

Medical and Wellness Tourism in India during Post COVID-19 Era: Opportunities and Challenges

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Coronavirus (COVID-19) pandemic has brought unprecedented circumstances before tourism and its allied industries (hospitality and airline). The highly infectious novel coronavirus has hit hard the various segments within the tourism industry and raises questions on their survival. While the COVID-19 had severely impacted the tourism industry globally at the same time it has developed the importance of maintaining health and wellness among people. India is a home of various ancient practices such as Ayurveda, Yoga, and other practices that come under AYUSH, therefore, attract a large number of domestic and international tourists to undertake medical and wellness tourism. This paper explores the opportunities and challenges of Wellness tourism in India in the post-COVID-19 era and aims to enhance the existing literature; it further aims to provide a way to conduct future research, particularly conceptual research work. This paper is based on the secondary data which was accumulated through sources like newspaper articles, magazines, books, the internet, media reports. The finding of the study reveals that medical and wellness tourism is expected to rise and recuperate the Indian tourism sector in post-COVID-19. The study also identifies the potential of the Indian wellness tourism industry and government initiatives to develop this sector in the post-pandemic period.

Keywords: Medical tourism, Wellness tourism, post-COVID-19, opportunities, Challenges

Introduction

For a decade, India has been continuously experiencing growth in the tourism industry. Health tourism is one of the latest emerging branches of tourism in India. The second most popular destination for health tourism in Asia is India after Thailand for modern surgeries (medical) and traditional Ayurveda, and Spa (wellness) (Brotman, 2010; Burns, 2014; Kim, Lee, & Jung, 2013; Sultana, Haque, Momen, & Yasmin, 2014). The wellness centers and hospitals are increasing in great number in the world and this is happening because of the growing number of consumer interests in the health industry. Medical and wellness activities are often represented by health tourism. Medical tourism happens when people travel to different destinations to seek medical treatment for diagnosed diseases (Smith & Puczko, 2008) whereas

wellness tourism is undertaken by healthy people to strengthen their wellbeing. Earlier in the year 2019, FICCI and IMS Health India Reported that the medical sector might boost up by 200% by 2020, hitting \$9 billion and accounting for a 20% share in the global market. However, the numbers have now been changed as the coronavirus pandemic hit the world.

Since COVID-19 was declared as a pandemic by World Health Organization (WHO), tourism has been one of the worst-hit sectors. In the previous decades, there were similar epidemics such as Ebola, SARS, MERS (Gössling, Scott, & Hall, 2020) but the world has never faced any disaster such as COVID-19 which has caused massive destruction to the economy and society (Naumov, Varadzhakova, & Naydenovc , 2020). While few industries can continue to struggle for their survival by adapting digital platforms (Mehroliya, Alagarsamy, & Solaikutty, 2020), some industries encountered unprecedented failure of survival during the pandemic because of travel restrictions and social distancing. Surviving without the mobility of people is just not possible for the tourism industry. The measures that have been applied in a phased manner have halted the economic activity as a result of which the tourism industry appeared to be the biggest loser of the crises (Gössling, Scott, & Hall, 2020). The World Travel and Tourism Council (WTTC) research reveals that because of COVID-19 global travel and tourism industry suffered a loss of almost \$4.5 trillion. The pandemic has also affected allied industries that are directly or indirectly linked to the tourism sector such as hospitality, transport, accommodation, etc.

The world is witnessing profound changes in people's behavior, attitudes, and economic life (Ahmed, et al., 2020; Faulkner, et al., 2020). The COVID-19 has changed people's attitudes towards life and shaken people to their core. People become more responsible towards their health and well-being during the pandemic. Amid the crises, economic fall, dissatisfaction, and social discontent there is risen in people's interest towards relaxing mind, body, and soul within tourism (Koncul, 2012). Most of the studies mentioned that wellness is going to be a top priority in post-corona travel (Samarathunga & Gamage, 2020; Wen, Kozak, Yang, & Liu, 2020)). Before the pandemic arose in 2020, people during their travel increasingly started turning towards health and wellness activities especially tourist activities to achieve health (Csirmaz & Peő, 2015). International tourists were coming to India for tried and tested healthcare remedial AYUSH medicines before the pandemic.

Even though medical and wellness tourism was one of the fastest-growing sectors in the tourism industry in India and has gained so much importance in the recent past the pandemic

has not spared it. The year 2020 and 2021 has raised many questions about how to relaunch and rebuild tourism industry in post-pandemic time but less emphasis has been given on rebuilding the medical and wellness industry. This study aims to reduce this gap.

