

ROLE OF ICT IN PROMOTION OF MEDICAL VALUE TRAVEL IN INDIA: A PRIMER

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ABSTRACT

It is widely recognized that tourism is an industry, which has huge potential for employment creation and economic development, and this is especially relevant for developing nations including India. India is bestowed with one of the best tourism resources in the world by virtue of its enviable natural resources as well as its cultural and historical background. Of late, the immense growth potential of Medical Tourism (MTm) and its new incarnation Medical Value Travel (MVT) has become the focal point for policy support by the Governments at the Centre as well as the States in India. In this context, this paper analyses the role of ICT in promoting tourism in India with special reference to MVT.

KEYWORDS

Health Tourism, Medical Value Travel, ICT, e-Health, PPP etc.

INTRODUCTION

When the journey of man started in ancient times, it was primarily meant for food and shelter as well as for escaping from danger. As time elapsed, people traveled for recreation purposes also, and hence it took the form of tourism. It not only denotes traveling to a peculiar destination but also it includes all activities undertaken during the stay in that location including day visits and excursions.

Tourism is of several different kinds like Ecotourism, Responsible Tourism, Rural Tourism, Medical tourism, etc. of these, healthcare tourism or Medical Tourism (MTm) which arises from the need to travel for the treatment of various diseases and also for wellness and health promotion people travel to other destinations, has become significant in the contemporary centrality in India. MTm has the dual motives of (i) getting treatment, and (ii) enjoying a vacation.

While in the past people from less developed nations travelled to major medical centers in advanced nations for healthcare that is unavailable in their own nations, presently the situation has reversed and people from the first world travel to developing nations like India for affordable medical treatment. India has the unique status as the provider of high quality medical services at very affordable rates. MTm covers a broad spectrum of medical services. It has become a common form of vacationing wherein leisure, fun and relaxation blends together with wellness and healthcare. Due to its special features, there is a growing demand for MTm in India.

By 2020 India aims to attract 4,30,000 foreign medical tourists a year for a market value of US Dollar 6.4 Billion (Mark Britnell (KPMG), 2011)[9]. While the growth prospects of Medical Tourism (MTm) are bright in India, its long-term sustainability depends on constantly modifying its design, package, delivery, and after-sales service. Even the term MTm is rather outdated, as presently the term Medical Value Travel (MVT) is being increasingly used to refer to the phenomenon of going abroad for the purpose of medical treatment.

It may be noted that the long-term sustainability of MVT depends on leveraging the immense potential of Information and Communication Technology (ICT) and various ICT-enabled products and services. In this context, this paper seeks to closely look into the role of ICT in enhancing the prospects of MVT in India and hence to suggest strategies for the effective use of ICT for the sustained growth of MVT, and hence the overall economic development of the whole nation, given the vast linkage effects of tourism with real estate and many other sectors of the economy.

RELEVANCE AND SIGNIFICANCE OF STUDY

It is widely recognized that since India has immense potential to offer high value healthcare at very reasonable rates, the prospects of Medical Tourism (MTm) are bright. As noted earlier MTm is fast being replaced by the more relevant term viz. Medical Value

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Travel (MVT). In fact, MVT denotes travelling abroad for medical treatments. In India, the tourism potential of the country is beyond doubt though it is largely underutilized. Hence, there is vast scope for effectively using MVT or other kinds of tourism for the economic development of the country.

Actually, MVT can garner significant levels of Foreign Exchange Earnings (FEE) into India, if it is properly developed and sustainably maintained. The role that ICT can play in this regard is vital because ICT adoption alone can ensure the quality and diversity of medical services and treatments that are desired by the modern medical tourists. The discerning nature of today's medical tourists on the one hand, and the vast range of medical treatments and other services including the various preliminary services like online consultations, that are made available elsewhere in the world on the other hand, makes ICT adoption an imperative for all stakeholders.

In spite of the vast growth prospects of tourism in India, especially in respects of segments like MTm or MVT, India has been very late in capitalizing this great opportunity and utilizing it for the purpose of the sustainable economic development of the nation. Today, though India is fast emerging as one of the top-most destinations for MVT in the world, meaningful and effective use of ICT and various ICT-enabled services alone can ensure its continuity and long-term sustainability, given the utmost dynamism-taking place in the healthcare world.

