



INTERNATIONAL JOURNAL OF RESEARCH IN COMMERCE AND MANAGEMENT

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AYURVEDIC WELLNESS TOURISM IN KERALA: A GATE WAY FOR ENTREPRENEURS TO EMERGE SUCCESSFUL

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ABSTRACT

Health/Wellness tourism refers to trips that are taken by tourists with the principal purpose being to improve their health and/or wellbeing. India is the most touted healthcare destination for countries like South-East Asia, Middle East, Africa, Mauritius, Tanzania, Bangladesh and Yemen with 12 percent patient inflow from developing countries. What attracts medical tourists the most to India is its low cost treatment, compared to western standards, along with the diverse tourism opportunities. Here, tourists can enjoy the vivacious culture, amazing contradictions, diverse geography, the most unique attribute – unity in diversity and are able to receive an orientation that will help them improve their life in terms of health and general wellness. Government and private sector studies in India estimate that medical tourism could bring between \$1 billion and \$2 billion US into the country by 2012. The reports estimate that medical tourism in India is growing by 30 per cent a year. Today, Kerala Tourism is a global super brand and is regarded as one of the destinations with the highest brand recall. The tag line Kerala- God's Own Country was adopted in its tourism promotions and has become synonymous with the state. Kerala's equable climate, natural abundance of forests (with a wealth of herbs and medicinal plants) and the cool monsoon season (June - November) are best suited for curative and restorative packages. Health care tourism has many exciting prospects for entrepreneurs. For those entrepreneurs with a willingness to be early to market and the tenacity to wait out the inevitable market acceleration in the medical tourism industry, this is a very attractive entrepreneurial opportunity. In order to cope with the growing demand for wellness, resorts, hospitals, medical practitioners and Government have taken ample measures to promote alternative health care in Kerala. This paper examines the various factors that contribute to Kerala's strength as a preferred destination for Ayurveda based Wellness tourism.

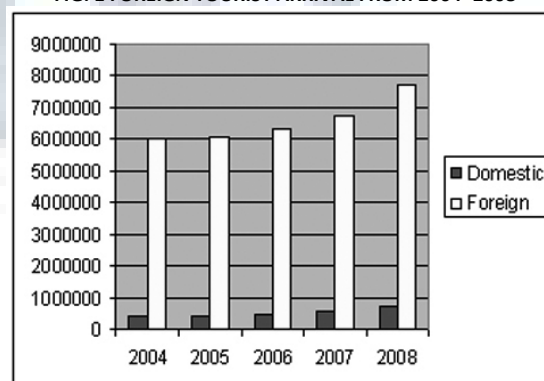
KEYWORDS

Ayurveda, Kerala, Tourism, Wellness.

INTRODUCTION

India is one of the most sought after destinations for medical tourism. In the year 2004, some 150,000 medical tourists from UK, US, Middle East and other foreign countries visited India seeking medical care in Indian hospitals. Since then, medical tourism in India has been growing at the rate of 20% per annum. Cheaper treatment is a huge attraction and during recession, that's a big fact. In 2007, Indian hospitals treated 4.5 lakh patients from other countries against topper Thailand which treated about 10 lakh patients. A significant factor for India's popularity as a medical tourism hub is the absence of long waiting time to avail medicare that is very common in the US, UK and Canada. Medical tourism showcases the potential of Indian healthcare sector to the world which dreaded India for the incidence of AIDS, Tuberculosis, Cancer, Malaria and Diabetes. As a move in promoting medical tourism, many hospitals are deemed as "corporate hospitals" that specially cater to the needs of medical tourists in India. Apart from offering world class treatments, they offer various services that make medical tourists' stay in India hassle free. The country's National Health Policy declares that treatment of foreign patients is legally an "export" and deemed "eligible for all fiscal incentives extended to export earnings." Government and private sector studies in India estimate that medical tourism could bring between \$1 billion and \$2 billion US into the country by 2012. The increasing attractiveness and economic significance of health and wellness tourism is further apparent in the growth of both domestic and international visitors since the beginning of this decade. Figure 1 indicates the foreign tourist arrivals from 2004 to 2008

