

HEALTH TOURISM - A CASE STUDY OF NARAYANA HEALTH, BANGALORE

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ABSTRACT

Health tourism is a term that has risen from the rapid growth of industry where people from all around the world are travelling to other countries to obtain good medical care. Due to Covid-19 Pandemic, industry showed reduction in the amount of people travelled to India for medical purposes, but the domestic medical industry in India is trying best to have its share from the emerging global market. Narayana Health, Bangalore has given importance to attract international patients through various marketing methods and its low cost strategies.

The present research paper aimed to find out opportunities and challenges of health tourism in Bangalore and factors that attract international patients to Narayana Health. Researchers also studied international marketing strategies followed by Narayana Health. The researcher conducted exploratory research with quantitative and qualitative variables. Using convenient sampling researcher collected primary data from 50 international Patients. Collected data was analysed descriptively using SPSS. Thematic content analysis with some grounded theory was used to analyse qualitative data. NVivo12 Pro software was used for the qualitative data analysis. Results indicate Narayana Health hospital in Bangalore is attracting many international patients using unique marketing strategy and cost effective practices.

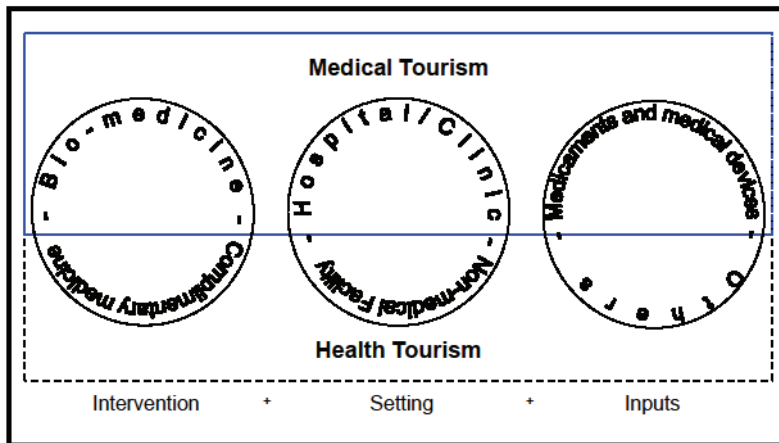
Keywords: Health Tourism, Medical Tourism, Healthcare, International patients, Narayana
Hrudayalaya (JEL Classification Code: I19, I10, I15, Z31, Z33)

Introduction

Health Tourism is one of the old concepts in the world. Health tourism is believed to have started in Peninsula in the Southern part of Greece. According to Greek mythology, this place considered to be the God of medicine as its soil and water have minerals. They started the concept of 'health by water' which later transformed into 'Spa'. Europeans popularised health by water concept and they travelled to many places to get water treatment. They developed and popularised the modern pleasure resort concept, in these resorts spas and mineral water were used to cure skin infection, poor digestion. The introduction of railway increased the

The popularity of Ayurveda and ayurvedic treatment made India a favourite destination for people around the world. India, who popularised Yoga to the world, also attracted health travellers and spiritual seekers. Traditional medical therapies like Ayurveda, aromatherapy, music therapy, meditation and yoga are very popular among the medical tourists. However, recently travellers primarily from U.S, Great Britain, Australia, Middle East and Africa are choosing India for advanced medical treatments like bone marrow transplant, cardiac bypass, eye surgery, hip replacement etc. Qualified and experienced medical professionals, cost effective treatment

Graph 1-Health and Medical Tourism



Source: Carrera and Lunt (2010)

flow of medical tourist to travel coastal and seaside resorts. These resorts also provided opportunity for relaxation and health restoration.

and after care makes India as favourite destination for many foreign health tourists. Differentiating medical tourism and health tourism Carrera

and Bridges (2006, p.447), define health tourism as the organised travel outside one's local environment for the maintenance, enhancement or restoration of an individual's well-being in mind and body. This definition encompasses medical tourism which is delimited to organised travel outside one's natural health care jurisdiction for the enhancement or restoration of the individual's health through medical intervention.