LITERATURE REVIEW

Ajmeri Sanjay (2012) [1] in his paper on medical tourism in India has noted that India, Singapore and Thailand are the three major medical tourism hubs in the world. Often, India projects the high-tech healing facilities associated with its private health care sector to attract tourists. Medical tourism in India is a combination of world-class treatment, holiday and big savings. The reasons behind rush to India is price, service, quality, availability, and tourism. India offers a vast array of services and customized medical packages along with the cultural warmth, which other countries of the world cannot even think of. He has pointed out that private insurance firms should set up medical insurance facilities and tie up with foreign insurance firms to cover foreigners coming into India for health care facilities.

Jolly George (2012) [6], in her study on challenges of medical tourism in "vulnerable" India reported that much medical tourism is for cosmetic surgery, fertility treatment, dental treatment etc. It has been pointed out that India has received about 1.5 lakhs medical tourists in 2005, which has become 2 lakhs in 2008 and the same has been estimated to be over 5 lakhs by 2015. Several associated industries would be blessed by the growth of Indian medical tourism, like hospitality industry, medical equipment's industry, and pharmaceutical industry. India is ranked in the top five favorite tourist destinations.

Joseph, Sindhu (2012) [7] has noted that the benefits of medical tourism are relatively competitive prices, quality treatment, timely and personal care. The article reveals the cost difference between Kerala and other cities and compares with the main competitors like US and Thailand. The complete cost of airfare to India, hospitalization etc. put together is 1/3 to 1/2 the cost of similar surgery in most western nations. Medical tourism in Kerala is a chain process it includes various stakeholders like doctors and other medical-paramedical staff, hospitals, government agencies, tourist resorts, travel agents, insurance companies etc. If it has to emerge and sustain as an active industry concerted efforts of all these authorities are essential.

World Economic Forum (WEF) (2015) [23] in its competitiveness report of travel and tourism industry has arrived at the competitiveness of different nations at the regional and global levels, and India is ranked 52 for its global competitiveness in tourism as against 17 for China. This shows a huge gap in tourism competitiveness between the comparable developing nations. Regarding regional (Asia-Pacific) competitiveness too, the gap is large (rank 12 for India and 6 for China).

World Travel and Tourism Council (WTTC) (2015) [24] in its report on travel and tourism has made a comparative performance of various countries, including future projections of tourism industry. It has been noted that South Asia, spearheaded by India and the Middle East, would emerge, as the fastest growing region in the world, in terms of the contribution of tourism to their GDPs. India has been included as a major tourism market along with the fast growing markets like China, Indonesia, South Korea and Turkey.

A macro level study on the prospects of tourism industry in India with a focus on that of Kerala state by Manoj P. K. (2008) [10], 'Sustainable Tourism in India: A Study from a Global Perspective with Focus on Tourism Prospects of Kerala' points out the vast tourism prospects of India in general and that of Kerala in particular, from a global perspective. Strategies for the faster and sustained growth of Kerala tourism have been suggested.

Another Kerala-based study by Oommen M. A. (2008) [19] has warned about the danger of ignoring the environmental sustainability while doing developmental activities. Regarding widely discussed 'Kerala model of development', the author has noted that serious environmental and ecological issues that Kerala faces need to be addressed first, but the present situation is that of 'Ecological Overkill'.



A paper by Manoj P. K. (2010) [11], 'Environment Friendly Tourism for Sustainable Economic Development in India', has underscored the vital role that tourism can play for the rapid economic development of India. The author has pointed out the utmost need for choosing environment-friendly and hence sustainable tourism models, and has suggested suitable strategies. Heung et.al. (2010) [5] have sought to develop a conceptual model of Medical Tourism (MTm) that can support future research on MTm.

A paper by Manoj P K (2010) [12], 'Tourism in Kerala: A Study of the Imperatives and Impediments with Focus on Ecotourism', has studied in detail the case of Kerala tourism using SWOT analysis and has given strategies for its sustainable tourism development.

Sudheer, B (2015) [21] in his research report (UGC-Sponsored) has noted the relevance of alternative and innovative tourism models like Responsible Tourism (RT) for minimizing the adverse effects of tourism on the environment and hence to ensure its long-term sustainability.

A paper by Manoj P K (2015) [13], 'Prospects of Responsible Tourism in Kerala: Evidence from Kumarakam in Kottayam District' has focused on RT in Kerala and based on his findings suggestions for the sustainable development of RT in Kerala have been made.