FIG: 1 FOREIGN TOURIST ARRIVAL FROM 2004 -2008



Source: The Economic Review 2009

Along with the tremendous opportunities for tourism and leisure, India offers the best treatments in conventional medicine: Ayurveda, Homeopathy, Naturopathy, Yoga and Modern medicine such as cardiology, orthopedic surgery, eye care, gynecology, cosmetic surgery and dental surgery. Southern states of India, especially, Kerala has developed Wellness Tourism as one of the products for the promotion of tourism in the state. The top 10 source countries for foreign tourist arrivals to India during 2005 and 2006 is shown in Table 1

Table 1- Top 10 Source Countries for Foreign tourist Arrivals 2005 -06

Rank	Country	Tourist Arrivals	Rank	Country	Tourist Arrivals
1	UK	651083	1	UK	734240
2	USA	611165	2	USA	696739
3	Canada	157643	3	Canada	176567
4	France	152258	4	France	175345
5	Sri Lanka	136400	5	Germany	156808
6	Germany	120243	6	Sri Lanka	154813
7	Japan	103082	7	Japan	119292
8	Malaysia	96276	8	Australia	109867
9	Australia	96258	9	Malaysia	107286
10	Nepal	77024	10	Nepal	91552

Source: Bureau of Immigration, India Tourism Statistics

OBJECTIVE OF THE STUDY AND REVIEW OF LITERATURE

The study examines the diverse challenges that need to be addressed by the medical tourism industry to realize its potential and suggests relevant guidelines for Entrepreneurs to choose this niche area and evolve successful. Earlier studies carried out in the field were analyzed and it reveals that a striking gap exists in the field of research in this highly potential but understudied area. The study is carried out with an objective to analyze the strength, weakness, opportunities and threat of alternative health care industry in Kerala. Related data were collected from the Directorate of Tourism, Govt. of Kerala, KTDC, Govt. Ayurveda College Thiruvananthapuram, Directorate of ISM, reputed and classified wellness resorts in the private sector as well as from the published research reports on health tourism. Among the classified health care units, selected ones were visited and primary data were collected from domestic / international medical tourists on acquiring prior permission from the respective management. The chief operating managers, resident doctors and masseurs of the wellness centers were also interviewed to arrive at the final judgment.

STATEMENT OF THE PROBLEM

The present study enquires into the current infrastructure and the market potential of Ayurveda based wellness tourism offered at Kerala in attracting international medical tourists and also the scope for entrepreneurs to emerge into the scenario. An attempt is made to study the Ayurvedic health care scenario by focusing on the strengths, weaknesses, opportunities and threats posed by the sector.

ANALYSIS AND INTERPRETATIONS

AYURVEDA BASED WELLNESS TOURISM IN KERALA

Kerala – The mesmerizing land located in the south of India enjoys geographical features that are unique and rich. This state is also the only place in India which practices Ayurveda in its purest form. Ayurveda is the traditional Indian system of medicine that has brought true health, happiness and wellbeing to millions of individuals throughout the ages. This ancient art of healing has been in practice for over 5000 years, and was also the mainstream medicine in the ancient times. Derived from its ancient Sanskrit roots – ‘ayus’ (life) and ‘ved’ (knowledge) – and offering a rich, comprehensive outlook to a healthy life, it is the only medical science in this universe which is useful even when one is not ill. Ayurveda is a complete science of health that is being applicable in all stages of life starting from birth, neonates, infants, childhood, youth, old age and even life before and after death. For many people, the image of Ayurveda is limited to the use of herbal or home/kitchen remedies and a traditional way of treatment. But in reality, Ayurveda is a much serious medical science, which strongly emphasizes on the diagnosis, examination, analysis of the disease, diet, medicinal properties, dose, frequency of the medicine and the medium with which it should be consumed. The Medicare in Ayurveda has broadly two parts: one is preservation of health and prevention of diseases and the second, diseases and their treatment. Ayurveda follows a totally different way of treating diseases known as “Panchakarma”, which means literally “Five Therapies” which are the subtly harmonizing purification procedures that dissolve metabolic waste products and toxins generated from the environmental ill effects, in a gentle and effective way from the tissues and eliminate them from the body. This treatment is advisable to the diseased as well as the healthy. Ayurveda also has a comprehensive system of massages and body treatments that gives relief from a wide range of illnesses, from migraine and sinus to arthritis and paralysis; that detoxify and cleans the body through controlled emesis, purgation, making the individual sweat; and that makes the body receptive to further treatment. These therapies are more effective in Kerala due to the almost year around humid climate of the state. In 2006, Kerala attracted 8.5 million tourists—an increase of 23.68% in foreign tourist arrivals compared to the previous year, thus making it one of the fastest growing tourism destinations in the world. Table 2 shows the position of Kerala among other States in terms of foreign tourist arrivals.

