



Challenges and Strengths of Medical Tourism in Delhi NCR

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ABSTRACT

Incredible India, website of Ministry of Tourism, Government of India, defined as a medical tourism as a term used to describe the rapidly growing practice of travelling across international borders to seek healthcare services which typically include elective procedures and complex surgeries etc. Indian is placed among the top three medical tourism destinations in Asia and Delhi is placed among five most popular destinations in India for medical tourism.

In the present paper a study of strengths and challenges of medical tourism in Delhi and NCR region have been made. The data has collected information through a structured questionnaire from 100 inbound patients from 22 nations visiting 16 big hospitals in Delhi for medical treatments. The key competitive strengths reported are economy in costs, big brand hospitals, qualified doctors, availability of all kinds of medical treatments, high tech procedures, online consultancy, less waiting time for treatment, good infrastructure and hygiene and cleanliness. However, patients faced challenges in finding good interpreters /translators, obtaining visa, getting insurance covers, problems are also faced by them in respect of follow ups and monitoring care, behaviour of tour operators, corruption, differential pricing policies and inadequate lodging arrangements.

Keywords: Medical Tourism, Pre-procedural, stage, procedural stage, post procedural stage, visa experience, strengths and challenges.

INTRODUCTION

Medical tourism is a term coined to describe the rapidly growing practice of travelling across international borders to obtain medical care. Medical tourism is fast growing multibillion dollar industry around the world and it is a trip that patients take from one country to another country to get cost effective and efficient medical treatment and other health care services. Medical tourism is also defined as an attempt to attract medical tourists by deliberately promoting its medical and healthcare facilities More than 130 countries around the world are competing for a pie of this global business. The popular medical tourism destinations include India, Brunei, Cuba, Columbia, Hong Kong, Hungary, Jordan, Malaysia, Singapore, South Africa, Thailand and USA etc.

India is a 5000 year old civilization. It is known not only for its arts and crafts, religious and cultural diversities but also for its popular indigenous healthcare traditions and modern high-tech healthcare treatments. India is a low cost destination which also provides advanced healthcare services. Indian brand equity foundation suggests that Indian health care sector is expected to become a US \$280 billion industry by 2020.

According to the Investment Commission of India, Medical Industry has experienced remarkable growth of 12% per year during the last five years. Though, Chennai is considered the health capital of India, Delhi is among top 5 popular medical tourism destinations in India. Delhi and NCR have vast number of world class private hospitals. These hospitals are said to provide world class facilities, hi-tech specialized treatments, highest qualified teams of doctors and other medical professionals and that to at affordable cost. The present paper is an attempt to make an in-depth study & analysis of the claimed strengths and the factors that influenced the patients to select Delhi as a destination for medical treatment. Efforts have also been made to learn and study about the services desired by the patients and challenges faced by the users of these hospitals during pre-procedural, procedural and post-procedural stages.

Key objectives of this study are to:

- Identify the sources of information for inbound patients.
- Identify the source of financing of the patients.
- Identify important factors influencing the selection of Delhi/India as a medical tourism destination.
- Identify factors influencing selection of hospitals.
- Identify and rate the criterion used for selection of medical tour operators.
- Identify and rate the most desired services and facilities at pre-procedural, procedural and post-procedural stages.
- Identify and rate the visa experience.
- Identify the problems and challenges faced by the foreign medical patients travelling Delhi/India for treatment.

History of Medical Tourism

As per various reports, medical tourism dates back thousands of years to when Greek pilgrims travelled from all over the Mediterranean to the small territory named Epidauria in the Saronic Gulf. This area was called the sanctuary of the heading God, Asklepios. So Epidauria is named as first travel destination for medical tourism. Spa cities and sanatorium are the early form of destinations for medical tourism. In Rome and United Kingdom, patients went to shrines to take bath in the holy waters for cure. Later, affluent people of Europe travelled to spas from Deutschland to the Nile River. In 1326, an iron rich hot spring was discovered in east Belgium which becoming very popular and became a full-fledged health resort by sixteenth century. It was the Europeans who developed and popularised the modern pleasure resort concept. In these resorts spas and mineral water were used to cure skin infections, poor digestion and rheumatism. The introduction of railways increased the flow of medical tourists to even remote coastal and seaside resorts. These resorts also provided opportunity for relaxation and health restoration.

In the United States and Canada, medical tourism developed around mineral spas. In the nineteenth century, wealthy European tuberculosis patients travelled to US for seeking different climate conditions for health improvement. In Asia, Japanese mineral springs known as Onsen were favourite health retreats for centuries. Indian yoga and Ayurvedic medicines & treatments have always attracted health travellers and spiritual seekers. Indian Yoga and

Ayurveda were popular even five thousands year ago. Sushruta was the very famous surgeon of ancient India.

Even today, traditional medical therapies like Ayurveda, pranichealing, aromatherapy, music therapy, meditation and yoga are very popular among the medical tourists. However, the popularity of India is also gaining ground in the areas of advanced medical treatments like bone marrow transplant, cardiac bypass, eye surgery, hip replacement etc.

Medical Tourism Structure in India

Today, in India medical tourism structure has advanced and lifesaving health care services on one side to wellness tourism on the other side. In India medical tourism product spectrum falls in four categories as shown in Table 1.

Table 1 Spectrum of Medical Tourism in India

Types	Services Offered
Wellness Tourism	Spas, Stress relief resorts & rejuvenation centres.
Alternate System of Medicine	Ayurvedic, Siddha, Unani and Naturopathy treatments & medicines.
Cosmetic treatments & surgery	Dental, Skin treatment, plastic surgeries, etc.
Advanced Lifesaving Healthcare	Cardio surgery, Eye treatment, transplants, surgeries, IVF, etc.

The above table talks about four distinct areas of medical tourism availed by inbound patients in India.

a) **Wellness Tourism:** - Wellness Tourism is a vacation to unwind oneself and to take up healthy activities for maintaining or enhancing one's personal wellbeing. The Wellness activities include visiting spas, health resorts and springs, yoga retreats, national parks and fitness centres. Ministry of Tourism has formed guidelines to make available quality products, by the service provider in this sector.

b) **Alternate System of Medicine:** - India has indigenous complete system of preventive medicine and healthcare which includes Ayurveda, Siddha, Unani, Naturopathy and Yoga. These systems are very popular across the globe and have a proven record of their effectiveness. The Government of India has formed AYUSH, i.e. Department of Ayurveda, Yoga & Naturopathy, Unani, Siddha and Homeopathy in November 2003 to develop educational research, to promote quality control and standardisation of drugs, to improve the availability of medical plant material and create awareness about the efficiency of these systems domestically and internationally.

c) **Cosmetic Treatments & Surgeries:** - Cosmetic treatments and surgeries are optional procedures which are performed on various body parts with the sole purpose of improving the appearance of a person / or removing the signs of aging. Breast lift and augmentation, facial implants, nose surgery, tummy tuck, dental surgeries & implants are some of the popular medical treatments which fall under this category. Argentina, Brazil, Colombia, Cuba, Mexico, Turkey, Thailand and Ukraine are some of the popular destinations for these surgeries. However, with the emergence of corporate health sector after the globalisation and

liberalisation of Indian economy in 1991, India has enhanced its strengths & capabilities in providing these states of art treatments.

d) Advanced and Lifesaving Health Care Services :- As a part of medical tourism, India is recognised for test tube babies (IVF), high tech cardiac, paediatric, orthopaedic, transplants, replacements surgeries. India has witnessed enormous growth in this sector of health tourism. In the present paper, strengths and weakness of this sector of medical tourism in Delhi have been identified and studied. For this purpose the treatment were classified into fourteen categories which are listed on the websites of various Indian hospitals. These treatments are Cardiac, Orthopedics, Nephrology, Neurology, Oncology, Gynaecology, Organ transplant, Urology, Bariatric, Eye Surgery, Dental, Tumour and Regular check-ups for diabetes, hypertension etc.