A study on rural tourism by Manoj P. K. (2015) [14], 'Employment Generation from Rural Tourism: A Field Study of the Local Community at Kumbalangi, Kerala' is based on the feedback from the local community about their perceptions on the employment prospects of rural tourism, their expectations regarding the Governmental actions etc. The high prospects of employment generation and economic development and the need for enhanced tourism infrastructure; primarily through Government, initiatives are noted.

A paper by Manoj P. K. (2016) [16], "Impact of Rural Tourism on the Environment and Society: Evidence from Kumbalangi in Kerala, India", has pointed out the obvious benefits of rural tourism but warned about the utmost need to protect the environmental purity by way of managing the inflow of tourists, controlling the use of non-degradable wastes like plastics, thrust on ensuring the cleanliness etc.

Nilaya Varma (KPMG India) (2016) [18] has endorsed the vast growth prospects of MTm in India. It is reported that it 'has taken leaps in terms of becoming a medical tourism destination'; but has noted the need to improve the delivery system and other infrastructure, the system being 'elusive to the section of the society with high healthcare needs'.

A very recent study by Manoj P. K. (2017) [17], "Segmentation Strategy for Promotion of Ecotourism Products: Evidence from Thenmala Ecotourism", the author has studied as to whether the socio-economic factors have influenced the decisions of the tourists and suggested the segmentation strategy for tourists.

In spite of many studies on tourism, including some on MTm, those focusing on the need for ICT adoption in MTm or MVT are nil. Hence, this paper seeks to study the role of ICT adoption in MVT for its faster growth and to suggest ICT intervention strategies.

OBJECTIVES OF STUDY

- To study of the relevance and significance of ICT in the promotion of MVT in India, and
- To suggest strategies for ICT adoption for the growth of MVT in India.

METHODOLOGY USED

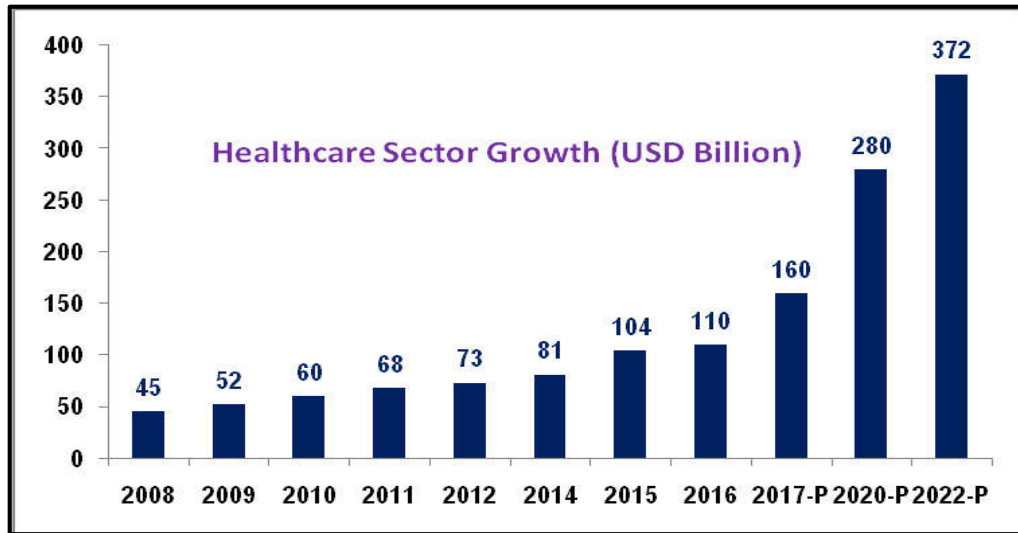
The study is descriptive-analytical and explanatory in nature and is based on authentic secondary data relating to the role of ICT in promotion of tourism in India, especially MVT. Authentic data sources, industry reports and research journals have been extensively used for the above purpose.

CONCEPT OF MEDICAL VALUE TRAVEL (MVT) AND IT'S CURRENT SIGNIFICANCE IN INDIA

World over, the concept of Medical Tourism (MTm) is gradually giving way to a related concept viz. Medical Value Travel (MVT). In fact, MVT refers to patients going abroad for medical travel. While MTm incorporates all medical treatments (including various types of wellness and rejuvenation treatments) and all sorts of customers (patients), MVT focuses on the overseas patients who want medical treatment.