TABLE 2- FOREIGN TOURIST ARRIVALS TO INDIA- TOP 10 STATES/UT

SI No	State	2005	2006
1	Delhi	1511893	1974836
2	Maharashtra	1449875	1712302
3	Uttar Pradesh	1174597	1328974
4	TamilNadu	1179316	1319501
5	Rajasthan	1131164	1220164
6	West Bengal	895639	998029
7	Andhra Pradesh	560024	669617
8	Karnataka	545225	505524
9	Kerala	346499	428534
10	Goa	336803	380414

Source: India Tourism Statistics – 2006

CURRENT INFRASTRUCTURE

Kerala, the state almost synonymous with the word 'Ayurveda', is now all set to reap the benefits of Ayurveda through health tourism. The reason for this is the popularity of Ayurvedic treatments and the manner in which Kerala is marketing Ayurveda in medical tourism. The promotion of Ayurveda in health tourism started in 1994 and the Kerala Tourism Development Corporation (KTDC) started Ayurvedic health centers in its premium properties like Hotel Samudra, Kovalam, during the same period. KTDC has tied up with the most reputed Ayurveda treatment providers and hence the authority of doctors and the quality of

the medicines used are not compromised. While all the hotels and resorts in Kerala have now started including Ayurveda in their services, there are some resorts, which are exclusive for Ayurvedic treatments. With a view to facilitate the wellness tourism industry to achieve the targets and to give a greater momentum for this growth, the Ministry of Tourism, Government of Kerala, in association with the Department of Indian Systems of Medicine (ISM) has identified an urgent need to evaluate the safety and service standards of the prevailing and newly establishing Ayurveda centers and classify them accordingly. Standards have been set in terms of **Personnel** – Qualified physicians and masseurs having sufficient degree and training from recognized Ayurveda institutions, **Quality of medicines and Health programmes** – Prior approval by the advisory committee for the levels of treatments, clear exhibition of the treatment programmes offered and usage of medicines manufactured by approved firms with proper labeling, **Equipments** - Standards are fixed for the size and make of massage tables, facilities for medicated hot water , sterilization, electric/ gas stove and the hygiene , **Facilities** - in terms of number of treatment rooms with prescribed size , proper ventilation and attached bathrooms, quality and finishing of floors and walls, consultation room with proper equipments, separate rest rooms, locality , ambience and the cleanliness of surroundings. Ayurvedic centers fulfilling all the mentioned essential conditions are awarded a certification named **Olive Leaf**. Apart from the same, Government has also set some optional conditions in terms of the construction and architectural features of the building, adequate parking space, facilities for steam bath, separate hall for yoga and meditation, herbal garden attached to the center and the picturesque location. The Ayurveda centers also fulfilling these optional conditions will awarded **Green Leaf**. The Department of Tourism does not take responsibility of any centre, which is not classified in either of the above categories.

ANALYZING THE SWOT

Strengths

The strengths of Kerala's Ayurvedic tourism were identified from the potentials listed below:

- Ayurveda is synonymous to Kerala
- World class Medicare facilities at affordable costs established at aesthetic locations.
- International visitors are already well versed with the alternative therapies prevailing in Kerala
- State- of-the-art equipments, technology and procedure
- Patients are welcomed as 'guests' and made to feel at home in unfamiliar surroundings.
- Recognition and classification of centers facilitated by the State Government.
- Ayurveda & spa available in all major resorts.
- Permanent cure of disease and rejuvenation of body , mind and spirit imparted by the Wellness therapies
- Consecutive national award winner for best performing State in tourism by Govt. of India
- Wide range of tourism resources, equable climate, variety of cuisine and vivacious culture.
- Kerala has been selected by World Travel and Tourism Council as a partner State
- Wide usage of English.

