical equipment available in the hospital, success rate of various treatments, skills of supporting staffs and the exclusive medical facilities provided to the foreign tourists. However they feel that they are not able to provide telemedicine to their overseas patients and instant availability of beds are their handicaps.

5.2.6: Effectiveness of advertising strategies adopted by the top modern hospitals and other renowned centres practicing ayurveda and other traditional Indian therapies.

The most preferred channels for marketing medical tourism abroad by the various health care organizations in Karnataka are through tie ups with international travel agents operating under medical tourism, through hospital networks abroad, tie ups with foreign hospitals abroad and by developing the web site of their hospitals.

Internet and international TV channels are the preferred media by the health care organizations to effectively attract foreign medical tourists to Karnataka.
5.2.7: Creation of attractive packages with a combination of modern and traditional Indian therapies.

Bangalore apart from being branded as an IT hub is also considered as a branded health City overseas, due to the traditional Indian therapies offered by the health care organizations here.

Medical tourism is considered as one of the major tourism sectors with high potentialities is eagerly waiting for promotion by the state tourism department. The USP of Karnataka in medical tourism is traditional Indian therapies. Majority of respondents are of the opinion that attractive packages combining both modern and traditional therapies can be created. While creating these packages, traditional therapies can be combined with cosmetic and dental treatments to a greater extent.

Foreign medical tourists coming for preventive treatments favor the packages with eco – tourism, adventure tourism and heritage tourism in Karnataka.

The following hypothesis was taken up for testing both with the foreign tourists as well as with the health care organizations in Karnataka and the analysis of primary data was satisfactory. A summary of the results are presented here.

5.2.8: “Medical Tourism in Karnataka is in its nascent stage”

Since more than 4/5 of the Health care organizations are agreeing on to the statement, one can say that medical tourism in Karnataka is at its nascent stage. Hence the first hypothesis is accepted.
When the medical tourists were verified against gender in their opinion on whether medical tourism in Karnataka is at its nascent stage, the statistical tests revealed non–significant differences between male and female tourists.

Statistical tests on the responses from medical tourists of different age groups in their opinion on whether medical tourism in Karnataka is at its nascent stage, the statistical tests revealed a non–significant differences between different age groups of the medical tourists.

When the medical tourists were verified against different nationalities in their opinion on whether medical tourism in Karnataka is at its nascent stage, the statistical tests revealed non–significant differences between different nationalities of the tourists.

5.2.9: “There exists a need for co-branding of Medical Tourism with traditional Indian therapies.”

Since more than 80% of the Health care organizations are agreeing to the above statement, one can say that there is a need for Co–branding of medical tourism with the traditional Indian therapies. It would lead to the creation of a niche market for attracting more foreign medical tourists. Hence the second hypothesis is accepted.

When the medical tourists were verified against gender in their opinion on whether Co – branding of medical tourism with the traditional Indian therapies would lead to the creation of a niche market for attracting more foreign medical tourists, the statistical tests revealed non – significant differences between male and female tourists.
When the medical tourists were verified against age in their opinion on whether there is a need for Co–branding of medical tourism with the traditional Indian therapies, the statistical tests revealed non–significant differences between different age groups of the tourists.

Statistical tests on the responses from different nationalities of medical tourists in their opinion on whether there is a need for Co–branding of medical tourism with the traditional Indian therapies, it revealed a non–significant differences between different nationalities of the medical tourists.

5.3: Lateral findings of the study

This research study entitled “a study on co–branding of medical tourism with traditional Indian therapies in Karnataka”, was undertaken to study the present status of the medical tourism industry and its growth in Karnataka. It also aimed at studying the scope for co–branding medical tourism with traditional Indian therapies in the state. However, the lateral findings of this research study can be described as under.

1. A pilot study was conducted by the researcher to study Bangalore as a destination for medical tourism. The major findings of this study are, Majority of respondents are highly satisfied by the facilities provided by a super speciality hospital in Bangalore.

2. Cost effectiveness is one of the most influencing factors for attracting foreign medical tourists to Bangalore. Super speciality hospitals in Bangalore are providing world class treatment with lesser cost. Majority of the customers are satisfied with the service received for the price paid.

3. Travel agents are most prominent in marketing medical tourism product abroad. Most of the super speciality hospitals and spas providing traditional Indian therapies have international travel agents promoting their products abroad.

4. It was found that brand image of Bangalore is an important factor that has highly influenced foreign medical tourists to seek medical treatment. Majority of the respondents revealed that they are highly satisfied by the services provided by
hospitals in Bangalore, which makes them to visit hospitals in Bangalore for their future treatment of diseases.