Following figure suggest, medical tourism is distinguished from health tourism by virtue of the differences with regard to the types of intervention, setting and inputs (Lunt, N et al., 2011, p. 7)

Types of Health Tourism in India

1. Wellness Tourism: Spas, Stress relief resorts, rejuvenation centres, Yoga centres etc;
2. Alternate System of Medicines: Ayurvedic, Siddha, homeopathy, Unani and Naturopathy treatments
3. Cosmetic treatments & Surgery: Dental, Skin treatments, hair treatment, plastic surgeries etc;
4. Lifesaving Healthcare: Cardio surgery, Eye treatment, transplants, surgeries and IVF etc; While a large number of the private hospitals in India are willing to provide medical treatment to patients irrespective of nationality, only a few are in the forefront of promoting the health-hospitality mix. Some of the corporate hospitals in India

that lead the medical tourism revolution are:

- Apollo Hospitals
- Fortis Healthcare
- Columbia Asia Hospitals
- Cytecure Hospitals
- Narayana Hrudayalaya Hospitals
- Manipal Hospitals
- Christian Medical College
- Leelawati Hospital
- Tata Memorial Cancer Hospital
- Escorts Heart Institute & Research Centre

Apart from the private players, public sector hospitals like All India Institute of Medical Sciences (AIIMS) has been receiving patients from over 16 countries including European nations and there is a steady increase in the number of patients, mainly for complex surgical procedures. The AIIMS has also initiated a dedicated International Healthcare Service team, which will take care of the patient right from arrival till their departure coordinating all aspects of medical treatment.

In India the health tourism is developing in three different ways:

- Outbound Health Tourism, were people are travelling to other countries from India avail medical services. With this method there is an outflow of Income to other countries.
- Inbound health tourism, were foreign nationals are travelling to India to avail medical and wellness services. Better quality service

and cost effectiveness increases contribution of inbound health tourism to Indian Economy.

- Intra bound health tourism, were Patients traveling within the country to receive medical care outside their geographic area, typically to a centre of excellence in another state or region.

Contribution of Medical Tourism in the Indian Economy

Hospitals in India are achieving international standard and getting accredited by international institutions and thus are offering world-class treatment at that cost which is comparatively 40-50% less than other countries. Taking this as an opportunity, the government of India is supporting the providers with changed rules and regulations and promoting health tourism in India.

Medical tourism in India is flourishing and gaining a status of industry and contributing a lot towards the revenue generation and removing the problem of unemployment from the society. Today many states of India like Kerala, Arunachal Pradesh, West Bengal, Uttarakhand, Tamil Nadu, Uttar Pradesh, Dadar & Nagar Haveli has got a status of an industry. State governments are making provisions to include tourism in Schedule-I, of the Industries Development Act 1951 to grant it the status of an industry and to promote.

Factors Favouring Health Tourism in India

Following are the major pull factors favouring Health Tourism in India:

- Medical facilities approved and accredited by international agencies
- Qualified and experienced medical practitioners
- Low comparative cost of treatment in India than other developed countries
- Competitive and world class facilities provided by Private Players in India
- Development of travel and tourism facilities in the country
- Supportive policies by Centre and State governments promoting foreign health tourism
- Popularity of wellness clinics and alternative medicines attracting Foreign tourists
- India is one of the largest pharmaceutical industries in the world

Health Tourism in Karnataka

Karnataka is one of the fastest growing states in India, especially in the field of technology. Many of India's high technological firms are located in its major cities like Mysore and Bangalore. Along with IT, Karnataka also have many of India's best medical providers and is attracting travellers for medical and health tourism. Even though, recent Covid-19 pandemic had reduced the inflow of travellers from outside the country, Karnataka is showing growth in Healthcare sector.

Table 1- Comparison of Cost of Treatment between USA and India

Medical Procedure	USA	India
Heart Bypass	\$ 123,000	\$7,900
Angioplasty	\$28,200	\$5,700
Heart Valve Replacement	\$170,000	\$9,500
Hip Replacement	\$40,364	\$7,200
Hip Resurfacing	\$28,000	\$9,700
Knee Replacement	\$35,000	\$6,600
Spinal Fusion	\$110,000	\$10,300
Dental Implant	\$2,500	\$900
Lap Band	\$14,000	\$7300
Gastric sleeve	\$16,500	\$6,000
Gastric Bypass	\$25,000	\$7,000

Source: <https://www.medicaltourism.com/compare-prices>

Narayana Health

Narayana Health is a group of hospitals, earlier known as Narayana Hrudayalaya, was established by renowned cardiac Surgeon DR. Devi Shetty. It was started in Bangalore in the year 2000 and since the hospital strives to provide world class treatment and facilities at affordable price. NH always functions on the theory of Economies of scale, that is, large scale activity and reduced cost. This policy of giving world class treatment and facilities at affordable price is attracting patients from different parts of the world and other States of India. The NH has received

accreditation with JCI and NABH from 2011 January.

