POLICY BRIEF

Medical Tourism in Hyderabad

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Medical tourism is an emerging concept to describe the rapidly growing practice of travelling across international borders to obtain healthcare. India has become a preferred health destination for those who are living abroad and also those foreigners who are looking for a speedy and inexpensive treatment. A study of Medical Tourism was conducted in three cities of Hyderabad, Chennai and Mumbai. The study looks into background characteristics of the foreign tourists seeking medical care, reasons for coming to India for treatment and source of information of foreign tourists to choose India for treatment, details of their medical and travel expenses, their perception about the quality of care, availability of translators, availability of care takers and ethical issues involved in Medical Tourism. This brief focuses on medical tourism in Hyderabad.

Hyderabad is the capital city of Telangana. It occupies 650 sq Km along the banks of the Musi River, in the northern part of the Deccan plateau. It has a population of 6,809,970 with 3,500,802 males and 3,309,168 females, and the sex ratio is 945 females for every 1000 males, according to 2011 Census.

Tourism in Hyderabad

Hyderabad, known as the City of Pearls, has a natural and sophisticated blend of old and new- an old 'Nawabi' culture with a new pro-active approach and hospitality. Hyderabad is home to a mix of Hindu-Muslim culture with a number of monuments of historical importance, including the very famous Charminar. Hyderabad has many tourist attractions, often making it difficult for tourists to set their priorities. Art lovers cannot resist the attraction of a huge repository of antiques displayed at the A.P. Museum, The Nizam Museum and the Salarjung Museum. The Golconda Fort is today very much part of the city, as is Cyberabad, a new local area created to keep pace with the zooming Information Technology and Tourism sector (Department of Tourism, GoAP, 2013).

Hyderabad attracted 150745 tourists in the year 2013. However, figures from the tourism department show that foreign tourist arrivals to the city in the first two months of 2013 fell by 68 per cent as compared to the same period in 2012. While 32,277 foreign tourists came in January and February in 2012, only 10,549 visited the city in 2013, with experts saying they were looking at a very dismal scenario in the aftermath of the Dilsukhnagar twin blasts that left 17 people dead (Rohit, 2013).

Foreign Tourist Arrivals in Hyderabad from 2010 to 2013	
Year	Numbers
2010	294951
2011	231503
2012	223837
2013	150745

Source: Department of Tourism, Govt. of India, 2013
Healthcare in Hyderabad

The Telangana Vaidya Vidhan Parishad is a state government department responsible for administering healthcare in Hyderabad. The corporate sector also started since the 1980s, beginning with diagnostic facilities. Corporate hospitals have come up as chains-Medinova, Apollo, CARE, Medwin, Mediciti etc. They are financed like any other industry with a share from the promoters, banks, financial institutions, public issues. All these hospitals have received subsidies from the government in the form of cheap land and reduced duties on imports of their equipment. Hyderabad is thus served by a variety of health care providers. At the large hospital level, choices available range from the government to the autonomous, Nizam Institute of Medical Sciences (NIMS) to the corporate hospitals of Apollo, CARE, Mediciti, Medwin, etc. (Kennedy, Duggal *et al,* 2009).

As of 2010-11, the city had 50 government hospitals, 300 private and charity hospitals and 194 nursing homes with around 12,000 hospital beds. For every 10,000 people in the city, there are 17.6 hospital beds,

9 specialized doctors, 14 nurses and 6 physicians. The city also has about 4,000 individual clinics and 500 medical diagnostic centers, which are preferred by many residents. Despite a high proportion of the city's residents (24%, according to a National Family Health Survey in 2005) being covered by government health insurance, only an estimated 28% of the population uses government facilities, mainly because of their distance, poor quality of care and long waiting periods. As of 2012, many new private hospitals of various sizes have opened or are being built (GHMC, 2011).