The study contributes to the existing literature by addressing two important concerns, first, it discusses the opportunities and challenges of health and wellness tourism in India in the post-pandemic era; and second, to identify the potential of the Indian wellness tourism industry and government initiatives to develop the health and wellness sector in the post-pandemic period.

Concept of Health, Medical and Wellness Tourism

Health tourism has two major subcategories – wellness and medical tourism (Mueller & Kaufmann, 2001; Voigt, Brown, & Howat, 2011). Medical and wellness tourism is widely explained by the term health tourism. Health tourism is defined as a form of general tourism in which tourists travel to seek specific healing treatments or for enhancing their mental, physical or spiritual well-being (Chang & zee, 2013; Yang, Paek, Kim, & Lee, 2015). Health tourism is traveling to a place away from the residence intending to seek medical services or to improve physical or mental state which leads to consumption of various travel services (Lunt, et al., 2011).

People often get confused between the terms health, medical, and wellness. Sometimes health is used as a substitute for medical whereas sometimes with wellness. But these terms are not the same. Medical tourism is a form of tourism in which tourists travel to another country to cure illness or to access medical treatments (Connell, 2013). Medical tourism is when a person travels to international borders to pertain medical services include, full range of services but it very often includes dental care, orthopedic treatment, cosmetic surgery (Uygun & Ekiz, 2018). Wellness tourism is undertaken by tourists to enhance or maintain their health and well-being through services offered by “wellness centers” (Hritz, Sidman, & D'Abundo, 2014). Wellness tourism is described as a holistic approach that emphasizes tranquillity and restoration or improving the mind, body, and soul (Smith & Kelly, 2006)Some of the desired outcomes of wellness travel are escape, relaxation, self-indulgence, novelty, self-esteem, transcendence, physical health, and appearance (Voigt, Brown & Howat, 2011).

In the discussion of health and wellness tourism, Mueller and Kaufmann (2000) advocate that wellness is pursued by healthy individuals with the primary goal of prevention and cure for those required to be healed. Mueller and Kaufmann (2000) further discussed the complexity of the definition of health and wellness. The authors stated that the usage of the terms varies in

different countries because of different cultural, linguistic, and historic understandings. For instance, in Finnish, no term can simply be translated to wellness, the closest term translates to well-being and in Hebrew, the word “wellness” doesn’t exist and is translated to “health” (Mueller and Kaufmann, 2000). But from a global perspective, the term wellness is widely used. Wellness has a different meaning across different countries and cultures. Malaysian associate wellness with well-being and lifestyle, and also stress release for working-class Their wellness activities are spa, cosmetics and beauty products, body treatments for well-being (Chan, 2007). In some European countries, wellness focuses on spas, physical fitness, air, sunshine, and the sea (Koncul, 2012). In Asian countries, wellness is associated with yoga, meditation, massage as daily wellness activities (Koncul, 2012).

Medical Tourism Vs Wellness Tourism

From the various literature, it is understood that medical tourism and wellness tourism are different from each other. Medical tourism is in which tourists travel to different places for the treatment of various diseases or cosmetic surgery which involves invasive treatment techniques (Global Spa Summit, 2011), on other hand, wellness tourism involves traveling to different places to rejuvenate or to maintain or enhance person well-being using non-invasive techniques or holistic approaches. The below-mentioned figure will differentiate between both medical tourism and wellness tourism.



Source : (Charak, 2019)

Indian Medical and wellness tourism industry: An overview

Potential of medical tourism in India

India is one of the leading and renowned medical destinations in the world (Madhekar, 2020). Developing countries such as Thailand, India, Malaysia, South Africa, Brazil, and South Korea, are popular medical destinations for offering treatment such as cardiac, organ transplant, dental, eye, and orthopedic to overseas with highly skilled professionals and world-class hospitals (Khan, Chauhan, Majeed, & Goyal, 2020). The demand for Indian medical tourism is higher than in many other developing countries (Mishra & Shailesh, 2012). India offers a complete bouquet of healthcare services to medical travelers such as world-class treatment at affordable prices, highly specialized doctors and medical professionals, no waiting period, advanced technology, high-class facilities and offers alternate medical treatment -AYUSH (Ayurveda, Yoga, Unani, Siddha, and Homeopathy). There are 700 plus accredited healthcare providers and hospitals (JCI and NABH) in India (NABH, 2021). The major destinations for medical tourism in India are Chennai, Mumbai, Delhi, and Bangalore. Apollo, Fortis, NH hospital, and Columbia Asia are present all over India (Chakraborty & Poddar, 2018)