Weaknesses

The major weaknesses that should be improved to attract more health tourists are:

- Poor infrastructure in terms of roads, drainage and traffic systems.
- Unscientific waste management system and pollution control.
- The positive message and curative therapies of Ayurveda has not yet spread globally to the full extent
- Presence of a large number of unlicensed alternative medical practitioners.
- If Ayurvedic medicines need to be exported, many countries pose compulsion of a certification regarding non-existence of metals in medicines.
- Open latrines, contaminated water and sewers convey a negative image
- Spread of diseases like swine flue, chikungunya, birds' flue and leptospirosis.
- Irritating behavior from the local public towards foreign visitors
- Lack of standardization in alternative Medicare and costing methods.
- Poor internet connectivity.
- Threat of terrorist activities
- Lack of international accreditation.
- Poor coordination among tourism providers.

Opportunities

- Preventive healthcare
- Combination of Ayurveda with leisure tourism
- More stress management and holistic treatment centers
- Medical outsourcing
- Government controlled information centers on Ayurveda in all countries
- Organizing of International Wellness expos in Kerala, annually
- An exclusive website for Ayurveda based wellness tourism facilities in Kerala monitored by Government missionaries.

Threats

- Commercialization of health care
- Threat on public health system due to over emphasis on health tourism.
- Sexual exploitation and development of sex tourism.
- Travel agents stress only on the massage part of Ayurveda
- Unlicensed and unqualified medical practitioners getting established.
- Hike in charges
- Adverse effects on culture
- Unhealthy competition among Wellness providers.

FINDINGS AND SUGGESTIONS

With the destination firmly established as the 'Wellness Capital of Asia', achieving world-class status is next on the national agenda. Kerala is the foremost state in India that realized the potential of Ayurvedic health tourism and has widely marketed it throughout the state. About 10-12 years back, Kerala started with the task of promoting Ayurveda on a larger scale. It is estimated that about 30% of the foreigners coming to Kerala avail themselves to Ayurvedic care and about 40% of the State's tourism revenue is generated from the same. The Kerala government realizes that it is of vital importance to offer assurance to spa guests and visitors to the state that safety, hygiene, service quality and quality assurance are top priorities. This is to be achieved through the introduction of quality standards, registration, certification and regulation, and legislation. The comprehensive plan also includes guidelines and measures to ensure fair pricing. Beyond a competitive pricing strategy, achieving quality is another key to Kerala's competitiveness. The ability to attain international standards and consistently deliver high quality products and services are critical success factors in the promotion of Kerala products on the global market. Kerala, as part of its marketing strategy,

continuously organizes road shows all around the world for the promotion of Ayurveda along with modern medicine. It is vitally important to create confidence in the products Kerala offers. There is much greater awareness and operators have come to realize that delivering quality translates into greater business efficiency, lower operating costs and increased profits.

The opportunity to visit a vacation destination for medical treatment coupled with easy access to air transportation has given medical tourism a lot of thrust, and many countries and individual entrepreneurs are beginning to take steps to benefit from it. Medical tourism has many exciting prospects for entrepreneurs and insurance companies. Patient misconceptions like lack of hygiene and other fears can be allayed by providing information and encouraging interaction with previous beneficiaries. An entrepreneur has to make many decisions on how much money to sink in, whether to partner, how to work with relevant government or regulatory entities, whether to invest in local or global brands or none at all, etc. The initiatives to build on the quality of service delivery for the customer can be on both a strategic and tactical level. At the very top are issues such as defining the mission and scope of business for the service provider.

1. Is Ayurvedic medical tourism a small initiative on the part of the institution or is it an area of major focus?
2. What type of segmentation and target market selection can the management undertake?
3. Who would form the biggest, most profitable, most attractive customers?
4. Do they fall under a logical group?
5. Which segmentation criteria or combination of criteria would be the most appropriate?

Table- 3 below provides some examples of various segmentation bases as applied to medical and health tourism.

