

AYURVEDA BASED WELLNESS TOURISM, AN INNOVATIVE OPPORTUNITY FOR ENTREPRENEURS- A CASE STUDY OF KERALA

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ABSTRACT

Wellness Tourism is a growing niche segment in the tourism industry. Wellness tourism is travel undertaken by tourists with the key purpose of maintaining or enhancing one's personal well-being. Destinations such as India have been conventionally associated with wellness. India is one of the most popular healthcare destinations among the South-Asian countries. According to the current estimates of Ernst and Young, Indian wellness industry is projected to grow at a CAGR of almost 12 per cent for the next five years and is estimated to reach Rs.1.5 trillion by 2020. India as a tourist destination has been a trend for American tourists seeking serenity and spiritual growth. Over 20 million Americans and more than a quarter of a billion people worldwide now practice yoga. Wellness tourism accounts for 14% of all domestic and international tourism expenditures. Today, Kerala is the most acclaimed tourist destination in India with its Global super brand 'God's Own Country' and is continuing as one of the leading tourist destinations of South Asia. The tourism campaign Kerala- God's Own Country was adopted in its tourism promotions and has become identical with the state. Kerala's tranquil climate, natural profusion of forests (with a wealth of herbs and medicinal plants) and the cool monsoon season (June - November) are appropriate for curative and restorative packages. Wellness tourism has many exciting prospects for entrepreneurs. In order to cope with the growing demand for wellness, resorts, hospitals and medical practitioners, Government have taken sufficient measures to promote alternative health care in Kerala. This paper scrutinizes the diverse factors that contribute to Kerala's strength as a preferred destination for Ayurveda based Wellness tourism.

KEYWORDS: *Wellness Tourism, Wellness Travellers Entrepreneurship, Ayurveda.*

Introduction

The terms health tourism, medical tourism and wellness tourism are used interchangeably. However, medical tourism is normally used for health tourists taking medical treatment like surgery, hip replacement etc; in multispecialty hospitals. Wellness tourism is related with fitness and alternative therapies for health maintenance and healing. It includes treatment regarding rejuvenation of body, mind and soul through herbal massage, yoga and meditation. Generally most of the folks tend to think that wellness holiday comprises imposed exercise, strict diets, or activities that may not be of their interests. However, things have changed a long way since then. There are adequate numbers of wellness retreats offered by Ayurvedic retreats or five-star resorts that allow guests to select what they want. There is a wide array of options available for wellness holidays - from rejuvenation to de-stress to detoxification, which is based on one's individual preference. Although wellness tourism is a relatively new niche segment within the global travel and tourism industry, the practice of wellness-focused travel is not new.

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While tourism authorities tend to focus on inbound, international travelers, domestic wellness tourism is actually significantly larger than its international equivalent-representing 84 % of wellness tourism trips and 68 % of expenditures. Wellness travellers expend 130 per cent more than the average traveller. International inbound wellness tourism represents a \$139 billion market. The Wellness Tourism niche encompasses 15 per cent of global travel. According to reports, Indians made 56 million wellness-related trips, both domestic and international; in 2017. Wellness tourism is a USD 439 billion industry worldwide within the USD 3.2 trillion global tourism industry, representing 14 per cent of all tourism spending.

It is evident that wellness tourism is growing globally with 6.5 per cent annually and it was worth US\$639 billion market in 2017. According to Global Wellness Tourism Economy report given by Global Wellness Institute, this niche sector is predicted to grow even faster through 2022 (7.5 per cent yearly), to reach US\$919 billion, It is directly responsible for 11.7 million global jobs, which deliver US\$1.3 trillion in global economic impact. And let's not forget that wellness tourists spend, on average, 130 percent more than the average global tourist! While Europe and North America dominate this market for now, over 50 percent of the projected growth in wellness tourism through 2017 will come from Asia, Latin America and the Middle East/North Africa.(Akshay Kumar, 2019)

As the birthplace of yoga, meditation and Ayurveda, India is one of the world's true wellness Meccas and an ideal place to explore its ancient roots. "India's wellness offerings are very understandable - they have yoga, meditation and Ayurveda.

An international wellness tourist spends 65 % more per trip than the average international tourist; the domestic wellness tourist spends about 150 % more than the average domestic tourist.