Medical Tourism in Hyderabad

Hyderabad medical tourism has become quite a success owing to the presence of many world class hospitals and experienced doctors. The city is also well connected to all the major air hubs and is thus easily accessible to tourists from all over the world. In Hyderabad, one can get world class medical services at affordable rates. The hospitals are well equipped with modern amenities and medical professionals who are highly qualified. The hospitals employ qualified translators so as to ease the language troubles faced by the visitors. There is no waiting period in the hospitals as one can get treatment immediately. Hyderabad also has outpatient and inpatient facilities that use Unani, Homeopathic and Ayurvedic treatments (GHMC, 2011). Moreover, Hyderabad has many tourist spots so that the medical tourists can combine medical treatment with holiday trip.

Hyderabad receives patients from Arab and African countries and also non-resident Indians from the developed world with a majority of the international patients finding the services provided in the hospitals very good. An easy availability of certified drugs and medicines at comparatively low costs can also be a reason behind a large number of international patients coming to Hyderabad (Shaikh and Khan, 2006).

Most of the hospitals in Hyderabad are accredited by National Accreditation Board for Hospitals and Healthcare providers (NABH), International Organization for Standardization (ISO), Joint Commission International (JCI), National Accreditation Board for Testing and Calibration Laboratories (NABL) etc. Hospital accreditation is a type of quality assurance process under which health services provided by hospitals are evaluated by an external body for determining whether applicable standards are complied with. An accredited hospital raises the confidence level of the patient.

Key Issues

The study attempts to examine the reasons why foreign patients are coming to Hyderabad for treatment, and also looking into their travel and medical expenses are examined. The perceptions and satisfa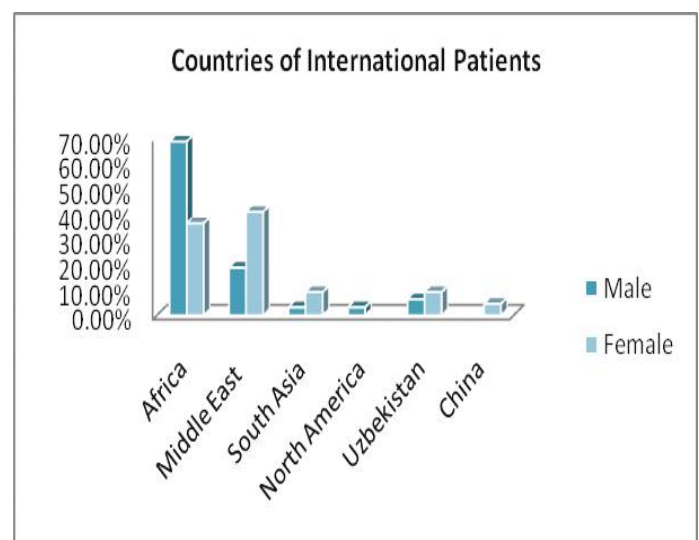ction levels of international patients regarding the quality of care and rapport with doctors and the staff in the hospital are also explored.

Interms of methos used for the study include a sample of 54 medical tourists availing treatment in seven hospitals in Hyderabad. The sample respondents were from world class hospitals like Basvatarakam Indo American Cancer Hospital and Research Institute, L.V. Prasad Eye Institute, Krishna Institute of Medical Sciences, Kamineni hospitals, CARE, Continental hospitals and Asian Institute of Gastroenterology.
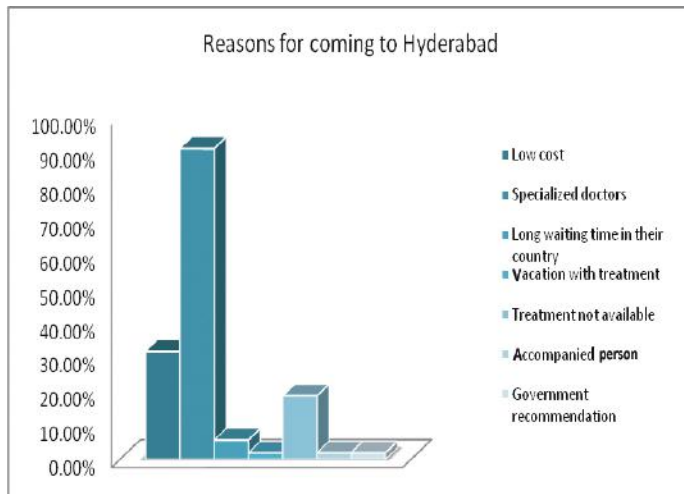
Major Findings

The respondent's profile revealed that the medical tourists were from all age categories with more males (59.3%) coming to Hyderabad than females (40.7%) for medical treatment. The educational status of respondents shows international patients are distributed across various levels of education with more female illiterates. The data regarding gender and education of the international patients across the three cities of Hyderabad, Chennai and Mumbai show the same trend.