Factors leading to the growth of medical tourism in India:

- Highly skilled medical personnel
- Low-cost treatment (20% less as compared to developed nations)
- Advance technology
- High-quality medical services
- Ease of communication
- No language barrier (Soloman, 2011)
- Medical travel along with business and holiday trip

Potential of Wellness tourism in India

India is ranked seventh as a wellness destination in the year 2017 with the expenditure of \$16.3 billion on wellness tourism, which directly provides 3.8 million jobs (Global Wellness Institute, 2018) which is 14% of all employment. India has always been recognized for Yoga, Ayurveda, and meditation and is a preferred wellness destination in the world (Charak, 2019). The Indian Himalayas has become an epicenter of wellness tourism because of its rich culture, diversity, flora and fauna, diverse landscape (Manhas & Kaur, 2014).

One of the most famous groups named the Carnoustie Ayurveda and wellness resorts in India is popularly known for its wellness and Ayurveda resorts in India, particularly in Kerala. Kerala is one such state which has developed an authentic and place-based wellness product and brand.

Two decades ago, Kerala has branded itself as a “land of Ayurveda” (Wayne & Russell, 2020). The backwaters of Kerala are one of the important wellness retreats and attracting tourists from all over the world. Ayurveda is being branded globally as from medication to medicinal services which are resulting in wellness from illness. Because of various wellness offerings such as Ayurveda, yoga, meditation, etc, India could become the pioneer in this field

Research Methodology

The study is based on data collected from secondary sources and through observation to fulfill the stated objectives. The secondary data sources included published articles in journals, websites, newspaper articles, reports, etc. The study begins with the selection of relevant literature from secondary sources. Therefore, literature highlighting the impact of COVID-19 on the medical and wellness tourism industry was identified and studied. Next, identification and study of challenges faced by the tourism industry in general and medical and wellness industry in specific was carried out. Further, the same process was carried out in case of opportunities and government initiatives to rebuild the medical and wellness tourism industry in the post-pandemic era. The aforementioned relevant data sources included research articles and research work published up to the year 2021.

Results and Discussions

Opportunities and Challenges for Wellness Tourism in India: Post pandemic

India is one of the oldest and leading wellness tourism destinations that attract wellness tourists from all over the world (Global Wellness Institute, 2018). The Indian wellness industry was growing at a great pace in pre-pandemic times. The number of wellness tourists arrival in India was 56 million in 2017, out of which 51 percent were domestic tourist arrivals (Global Wellness Institute, 2018). However, the data has been drastically changed because of the covid-19 pandemic.

Like other countries, the Indian government has closed its borders to reduce the spread of the highly contagious virus. The cancelation of flights, restrictions on travel, lockdown, issue of travel advisories are some of the measures taken by the Indian government with immediate effect (Ghosh, Nundy, & Mallick, 2020). The travel restrictions in India during the pandemic made it impossible to travel not just for foreign tourists but for domestic tourists as well. This has drastically impacted wellness tourism in India. The COVID-19 crises have both negative and positive outcomes on wellness tourism globally.

Wellness can open series of opportunities in current tourism, mainly because of its tangible and intangible resources. The wellness industry has witnessed a tremendous shift in post-pandemic times. One such shift is wellness became extremely important (Yeung & Johnston, 2020) because people are now more focused on maintaining their health. The demand for wellness activities is expected to rise in the post-pandemic period. The countries are easing the travel restrictions, people are looking for holidays to benefits from emotional and physical wellness. The risen demand for wellness-focused holidays creates a huge opportunity for wellness stakeholders to develop wellness products.