In MVT, as the visitors from abroad, their healthcare seeking behavior is associated with its wider economic impact on the host economy viz. the nation that provides such treatments to the foreign patients. The vast potential for Foreign Exchange Earnings (FEE) from MVT, makes it a favorite for many a developing nation like India. Therefore, patients from abroad are attracted because of the relatively low medical expenses, availability of unique or highly specialized treatments.

Figure-I: Growth Pattern of Healthcare Sector in India (USD Billion)



Sources: IBEF (2017), *Healthcare*, December.

The global MTm industry, which is estimated at USD10.5 Billion in 2012, is expected to grow at a CAGR of 17.9 per cent from 2013-19 to reach USD32.5 billion in 2019. (KPMG, 2014) [8]. In the Indian scenario, MVT is being promoted by nations like India because of its immense potential for faster economic development by attracting FEE, creating employment, contributing greatly to the GDP etc.

India too has joined the bandwagon, and States with greater healthcare infrastructure are in the forefront. Healthcare is one of the fastest growing sectors in India. This industry is growing at fast pace because of the growing investments in the sector by the public and private sectors, particularly by the private sector. It may be noted that there has been an impressive growth pattern for healthcare sector in India over the years (Figure I)

Figure-II: Foreign Exchange Earnings (FEE) from Tourism in India (USD Billion)



Sources: (2018), *Tourism and Hospitality*, February.

It is noted that tourism and hospitality is a sector that can attract FEE in a big way, apart from generation of employment opportunities to lakhs of people. (Figure II). It may be noted that there is a steadily growing trend in respect of the foreign exchange earnings (FEE) from Medical Tourism (MTm) in India over the years.

Naturally, this situation creates an environment that is conducive for the growth of MVT in India. (Figure II). It may further be noted that about 30 percent of the total FEE into India relates to MTm and allied fields like MVT. MVT, in general, offers benefits to the patients concerned and the respective host nations (Table I).

Table-I: Value Created by MVT – to the Patients Concerned and the Hosting Nations

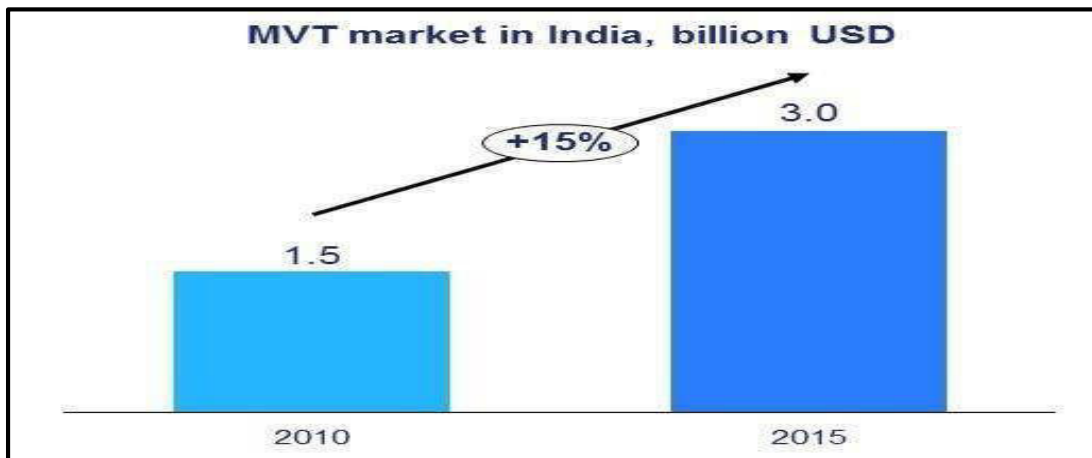
| Medical Value Travel (MVT) – Value to Patient and Value to Host Nation | |
|--|--|
| Value to the Patient | Value to the Host Nation |
| Lower Cost of Treatment | Source of Foreign Exchange Earnings (FEE) |
| Better Clinical Outcomes | Boost to country’s image |
| Less Waiting Time | Growth of hospitality and aviation sector. |
| Opportunity to travel and explore new places | |

Sources: FICCI (2016), *Medical Value Travel in India*, FICCI Knowledge Paper

Here, it may be noted that aggressive expansion of MTm was one of the suggestions made by the Working Group on Tourism, XIth Five Year Plan (2007-2012), constituted by the Government of India, Ministry of Tourism. This Group has accordingly pointed out that India’s medical expertise has gained global popularity, especially in the West where the medical costs are prohibitively high.

