Chapter 5
Conclusion and Recommendations

5.1 INTRODUCTION

The purpose of this chapter is to summarize the important finding and result from this study. The relevance of this research is the major contributors to this study were the doctors and the health tourists. The future of India as a health tourist destination is to be dealt with importance. Therefore, this section compiles the last stage of the study which draws conclusions regarding the present scenario of health tourism in India and the factors pull out the trum may be used for promoting medical tourism in India. Also discussed are the probable areas for future researches based on this research.

5.2 RESOLVING THE RESEARCH QUESTIONS

In order to make this study more focused and result oriented, the researcher had framed four research questions. These answers to these questions proved as the guidance in drafting the key measures for health tourism in India. The research questions were:

1. What are the exiting opportunities and potential of Health Tourism and Strategic initiatives taken for the development of Health Tourism in India?
2. What are the key marketing initiatives taken for promotion of Health Tourism among foreign nationals?
3. What are the critical success factors in designing marketing mix for attracting international health tourists for Indian market?
4. How to study the health tourist in India for medical treatment based on demographical variables and perceived value and satisfaction towards Health Tourism in India?

All these questions were addressed with rationale in the research process with answers listed out in the corresponding chapters. The critical success factors required
to sustain medical tourism were found out which formed the essence of the research findings.

5.3 VISION FOR INDIA AS A GLOBAL HEALTHCARE DESTINATION

This study had discussed on the various possibilities for the country to explore opportunities in the field of healthcare travel and tourism. India had already attained the status of a popular vacation spot for foreign travellers. Country wise comparisons also proved that India is ranked three among popular Asian destinations after Thailand and China (The Gallup Organisation, 2007). The vision of India should include:

- Revolutionizing medical care of the future
- Leaving a premium experience in international travellers’ minds
- Providing customized care
- Partnership with top international and local doctors
- Uncompromising quality and safety standards
- Ensuring usage of cutting-edge medical equipment and technology

5.3.1 Healthcare Positioning

The study observed, India is a planned destination by medical travellers who seek for cost-effective quality treatments. India has the potential to offer both mainstream and alternative styles of treatment. Considering the tour options aspect, India has got a lot of variety to offer. So the positioning should be a unique blend of medical treatment and tourism aspect reflecting the warmth of Indian care, cure and comfort providing a pleasant experience to the traveller.

5.3.1.1 Cost of Healthcare in Developed Countries

Healthcare is one of the fastest growing sectors, both in India and overseas. People are increasingly becoming health conscious and are in watch out for quality healthcare systems that would provide solutions in a holistic way. Cost increase in developed countries are being attributed to general inflation, increase in cost of healthcare services (cost of updated technology, broader access plans) and increase in consumption (aging, lifestyle, new treatments). Thus, low cost healthcare services coupled with internationally acceptable medical practices would position India as an
attractive healthcare destination. Indian hospitals are cost efficient than many developed countries such as USA and Europe. Even when compared to other South-East Asian countries, such as Thailand and Singapore, India scores better, with the cost of procedures cheaper by around 20 percent. Such a scenario provides opportunities for Indian healthcare sector.

5.3.1.2 Climate and Geography

India has tropical weather with climatic variations occurring from region to region. The coolest months are from November to mid March and the hottest are from April to June. The monsoon rains are experienced from mid July to September. India has been attracting a lot of tourists with such various climate and geography. For tourists, India provides ample opportunities to participate in diverse activities in different parts of the country. The northern plains of India have extreme climates with hot summers and the most favour season is the winter, which attracts lot of tourists who wants to enjoy cool climates. The western Himalayas provide opportunities for trekking, hiking, water rafting during the summers attracting plenty of adventure lovers. Southwest India offers good sunny days and cool breezy evenings during the mid November to mid March after which the climate tends to be hot. These different climates provide opportunities for the country to attract tourists with different tastes throughout the year.

5.3.1.3 Tradition of Nutrition Values

India is popular for its cooking traditions. Many spices used in Indian culinary traditions are claimed to be having medicinal properties. Even some of the tropical Indian vegetables are claimed to be having medicinal properties. The awareness among the people to be healthy has been encouraging them to consult nationalists and dieticians for their overall health improvement. Naturopathy is also one of the traditional Indian systems of medicine. Many nutritionists and consultants trained in the naturopathy are advocating special natural way of diets for various ailments. Consultancy services are provided by nationalists which is a great opportunity for people engaged in that field. The number of students enrolling for the nutrition and dietetics course is also witnessing a rise due to the diverse opportunities that the field provides.
5.3.2 Strategies and Initiatives

The Government and Tourism authorities have to take initiatives and formulate appropriate strategies for boosting up medical tourism in the country. Measures like joint promotions with private entrepreneurs and increased communication and marketing support for new products/services would prove beneficial to the industry. Efforts in the direction of conservation and sustainability of resources, institutional development programs, training and enforcement of service staff and tourism marketing development are critical moves to be initiated in this area.