Key Players in the Network of Medical Tourism

Important links in the medical tourism network are

(i) The Traveller: The inbound patient tourist is the initial link in the medical tourism network that then triggers the other linkages.

(ii) The Tour Operator: The foreign traveller patient may book his travel, treatment and stay through a tour operator. These tour operators provide variety of services through attractive packages. The services offered by these operators are help in finalizing travel itinerary airport transfers and drops, arrangement of interpreters and translators, help in obtaining visa, and arrangement of accommodation and leisure tourism service etc. In the present paper, the services provided by Delhi hospital are studied for their strengths and weaknesses.

(iii) The Hospital: Indian hospitals are recognized globally for the availability of treatment, cost effectiveness and other specialized services. In the present paper these services have been classified into three categories to study their strengths and weaknesses.

i) Pre-Procedural Stage Services: These days with the increasing availability of online information and consultancy any foreign patients like to book their treatment travel directly with the help of the hospital chosen. Services like online consultancy, online pre-operative counselling, electronic transfer of medical records, arranging for a medical tourist facilitator, tie up with insurance providers, arrangement of translators, pickup and drops, appointment scheduling etc. fall in this categories. The present paper has tried to assess the efficiency of Delhi hospitals for these services through the response of patients visiting Delhi hospitals.

ii) Procedural Stage Services: Procedural stage services begins with patient reaching the hospitals for the treatment services like express/swift admission process, concierge services, counselling on arrival, responsiveness of nursing staff, availability of doctors and their qualifications, availability of translators and interpreters availability of international cuisine, proper arrangement for accompaniment, availability of business centre etc. fall in this categories. Delhi multi-speciality hospitals are making all the attempts to provide the paper has studied and rated all these services for the Delhi hospitals. The present paper has studied and rated all of them for the Delhi hospitals under study.

iii) Post-Procedural Stage Services: After the procedural treatment but before the discharge various services such as swift and simple discharge procedures, clear instructions on discharge, error free billing, post-operative monitoring care, future appointment scheduling are expected by the patients. All these services create long lasting impressions which the patient carries to his/her own country. An attempt has been made in this paper to study the satisfaction level of patients regarding these services.

(iv) Insurance Companies: Insurance companies provide the cover against the high cost of medical treatment undertaken by the patients. It has been noticed that most of the patients

who have come to Delhi has self-financed their treatment and has not availed any insurance cover. A vast scope of business lies have for insurance companies especially in care of life saving surgeries of major types.

(v) Hotels and Stay Lodges: Hotels play an important role in providing accommodation to the attendant of the patients and the patients before and after the treatment. In Delhi many foreign patients' lodges have mushroomed around hospitals which boast of high class variety of services. Most of them are affiliated to some big hospital in Delhi. The students visited many such places to get the questionnaire filled up and reported that they are highly priced with limited number of room though they provide 3 star to 5 star level facilities to the resident patients.

(vi) Local Tour Operators: In case medical tourists wish to visit the local tourist destinations, local tour operators and guides become helpful. They may offer the services transport local guide, translator and interpreters.

(vii) Government and Policy Makers: Government and Policy makers play an indispensable role in promoting and making available various quality health care services making easy visa norms, providing infrastructure facilities to the services providers putting accreditation system in place and so on. Government of India also provide financial assistance to services providers under its medical Development Assistance (MDA) Scheme. In the present study, visa experiences of the patients have been assessed for availability, cost, time taken, extension availability and corruption etc.

METHODOLOGY AND SAMPLE RESEARCH

The research is primarily based on primary data collected through a structured questionnaire administered to 131 inbound patients visiting Delhi and NCR hospitals for medical treatments. In total 100 questionnaires were found complete for the study. The data has been collected from the foreign patients of 16 Delhi-NCR hospitals.

Hospital Wise Sample Composition

Highest numbers of the patients under study are from Max Hospitals followed by Apollo and Fortis hospitals inclusive of the branches of these multi-speciality hospitals in and around Delhi. (See Table A1 in appendix)

Age Wise Distribution of the Sample

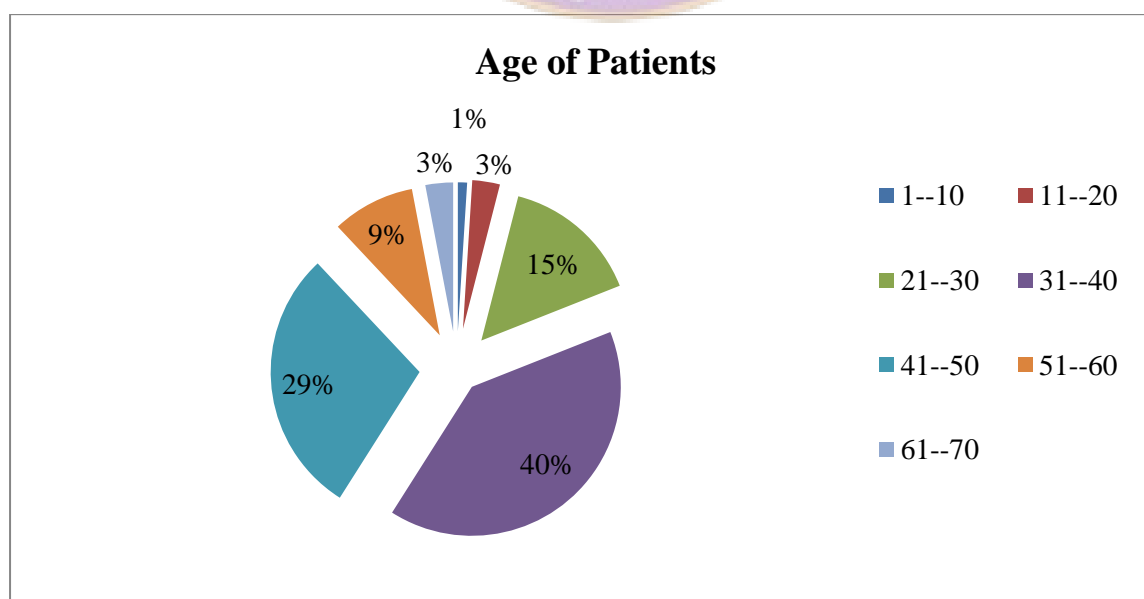


Fig.1 Age wise distribution of the respondents

40% of the respondent patients are in the age group of 31-40 and 29% are in the age group of 41-50 and 15% are from age group of 21-30. Therefore, 84% of the patients under study fall in the range of 20 to 50. Hence, more young and middle-aged patients have been found to be coming to Delhi

Gender Wise Distribution of the Sample

Sample includes 76% males and 24% females from the total respondents as depicted in Fig.2.