5. Availability of traditional Indian therapies plays a major role in attracting foreign medical tourists to Bangalore. In this competitive service industry, it provides an advantage to the state of Karnataka.

6. It was found that majority of respondents did not encounter any problem to get visa to visit Bangalore. Government’s liberal rules for medical visa has helped for the growth of this industry.

7. Most of the respondents had no problems during their stay in Bangalore. Hospitals here have trained medical and para-medical staff. They have established a separate block for international patients which helps them to provide customized services to medical tourists from different countries.

8. It was found that most of the respondents were very highly satisfied with customized and personalized services available in the hospital that they visited. They have even recommended the same hospitals to their friends and family people for treatments.

9. Further, majority of foreign medical tourists are aware of the availability of alternate medicines like Ayurveda available in Bangalore. This can be used to attract more foreign medical tourists as it provides a competitive edge.

10. Narayana Hrudayalaya Institute of Cardiac sciences is a pioneer for medical tourism in Karnataka. Being a Super speciality hospital, Narayana Hrudayalaya is providing world class treatment with lesser cost.

11. It has appointed international travel agents who are involved in marketing medical tourism product abroad.

12. It was found that brand image of Bangalore is an important factor that has highly influenced foreign medical tourists to seek medical treatment.

13. High Success rates of complex surgeries performed at Narayana Hrudayalaya is a major factor attracting foreign medical tourists. Success rate of bi pass cardiac surgery is 98% here.
14. Business model practiced at Narayana Hrudayalaya can be very effective in the process of medical tourism. This model aims at delivering the medical product at the cheapest price. This is made possible by carrying out as many surgeries as possible each day. Further, each surgeon does only surgeries. Hence, his expertise is used only for that purpose. This results in cost cutting.

15. The adoption of Kerala model of tourism can be very effective for Medical Tourism in Malnad region. Arrangement of a place to stay in a cottage in this area itself will be an “enjoyment”. If this is coupled with Ayurvedic treatments like, Panchakarma, Shirodhara, Katibasti, which is performed by a qualified Ayurvedic doctor, the medical tourist can be delighted.

16. Malnad region can offer a variety of tourism options like, agro – tourism, adventure tourism, eco –tourism, home stays coupled with ayurvedic products, etc.

17. Potential strengths of medical tourism in Karnataka that can be identified are, strong demand for the services both from within and abroad, superior intellectual capital of Indian physicians. Further, the increased allocation of resources in the government’s ninth and tenth five year plan has lead to an increase in the flow of foreign medical tourists to the state.

18. It was found that only few healthcare organizations have realised the potential of medical tourism and are into focused promotion. But, in spite of having the potential to attract foreign medical tourists, some healthcare organizations lack adequate global distribution capability.

19. Some of the opportunities that can be identified for medical tourism in Karnataka are possibility to expand to new geographic markets, alliances and joint ventures with the foreign governments and hospitals which can expand the market coverage.

20. Shift in the needs of the clients due to new lifestyles and competition from other Asian countries in medical tourism can be identified as threats for this industry in Karnataka.
21. Majority of the healthcare organizations in the state have the objectives of “providing high customer value” and “increasing the goodwill”. This enables them to provide first world services at the third world prices.

22. In most of the healthcare organizations, marketing department involves the doctors and travel agents while making various decisions on marketing the service to foreign medical tourists.

23. The countries which have greater potential for medical tourism are, SAARC region, Afghanistan, Gulf countries, Southeast Asia, Mexico, Canada, U.S.A., Germany, England and African countries. However, the motivators are different for medical tourists coming from different nationalities. Medical tourists from developed countries are attracted by the lesser cost of treatments and the availability of traditional Indian therapies. But, the medical tourists from African countries are attracted by the high quality of treatments available in the country. Further, those from Europe are attracted by the low waiting time for various treatments in the healthcare organizations in the state. Hence, separate marketing strategies customized to their needs helps in reaching to this segment.

24. Accreditation of hospitals by the Joint Commission International and development of world class infrastructure facilities are the most needed requirements for the growth of medical tourism industry in Karnataka.

25. High – end medical tourists from, U.S.A, Canada, Europe and Middle East countries are highly attracted towards the traditional Indian therapies offered by various healthcare organizations in the state.

26. “Incredible India” ad campaign has been ranked as the highest recall advertisement worldwide by “Travel and Leisure”. This speaks about the effectiveness of advertising strategy used by India.

27. Rural tourism has got a high potential to attract the foreign medical tourists. This is an untapped tourism product which can provide an additional source of income for the people in rural Karnataka.