Services Provided by NH for International Patients:

- International Division
- Concierge Services and accommodation facilities
- Language Interpretation Services
- Medical opinion
- Visa Process
- International Cuisine
- Entertainment/International television
- Medical/legal assistance
- Travel and Tour facilities
- Post Treatment care
- Post travel Medical care

LITERATURE REVIEW

Health and Medical Tourism

Research article titled Medical Tourism: treatment, markets and health system implications: A scoping review (Lunt, N et al., 2011) analysed the difference of medical and health tourism. The paper also explains the reason for the change in preferred destination by foreign travelers from developed countries to developing countries. Due to globalization, travelling to developing countries is become cheaper and wider internet connectivity provided information about treatment and facilities provided by these developing countries at more affordable cost.

Piazolo, M., & Zanca, N. A. (2011) Medical tourism: A case study for the USA and India, Germany and Hungary, says that by adapting the international trade of different kinds of medical services, it has shown some of the theoretical background of hospitality and it also explained by using the Traditional Ricardian theory and other theory as well, for the rise in worldwide medical tourism.

Crooks, V. A., Turner, L., Snyder, J., Johnston, R., & Kingsbury, P. (2011), in their study Promoting medical tourism to India: Messages, images, and the marketing of international patient travel, focused on innovative marketing as a tool for successful medical and health tourism. They strongly suggested the need for informing potential patients

about procedure options, treatment facilities, tourism opportunities, and travel arrangement of the destination countries through marketing methods. The study focused on thematic content analysis of the promotional print material distributed at the first medical tourism trade show in Canada in 2009.

Cyranski, C. (2017) in doctoral dissertation, Purifying purges and rejuvenating massages: Ayurvedic health tourism in South India, did theoretical and empirical analysis of international health tourism and transnational practice. The paper also discusses the problems of inappropriate Ayurvedic treatments against traditional methods to attract health tourists

Quality of Medical Treatment

A Critical Comparative Study on the National Accreditation Standards for Hospitals of India, Australia, Denmark and South Africa by Shaikh, Z. M. (2020) explained the importance of accreditation to improve structure, process and outcome to maintain the quality of healthcare industry. Paper also focused on standardising medical care which improves outcomes, safety and quality of care for patients.

The audit process and medical organisation. Quality in Health Care by Packwood, T., Kerrison, S., & Buxton, M. (1992) emphasised continuous, cyclical and systematic medical audit to create trust among patients on medical providers. In order to improve quality of health care,

accountability by doctors, nurses, staff and management is very crucial. Periodical Medical Audit will also help patients to decide on hospitals and destination for treatment.

Medical tourism in India: issues, opportunities and designing strategies for growth and development by Sankar, P. (2019) focused on opportunities, threats and promotional activities of growing medical tourism sector. Paper also throws light on key drivers and key challenges of medical tourism in India.

Swain, D., & Sahu, S. (2008, May), in their study, Opportunities and challenges of health tourism in India, compared treatment cost and facilities provided by India and other countries like USA, UK, Thailand and Singapore. They also explored the growth of medical tourism as an industry.

Impact of Epidemics and Pandemic on Health Tourism

Hospitality and tourism industry amid COVID-19 pandemic: Perspectives on challenges and learnings from India, a study conducted by Kaushal, V., & Srivastava, S. (2020) analysed the impact of Covid-19 on hospitality and tourism sector. With the help of thematic content analysis, they analysed the practices followed by major players in tourism and hospitality industry. They also compared SARS outbreak with Covid-19 outbreak.

Knowledge management orientation

and operational performance relationship in medical tourism overview of the model performance in the COVID-19 pandemic and post-pandemic era, by Ghasemi, M., Nejad, M. G., & Aghaei, I. (2020) studied considerable impact of Covid-19 on health tourism.

Objectives

1. To understand Health Tourism opportunities and challenges in Bangalore.
2. To analyse the factors which attracting the international patients.
3. To know about international marketing of Health tourism at Narayana Health.