The number of international patients were more (55.6%) from Africa out of which 22 (73.3%) were males and 8 (26.7%) females, followed by 15 (27.8%) from Middle East countries (40% males and 60% females).Comparing the data from the three cities, more patients were from Africa in Hyderabad, while in Chennai and Mumbai, more patients were from Middle East countries. The international patients come for treatment of many different kinds of health problems rather than any single type of procedure. The sample included 13 (24.1%) patients for cancer treatment, 22.2% for cardiac treatment, 11.1% patients for treatment of gastro intestinal problems and 9.2% each for treatment of neurological and ophthalmic problems. Chennai and Mumbai had more number of patients coming for cardiac problems.

Most of the patients (90.7%) had chosen to come to Hyderabad for treatment due to the doctor's specialization though low cost of treatment is also a reason for few (31.5%) of the international patients and they had been suggested by their friends and relatives about the hospital. Moreover, 85.2% of the respondents opted to come to Hyderabad for treatment due to the non-availability of specialists for problems faced in their country. Specialization of doctors seems to be the main reason for choosing India for treatment followed by low cost of treatment which is evident from the data across the three cities.

Reasons for coming to Hyderabad

In Hyderabad though many of the international patients did not face any problems in getting visa, almost all the patients were of the opinion that getting visa to India was a lengthy process and could be frustrating for patients, particularly those with serious health problems. The patients felt that the staff at the embassy should be a little more compassionate with people seeking visa for treatment purpose. A few felt that it was very difficult to get medical visa. If the visa is urgent they charge double the money. A few of the patients, therefore, prefer tourist visa. A few had come with both medical visa and tourist visa for the attendant/s. All study hospitals reported that they had helped the foreign patients in arranging for visa and passports.

The findings show that very few had health insurance coverage and most of the patients (88.9%) coming to Hyderabad were self-supported. And out of the remaining patients, who had come with insurance, would have come even without insurance. Like Hyderabad, Chennai also had more patients without insurance while in Mumbai more than half of the patients had insurance. However, it was found across all the three cities, that, those who had come with insurance would have anyway come to India even without insurance coverage.

Medical Tourism combines medical treatment with tourism. However, for many of the patients (61.1%) in the study, travelling was not an important aspect during their stay in Hyderabad. This was also found in both Chennai and Mumbai.

The patients who gave information about their treatment cost, spent US$ 5931.99s on an average, ranging from a minimum of US$ 29.91 to a maximum of US$ 23000. The expenditure for the foreign patients of Hyderabad was less as compared to Chennai and Mumbai. The expenditure, however depends upon the type of health problems and duration of stay in the hospital.

Since most of the international patients in Hyderabad were from Africa and well versed in English, they did not face any problem with language. And those having some problem were provided with interpreters by the hospital though few complained that interpreters were not always available since there was only one interpreter in most of the study hospitals. Similarly, language was not a problem for more patients both in Chennai and Mumbai. And those having some problem were provided with interpreters by the hospital.

Most of the patients were satisfied with the hygiene and cleanliness at the hospital, but according to few there was still scope for improvement. The cleaning staff continuously clean within the hospital premises. This was also found in all the study hospitals in both Chennai and Mumbai.