28. Majority of the healthcare organizations have adopted fast, patient – friendly technology which can cater to immediate requirements of the clients. Hospital
Information System (HIS) is very helpful in improving the quality of healthcare services.

5.4 Conclusions of the research study

The study leads to the conclusion that Medical tourism as a phenomenon is just over a decade old in Karnataka. Medical tourism in Karnataka hence is in its nascent stage. Yet, with innovative marketing strategies like, Co – branding with traditional Indian therapies could provide the core competency for medical tourism in Karnataka. This will help Karnataka to become a very important medical tourism destination, attracting foreign patients from all over the world.

After the success of IT industry here, Medical tourism has become the major industry in Karnataka. The major motivators for medical tourism in Karnataka are: the existence of large number of top hospitals in the city and innumerable medical institutes and colleges. The super speciality hospitals like, Narayana Hrudayalaya, Wochhardt Hospital, Apollo Hospital, Sagar Hospital, M S Ramaiah memorial Hospital, Columbiaasia hospital, Manipal Hospital are the pioneers of medical tourism in the state. Among the spas providing traditional Indian therapies, Soukya Spa, Ayurvedagram, Indus Valley Ayurvedic Centre, are the major players.

The motivators for medical tourism in Karnataka are, the air conditioned climate, lesser cost of treatment, world class infrastructure, range of medical packages and higher levels of expertise of doctors, existence of both modern and traditional therapies under one roof, touristic options in the state, etc. All these have helped Karnataka to become the most important medical tourism destinations in the world. Motivators are different for foreign medical tourists coming from different countries.
Therefore this study leads to conclude that the parameters like, cheaper costs of treatment, superior quality of the treatment, success rates of surgeries, combined promotional efforts of all the stakeholders like, the hospital, spas, travel agents and state tourism boards, support of both central and state government, improvement of infrastructural facilities, building of brand image, focused advertising strategies are very important for the rapid growth of medical tourism in Karnataka.

5.5 Suggestions

The suggestions which could be offered relate to all the major players in the medical tourism industry viz., super speciality hospitals, spas proving traditional Indian therapies, the government, state tourism boards and travel agents.

Suggestions are offered in two parts, the first part indicates suggestions based on the findings of the study. The second part comprises of the suggestions offered by the researcher to improve the flow of foreign medical tourists to Karnataka.

Part 1: Suggestions based on the findings of the study

1. **Quality of treatment**: Quality is the key for the success of a healthcare organization. According to this study, the super speciality hospitals and spas which are into medical tourism provide world class quality service to the foreign medical tourists. The foreign medical tourists are highly satisfied with it. Hence the other healthcare organizations need to improve their quality of service in order to attract more foreign medical tourists.

2. **Speed of treatment**: Speed of treatment is a major dimension in the case of healthcare organization and a major motivator attracting foreign medical tourists. The IT revolution and HIS (Hospital Information System) have helped the healthcare organizations to deliver the service with high speed. Hence other players need to concentrate on reducing the waiting time for patients, arranging for video – conferencing, easing of medical visa,
improving the frequency of the flights to key international destinations so that emergency medical services can be arranged and offered at the earliest possible time.

3. **Availability of traditional Indian therapies**: This is the Unique Selling Proposition of Karnataka in the medical tourism front. Karnataka has the core competency in this field. Hence, there is a need to co-brand medical tourism with traditional Indian therapies and provide it as a unique package to foreign medical tourists.

4. **Lesser cost of treatments compared to the home country of the medical tourist**: This is the main reason for the growth of medical tourism in Karnataka. The healthcare organizations hence need to maintain the competitive prices for various treatments.

5. **High success rates of surgeries**: Findings of the study reveals that the healthcare organizations in Karnataka have the high success rates of surgeries. This assurance dimension of service quality needs to be communicated to the international audience through aggressive promotion.

6. **Best treatment in every medical division**: As Karnataka has a number of medical colleges, nursing colleges, para-medical colleges, physiotherapy, Ayurvedic, homeopathy, naturopathy institutions, best treatment in every medical division is provided. A co-ordinated effort from all these players is essential to capture the medical tourism market at present as well as in future.

7. **World class technology**: The findings of the study reveal that most of the doctors in these super speciality hospitals have medical degrees from first world foreign countries. They have expertise in the world class medical technology. Therefore, the other healthcare organizations aspiring for medical tourism have to use world class technology.
8. **Availability of post operative vacation**: The findings of the research suggest that one of the motivators for medical tourism in Karnataka is the availability of post operative vacation. For foreign medical tourists it is dual advantage. In Karnataka many spas provide traditional Indian therapies where rejuvenation for the foreign medical tourists can be provided. Hence, the healthcare organizations need to include the post operative vacation in another setting outside the hospital in order to attract many foreign medical tourists.