TABLE 3- BASES OF SEGMENTING THE HEALTH AND TOURISM MARKET

Segmentation base	Examples
Geographic	USA, UK, Nepal, Arab world, Africa.
Demographic	Age, sex, income, education, NRI's.
Psychographic/Lifestyle	Spending patterns, risk averse, attitude toward health and fitness.
Benefits sought	People wanting to mix fun with treatment, People seeking less expensive treatment. People seeking faster treatment without waiting time, better quality of treatment; issues of confidentiality.
Behavioral	First time consumers, frequent purchasers of service; membership status

An Entrepreneur, who wish to emerge successful as an Ayurvedic Wellness Tourism Provider, should explore the following questions and to formulate a detailed business plan before commencing the real activities

1: Define the business

- Product or service
- Geographic marketing area - neighborhood, regional or national
- Competition from other Wellness providers
- How to differ from the competition
- Price and Charges
- Distribution methods or business location

2: Define the customers

- Current customer base: age, sex, income, neighborhood
- How the medical tourists learn about the product or service - advertising, direct mail, word of mouth, yellow pages
- Patterns or habits potential medical tourists share
- Qualities, customers value most about the offered product or service - selection, convenience, service, reliability, availability, affordability
- Qualities, customers like least about the product or service - can they be adjusted to serve them better?
- Prospective customers who are not currently reached

3: Define the plan and budget

- Previous marketing methods used to communicate to the medical tourists that have been effective
- Cost compared to sales
- Cost per customer
- Possible future marketing methods to attract new and potential tourists
- Percentage of profits which could be allocated to the marketing campaign
- Marketing tools within the budget - newspaper, magazine or yellow pages advertising; radio or television advertising; direct mail; tele-marketing; public relations activities such as community involvement, sponsorship or press releases
- Methods of testing the marketing ideas
- The marketing tool that could be implemented immediately.

The final component in the business plan should be the overall promotional objectives: to communicate the message, create an awareness of the product or service, motivate customers to buy and increase sales, or other specific targets. International patients seeking medical services across borders or globally look at more than just cost comparisons in their search for the right physician and right facility to address specific needs. The top priorities include

1. **Credentials** - recognized international accreditations & certifications.
2. **Experience** - board certified doctors, training, years of experience.
3. **Patient References** - patient testimonials, before & after pictures.
4. **Specific Treatment Methods** - uniqueness of center & procedures offered.
5. **Comprehensive Solution** - provide complete solution to a treatment.
6. **Reputation** - locally as well as internationally e.g., publications, research papers.
7. **Language** - effectively communicate in patient's preferred language.
8. **Geographic Location** - local conveniences, transportation services, attractions.
9. **Cost** - clear price list, services included in the package, pricing options.
10. **Benchmark Data** - any comparative information that will convince patients

Despite the priorities, patient misconceptions like lack of hygiene and other fears can be allayed by providing information and encouraging interaction with previous beneficiaries. It then outlines a range of strategic and tactical initiatives, which would contribute to a faster growth of the industry. Special emphasis

needs to be placed on the need for partnership amongst the various stakeholders such as medical and healthcare providers, hospitality and transportation services, tourism departments and the Government. Hospitals are also eager to tap this revenue boosting stream and will be eager to co-operate with agencies and join the network of health service providers. Travel and stay logistics can now easily be arranged online and do not need any specific infrastructure or know-how. The only real challenge is to be able to reach out to the right segments and address their concerns.

CONCLUSION

The Indian tourism industry has outperformed the global tourism scenario in terms of growth, revenue and the volume of international tourist visits. A recent trend has shown that people from developed countries are seeking treatment from the health professionals from developing countries. The destination in wellness tourism is often an alternative space in which one can engage in self analysis without the stresses and distractions of home as well as work place. In the long run, Wellness tourism can become the niche for foreign revenue generation as there is an increasing trend in the number of visitors to Kerala as wellness seekers. The study reveals that the most favourable factor for Kerala to emerge as the Global Wellness Hub is its authenticity and rich Ayurvedic heritage with multifaceted attractions. The enormous scope and growth of alternative health tourism provides a great opportunity for Entrepreneurs to commence Ayurveda based healthcare establishments in the state to tap the potential of international patient market.

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