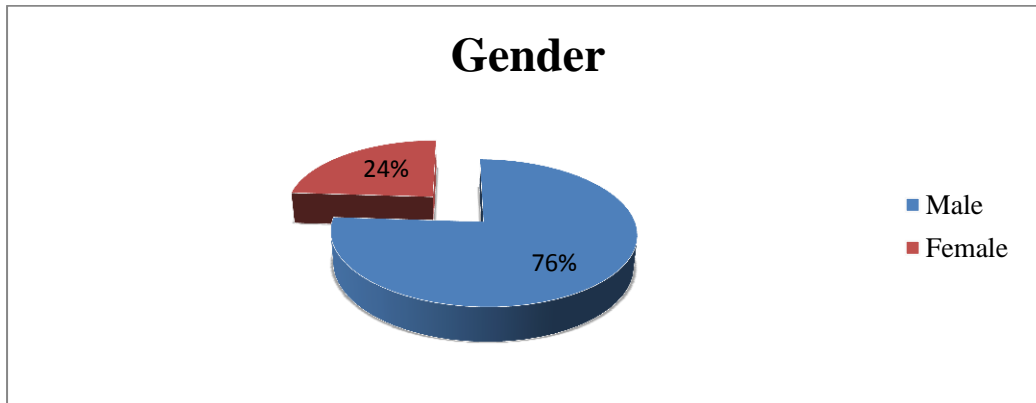


Fig.2 Gender wise distribution of patients

Country Wise Distribution of the Sample

It is observed that (see Table A.2 in appendix) that the medical patients have come to Delhi not only from neighbouring countries such as Nepal, Srilanka, Bangladesh, and Pakistan etc. but also from advanced nations like UK, US and Canada. The highest numbers of the patients covered under this study are from Iraq followed by USA, Nigeria and Afghanistan. In total, patients from 22 countries have been studied that have come from both developed and developing nations. Most primarily the medical patients have arrived from the Middle East, Africa and South Asia where high quality procedures may not be available and that too at affordable costs.

Popular Medical Treatments

It is observed that (see Table A.3 in appendix) that patients have come to Delhi for a large variety of medical treatments.

Delhi multi-speciality hospitals under study provide medical treatment for a wide range of simple and complex medical problems.

Cardiac, Orthopedics, Neurology, Oncology, Organ Transplant, Eye Surgery and Tumour treatment are some of the popular medical treatments undertaken by the patients visiting Delhi-NCR hospitals.

Patients are also found to be coming Delhi for Spine treatment, Hip Surgery, Bone Marrow Transplant, ENT, Hernia, Gastroenterology, Diabetes and Hypertension.

Source of Information for Delhi/India as a Health Care Destination

Most of the medical patients have come to Delhi when referred by their family and friends or by their doctors and hospitals. However, some have obtained information directly from internet too as seen in Fig.3.

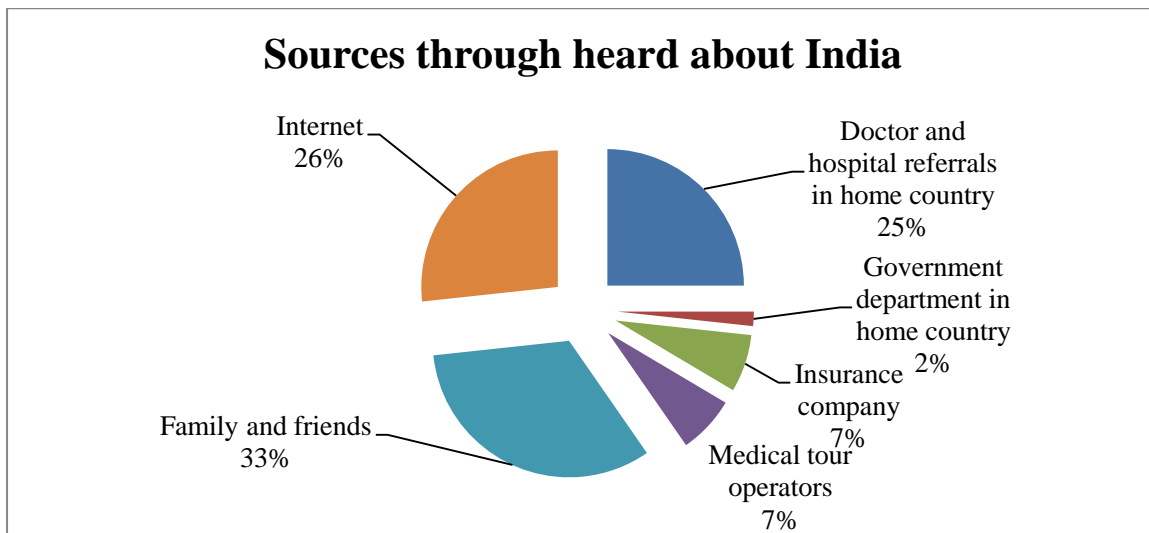


Fig. 3 Sources used to choose Delhi as a Health Care Destination

The diagram clearly indicates that the patients have not depended upon Medical Tour Operators and Insurance Agents for the selection of the hospital and the country forgetting treatment.

Source of Financial Support

78% of the patients under survey have self-financed their treatment. Only 17% have come with the Insurance cover as seen in fig.4. Government sponsored and charitable agencies sponsored patients are only 2% and 3% respectively.

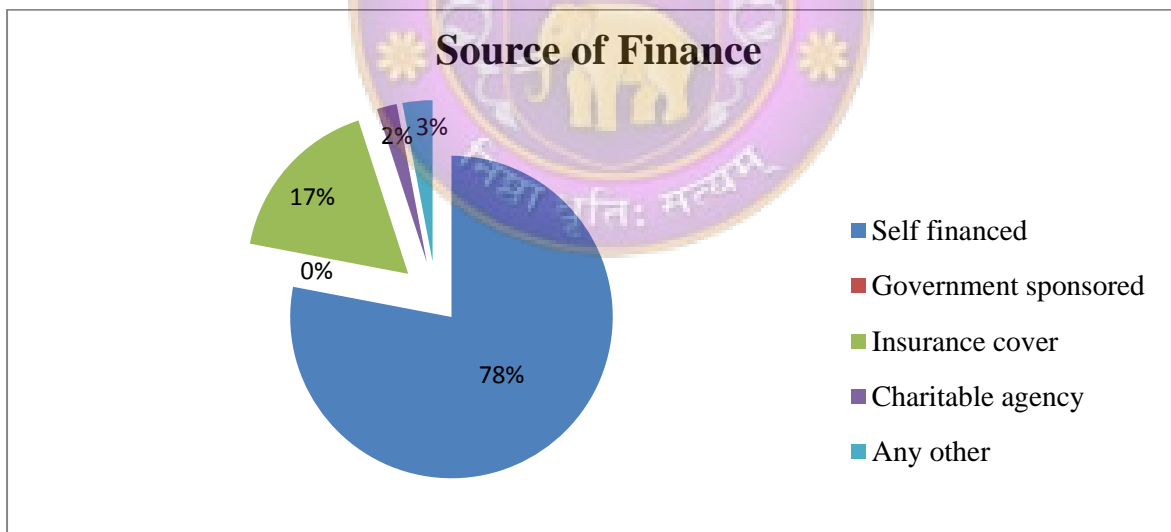


Fig.4 Various Sources of financial support

Patients in the Developed nations are mostly covered by a social security or a health insurance cover. However, in African and Middle East nations patients are not usually getting any such facility. And maximum numbers of the patients are coming to Delhi, India from these nations. (Refer table A.2). The patients like to travel low cost destinations such as India as they are required to personally finance their treatments.

To sum up, a large number of young and middle aged medical tourists are coming to Delhi for a variety of treatments. Popular medical treatments sought by them are Cardiac, Orthopedics, Oncology, Eye Surgery, Neurology and Tumour treatment. Most of them have come to India on the advice of their family and friends or doctors and hospital

referrals. Mainly the patients are found to be coming from Middle East, African and South Asian countries that self-finance their treatments.

ANALYSIS OF RESULTS

The respondents were asked variety of questions to assess the strengths and challenges facing medical tourism industry in Delhi/India. Patients were asked to identify and state reasons for choosing India as a medical treatment destination, factors which influenced their selection of hospital, criteria for selection of medical tour operators etc.

They were also asked to rate the services of the hospitals during pre-procedural, procedural and post procedural stages. Further they were asked to rate their visa experience.

Following interesting, exciting and enlighten results emerged from the analysis based upon questionnaire survey.