METHODOLOGY

Participants

A cross-sectional survey using in-depth interview was applied as a part of qualitative analysis. Convenience sampling method was used to select 50 in-bound and out-bound patient travelled for medical treatment to NH, Bangalore. 10 international wing staffs were interviewed to find out international marketing strategies of Narayana Health. Researcher gave an overview about the research to the respondents. A face-to-face in-depth interview by the researchers was conducted with the respondents consent.

The respondents belonged to different states of India and foreign nationals, who choose Narayana Health for different medical treatments. To obtain

genuine information, respondents were informed that the result will be used only for research and academic purpose. Duration of each interview was around 45-60 minutes. The tool used was a structured format of questions, asked in a more or less similar order by adjusting to each respondents answer. All interviews were recorded and key points noted. Justification on choosing Narayana Health Hospital

Best practices of Narayana Health hospital and the wide variety of medical procedures provided by them makes NH as the favourite destination for health tourists. NH connects to Patients from 78 countries, which makes the researcher to get information from large network.

Scope of study

The scope of the study is limited to find out the health tourism opportunities and challenges, factors which attract the international patients to NH, Bangalore. The paper reveals the international marketing strategies of the Narayana Health Hospital in Bangalore.

Analysis

Primary Data collected through interview was descriptively analysed using SPSS software. Thematic content analysis with some grounded theory was used for further analysis. Researcher used similar version of three-step coding and analysis approach, which consisted of open coding, axial coding and selective

coding (Strauss & Corbin, 2008). Each response was heard twice and field notes were used to identify core concepts. Codes were assigned for the selected concepts and sub themes were developed by detailed coding. NVivo12 Pro software was used for this analysis.

Fifty participants were identified and recorded their responses. All of them travelled for medical treatment in Narayana Health, Bangalore.

Descriptive Analysis

The table shows the Age group of people who has gone for medical treatment. 42% of the total participants belong to 41 to 50 age category. 70% of males and 30% of female patients were considered for analysis.

By the study we can understand that 78% of the international patients visited for the medical treatment only and 20% of patients visited for medical treatment and sightseeing also.

By the study we can understand that 38% of respondents' undergone Heart transplant as NH is famous for heart related treatments and 18% visited for Kidney transplant.

Thematic Content Analysis Results 50 participants were identified and recorded their responses. All the respondents were patients who received treatment from Narayana Health. Out of them, 39 were foreign nationals and 11 from other states of India. 10 international wing

staffs were interviewed to find out international marketing strategies of Narayana Health.

Factors attracting International Patients

From the in-depth interview, researcher identified 4 major factors which attracting the international patients to NH. They are:

- Cost Effectiveness
- Qualified and Experienced medical practitioners
- Better Healthcare
- Technological improvement

Respondents were identified with all or some of the above mentioned reasons for choosing NH for treatment. The following table elaborates themes emerged by the narratives of the respondents.

Table - 12 Thematic Frame work of the results

Themes	Sub-themes
1. Cost Effectiveness	<p>Affordable Price : International patients are attracted generally to India and specifically to NH due to fewer prices for various treatments.</p> <p>Comparative cost of treatment and Tourism: Respondents traveled to Bangalore considering comparative cost of treatment than other countries. Bangalore is also a tourist destination. People travel business and sight- seeing.</p>
2. Qualified and Experienced medical practitioners	<p>Cardio and Heart surgeons at NH: Cardio and Heart surgeons at NH: Respondents agreed Narayana Health is famous for Cardiac and heart surgery. Its world famous award winning Surgeon Dr. Devi Shetty is the best example for their success.</p>
3. Better Healthcare	<p>Healthcare: The meaning of the word healthcare has evolved and changed its aspects. It is not just treatment, it is pre and post treatment care, facilities, insurance, experience, communication with patients and by standers, friendly behavior ect; includes in Healthcare. Respondents have selected NH due to all these factors, not just doctors and treatment.</p>
4. Technological improvement	<p>Technology: Respondents' are attracted with the modern technology provided by NH in all aspects of healthcare at affordable price.</p>

Source: Primary Data collected by interview

International marketing at Narayana Health

From the in-depth interview of the NH staff and international patients researchers identified 5 international marketing strategies provided by NH and which had influenced international patients.

1. Country specific web sites
2. Variety of complex medical procedures and facilities
3. Corporate and NGO connect
4. Accreditation

The following table elaborates themes emerged by the narratives of the respondents.