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Kerala is one of the best places for Ayurvedic treatment on the earth. It can easily be called the only place that has an unbroken tradition of Ayurveda. This is almost 500 years old system of curing or healing continued to flourish over the centuries and this is all because of the geographical factors that affect this place. It has become an indivisible part of wellness tourism. Kerala is renowned for its therapies in standard medicines across the world. It also offers homeopathy, Ayurveda, Yoga, Naturopathy and other curative procedures.

Significance of the Study

The new trend among people is to travel for healthcare. Health conscious people prefer to travel across healthcare destinations. Through health tourism one can enjoy the beauty of flora and fauna, cultural programmes etc; of the healthcare destinations in addition to medical treatment. The slogan of health tourism is 'First world treatment at Third world prices'. Kerala has emerged as the most acclaimed tourist destination in the country. Beaches, warm weather, back waters, hill stations, water falls, wild life, Ayurveda, art forms, festivals and the diverse flora and fauna make Kerala a unique destination for tourists. Kerala has world class medical infra structure and can provide quality healthcare about 10% of the cost of the same procedure in the US or UK. Even on the domestic front, cost of treatment in Kerala will only be about 60% as compared to the cost of other healthcare destinations in India like Mumbai, Delhi and Chennai. Kerala is blessed with health tourism resources. To tap the opportunities in health tourism it is high time to identify health tourism resources and ensure its optimum utilisation. The study focuses on service quality maintained by health tourism providers of Kerala. It emphasizes on striking opportunities for entrepreneurs in wellness tourism sector in Kerala.

Operational Definitions of the Terms Used in the Study

Wellness tourism involves people who travel to a different place to proactively pursue activities that maintain or enhance their health and wellbeing, and who are seeking unique, authentic or location based experience/therapies not available in the home country

Wellness tourists are those persons who travelled to a wellness tourism destination with the prime objective of obtaining healthcare treatment. This study considers only foreign health tourists. Leisure tourists who had availed Ayurveda spa is also considered as health tourists in this study.

Review of Literature

Trivedi Rohit H (2005) opined that many foreign countries have begun looking to India for understanding the Ayurveda and incorporating it through education, research and practice to meet the overwhelming desire of consumers to access complementary and alternative medicine .P.N. Hari Kumar

et.al (2007) examined the impact of Ayurvedic rejuvenation in promoting backwater tourism and found that there is significant impact of the introduction of Ayurveda centres on attracting more tourists into the backwater spots than before introducing this facility. Dr. Azad Moopen (2007) opined that apart from the sea, the mountain and the rivers in the backdrop of the lush green vegetation, Malabar (Kerala) has its own ingredients for tourism development, which are not effectively utilised. An example of the utilised potential of Malabar is Kottakkal Arya Vydyasala, which is the bench mark for Ayurveda in India. Even without promotion Kottakkal is well - recognised healthcare destination both for domestic and international tourists.

Research Objectives

The study also analyses the service quality maintained by health tourism providers as it is one of the competing factors which contributes to the emergence of Kerala as one of the top health tourism destinations in the world offering innovative opportunities for entrepreneurs.

Objectives of the Study

- To evaluate the health tourism resource potentials of Kerala.
- To identify the innovativeness of Ayurvedic wellness sector for the budding entrepreneurs.
- The study is carried out with an objective to analyze the strength, weakness, opportunities and threat of Ayurveda wellness industry in Kerala in order to identify the competitiveness of the destination for undertaking entrepreneurial activities.
- To evolve a model for developing opportunities for entrepreneurs in Ayurvedic wellness sector in Kerala.

Scope of the Study

This study focuses on the potentials of health tourism in Kerala by evaluating healthcare resources and tourism resources. Health Care resources include organisations providing healthcare treatment like multi-speciality hospitals, Ayurveda hospitals, health resorts and medical infrastructure like sophisticated equipments, medical professionals and variety of treatments provided etc. If the expectations of tourists are met, more and more tourists will be attracted to Kerala by which the state can emerge as a health tourism destination. The scope of the study is limited to the entrepreneurial opportunities in Kerala especially in Ayurvedic sector.