Factors affecting the selection of Delhi/India as a Medical Tourism Destination

The two key competitive advantages of India in Medical Tourism is always said to be the low cost advantage and the quality of the treatment provided. Both these factors are significantly underlined by the Respondent patients as represented in Fig.5 (Also see Table A.4 in appendix)



Fig. 5 Reasons for choosing Delhi/India as the destination for medical treatment

91% of the respondents said that they came to India because of low cost of medical procedures, 87% found the cost of travel and stay also low. 64% of patients also selected India for its quality of medical procedures.

66% of the respondents reported that less wait time for treatment is another significant factor which influenced the choice of destination. Interestingly, Hygiene and cleanliness and Electronic transfer of records emerged as two other important reasons for the patients to select India. Multi-specialty hospitals like Medanta, Max, Fortis, etc. are known for their stress on cleanliness and comfort. Electronic transfer of records is a definite help in pre and post consultations with doctors and this facility is now provided by most of the hospitals in Delhi-NCR.

Competence of doctors and paramedical staff is found to be satisfactory. Quality of infrastructure, affordable costs of insurance, availability of medical visa, multiple terms of

payments, availability of translators and facilitators have also influenced the choice in selection of India as a Medical Tourist Destination. However, availability of medical insurance or tie ups with insurance providers, availability of medical tour operators, proper arrangement for accompaniment, travel time and availability of pre and post-operative counselling were not given importance by the patients in their selection. Very few patients have ticked these factors as relevant considerations.

Factors influencing patients for selection of hospital

Brand name, Profile of the doctors, Quality of medical procedures, Special services provided by the hospitals are the most rated factors which influenced the choice of hospital in Delhi as seen in Fig.6 (Also see Table A.5 in appendix)

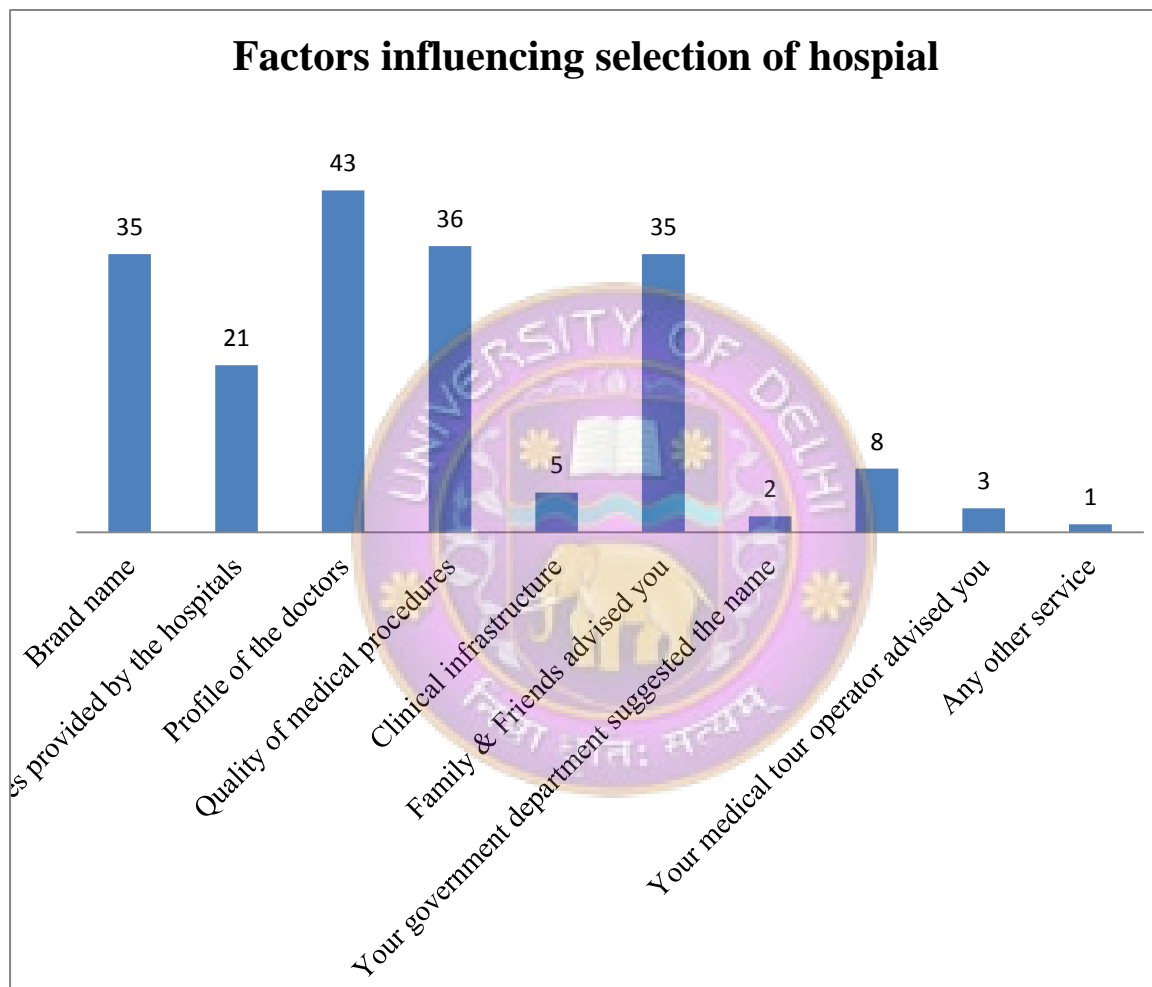


Fig.6 Various factors affecting the selection of the hospitals

Max, Fortis, Medanta, Apollo, Nova and Moolchand are renowned for their well-known doctors, customized services, highly advanced equipmentstechnologies& procedures and other world class facilities which have made them popular brand names across the globe. This is corroborated further by the observation that the advice of family and friends has also significantly influenced the selection of a hospital in Delhi.

Clinical infrastructures, the suggestion of government department in the home country, advice of the medical tour operators have not influenced the decision of the patients in selection of a Delhi hospital. Some have, however, considered the advice of their home country doctor. The results are consistent with the observations made in Section 2.6 that most

of the patients have come to Delhi/India on the advice of either their family and friends or doctors and hospitals referrals in their home country.

Criterion for selection of Indian Medical Tour Operator

The response to the question ‘What was your criterion for selection of Indian Medical Tour Operator’ was low as many of inbound patients have come on their own to Delhi. However, when probed, Brand name of operator and easy accessibility are the two important reasons which influenced their selection as depicted by Fig.7.