5.3.2.1 Industry Level Initiatives

At industry level, several initiatives are taken to platform India as a healthcare destination. First and foremost is formation of Indian Healthcare Federation to voice the concerns of the industry. Indian healthcare establishments are also working closely with other stakeholders such as hotels, travel agents, tour operators and airlines to offer healthcare tourism as a composite service. While doing so, patient safety is being ensured through joint efforts of various stakeholders.

Some healthcare service providers have formed strategic alliances with foremost healthcare establishments in the world. Efforts are being made to tie-up with national healthcare systems abroad and social / commercial insurance providers. Few of them have also established alliances with academic and research institutions abroad to update on medical technologies and practices. Players are imparting hi-tech equipments and medical infrastructure such as the da Vinci Surgical System for Robotic Cardiac Surgery, 64 slice CT Scan, Linear Accelerators similar to Sloan Kettering, New York. Strict blood safety and infection control processes are installed.

5.3.2.2 Government Initiatives

Government has also been supportive of the initiatives taken by the healthcare and tourism industry to realize the potential. The center and many state governments are encouraging healthcare / tourism firms to participate in international fairs and promotional programmes to platform the capabilities of India. Many state governments have unveiled specific policy supporting healthcare tourism. State governments, such as Kerala, are leveraging their specialization in Ayurveda and have announced customized policies to attract healthcare tourism.
Government of India has announced two separate national policies for development of a) healthcare, and b) tourism. Government of India has formed a Task Force on Medical Tourism with the objective to suggest policy structure to project India as a healthcare destination. The Government has set up National Accreditation Board for Hospitals to provide accreditation to public and private hospitals ensuring quality in healthcare services. The Government has announced a policy framework for issue of Medical Visa to ease the immigration procedures of healthcare and accompanying tourists. Foreign Direct Investment is permitted up to 100 percent for setting up of hospitals as also hotels and tourism projects in India.

5.3.2.3 Multi-language Skills

Multi-language skill, which is one of the prominent interfaces while availing healthcare as also the tourism services abroad, is another advantage for India. In addition to skill in English, Indians are proficient in speaking Hindi, Urdu, Bangla, Arabic, Tamil, which are widely spoken in neighbouring countries of West Asia, South and South East Asia.

5.3.2.4 Value Added Services

Some of them have also established their presence abroad through influenced buy-outs. Interesting feature is that establishment of healthcare institutions abroad is also in the traditional wellness systems, such as Ayurveda and Yoga. Indian healthcare establishments, focussing on international tourists, have started providing associated value added services such as arranging accommodation, facilitating completion of travel documentation, travel arrangements, translation services and escort services. Such initiatives have been projecting India’s prowess in hospitality skills as also a destination for healthcare solutions.

5.3.3 Growth Opportunities

Growth in the healthcare tourism market lies with the ability in offering customized products/services for the international patients. Overseas marketing of destination India should carry the message of being a destination that has a lot to offer. Special segments should be identified based on the preference of vacation options together with treatments and dedicated communication strategies should be developed to highlight the elements of those exclusive packages. Alternative forms of
medicine like Ayurveda and Yoga coupled with tour packages is an area to be focused upon.

5.3.3.1 Availability of Manpower

India has been producing a lot of young professionals in the fields of medicine, including specialization in some of the traditional systems. In addition, many graduates are trained on the job in the travel and tourism industry, which also caters to the growth of healthcare tourism. The concept of freelancing is also picking up fast in India, especially in the traditional healthcare division, where the healthcare professionals provide their services travelling to various places and offer their services across the world. As the availability of highly skilled healthcare professionals, and well-trained travel / tourism professionals are the determinants of growth in healthcare tourism industry, India is considered as potential land for healthcare tourism business

5.3.3.2 Long Waiting Time in Developed Countries

Long waiting time in several countries works in favour of growth in healthcare tourism flows towards developing nations. Countries, such as UK and Canada, that provide free healthcare services to their citizens thus become a source for large number of healthcare tourists visiting India. Indian players could leverage quality in services rendered beside with low cost healthcare solutions, to attract more number of patients from these countries into India.