The satisfaction level of international patients with the quality of care and relationship with doctors and staff of the hospital is an important parameter that influences the success of Medical Tourism. Almost all the international patients coming to Hyderabad for treatment were satisfied by their overall experience in the hospitals. In few of the hospitals visited for the study like Krishna Institute of Medical Sciences and CARE, the patients are picked up from the airport and everything is taken care of by the hospital staff. These two hospitals along with Continental and Asian Institute of Gastroenterology also had special wings for international patients with staff specially trained to deal with the foreign patients. After the treatment, the hospital also makes sure that the patients return to their home country safely. A majority of the patients (94.4%) did not face any problem, while getting admitted. Most of the patients (98.1%) found the staff in the hospital friendly, courteous and helpful. All the patients who had undergone surgery were satisfied with the surgical procedure. A few were waiting for surgery and in a few cases, surgery was not required. Almost all the patients (94.4%) were satisfied with the doctors. Medicines prescribed by the doctor/s were provided to the patients from the hospital. Accommodation was arranged by the hospital for majority of the patients (94.4%). The international patients in Chennai and Mumbai were also satisfied with the quality of care and relationship with doctors and staff of the hospital.

Though most of the hospitals had special dietary services for international patients, many of the patients (64.8%) in Hyderabad were not satisfied with the food provided in the hospitals. They found it too spicy and hot. However, the international patients in Chennai and Mumbai were satisfied with the food provided in the hospital.

that are continuously upgraded and internationally recognized and highly qualified medical professionals and skilled health staff, Hyderabad has great potential to attract more and more international patients for medical treatment. A new medical visa is issued to international patients coming to India for treatment which is a lengthy process. Policy is required to ensure a speedy
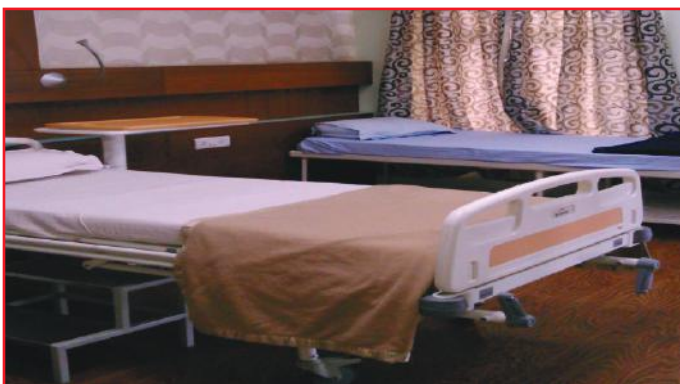
Photographs of the International Patient Wing at Basavatarakam Indo American Cancer Hospital and Research Institute
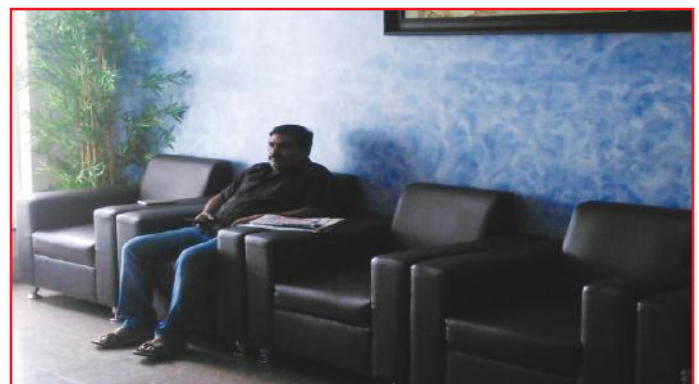

Help Desk

Waiting Lounge

Rooms for International Patients

International Patients Wing

Depending upon their satisfaction level, the patients were willing to come even for follow up check-ups, if necessary. Almost all the patients (98.1%) were sure that they would come to the same hospital if they required any treatment in the future. They would definitely recommend the hospital and doctors to their friends and relatives (98.1%). A few had already told their friends and relatives about the hospital. This trend was also found among the international patients in both Chennai and Mumbai.

visa clearance and immigration by developing simplified systems of getting medical visas. Visa can also be extended depending on the condition of the patients. International standards and accreditation is important for medical tourism as patients may not travel to other countries if the facilities are not properly maintained and the quality of care is poor. If India has to become a world player in medical tourism industry, public and private health sectors and voluntary organizations should create a congenial atmosphere for the growth of medical tourism.

Way Farward

The future of medical Tourism in Hyderabad seems promising. With the availability of world class facilities in private hospitals