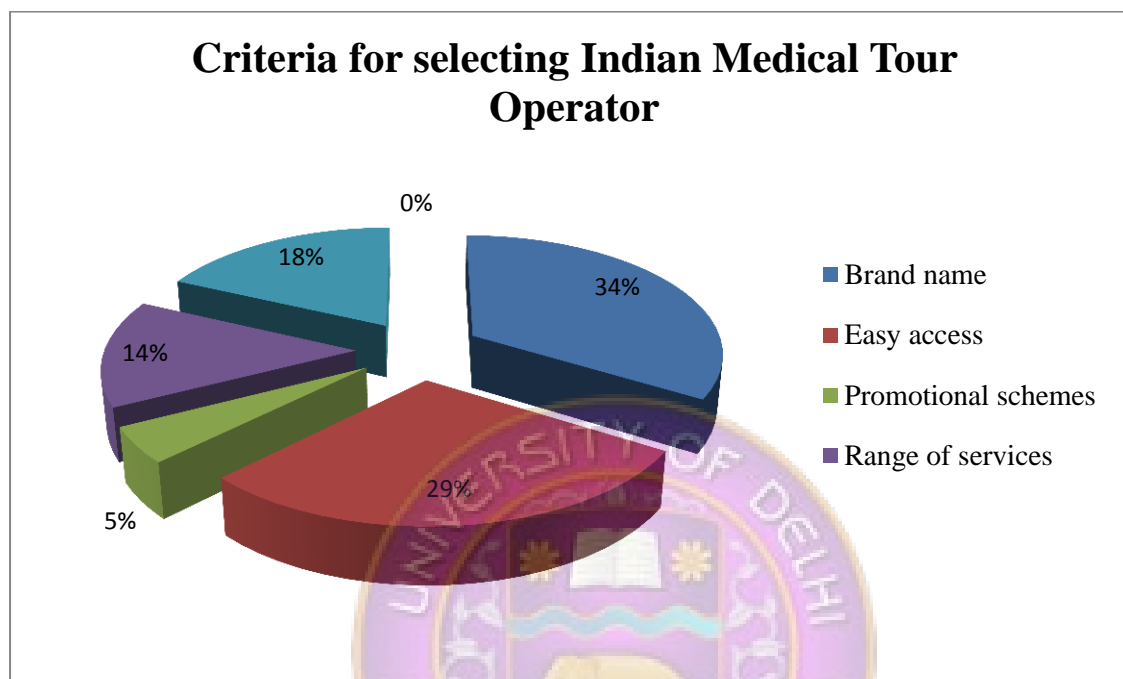


Fig.7 Criterion for selection of Indian Medical Tour Operator

Range of services provided and the rationale of operators are also considered desirable as it will facilitate smooth and comfortable stay of the patients in India.

Patients were also asked to state the importance and rate the services of their tour operators. The results are shown in Table 2

Table 2 Importance of services provided by tour operators

S. No.	Services	No. of Ticks	%
1	Help to finalize travel itinerary	40	13.5
2	Help in obtaining medical insurance	26	8.8
3	Cost of price	50	16.9
4	Airport pickups& drops	28	9.5
5	Arranging interpreters & translators	31	10.5
6	Help in obtaining visa	38	12.9
7	Additional leisure tourism service	20	6.8
8	Behaviour of tour operating staff	42	14.2
9	Arrangement of accommodation	15	5.1
10	Any other	6	2.0
	Total	296	100

Help in finalizing the travel itinerary, cost, help in obtaining medical visa, behaviour of tour operating staff are stated as important services provided following by arrangement of interpreters and translators, help in obtaining medical insurance, air pick-ups and drops. Additional leisure tourism service and arrangement of accommodation are not ticked by many as influencing factors.

It is good to note that more than 80% of the respondents to this question have given the rating either satisfactory or good to almost each service provided by the tour operators. However, gap is noticed in regard to two services i.e. arranging interpreters and translators and help in obtaining visa. Many respondents have found these services less than satisfactory and have obtained poor rating too.

Services provided at Pre-Procedural stage

At pre procedural stage, services were identified and the inbound patients were asked to rate their hospitals for them. The summary results are represented in Fig.8 (Also see Table A.7 appendix).

Online consultancy, electronic transfer of medical records and availability of translator and interpreter turned out to be most desirable services required by the inbound patients at pre-procedural stage. They have also been rated as good or satisfactory by the patients.

Multiple payment options, appointment scheduling, pick-up and drops and tieups with the insurance providers from the second group of services. Online pre-operative counselling and arrangement for medical tourist facilitators are not too much in demand as shown by the number of ticks.

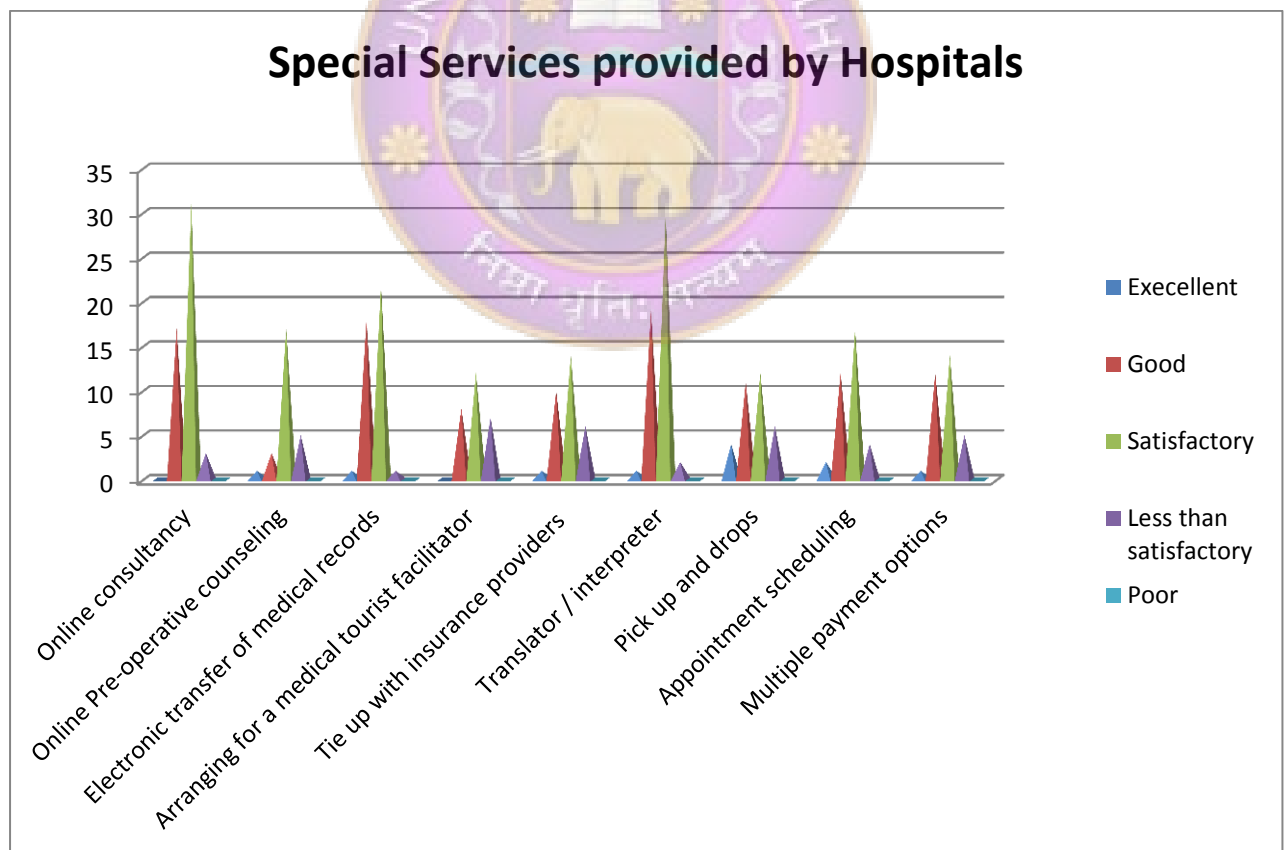


Fig.8 Special Services provided by Hospitals

Fig.8 depicts the % rating provided by the respondents to this question as excellent, good and satisfactory.

The table clearly shows that the patients have found all the series of the hospitals satisfactory and above. Although, none of the services is given poor rating by the patients, scope of improvement is visible in online pre-operative counselling arrangement for a medical tourist facilitator, tie-ups with insurance providers' pickups and drops and multiple payment options.

Procedural Stage Services Provided by the Hospitals

The respondents were asked for their response for the 11 procedural stage services provided by hospitals in Delhi.

Availability of doctors when required, qualification of doctors, availability of translators/interpreters and express/swift admission process have emerged as most desirable services required at the procedural stage by the medical tourists. Knowledge, skilfulness of nursing staff, doctors willing to share information availability of international cuisine falls in the second set of factors.