5.3.3.3 Professional Skills and Experiences Gained from Developed Countries

Many analysts have predicted that healthcare tourism will be one of the next big opportunities for India. Such predictions are on the grounds that India is one of the countries with highly skilled professionals and with advanced healthcare solutions. It may be mentioned that Indian doctors have been helping in developed countries such as USA, UK and Canada and have gained high reputation. In addition, India’s popularity in the international arena is increasing with the prevalence of traditional wellness systems, especially Ayurveda and Yoga. It is estimated that a large number of tourists have visited India to practice the wisdom of Indian wellness systems.
5.3.3.4 Opportunities Provides for Other Sectors

There are also opportunities in the infrastructure sectors, due to higher demand for travel (airlines, road / rail transport, hotels, hospitals) and communication (telephone, internet). Newer models of campaigning and promotions provide business opportunities for media and mass-communication segments. Consultants, in wide range of areas covering healthcare, tourism, infrastructure, communications, media, marketing and promotions, are likely to get business opportunities with the growth of healthcare tourism in India.

5.3.3.5 Healthcare Skill Outsourcing

Growing health consciousness among middle and high income families of developing countries is heralding such opportunity. Besides, developed countries are in the course of action of outsourcing laboratory and diagnostic tests to low-cost destinations. It is being reported that highly specialised tests like molecular diagnostics, cytogenetics or tests for diseases related to abnormalities in chromosomes and hormones, infectious diseases and hepatitis B and C are outsourced to countries like India due to advancements in the healthcare sector and availability of professionals. Further, it is estimated that Indian laboratories are cheaper in undertaking pathological tests as compared to developed country markets. There are estimates that laboratory / diagnostic outsourcing market in the world is approximately US $ 1 billion.

5.4 FUTURE CHALLENGES

The researcher had listed out certain challenges that India was facing in successful positioning as a medical destination. The tour operators had commented that, overseas marketing efforts of India had not reached the expected levels. Other major challenges would be to develop suitable products/services for medical travellers and formulation of appropriate rules, laws and regulations to safeguard interests of medical tourists. Some destination issues like cleanliness/hygiene, safety/security and transportation problems also pose challenges.
5.4.1 Strengthen Market Presence

The market presence of India as a global healthcare provider should be facilitated through establishment of India Tourism Offices in key source markets. This would create interest in India as a medical tourism destination if supported by appropriate packages and communication that suits the needs of those markets. Together with private participation of entrepreneurs, tourism offices can sustain interest and relevance of the destination through aggressive promotional efforts. This would be succeeded by expanding presence to those markets which are not being represented currently.

5.4.1.1 Accreditation

India is gaining the advantage of being the low cost destinations for healthcare services. However, the healthcare industry needs to prove that the low cost services offered by them are in real terms and the quality of services offered is comparable with developed nations. One of the ways to prove ourselves quality aware is to get international accreditation of healthcare facilities. The attitude of the hospital towards quality certification in very cold. There are only few hospitals that have been accredited by international agencies such as Joint Commission International. Although, India has established a national accreditation system for healthcare establishments, very few hospitals have applied for accreditation.

Such accreditation will be beneficial for both hospitals as well as patients. As the accreditation process, especially from an international agency, involves rigorous checks on the processes and procedures employed by these hospitals, it helps the healthcare service providers in improving their overall good organization and management of healthcare services. Patients are assured of quality in the procedures administered while availing healthcare services, through such accreditation, and thus are satisfied. Hence, Indian hospitals need to go for national as well as international accreditation to remain competitive.

5.4.2 Ensuring Sustainability

In order to ensure sustainability in medical tourism, even successful clinical procedures and outcomes require frequent follow-up. Complications, side-effects and post-operative care are usually the responsibility of the medical care in the patient’s
home country. This would hinder medical tourism growth as it will give rise to new expenses. Strong law enforcement policies to support foreign patients should be formulated to provide increased access to local courts and medical boards. Food and Drug Administration approval of treatments and therapies is expected to emerge as a global benchmark in proving quality and credibility of medical practices.

5.4.2.1 Negative Perceptions

Experiences suggest that low-cost solutions alone may not be enough to bring-in international tourists for undergoing healthcare treatments in India. The negative perceptions about India, with regard to public sanitation / hygiene principles, prevalence of contagious diseases in India, quality of healthcare services provided in public sector hospitals, and wastage management practices adopted in India, counter the positive vibes created by the cost competitiveness of Indian healthcare system. Other infrastructure associated problems such as shortage of air linkages, power, water, and traffic congestions also affect the flow of healthcare tourists towards India.