Therefore, promotion of MTm, particularly highly specialized segments of MTm could attract significant economic and social gains to a country like India. Besides, along with MTm or MVT, it is meaningful to offer India’s world-renowned holistic healing and rejuvenation packages and project India as world’s complete ‘Wellness Destination’. Due to high growth rate (15 percent), MVT in India was estimated at USD 3 Billion in 2015. (Figure III).

Figure-III: Growth Prospects of MVT Market in India



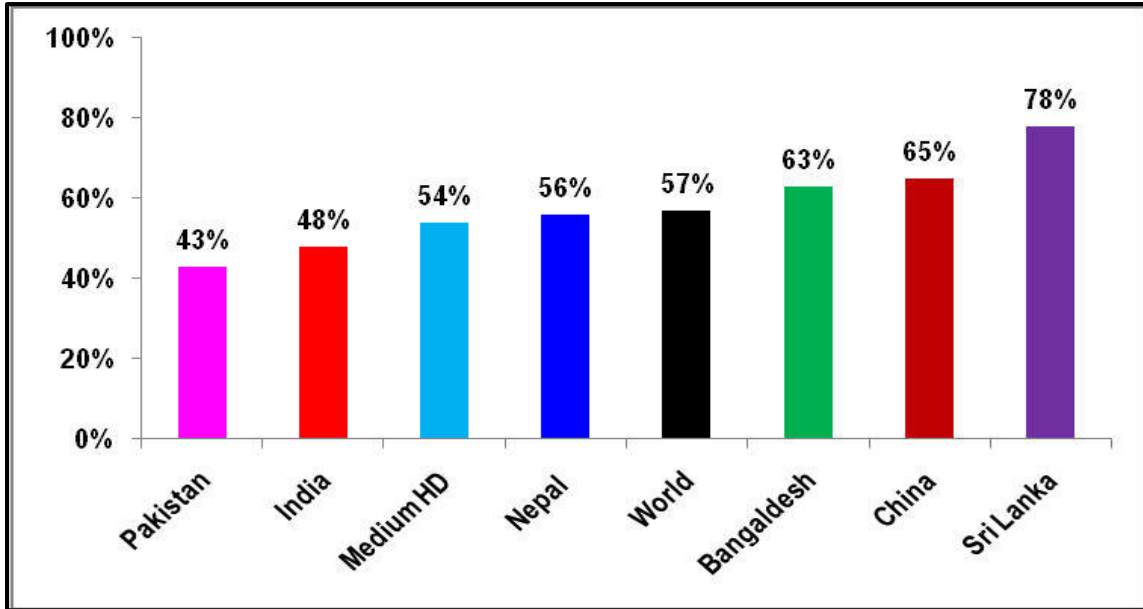
Sources: FICCI (2016), *Medical Value Travel in India*, FICCI Knowledge Paper

PROMOTION OF MVT IN INDIA AND THE ICT IMPERATIVE

It is noted that India has vast potential of MTm and hence MVT in India especially in certain segments like Ayurveda Tourism wherein it has certain unique features. But the fact remain that in respect of the quality of healthcare, India’s rank one of the worst in India and is ranked below even nations like Nepal, Bangladesh and Sri Lanka, leave alone China.