Concierge services, arrangement for accompaniment and availability of business centre are also preferred but fall in the last category of facilities desired by the inbound patients. The rating of the services at procedural stage has been captured in Fig.9 (Also see Table A.6 in appendix)

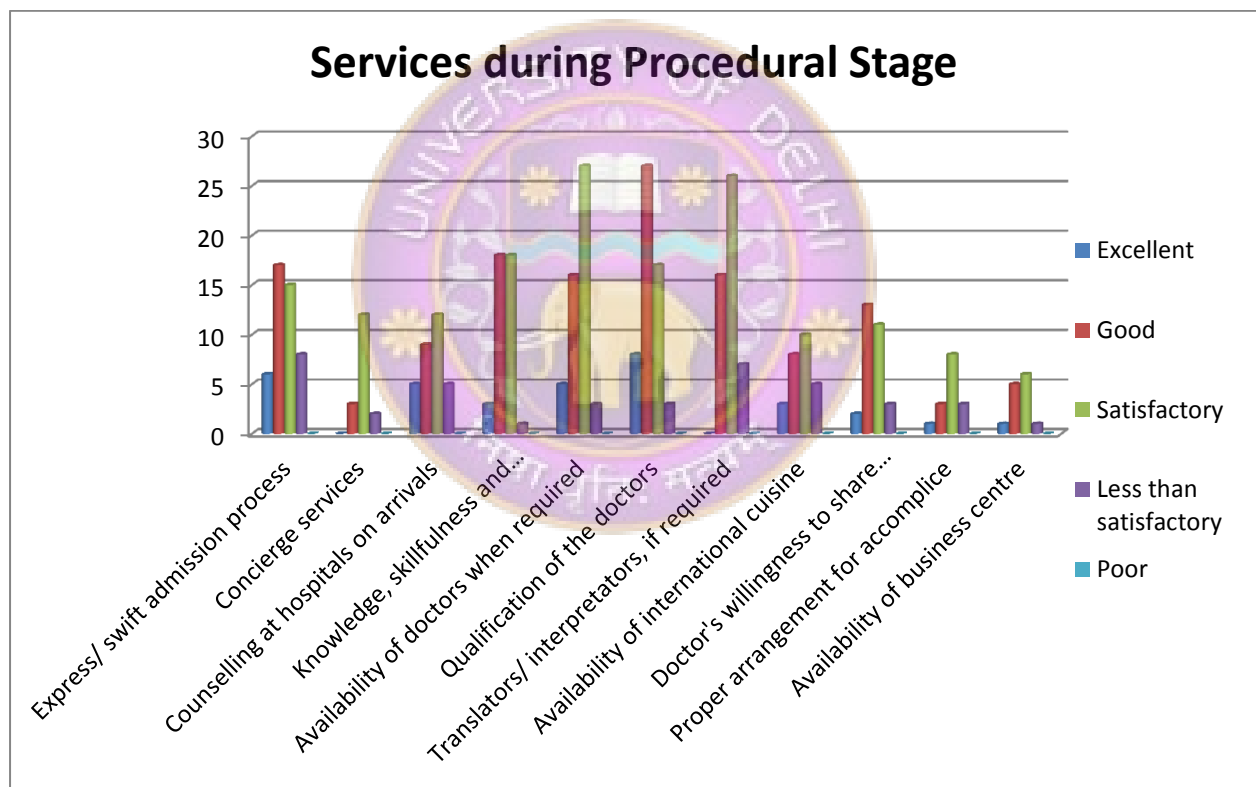


Fig.9 Services during Procedural Stage

It is significant to note that none of the services at procedural stage is considered poor by the patients. From swift admission process to availability of business centre, all the services are rated as satisfactory or above by the most of the patients. Even excellent rating is given for many services by many patients. However, scope of improvement is visible in case of admission process, counselling at arrival, availability of translator & interpreters as and when required and the availability of international cuisine. A large of Delhi hospitals still does not provide a variety of international food items in their menu for patients.

Post Procedural Services of the Hospitals

Fig.10 summarises the response of the patients in regard to the post procedural services expected by the patients who are not yet discharged. (Also see A.8 in appendix)

Swift discharge procedure and clear instructions on discharge form are two turned out to be the most desired post procedural services by the patients. These are followed by error free billing and future appointment scheduling, if required.

Post-operative monitoring care and availability of prescribed medicines in home country were put last in the list of services desired after treatment.

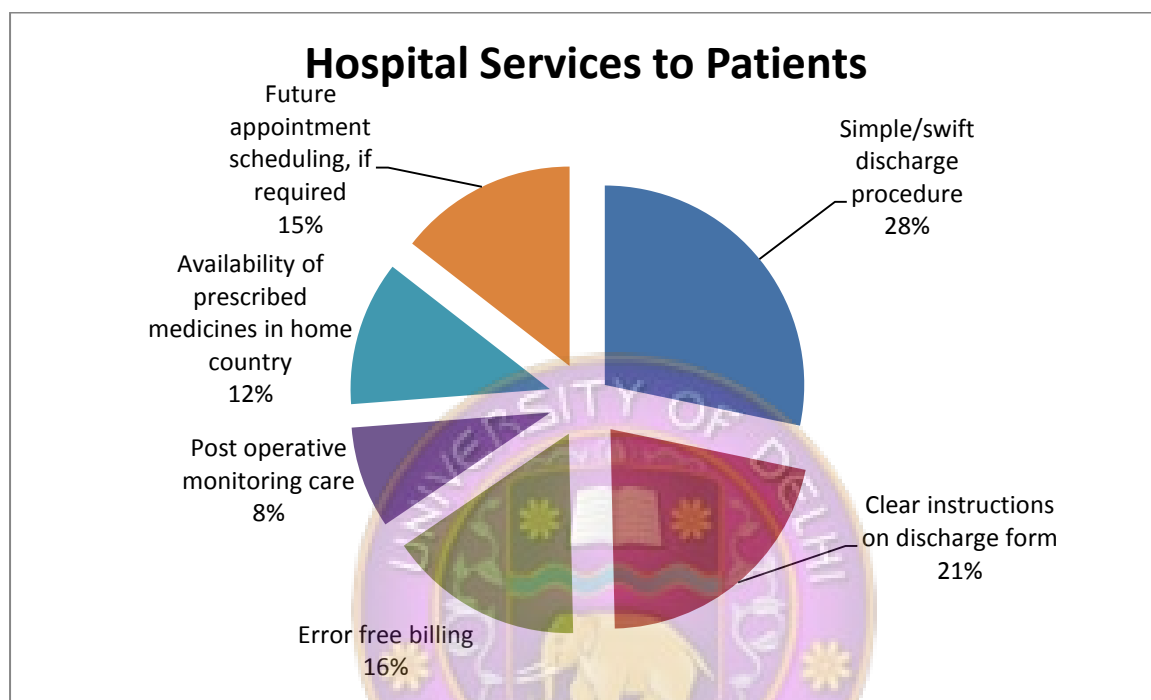


Fig.10 Hospital Services to Patients

When already discharged patients were asked to rate the post procedural services provided by the hospitals, they have shown satisfaction with all the services as seen in Fig.10. However, scope of improvement is visible for discharge instructions, follow monitoring care, follow-up assistance and consultation after getting back home and future appointment scheduling.

Visa Experience

Respondents really liked to talk about their visa experience. Three most important variables governing visa experiences are availability of visa, cost and time taken in obtaining it (See Table A.9 in appendix). Extension availability is also desired by the patients coming for treatment in Delhi-NCR. Further, many respondents rated their visa experience as good or satisfactory, however, less than satisfactory and poor experience have also been mentioned by a lot of patients as seen in Fig.11. Indian Government is continuously streamlining its visa procedures.