India is a home to numerous traditional wellness practices such as Ayurveda, yoga, meditation that concentrates on holistic health and well-being in pre-pandemic times and is well-positioned to grasp this demand in the future (Economic Times, 2021). To fight against this deadly disease immune system plays a critical role and to boost the immunity system people are relying on Ayurvedic immunity-boosting measures. Ayurveda is the oldest traditional system of medicine which is accepted worldwide (Jaiswal & Williams, 2017). It was originated in India and is 5000 years old system of natural healing which is traditionally originated from Vedic culture in India. The Ministry of AYUSH, Government of India, 2020 recommended self-care guidelines for preventive health measures and boosting immunity which is supported by Ayurvedic principles and literature. The prime minister of India has also mentioned improving immunity against covid-19 using Ayurveda medicines while addressing the nation. It further led to a surge in demand for Ayurvedic medicines. The COVID-19 pandemic has altered the meaning of health and wellness among people. This creates the opportunity for Ayurveda and wellness tourism to market itself in the post-pandemic period

India being a well-known wellness destination, it still has not fully utilized its potential like its competing Southeast countries (Travel Trends Today, 2021).The pandemic has created an opportunity for India to create its distinguished brand of wellness tourism products. It is the best time for Indian wellness service providers to ensure to hit the reset button and re-strategize to strengthen their competitive capabilities in comparison to their Southeast Asian competitors. To begin, India must create marketing efforts that position the country as a worldwide wellness tourist destination in the post-COVID era. According to the latest report by the Indian market research firm, Numb Research, the Indian (443 million) millennials spend an average of INR 4,000 per month on seeking health and wellness services. (Media India Group, 2021).

Wellness retreats were always there but were known to upper-class people and are more prevalent in international tourists. Thousands of foreigners visit Rishikesh every year just to practice meditation, yoga and stay in retreats (Hindustan Times, 2018). For Ayurvedic purposes, Kerala is the first choice among foreigners in India (Rao, 2007). Wellness tourism was considered a niche concept in pre-pandemic times however, now it becomes mainstream because of drastic changes in people's lifestyles. The wellness segment's growth was hampered in the past because wellness tourism operators focused on international travelers. This created an opportunity for wellness service providers to shift the focus from international tourists to domestic tourists as the number of Indians traveling for wellness purposes is expected to grow in the post-pandemic period. Most wellness and spa centers across the country focused on international tourists, their pricing strategy and packages dissuade domestic tourists. Hoteliers must modify their wellness programs as per the demand of their guests while adhering to pandemic-related safety and sanitization standards. The wellness treatments required close interaction, hotels management needs to implement tougher rules and regulations to protect their customers and staff. The virtual shift is the latest emerging trend during the pandemic, the hotels have options to organize virtual sessions on self-care, immunity-boosting methods, meditations, fitness, etc through their social handles. The data shows that the Indian tourism sector has tremendous potential to develop in the upcoming time as people continuously adapting a healthier lifestyle and looking for a personalized travel experience in the post-pandemic times.

In the post-pandemic era, Indian wellness tourism is expected to face various challenges, the major challenge that India is facing is the lack of skilled manpower in the wellness tourism segment. The unskilled manpower can cause a severe effect on the quality of services provided to wellness tourists. Another challenge for the Indian wellness segment is the lack of awareness about the therapies and benefits of Ayurveda and Yoga. However, people are already much aware of the wellness practices as compared to pre-pandemic times but still, more awareness can be created by organizing virtual programs and online sessions on the benefits of Ayurveda and Yoga.

Opportunities and challenges for medical tourism in India: Post pandemic

India has emerged as a major medical tourism destination and placed as "First World Health Care at Third World prices" (Turner, 2007) The main reasons to undertake medical tourism are low-cost treatments, faster services, and quality of healthcare (Almanza, Julve, Munoz, & Santillana, 2019). India was ranked as the third most popular destination in 2015 with \$3 billion

worth. The country has reported 234,000 international medical tourists on the medical visa in that year (Amiri & Safariolyaei, 2017). The arrival of international medical tourists to India is increasing year by year (Ministry of Ayush, 2019). But the pandemic has changed the whole scenario. As the COVID-19 virus has spread across the world during the year 2020, medical travel was put on hold because of travel restrictions, shut down of countries' borders across the globe. Medical tourism in India faced a direct hit because of restrictions by the government to reduce the spread of covid-19. The continuous rise in covid-19 cases paints a destination in a negative light which can worsen by sensational media reports (Yu, Li, Yu, He, & Zhou, 2020)

Amid the lockdown, top medical destinations cut back on treatments provided by them and using their healthcare resources to curb the infection. Hospitals were functional but were taking emergency cases or indulged in COVID-19 treatment. As traveling is returning to normal, one of the major challenges that medical tourism destinations will face in the post-pandemic era is that medical tourists will not just look for quality and affordability of treatments but also medical destinations that provide safeguard to their health from covid-19 with proper precautions and safety measures. The pandemic has increased the risk of safety, addition to healthcare quality, it is extremely challenging for healthcare service providers to execute the protocols that reduce the risk of COVID-19 infection during the whole journey of medical tourists. This challenge can turn into an opportunity for the Indian medical industry if the healthcare service providers follow proper precautions.