5.4.3 Identified Areas for Future Research

Relating to this study, the researcher got the opportunity to refer to many academic journals and listen to experts in the healthcare field. Those observations threw light on the emerging areas in the healthcare industry in India which had close relation with this dissertation topic. The researcher identified those potential areas for undertaking future academic research works. The important among them are discussed below:

5.4.3.1 Scope of Preventive Healthcare

Increasing health consciousness among middle and high-income families in India creates a new business segment for medical entrepreneurs. Preference for health check-ups in India is increasing with the emergence of quality packages and tie-ups of corporate companies with medical insurers. This is a growth area which could be monitored.
5.4.3.2 Tele-Medicine

The advancement in Information and Communication Technologies coupled with reduced telecommunication costs opened up India’s competency in the field of tele-medicine. As a result, tele-medicine centres are spread all across the country especially in the rural areas. Fast paced development in this area provides ample scope for future researchers.

5.4.3.3 Healthcare Outsourcing

Globally, healthcare industry figures on outsourcing services had been increasing. This had been attributed to increased treatment costs in developed countries like U.S and U.K. Such countries are outsourcing medical facilities to India which had been attaining advancements in healthcare facilities and services. This new segment could contribute towards the Indian economy as well as creation of tremendous employment opportunities providing valid rationale for further research.

5.4.3.4 Healthcare–Information Technology

Healthcare IT is a developing concept in the Indian Healthcare industry. Information technology is becoming a major enabling sector for healthcare delivery all over the world. At present, healthcare organizations are estimated to be outsourcing around 10% their IT requirements. However, in the near future, the share of IT outsourcing is expected to increase providing opportunities for Indian IT capabilities. India has been traditionally attracting outsourcing business in medical insurance claim giving out and digitising the patient health records (medical transcription). This is being further strengthened with outsourcing of high-end services such as clinical data analysis, biometric services and chemical engineering. India’s strengths in IT and IT enabled services could be leveraged to support such knowledge processing activities. These include areas like computerization of medical records, networking of departments and online reporting of radio-diagnostic results. Growing interest in the field has interested researchers into this concept.

5.4.3.5 Product and Market Segment

A special effort should be targeted at SAARC countries for attracting health tourist, because quality of health services are not available on these countries. Under
the medical tourism a special effort should directed for those medical treatment which required for long treatment for such products India can taken its strategies advantage for other type of tourism activities.

**5.4.3.6 Setting Up National Level Bodies**

To market India’s specialised healthcare potential globally and address the various issues confronting the corporate healthcare sector, leading private hospitals across the country are planning to set up a national-level body on the lines of National Association of Software and Service Companies (NASSCOM), the apex body of software companies in the country. Talks are on between the Association of Hospitals of Eastern India (AHEI), Association of Hospitals (AoH) and other hospital associations in Pune, Delhi and other cities to form this body and give a boost to healthcare. The body would address issues related to infrastructure, health insurance, the role played by third-party administrators (TPAs), biomedical waste management, investments by foreign investors, tax benefits and promote India as destination for medical tourism. It is felt that not only the private hospitals but the country too stands to benefit from this by earning foreign currency (Roy Choudhury and Dutta 2004).

**5.4.3.7 International Linkages**

Corporate hospitals in developed countries have links with Indian corporate hospitals and do help in referring cases when their own queues are very long (Kang 2003). Major hospitals are forming partnerships and international linkages with other countries. Mohali’s Fortis Hospital has entered into a mutual referral arrangement with the Partners Healthcare System, which has hospitals like Brigham Women’s Hospital and Massachusetts Hospital in Boston under its umbrella, to bring patients from the US (Kohli 2002). Apollo and Rockland are in talks with National Health Services (NHS) of the UK to bring their patients for treatment at cheaper rates in India (Shrivastava 2003b). The Apollo group has tied up with hospitals in Mauritius, Tanzania, Bangladesh and Yemen. In addition, it runs a hospital in Sri Lanka, and manages a hospital in Dubai (Dogra 2003). As a packaged initiative, Rockland is soon going to start a Rockland hospital in London. This will also act as a follow-up care centre for patients from Europe (Dogra 2004).
5.5 SUMMARY

The trend of healthcare tourism is still in its infancy in India, but it possesses an enormous potential for growth and development. Cost-effectiveness, medical expertise and low lead times are the competitive advantages India can leverage on. The whole dissertation discussed on how India can position itself to withstand competition from other countries. The Validated Positioning Model been proposed by researcher is conceptual in nature and is sure to work in almost all the cases even if certain elements are absent. So, it stands close to the real-life situation which would be the highlight of this dissertation. As medical treatment costs are ever increasing, travel for quality and cost-effective medication will become a regular routine among citizens of developed nations. All the recommendations and suggestions based on key findings of the research would help in successful positioning of India as a Global.