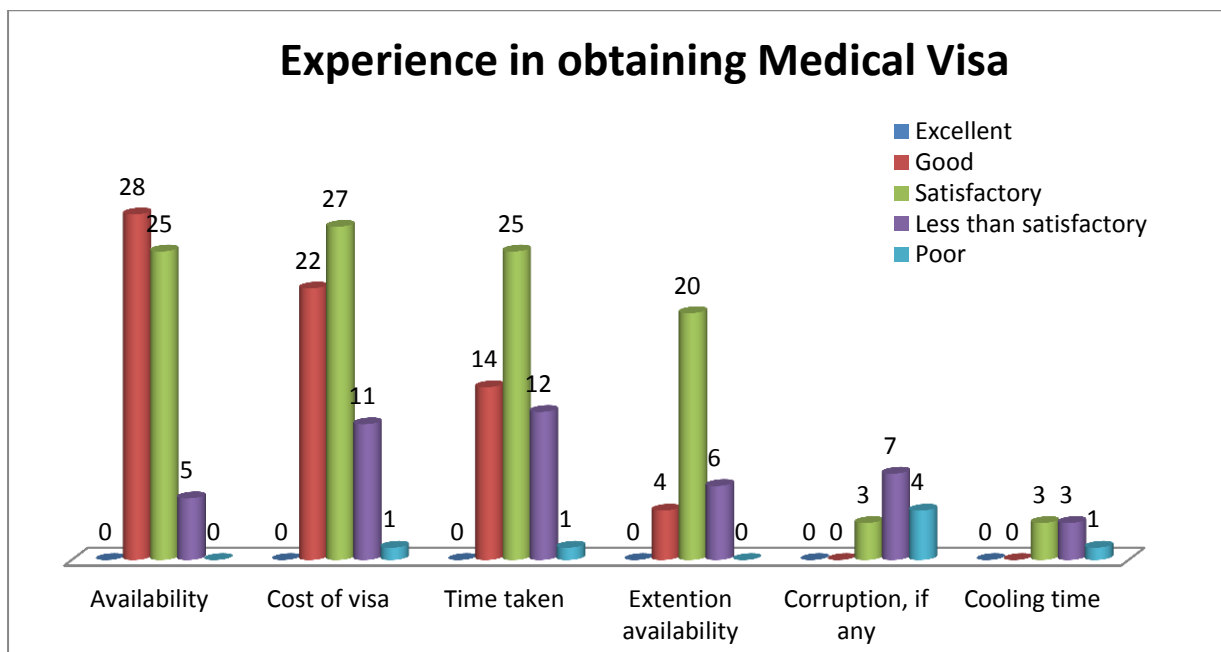


Fig.11 Experience in obtaining Medical Visa

Surprisingly, not a single respondent rated the visa service as excellent. Most of them have rated it either good or satisfactory in regard to availability, cost, time taken and availability of extension. However, a significant number has reported dissatisfaction regarding corruption, time taken and cost. This is an area which requires immediate attention from our policy makers and government so as to remain in competition with other South East Asian countries like Thailand, Singapore and Malaysia where visa is cheaper and easily available.

SUMMARY AND CONCLUDING OBSERVATIONS

Medical tourism is becoming an important fast driver for the growth of India tourism and of healthcare industry. Medical Tourism is defined as the concept of travelling outside the country of residence to some other nation for the purpose of receiving medical treatments and healthcare services. The Govt. of India, tour and travel operators, hotels, private sector hospitals are channelizing their efforts and resources to capitalize on this opportunity by making India emerge as a preferred destination for medical services. On the one hand, medical tourists come to India for rejuvenation and relaxation therapies offered by Yoga and Ayurveda.

On the other, it is becoming popular for its low cost, hi-tech world class medical facilities in multi-specialty hospitals by teams of dedicated and highly qualified professionals. Delhi appears among first five most popular destinations for medical tourism in India.

The present study was an attempt to identify the strengths of Delhi's medical tourism industry in providing advanced and lifesaving healthcare. The paper also focuses on identifying services desired by the patients at pre-procedural, procedural and post-procedural stages. The problems faced by the patients are also studied to know the challenges lying before medical tourism industry so as to successfully attract more and more patients. The primary data for the study have been collected through structured questionnaire filled by foreign medical tourist visiting Delhi-NCR for medical treatments.

It is found that a large number of young and middle aged medical tourists have come to Delhi for a large variety of medical treatments mostly from Middle East, African and South Asian countries. Popular medical treatments undertaken by them are in the field of Cardiac, Orthopedics, Oncology, Eye Surgery and neurology etc. The key competitive advantages and

strengths identified are low cost of medical procedures, travel & stay, less waiting time for treatment, hygiene & cleanliness, electronic transfer of records and competence of doctors & paramedical staff. Patients selected hospital for its brand name, profile of the doctors and quality of medical procedures and services provided. Online consultancy, electronic transfer of records and availability of interpreters are most wanted services at the pre-procedural stage. Availability of doctors when required, qualification of the doctors, availability of translators and swift admission process are most desired services at procedural stage. Swift discharge procedures and clear instructions on discharge turned out to be the most significant services desired by inbound patients. Patients have faced problems in arrangement of interpreters, obtaining visa, insurance covers, finalizing travel itinerary, express admission process, counselling on arrival, availability of international cuisine. They have found lag in discharge instructions, follow-ups and monitoring care. The behaviour of tour operating staff and corruption are other significant challenges faced by them.

The strength, weakness, opportunities and threats noticed by the above analysis and mentioned by the patients are summarised in the following SWOT Analysis Table 3.

Table 3 SWOT ANALYSIS

Strengths	Weaknesses
<ol style="list-style-type: none"> 1. Economy in cost. 2. Qualified doctors with brand name. 3. International recognized Brand name hospitals. 4. Good services during procedural stage. 5. Online Consistency 6. Availability of all kinds of medical treatments. 7. Less waiting time for treatment 8. Good infrastructure with technologies and facilities. 9. Hygiene and cleanliness in the hospitals. 	<ol style="list-style-type: none"> 1. Arrangements of interpreters 2. Problems in obtaining visa 3. Non-availability of financial support 4. Lags in discharge instructions. 5. Lags in follow ups and monitoring cave 6. Behaviour of tour operating staff 7. Differential pricing policies. 8. Inadequate lodging arrangements 9. Corruption
Opportunities	Threats

<ol style="list-style-type: none"> 1. Increasing demand due to high cost of medical treatments in other nations. 2. Increased demand due to no or less waiting time for the treatments 3. Increased demand due to non-availability of very good medical facilities in the neighbouring countries. 4. India is rated among the top 3 nations in Asia and Delhi falls among five top destinations for medical tourism in India. 5. Patients from around the globe. 	<ol style="list-style-type: none"> 1. Lack of international accreditation 2. Visa hurdles 3. Lack of financial support 4. Competition from South East Asian nations like Thailand and Singapore. 5. Non-availability of good translators and interpreters. 6. Infrastructure not impressive 7. Corruption 8. Security threats
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RECOMMENDATIONS

(i)Marketing and Promotion: - Marketing and promotion of India as a next medical hub is critical for the medical tourism industry to achieve its potential. More and more participation is required to fairs, exhibitions, seminars, advertisements at airport and travel magazines with the support of government.

(ii)Security Measures: - Terrorist attacks or political unrest in different parts of nation adversely affects the medical tourism industry. Recent terrorist attacks in Delhi, Mumbai have serious concerns about the safety of the foreign tourist including the medical patients. Strict safety measures should be established at airport, hotels, hospitals and tourist destinations.

(iii)Simplifications of Visa Procedures: - Inbound foreign patients see long and time consuming visa procedures as a hindrance. There are nations which even provide visa on arrival. Government is conscious about this problem and is making continuous attempt to simplify the procedure, though, a lot is required to be done for speedier clearances.