Another challenge faced by Indian hospitals was detecting covid-19 cases in doctors and hospital staff through direct or indirect contact with asymptomatic patients who visited hospitals for some other reasons. This put questions on the safety measures and reputation of hospitals that are JCI accredited and caters to international patients (The Lancet, 2020). The multi-dollar medical industry in India was disturbed by the ongoing pandemic. The pandemic has caused huge losses to the economy as well as the reputation of the country which can be transient or permanent. To rebuild the image, medical service providers must implement standards or best practices for patients' safety and communicate the same with them to build the lost trust.

The Indian medical tourism industry has witnessed a much-needed change in the healthcare system during the covid-19 pandemic. There has been a demand for virtual consultation because of the enforced travel restrictions. As a result of which executive barriers were modified by countries to ensure easier virtual care to patients. Telehealth services are poised to

grow aggressively in upcoming years, allowing hospitals and healthcare institutions to enforce telehealth solutions with the potential to boost medical travel volume. in a post-pandemic period. The Indian government has also issued guidelines to legalize the practice of telemedicine in India.

The things in terms of medical tourism in India are supposed to change for good in the post-pandemic period, therefore, developing various opportunities to rebuild its destination image. India has successfully managed to manufacture its medical equipment, disposable, drugs, and vaccines which made India a global leader. India has not only catered the domestic tourists but also help the other countries in a tough time of covid-19 crises. Furthermore, a large number of hospital staff and doctors are now vaccinated in India which means they are now safe and will not be spreading the infection.

Government Initiatives

The government of India has recognized medical and wellness tourism as one of the important sectors having enough potential to accelerate the country's development in attaining the objective of Aatmanirbhar Bharat. The government of India has recently prepared a national strategy and roadmap for medical and wellness tourism to maintain the country's competitive advantage. The roadmap aims to provide an institutional framework, develop a brand to ensure quality assurance. To promote India as a Medical Value travel, the government of India has set up various ministries which are the ministry of tourism, ministry of commerce, ministry of health, ministry of Ayush, ministry of external affairs, National accreditation board for hospitals (NABH). Each ministry has a separate role to play in promoting medical and wellness tourism.

Currently, India is being promoted under the term Incredible India. The government of India has considered that there is a need of promoting and highlighting wellness offerings of the country. In this respect, in upcoming years India will be marketed under the "Heal in India" brand. It will be considered as a sub-brand of Incredible India on all global media campaigns and digital platforms of ministry.

The government of India's national roadmap mentioned that the previous portal set up by Services Export Promotion Council will be revamped to provide a one-stop solution for international travelers. The portal will help them in all services such as exploring, planning,

booking, etc. It will ease the process of medical booking, payment, and post-operative services for medical travelers.

The government of India has already introduced e-VISA for medical tourists to visit India. The government is aiming to further liberalize to make it more friendly to medical tourists.

The government of India has launched NDHM (National Digital Health Mission) for addressing the country's health emergency. The major components of this mission are telemedicine, health records, health IDs, e-pharmacy, and Digi-doctor services.

Conclusion

To conclude, this study has given an overview of the Indian medical and wellness industry in the post-COVID-19 era. Specifically, this study has focused on the opportunities and challenges of medical and wellness tourism in India in post-pandemic times.

It can be concluded that Indian medical and wellness tourism has great capacities and significant positive components to grow rapidly in post-pandemic times. The identified opportunities can be used by major tourism players and marketers to encourage medical and wellness tourism in India after COVID-19. These can act as a pull factor to attract tourists for medical and wellness purposes in India once the pandemic is over. The study reveals that medical and wellness tourism is expected to rise and recuperate in India after the pandemic because of the level of trust and familiarity with the destination.

The study further discussed the Indian governments' initiatives to rebuild the medical and wellness industry. However, various challenges need to be tackled after COVID-19 as the pandemic has created a negative destination image of India as to date India is being on the second number in covid-19 cases tally. The loss of trust among the travelers can regain by proper marketing and branding wellness products on a global level. Therefore, future research on the study of branding and marketing of wellness tourism in post-pandemic time is recommended.

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