Table - 13 Thematic Frame work of the results

Themes	Sub-themes/interview feedback
1. Country specific web sites	NH International wing have specific international web sites for Bangladesh, Nigeria, Tanzania, Kenya and Ethiopia. This helps to connect to the patients from those countries more efficiently. A separate help desk is provided for patients from Bangladesh, which helps them to communicate and understand the procedures more clearly in their local language. NH connects to 78 countries through one network.
2. Variety of complex medical procedures and facilities	<p>Doctors at NH provide variety of services and complex medical procedures under different specialties. NH also provides comprehensive support and services. Concierge service, language interpretation, visa invitation, medical opinion, international cuisine, prayer room, international television, travel and tour assistance, legal assistance, post treatment medical care even at home countries ect. are some of the facilities provided by NH.</p> <p>Covid-19 Care: In view of Covid pandemic situation, NH took at most care to treat their patients across the globe. Even though, there was reduction in the number of International patients visited NH during Covid-19 Pandemic, 64,000 International patients from 78 different nationalities were treated at NH hospital network in 2020. This shows the trust and the international marketing strategies used by NH.</p>

3. Corporate and NGO connect	NH is working with world famous corporates and NGO's like Nigerian National petroleum corporation, MEAK foundation Kenya, Chain of Hopes UK, ACDIPE Uganda, Tareek Al Zuhoor Charity, Morning Star Foundation ect;
4. Accreditation	NH gives importance of accreditation to provide world class healthcare. They have 23 hospitals, 7 Heart centres and 19 primary care facilities. Out of which 13 hospitals are NABH (National accreditation board for hospitals & Healthcare providers) accredited and Joint commission International (JCI) accredited 2 of NH hospital. Narayana Institute of cardiac science, Bangalore from where most of the data collected, is JCI accredited hospital.

Source: Primary Data collected by interview

Findings

- Affordable and quality healthcare makes Narayana Health as one of the favourite destination for international patients.
- 52% of the respondent has responded moderate affordability of cost of treatment, but the facility of concession provided by the hospital helps the patients to afford the medical treatment cost.
- International patients consider different types of healthcare, like Ayurvedic, Siddha, homeopathy, Unani and Naturopathy treatments
- Wellness centres, Spa, Yoga therapy ect; are attracting International patients to India
- 40% of international patients agreed that they faced problems because of the rules and regulation by the government in visa processing, transportation etc.
- Approximately 38% of patients undergone heart transplant and other cardio related surgeries at NH Bangalore as it is famous for cardiac related treatments. Many patients consider NH Bangalore because of Famous Surgeon Dr. Devi Shetty
- Covid-19 Pandemic affected travel plans of many patients from different countries. NH provided expert opinion for them on treatment and aftercare at their respective countries. Country specific website is useful for the patients especially from developing countries.
- Comparative cost of treatment and tourism opportunities in Bangalore is attracting many patients to Narayana Health.
- Care providers at Narayana Health have redefined the meaning of healthcare to a holistic approach of care, but many patients felt that care providers are overburdened with the number of patients.

Conclusion and Recommendations

India is an emerging health tourism destination and the revenue generated from health tourism is creating an impact on social and economic growth of the country. The improvement in this sector creates employment opportunity for many, increases foreign exchange earnings and thus contributes to our GDP. Medical providers in India is targeting on this growth. With well- equipped hospitals, qualified care givers and experienced doctors Indian Health industry is targeting the international patients. The role of government is very important in accelerating this growth.

The research suggests following recommendations which can help the Healthcare industry to grab opportunities and march towards success:

Progressive measures and initiatives by central and state government to improve health tourism. Government can form an exclusive department for Inbound Medical Tourism under ministry of tourism.

- Even though India is one of the favourite destinations for health tourism, majority of patients are coming from developing countries as many providers are lacking international accreditation. All hospital providing treatment for foreign

tourist should take necessary step for getting international accreditation.

- Well-coordinated health tourism and allied sectors is appreciated for greater improvement in this industry.
- MOU and collaboration between health tourism providers with airlines, hotels, wellness centres will improve the growth of health and medical tourism.
- Indian hospitals can tie up with international healthcare providers.
- Better advertisement and innovative promotional activities will attract inbound medical and health tourism
- Better technologies like robotics and Innovative care products will increase the popularity of
- Indian hospitals like in Singapore and Malaysia.
- Central and state governments can have Public Private Participatory projects with private hospitals in creating awareness and implementation of cost competitive quality medical treatment in India.
- Developing technology and methods to tackle situations like Covid-19 is an important task for care givers and hospitals

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