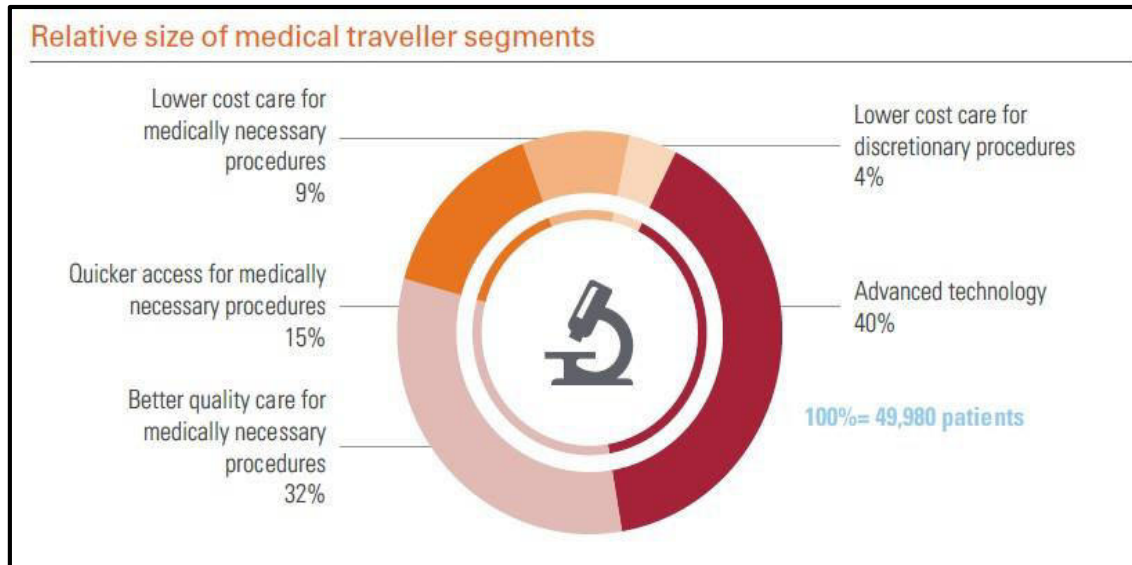
Besides, India’s rank is below the global average and the rank corresponding to Medium Human Development (HD). It is in the above context, the need for enhancing the quality of healthcare assumes importance, and needless to mention the fast advances in Information and Communication Technology (ICT) becomes an imperative rather than an option. (Figure IV).

Figure-IV: Healthcare Quality (Percentage Satisfaction) – India and Select Nations



Sources: KPMG (2016), *Healthcare in India: Current state and key imperatives*, p.11.

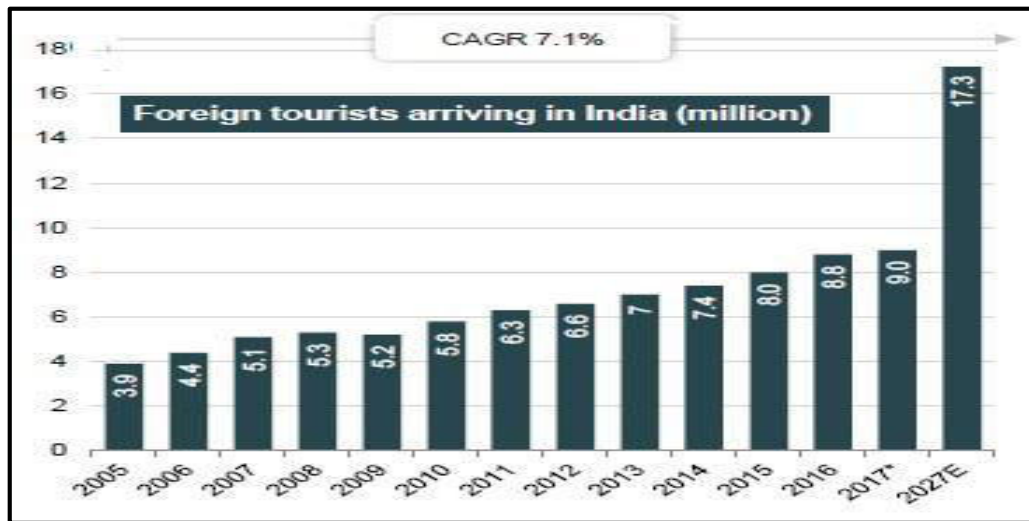
Figure-V: Preferences of MVT Travelers (based on the Feedback of 49, 980 Patients)



Sources: KPMG (2014), *Medical Value Travel in India*.

It may be pointed out that the largest segment of the MVT customers (40 percent) are attracted by the ‘Advanced Technology’ factor associated with MVT and thereafter comes quality of healthcare (32 percent) and so on. This was based on the feedback based on an extensive survey of 49,980 MVT travelers. (Figure V).