(iv) Creation of more Value Added Services:- Over the years hospitals in India have adding more and more value added services like online consultancy, arrangement of interpreters providing international cuisine, electronic transfer of records multiple terms of payment, appointment scheduling, availability of business centres and so on however allot can still be done to increase the convenience for the patients in terms of sightseeing tour services, medical transportations, one to one nursing care services, overseas diagnostic and follow up centres and so on.

(v)Streamlined and Competitive Pricing Policies: - Although India is known for providing high standards, low cost, medical treatments; a lot is required to be done to streamline the pricing policies. The patients often finds that their cost budget shoots up after arrival due to various cost not known before hospitals are also found to have different price for pre and post procedure care and arrangements. A uniform pricing policy will definitely increase the credibility of the hospital and India as medical tourism destination.

(vi)Maintenance and Enhancement of the quality: - The quality of the doctors and medical procedures is considered good in India however shortage of doctor and trained Para-medical staff is treated as major threats to medical tourism industry. More and more doctors and

medical staff are required to be trained to provide specialized services demanded by foreign patients. Joint Commission International (JCI) and National Accreditation Board for Hospitals and Healthcare (NABH) provide accreditation to Indian hospitals for quality. More and more hospitals are required to be covered by these institutions.

Role of Government in Promoting Medical Tourism

From time to time Indian Government has undertaken various measures to promote India as a global health destination, such as

1. Introduction of 'M' Visa.
2. Improvement in basic infrastructure.
3. Organization of road shows.
4. Dedicated exhibition space for Medical Tourism in international travel and tourism exhibitions.
5. Production of publicity material and its circulation in target markets.
6. Provision of fiscal incentives by introducing Market Development Assistance Scheme. Under the scheme, financial support is provided to approve medical tourism service providers. No doubt, government is continuously making effort to promote Medical Tourism.

However, it is felt that the Government of India should play a larger role by acting both as a regulator and as a facilitator. As a regulator, the Government should institute a uniform grading and accreditation system for healthcare service providers to build patient's trust.

As a facilitator it should

- (i) Encourage private investment in medical infrastructure.
- (ii) Reduce rates, taxes and duties pertaining medical equipment and services.
- (iii) Simplify visa norms and procedures.
- (iv) Reduce instabilities and create terror free environment by enhancing security measures.
- (v) Invest in training and development of doctors, nurses and other paramedical staffs.
- (vi) Invest in accommodation sector.
- (vii) Reduce bureaucratic roadblocks.
- (viii) Improve airport facilities.
- (ix) Improve community participation and awareness.
- (x) Encourage the development and availability of good language translators.
- (xi) Adopt customer oriented approach in promotion of medical tourism.

CONCLUSION

Medical Tourism in India/Delhi is blossoming. Various kinds of medical facilities are available to inbound patients easily and economically. However, a few challenges faced by the patients need to be addressed. Acknowledging the importance of medical tourism, government has taken various initiatives, though; a lot is still to be done. The vast potential in the field of medical tourism is still to be tapped. A customer oriented approach is required to make inbound patient believe that India is "Your Passport to Healthy Sojourn"

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APPENDIX

Table A.1 Hospital wise distribution of the sample

S.No.	Hospitals	No. of Respondents
1	R G Stone, Urology & Laparoscopy	3
2	Nova	7
3	BLK	2
4	Medanta	5
5	Apollo	13
6	Yashoda	2
7	Paras	3
8	Moolchand	6
9	Max	31
10	Columbia	5
11	Fortis	10
12	Artemis	2
13	Primus	3
14	Vasan Eye Care	3
15	Lal Bahudar Shastri	2
16	Rockland	3
		100

Table A.2 Country wise distribution of the responded patients

S.No.	Countries	No. of Respondents
1	Scotland	1
2	Nepal	4
3	USA	15
4	Afghanistan	10
5	Qatar	2
6	Tanzania	3
7	Nigeria	12
8	Kenya	4
9	U.K.	8
10	South Africa	2
11	Bangladesh	1
12	Uganda	1
13	Ukraine	1
14	Singapore	1
15	UAE	2
16	Iraq	17

17	Zambia	1
18	Oman	4
19	Pakistan	1
20	Canada	3
21	Swedan	2
22	Srilanka	5
		100

Table A.3 Distribution of Medical Treatments taken up by the Medical Respondents

S. No.	Treatments	No. of Respondents
1	Cardiac	9
2	Orthopedics	10
3	Nephrology	1
4	Neurology	6
5	Oncology	10
6	Gynaecology	3
7	Organ Transplant	5
8	Urology	3
9	Bariatric	5
10	Eye Surgery	7
11	Cosmetic Surgery	2
12	Dental	1
13	Tumour	7
14	Regular Check Up	2
15	Any Other Treatment	38

Table A.4 Reasons for choosing Delhi/India as the destination for medical treatment

S. No.	Reasons	Out of 100
1	Low cost of medical procedures	91
2	Low cost of travel and stay	87
3	Less wait time for treatment	66
4	Quality of medical procedures	64
5	Competence of doctors and paramedical staff	18
6	Hygiene and cleanliness	38
7	Quality of infrastructure (like buildings, rooms, etc.)	11
8	Availability of medical insurance/tie ups with insurance providers	2
9	Affordable cost of insurance	19
10	Availability of medical visa	18
11	Multiple terms of payments	19
12	Availability of medical tour operator & facilitator	5
13	Availability of translator & facilitator	16
14	Availability of pre & post-operative counselling	1
15	Electronic transfer of records	38

16	Proper arrangement for accomplice	4
17	Travel time to destination	8
18	Any other	0

S. No.	Services	No. of ticks	%
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Table A.5 Factors influencing selection of hospital

S. No.	Reasons	Out of 100
1	Brand name	35
2	Special services provided by the hospitals	21
3	Profile of the doctors	43
4	Quality of medical procedures	36
5	Clinical infrastructure	5
6	Family & Friends advised you	35
7	Your government department suggested the name	2
8	Your home country doctor or hospital referred the name	8
9	Your medical tour operator advised you	3
10	Any other service	1

Table A.6 Ranking of Services provided at the procedural stage

S. No.	Services	No. of Ticks	%
1	Express/ swift admission process	46	12.4
2	Concierge services	17	4.7
3	Counselling at hospitals on arrivals	31	8.3
4	Knowledge, skilfulness and responsiveness of nursing care staff	40	10.8
5	Availability of doctors when required	51	13.7
6	Qualification of the doctors	55	14.8
7	Translators/ interpreters, if required	49	13.2
8	Availability of international cuisine	26	6.9
9	Doctor's willingness to share information and attending queries	29	7.8
10	Proper arrangement for accomplice	15	4.0
11	Availability of business centre	13	3.5
Total		372	100

Table A.7 Pre-procedural services provided by the hospitals

1	Online consultancy	51	15.5
2	Online Pre-operative counselling	26	7.9
3	Electronic transfer of medical records	42	12.7
4	Arranging for a medical tourist facilitator	27	8.2
5	Tie up with insurance providers	31	9.4
6	Translator / interpreter	52	15.8
7	Pick up and drops	33	10.0
8	Appointment scheduling	35	10.6
9	Multiple payment options	32	9.7
	Total	329	100

Table A.8 Post Procedural services of the hospital

S. No.	Particulars	No. of respondents
1	Simple/swift discharge procedure	41
2	Clear instructions on discharge form	31
3	Error free billing	23
4	Post-operative monitoring care	12
5	Availability of prescribed medicines in home country	17
6	Future appointment scheduling, if required	21

Table A.9 Analysis of Visa Experience

S. No.	Particulars	Total	%
1	Availability	58	26.1
2	Cost of visa	61	27.5
3	Time taken	52	23.4
4	Extension availability	30	13.5
5	Corruption, if any	14	6.3
6	Cooling time	7	3.2
	Total	222	100