Research Methodology

The study conducted is based on descriptive and exploratory research. Data is collected through both primary and secondary sources. Interview is the method employed to collect primary data. And secondary data is obtained from sources like books, newspaper articles, magazines, websites and related journals. SWOT Analysis is done to identify the destination competitiveness that it offers the investors to start - up business in the Ayurveda wellness sector in Kerala.

Wellness Tourism in India

The potential of wellness systems, developed through centuries of wisdom of this ancient civilization would be fully tapped. This is being done by positioning India as a centre of Ayurveda, Yoga, Sidha, Naturopathy, etc. together with the spiritual philosophy that has been integral to the Indian way of life. Over 20 million Americans and more than a quarter of a billion people worldwide now practise yoga. That is more than the populations of the UK, France, Germany and Italy put together. Mushrooming of wellness centers in the country have given rise to the concern for quality service. The Indian wellness sector especially the ayurvedic segment generates several business opportunities for existing and aspiring entrepreneurs and franchisors interested in this particular segment for establishing their careers. (Bureau, 2018)

There are numerous examples of Indian-based hotels and resorts driving the growth of spa and wellness travel, such as Taj Hotels, Resort and Palaces, Oberoi Hotels and The Leela Palaces, Hotels and Resorts, all well-established, growing, high-end hotel players with a strong spa component that incorporates India's unique cultural and wellness heritage. Destination spa properties like Ananda in the Himalayas and Soukya also bring a great deal of global attention to the country and India's spa industry, winning many awards and attracting high-profile international guests. Kaya Kalp Spas, located in numerous high-end Indian hotels, are growing fast and should continue to thrive. All of these brands have a powerful opportunity to not only expand into more properties, but also to extend their strong brands into products and other wellness related businesses.

Ayurveda based Wellness Tourism in Kerala

Ayurveda wellness tourism is growing exponentially year by year. This segment is expected to cross the \$5 trillion mark globally by 2050. With high quality healthcare, state-of-the-art hospitals with internationally experienced and qualified clinicians and substantial cost saving, India, especially, Kerala is well equipped to ride this health wave. One such segment that is gaining rapid popularity among the health-conscious population of our nation and different international countries is Ayurveda segment. Kerala is recognised for its healthcare standards by world bodies such as World Health Organisation and has some of India's most outstanding Ayurvedic physicians and hospitals. In other words, Kerala is considered as Ayurveda Tourism destination in India and has been growing spontaneously. (Padmasani & Remya, 2015). Ayurveda is a holistic system of healing that has a tradition of 3000 years old. Kerala and Ayurveda are tantamount to each other, as it is the only place on earth where Ayurveda is practised with absolute authenticity and dedication. Ayurveda wellness tourism is another form of wellness tourism, which is described as holiday trips taken by healthcare seekers mainly for the betterment of their health and wellbeing. Its main motive is to focus on the leisure and quality treatment of their clients, especially their foreign clients. Ayurveda treatment generally takes a long time to show its results while treating certain chronic diseases. Ayurvedic treatment is primarily offered during monsoon months of June, July and August. (Swain & Sahu, 2012)

Ayurveda have no side effects as only natural therapies are used for the treatment. It is an alternative system of medicine providing treatment for all psychological and physiological diseased conditions. It is safe, natural, highly effective and affordable system of restore and maintains health and happiness of the mind and body. Every year, many people from western countries fly to countries like India and Sri Lanka, to get the experience of Ayurvedic treatment.

Ayurveda, practised in Kerala in its traditional and authentic form, has been a major attraction for tourists. The private players and the government has planned to leverage its healing and curative aspects, along with its wellness system, to encourage tourists during the monsoon season. Ayurveda offers solution for almost all health problems such as autism, Alzheimer's, migraine, diabetes, slip disc etc. The Western Ghats being a treasure trove of rare medicinal herbs have always evoked interest among botanists. 'Agasthyakoodam' peak which is situated near Trivandrum is the home to some of the rarest medicinal herbs that is believed to be the abode of Sage Agasthya of Indian mythology. One of the eight biodiversity hot spots in the world, the Western Ghats has become a happening theme in Kerala Tourism's campaign. Kerala is funding heavily on ayurveda and has come up with many an innovative plans to provide world-class Ayurveda facilities and services for visitors.