Figure-VI: Foreign Tourists arriving India (in Million)



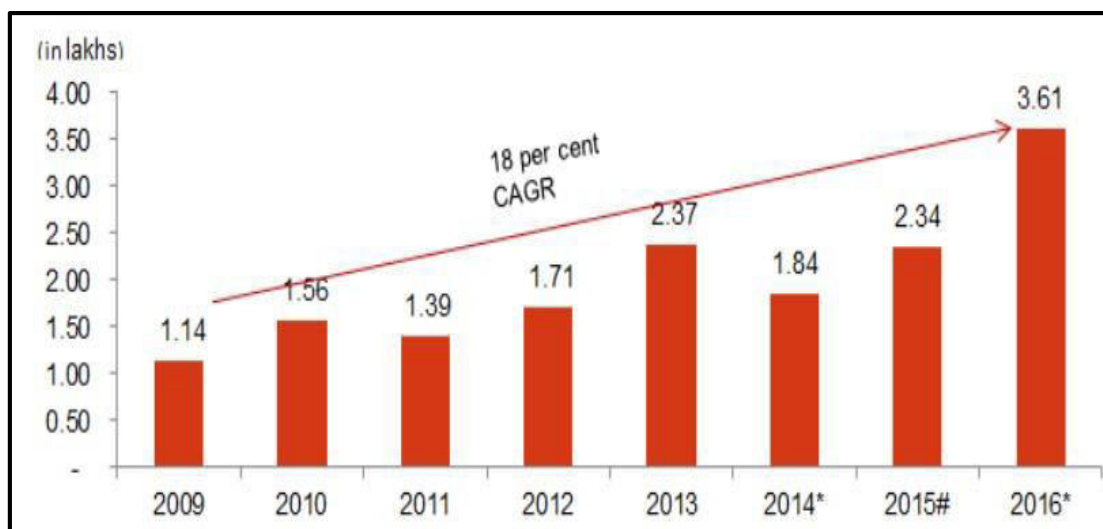
Sources: IBEF (2018), *Tourism & Hospitality*, February

In the Indian scenario, there is already a quality image associated with high-end medical treatments and that too at significantly lower costs than most other nations offering comparable services. This image can be further boosted with the use of advanced technology, especially those based on ICT and other ICT-based tools. As of 2016, India has been ranked 3rd among 184 nations of the world in terms of the contribution of the Travel and Tourism sector to the total GDP of the nation.

It contributed about US Dollar 219.72 to India’s GDP in 2016 foreign exchange earnings (FEE) and 10,79,696 foreign tourists visited India in 2016. The estimated FEE is over US Dollar 232, as of 2017. There has been a steady increase in the number of tourists arriving in India over the years. This shows the vast growth prospects of MVT in India. (Figure VI).

It may be pointed out here that roughly 30 percent of the total foreign tourists visiting India are medical (MVT) travelers. Over the years, there has been a more or less constant growth of medical tourists to India. During the period 2009-2016, there has been a CAGR of 18 percent in the number of medical tourists visiting India (Figure VII).

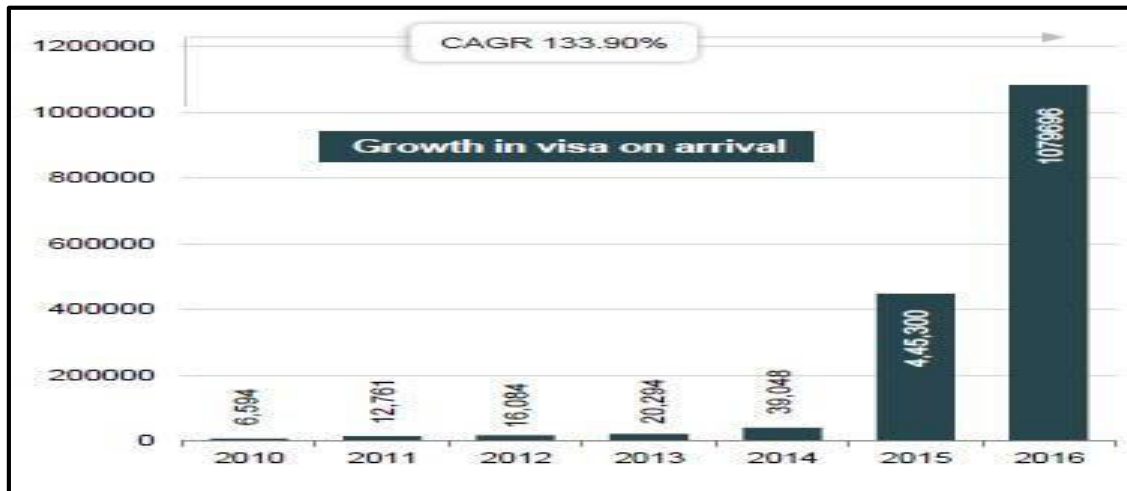
Figure-VII: Medical Tourists (Medical Travelers) Visiting India (in Lakhs)