9. **Customized services**: It is clear from the findings of the study that foreign medical tourists from different countries seek different types of services. Duration of stay, type of accommodation, other value added services, touristic options, food, language, play a major role in the process of medical tourism product. Therefore, the healthcare organizations need to stress upon the provision of services as requested by the medical tourist.

10. **Brand image**: Findings of the study reveals that hospitals like, Narayana Hrudayalaya, Sagar Hospital, Manipal Hospital, Apollo Hospital, Wockhardt Hospital enjoy brand image compared to other healthcare organizations. The image of “first world treatment at third world prices” has to be adopted by other healthcare organizations.

11. **International marketing efforts**: Hospital websites, association with international travel agents, hospital networks abroad, participation in medical tourism expos, tie – up with foreign hospitals are leading to increase in the number of foreign medical tourists to Karnataka. Therefore, these marketing efforts should be adopted by other healthcare organizations in order to attract foreign medical tourists.

12. **Travel desk to cater to foreign patients and their relatives**: Foreign medical tourists and their attendants need to have a quick arrangement for their travel. So, the travel desks will help them by making all arrangements for their air travel, foreign exchange, travel duration, accommodation and Medical visa. Hence, travel desks have to be established by the healthcare organizations.
13. **Tie – ups with travel agents:** The study reveals that travel agents act as the major links between the medical tourist and the medical tourism destination. They are tied up by major medical tourism destinations in Karnataka like, Narayana Hrudayalaya, Apollo, Wockhardt Hospital, Hosmat hospital. Other healthcare organizations can also tie – up with travel agents to arrange for maximum visits of foreign medical tourists.

14. **Co – branding with spas providing Ayurvedic therapies:** It is advantage Karnataka in the case of co – existence of Ayurvedic treatments as well as modern medical treatments. Co – branding of medical tourism with traditional Indian therapies will create synergy and unique selling proposition for the state. Hence, modern hospitals and ayurvedic spas should co – brand with one another to attract maximum number of patients from abroad.

15. **Establishment of the entire floor for foreign medical tourists:** The study reveals that many pioneers in the field of medical tourism like, Narayana Hrudayalaya, Apollo Hospital, Wockhardt, Manipal hospital have established the entire floor with special facilities for foreign medical tourists. This includes customized food, language and accommodation. Other healthcare organizations need to provide these exclusive facilities for the foreign medical tourists.

16. **Participation in the medical tourism expos and seminars abroad:** The Department of Tourism encourages the private players to participate in the medical tourism expos and seminars. The pioneers in medical tourism have benefited from this strategy. Other healthcare organizations need to use it in order to target the foreign audience.

17. **Tie- up with the state tourism boards:** In the process of co – branding of medical tourism with traditional therapies, state tourism board can play an important role of promotion. It is mutually beneficial. Therefore, the hospitals into medical tourism in Karnataka have to tie up with state tourism boards to provide the best service to the foreign medical tourists.
18. **Customer relationship management**: Hospitals can also use customer relationship strategies to retain foreign patients who will be their potential consumers in future. Further, they can become the brand ambassadors for these organizations. Especially for healthcare, word of mouth promotion can be very effective. Further, for rejuvenation therapies, special discounts can be offered to regular tourists which makes them to seek same healthcare treatments again in the same place.

19. **Tie Up with foreign governments**: Demand for medical tourism increasing from underdeveloped neighbouring countries and African countries. Narayana Hrudayalaya has a tie up with some of these foreign governments. They provide the treatment at the least possible cost to medical tourists coming from these countries. They send the patients here due to non availability of the treatment on the one side and superior quality of treatment offered by this hospital. Even other healthcare organizations can follow this strategy.

20. **Implementing SERVQUAL dimensions**: One of the reasons for the popularity of these healthcare organizations is the adoption and focus on the SERVQUAL dimensions. For healthcare service, the relevance of these dimensions is highly instrumental in delivering the quality delivery. They are reliability, assurance, empathy, tangibility and responsiveness.
Part 2: Suggestions offered by the researcher for the growth of medical tourism in Karnataka by co–branding with traditional Indian therapies:

The other super speciality healthcare organizations which have not yet co–branded with spas providing traditional therapies need to tie–up with each other. This would create a synergy and niche market for medical tourism in Karnataka.