The Tourism Department has classified ayurvedic institutions as 'Green Leaf' and 'Olive Leaf' and these 'Kerala Tourism approved Ayurvedic Centres will ensure authentic ayurvedic rejuvenation programmes. (PTI, 2013) Kerala received 94 lakh domestic visitors last year, while number of foreign tourists stood at eight lakh. A majority of tourists from Germany, the Middle East and Australia cited Ayurveda as one of the most compelling reasons for them to make a trip to Kerala. Ayurveda of Kerala is typically wellness oriented and many people opt for it for rejuvenation and relaxation and not just for curing physical ailments and it is this wellness element in ayurveda that Kerala will be aiming to exploit in drawing more tourists to this beautiful southern State of India.

Opportunities for Entrepreneurship in Ayurveda based Wellness Segment in Kerala

People have always travelled for health reasons. Entrepreneurship in the tourism and leisure industries is not new. Wellness Tourism adds a further dimension and provides an opportunity for some unique and specialised business ventures to be created. This new wellness tourism mainly involves private Ayurvedic hospitals, clinics or private health care providers that rely on the number of fee-paying patients to support and fund their functions.

The characteristics of the 'new' wellness tourism are very much like those for international business. Firstly, international business involves financial transactions across the borders of two or more countries. With transactions across borders, there would be country issues and differences that emerge. These can include differences in cultures, religions, attitudes, behaviour, legal systems and resources. As the price of healthcare increase in western nations, many of their citizens look overseas for healthcare treatment and rejuvenation. Private sectors and governments are also following such developments with interest.

In addition to just providing health care services, many such Ayurvedic health or medical-related packages provide additional leisure and recreational activities that are included in the price of the package. This is where entrepreneurs can create novel group travel packages to accommodate the requirements of the wellness tourist and their accompanying family and/or friends.(JACOB AND ROBINET, 2008).

For accommodation providers, there is opportunity to provide medium term accommodation packages and facilities for tourist who need to get better sufficiently before flying back to their home country. The average tourist may only stay of a few days whereas a wellness tourist is likely to stay for a week or more, especially if they are provided with the incentive to stay and it is affordable. Therefore, the wellness package can be very attractive to the health tourist. The promotion of Ayurveda in health tourism started in 1994 and the Kerala Tourism Development Corporation (KTDC) started Ayurvedic health centers in its premium properties like Hotel Samudra, Kovalam, during the same period. KTDC has tied up with the most reputed Ayurveda treatment providers and hence the authority of doctors and the quality of the medicines used are not compromised. While all the hotels and resorts in Kerala have now started including Ayurveda in their services, there are some resorts, which are exclusive for Ayurvedic treatments.

The growing fascination for Ayurveda, encouraged the private sector to enter in the wellness sector in a big way, as is evident from the number of spas, hotels and resorts coming up in Kerala. Pankajakasthuri, Kottakkal, Kairali, Shanthigiri and Vaidyaratnam are the major private organisations in the Ayurveda sector. Kerala Tourism has introduced the "Green Leaf" and "Olive Leaf" grading for Ayurvedic institutions in order to ensure quality service.

Kairali has won the Winner of World Travel Awards 2015, the "Oscar" Of The Travel Industry! It has been awarded as "India's Leading Spa Resort" at the World Travel Awards 2015, held at Grand Stanford, Hong Kong. It has also won for "Entrepreneurial Excellence for AYUSH Leadership". AYUSH stands for Ayurveda, Yoga and Naturopathy, Unani, Siddha and Homoeopathy.

SWOT Analysis of Ayurveda Tourism in Kerala

<p>Strengths</p> <ul style="list-style-type: none"> • World class Ayurveda wellness facilities at affordable costs established at aesthetic locations. • Ayurveda & spa available in all major resorts of Kerala. • Tourists are welcomed as 'guests' and made to feel comfortable. • Best performing State in Ayurveda tourism. • Knowledgeable and expert Ayurveda physicians. • There is no compromise on the quality of Ayurvedic medicines 	<p>Weakness</p> <ul style="list-style-type: none"> • The positive awareness and remedial therapies of Ayurveda has not yet spread globally and other parts of India to the full extend. • In case of need to be exported, many countries impose regulation of a certification regarding non-existence of metals in medicines. • The forged agencies cheat tourists which spread wrong message about Ayurveda. • Improper and Unscientific waste management system and pollution control.
<p>Opportunities</p> <ul style="list-style-type: none"> • More avenues for setting up of stress management and holistic treatment centres. • A website about Ayurveda wellness tourism facilities in Kerala monitored by Government. • Arranging International Ayurveda wellness expos in Kerala annually. 	<p>Threats</p> <ul style="list-style-type: none"> • Commercialization of Ayurveda health care. • Threat on medical system due to over emphasis on wellness tourism. • Costly Ayurveda health packages. • Loss of rare medicinal herbs due to ecological factors • Travel agents emphasises more on massages in Ayurveda than its other aspects. .