Sources: CRISIL Research (2018), *Hospitals*, January

In fact, the Government of India has already launched many ICT-based interventions like the online platform viz. Electronic Tourist Authorization (or, E-Tourist Visa) way back on 27th Nov. 2014. This online E-tourist Visa facility was initially available for tourists from 43 countries of the world, but later it was extended to 150 countries in 2015 and further to many more countries later on. As of 2018, E-visa facility is available for 165 nations. Because of a facility the arrivals through e-visa have grown by 58.8 per cent (year-on-year) to reach 1.457 million in the period Jan.-Nov. 2017.

Figure-VIII: Growth in Visa on Arrival to India



Sources: IBEF (2018), *Tourism & Hospitality*, February.

With a view to promote MTm/MVT in India, the Government of India has recently released a new Category of Visa viz. Medical Visa (or, M Visa) and it is estimated that MVT will attain the level of USD8 Billion by the year 2020. (Figure VIII).

Table-II: Cost of Treating the Major Ailments – India Vs. Other Competing Nations (in USD)

| Treatment Type | US | UK | Thailand | Singapore | India |
|------------------------|----------|----------|----------|-----------|--------|
| Heart surgery | 1,00,000 | 40,000 | 14,000 | 15,000 | 5,000 |
| Bone marrow transplant | 2,50,000 | 2,90,000 | 62,000 | 1,50,000 | 30,000 |
| Liver transplant | 3,00,000 | 2,00,000 | 75,000 | 1,40,000 | 45,000 |
| Knee replacement | 48,000 | 50,000 | 8,000 | 25,000 | 6,000 |

Sources: CRISIL Research (2018), *Hospitals*, January

English-speaking technical staff in the healthcare and tourism sectors is strength of India’s MVT industry. Due to the many unique advantages as above and the favorable governmental policies, MVT’s market size is expected to grow to US Dollar 8 Bn. by 2020.

Emerging technologies that could be very meaningfully employed in the MVT sector to enhance its efficiency and cost-effectiveness and to improve the quality of medical services delivered in India include, inter alia, the following:

Enterprise Resource Planner (ERP): An ERP can be used to to store, process, and analyses information generated or used for routine medical operations, pertaining to all the functional areas, like, HR, Finance & Accounts, etc. An ERP would definitely enhance the quality of services in a medical or clinical setting and is essential for the success of MVT.

Electronic Health Records (EHRs): EHRs are are designed to manage detailed medical profile and history of patients like medication and allergies, immunization tests, laboratory results, radiology images etc. EHRs have the provisions for analyzing data relating to a peculiar ailment, report generation, alarm setting, reminder-alarm, diagnostic results, etc.

EHRs can be shared among multiple systems thus permitting doctors belonging to various specialties to share the data set of a patient. EHRs enable coordination among the doctors, provide time savings, minimize redundancy of medical records, and allow the transfer of medical histories quickly and accurately thus ensuring effective and timely treatment.

Other systems like Radiology information system (RIS), Clinical decision support system (CDSS), Mobile based Applications (Mobile Apps), and Tele-Medicine etc. need to be meaningfully incorporated into the macro level healthcare delivery system in India. This ensures the overall competitiveness and higher quality of services and hence the long-term sustainability of MVT in India.

CONCLUDING REMARKS

Given the unique advantages of tourism in general and MTm in particular in the Indian scenario, the prospects of MVT appear to be quite bright. Noticing the vast potential of MVT for generating FEEs and hence facilitating rapid economic development of the nation, the Governments at the Union and State levels have already initiated several measures for the promotion of MVT in India.

The launching of E-Visa in general and M-Visa in particular are examples of the policy support from the successive Governments. Technology integration has become an imperative for the sustained growth of MVT in India and for this; vast investments in ICT and various other technology-based platforms and devices are required. Given the budget constraints of the Government, emerging models like Public Private Partnership (PPP) have to be employed effectively. The growth prospects are bright and MVT is here to stay for long.

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