This suggestion is offered because, at present, medical tourism market is highly competitive both at the international and national level. Karnataka has the ability to provide two different varieties of medical treatments which is unmatched by any other place. The hospitals like Narayana Hrudayalaya, Soukya spa, Manipal hospital, ayurvedagram have adopted this and have got benefited.

In the process of co–branding the following linkages between eight agencies can be created. They are:

a) Specialist doctors and surgeries in the super speciality hospital

b) Travel agents who act as the link between foreign medical tourists and the healthcare organizations

c) Hotels which provide accommodation to the attendants and patients during post surgery period

d) Banks dealing with currency exchange for the foreign medical tourists

e) Tourism boards which promote tourism in general and medical tourism in particular

f) Diagnostic centers which provide laboratory services reliably

g) Spas providing traditional Indian therapies like, Ayurveda, naturopathy, siddha, meditation, yoga.

h) Health insurance companies abroad
i) Foreign governments especially of underdeveloped countries which send patients with chronic problems to the state for treatment.

These linkages will lead to the successful co-branding programme. As all the stakeholders can mutually benefit, it can be a successful business model. Each of these players has definite role to play.

Co-branding medical tourism with traditional Indian therapies will benefit the players in the following ways:

a) **It enhances the brand image of the product**: Karnataka has tough competition from other countries and states in Medical tourism. Hence, enhancing the brand image of the product by co-branding will help for the creation of core competency.

b) **It results in increased satisfaction**: Co-branding can lead to an increased satisfaction for the foreign medical tourist. Because, he gets the complete healthcare under one roof in one visit.

c) **Speeds up the recovery process**: Recovery procedures in Ayurveda are unique. As a result of co-branding foreign medical tourist will be sent to a spa for recuperation. This will lead to faster recovery in a natural environment.

d) **Provides effective marketing and promotional strategy**: This niche market is in its nascent stage. Co-branding helps for the unique product mix strategy, value proposition for promotion of the product.

e) **Leads to easy positioning of the product amidst international competition**: With co-branding, focused product positioning strategy for the target customers can be created. It is innovative and distinct in nature.

f) **Creates synergy**: Super speciality hospitals and Ayurvedic spas are together in the process of attracting maximum foreign medical tourists. These two types of health treatments are complementary in nature. So, if they are co-branded together, both the players will benefit.
g) **Attracts tourists for special value it creates:** For the foreign medical tourists, it is a one stop shop to avail complex surgeries and recuperations. Excellent treatments in Ayurveda can reduce the average length of stay in the hospital and result in increased patient flow.

### 5.6 Scope for Further Research

a) The present study on co – branding of medical tourism with traditional Indian therapies in Karnataka is based on the foreign medical tourists who have visited Karnataka for various treatments and the business development heads of various healthcare organizations. Therefore, there is a need to investigate the broader aspects and other dimensions of the concept of medical tourism development. Besides, the specific areas of medical tourism development and its marketing in Karnataka are to be investigated separately, for which the researcher would like to suggest the following areas for further research.

b) The impact of medical tourism development on the economic development of Karnataka.

c) The impact of medical tourism on other healthcare organizations which are not in the process of medical tourism at present.

d) The case of sustainable development of medical tourism in Karnataka.

e) The negative impacts of medical tourism in India.

f) A cost – benefit analysis of co - branding of medical tourism with traditional Indian therapies.

g) Cross country comparison of medical tourism industry and its growth. This aims at studying the unique advantages available with other competing countries in the medical tourism front.

h) Role played by the international travel agents in marketing medical tourism.

i) Role of medical insurance in medical tourism.
j) Advertising strategies for medical tourism in India.

k) Supply chain management for medical tourism in India.

l) Lessons from International competitors for medical tourism in Karnataka.

m) Bangalore’s reputation of health city as a medical tourism branding strategy for Karnataka.

It is hoped that the present study would provide a base for further research in the above areas. Systematic studies on the various aspects of medical tourism and its marketing will not only give new insight into medical tourism but make the decision makers aware of the significance of this industry. Karnataka being a dominant player both in the case of allopathy and Ayurveda types of healing has a very good chance of becoming the hottest medical tourism destination in the world. It has all potential to become the most sought after medical tourism destination.

As governmental agencies and the healthcare organizations become more and more aware of the tremendous potential of medical tourism industry, it is hoped that there will be a more comprehensive planning and more efficient implementation of projects related to medical tourism. That, in brief, is the ultimate objective of the present study. Therefore, there is a need to formulate the roadmap for the promotion of medical tourism. It needs to an unified effort from all the agencies involved in the medical tourism process, like, modern hospitals, spas providing traditional Indian therapies, the union and state governments, tourism boards, travel agents, international governments and insurance companies.