Suggestions and Conclusion

The above SWOT analysis on Ayurveda Wellness Tourism in Kerala helps in determining the potentials for entrepreneurship in Ayurveda wellness segment in Kerala. The efforts of various stakeholders have resulted in attaining global recognition for its system of medicine. Ayurveda is a significant money earner for Kerala tourism as it has been a key to a substantial increase in the number of visitor arrivals in to the state. The state offers favorable climate for Ayurveda and spa related activities. In order to attract fresh start ups in Ayurveda wellness tourism, the Kerala tourism board and the state government addressed many challenges like bringing in state- of- art quality control standards and standardisation in the ayurvedic treatments delivered in the state to cope with the demands of modern times. Kerala offers tremendous opportunities to undertake entrepreneurship in the field of Ayurveda health care. The Confederation of Cochin has provided strong impetus to entrepreneurship in the Ayurvedic sector through a contest entitled Ayurstart 2018. (Karai, 2019)

From Business perspective, Ayurveda generates a sum of above \$20 billion in the global market and is the fastest growing market in Kerala. (Warsi, 2019) Therefore Kerala has the potential to tap investment from various organizations and encourage people to start new ventures in this field. It is recommended that condition for Telemedicine and E-Medicare in Ayurveda wellness centers could be a successful factor for attracting more international health tourists as it may be highly beneficial by providing an increased access to health care, extended employment of specialized expertise and speedy availability of patient records. Communicating these technologies in Wellness centers may help to increase follow up advice for patients, prevention of complications/side effects and post treatment care.

IBM is one such platform to showcase the strength of Ayurveda before the business and entrepreneurial community and take it to the global level. We invited entrepreneurs from all across the world to leverage Kerala's unique strengths here. KSIDC would come up with a comprehensive plan to promote the sector with inputs from the IBM," she said.

Achieving quality is another key to Kerala's competitiveness apart from a competitive pricing strategy. The ability to accomplish global standards and steadily deliver high quality products and services are major success factors in the promotion of Kerala's Ayurveda products in the international market. Kerala continuously organizes road shows all around the world, as part of its marketing strategy for the promotion of Ayurveda along with modern medicine. It is essentially important to create confidence in the Ayurvedic products Kerala offers. There is a greater awareness and tour operators have realized that delivering quality translates into enhanced business efficiency, reducing operating costs and increased profits. Growth of ayurveda would mean the use of indigenous knowledge systems for creation of jobs and wealth. It has significant multiplier effects in the area of tourism, agriculture, manufacturing and education.

Conclusion

Kerala is the foremost state in India that realized the potential of Ayurvedic health tourism and has widely marketed it throughout the state. The destination has established itself as the 'Wellness Capital of Asia'. It was understood that the consciousness about Kerala and the Ayurveda based wellness therapies were much higher (over 80%) amongst the international tourists and almost all expressed their optimistic intention to visit the destination again and to practice and continue the therapies and diet. About 10-12 years back, Kerala started with the task of promoting Ayurveda on a larger scale. It is estimated that about 30% of the foreigners coming to Kerala avail themselves to Ayurvedic care and about 40% of the State's tourism revenue is generated from the same.

The destination in wellness tourism is often a substitute space in which one can engage in self analysis without the stresses and distractions of home as well as work place. Wellness tourism has become the niche for foreign revenue generation as there is an increasing trend in the number of visitors to Kerala as wellness seekers. The study exposes that the most favourable factor for Kerala to emerge as the International Wellness Hub is its legitimacy and rich Ayurvedic heritage with comprehensive attractions. The massive scope and growth of alternative health tourism provides a great opportunity for Entrepreneurs to commence Ayurveda based healthcare establishments in the state to tap the potential of international patient market.

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