



Review Article

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SIDDHA AND WELLNESS TOURISM: OPPORTUNITIES AND CHALLENGES FOR “BRAND TAMILNADU”

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ABSTRACT

Rising health awareness among world travelers and tourists have changed the Global Tourism Industry sharply in the past decade. The concept of getting tired after a vacation due to drinking alcohol, over eating, and late night sleeps is losing its fame and there is a huge rise in health consciousness among the Tourists all around the world. Increasing popularity of alternative medicine and traditional healing systems, especially ayurvedic massage and treatments have positioned India as a favorable destination for wellness and health care in the global scenario. Though Tamilnadu have positioned itself as number one destination for medical tourism, its role with reference to its capabilities on offering traditional healing systems is minimal. Being the homeland for Siddha - one of the world's traditional healing systems there is an opportunity for the state to tap this growing market segment. This article is an attempt to unravel the issues and prospects of siddha and wellness industry in the state and to outline strategies for marketing 'Brand Tamilnadu' as the ideal destination for siddha and wellness tourism. Projecting the Brand image of Tamilnadu as a land of Siddha and wellness destination is essential and it is necessary to grab the world's fastest growing wellness tourism segment. Proper policy framework, developing adequate infrastructure and professional marketing are required to be initiated to benchmark Tamilnadu as a Land of Wellness.

Keywords: Wellness Tourism, Siddha, Yoga, Destination Image Building, Brand Building, Tamilnadu Tourism, Traditional healing systems

INTRODUCTION

Tourism is an important, even vital, source of income for many countries. In 2013, Travel & Tourism industry's total contribution to the globe hike to 9.5% of global GDP (US \$7 trillion), not only outpacing the wider economy, but also growing faster than other significant sectors such as financial and business services, transport and manufacturing. In total, the travel and tourism sector contributed nearly 266 million jobs in 2013 - 1 in 11 of all jobs in the world¹.

Tourism Industry is one of the emerging service sectors in India and economically important because it contributes a remarkable share towards the nation's GDP. According to the WTTC, Travel and Tourism Economic Impact - India, 2014, the sector has the capacity to create large scale employment both direct and indirect, for diverse sections in society, from the most specialized to unskilled workforce². It creates job opportunities and thus alleviates poverty. Countries like Coasta Rica, Belize, Singapore, Thailand, Hong Kong, Malaysia and several others have set their traditional economy on modern pattern through developing tourism as a measure of regional development³.

WTTC calculated that the total contribution of tourism to GDP was 990.3 billion US Dollars in 2013. It directly supported 100,894,000 jobs, which is 3.4% of the World's total employment. It contributed 8.9% of the world employment directly and indirectly in the year of

2013². In India, the total contribution of Travel & Tourism to GDP was INR 6,631.6bn (6.2% of GDP) in 2013 and is forecast to rise by 7.3% in 2014, and to rise by 7.0% pa to INR 13,983.0bn (6.8% of GDP) in 2024. "Medical tourism", a subsector of Indian Tourism is growing at an estimated rate of 30% annually to reach about 95 billion INR by the end of 2015^{4,20-22}. Though several Asian countries like Singapore, Malaysia and Thailand offer medical and wellness tourism facilities, India's offers a unique holistic wellness tourism service which is a combination of traditional healthcare therapies like Ayurveda and Yoga with allopathic treatment⁴. This uniqueness gives India an advantage over other competitors in this niche market and it is essential for the country to increase the awareness of its traditional healing systems to become the top player of wellness tourism Industry.

Literature Review

After the World Health Organization's (WHO) recommendation to practice the traditional system of medicines as it is safe, affordable, and culturally acceptable⁵, alternative medical systems have come under the limelight of people seeking cure for sickness and wellness.

Traditional system of medicine (TSM)

Traditional medicinal system is often termed by modern scientist as, "alternative", "non-conventional" or

“complementary” medicine⁶. But all native medical systems including Indian Ayurveda, Yoga, Unani, Siddha, Naturopathy and Homoeopathy are commonly termed as “Traditional medicine”. Practice of traditional medicines is highly influenced by factors like history, civilization, culture, and philosophy. The Traditional Medical systems are considered to be safe because of its long historical use, including experience passed on from generation to generation^{7,23}.

Traditional Medicine

WHO defines traditional medicine as “including diverse health practices, approaches, knowledge and beliefs incorporating plant, animal, and/or mineral based medicines, spiritual therapies, manual techniques and exercises applied singularly or in combination to maintain well-being, as well as to treat, diagnose or prevent illness”^{6,23}.

History of traditional medicine

Traditional medical systems have been practiced for thousands and thousands of years all around the world⁸. Fossil records prove that Herbal Plants were used as medicines as early as 60,000 years ago. Neanderthal man’s graves in and around Europe were one of the great evidences of this historic association. 4000-year-old Sumerian clay tablet were the earliest known recorded plant remedies for various illnesses. The information regarding medicinal benefits of plants, along with the hundreds of other remedies, has been preserved in the Ebers papyrus for about 3500 years ago^{9,10}. In Asia, some of the earliest records of the usage of plants as drugs are found in the clay tablets in Mesopotamia (1700 BCE), the Artharvaveda (2000 BCE), and the Eber Papyrus in Egypt (1550 BCE)^{8,23}.

Significance of traditional medicine

Traditional Medicine is widely practiced and also popular in many developing countries because it is surrounded with wider belief systems⁶. Traditional, cultural and historical beliefs highly influence the practice of alternative medicinal systems all around the world, especially in Asia and Latin America^{6,23,24}.

Indian Traditional Medical System

India has six recognized peculiar traditional medical system which are Ayurveda, Siddha, Unani, Yoga, Naturopathy and Homoeopathy in this category. Though Homoeopathy originated from Germany, its wide recognition and use has made it also to be considered as a part of Indian Traditional medical system¹¹. Unani with its roots from Arabia is practiced throughout India especially by Muslim communities (Zysk, 2008). Yoga is considered to be a base for the remaining two Indian traditional medical systems. Ayurveda is the comparatively popular than Siddha and is widely practiced in northern India and in the state of Kerala in south India. Siddha medicine has its origination from

Tamilnadu (Figure 1). The present article focuses on the current trends of global wellness tourism market, Siddha (Tamil: Siddha Vaitthiyam) System²³ of Medicine and the existing major challenges and the opportunities to promote this ancient indigenous Tamil traditional health system as “Brand Tamilnadu” towards attracting the Wellness Tourism Market Segment.



Figure 1: Map of Tamilnadu in India (Source: <http://dardel.info/photos/TamilNadu/maps.html>)

Defining Wellness

Since wellness Industry is identified recently in late 1950s, there is no clear definition for the Industry. It is considered to be a proactive side of the medical (sickness) Industry.

Stanford research institute’s defines wellness as a positive approach of living. Further it defines that “It is positive and affirming, encompassing physical, mental and spiritual well-being, for self, for others and for the environment”^{14,31}

Defining the Wellness Industry

In the fields of economics and business, there is no clearly defined wellness industry, although there is an emerging sense that such an industry does exist and is growing rapidly^{14, 15, 29}. Paul Zane Pilzer¹⁶ defines in this book “The Wellness Revolution” that wellness Industry is the business of offering products and services for proactive people who look for healthier life style and or prevent from sickness.

As per SRI Report^{14,15}, Wellness Industry is classified under nine Industry sectors. Also SRI estimates conservatively that the wellness industry cluster represents a market of nearly \$2 trillion dollars globally (Figure 2).

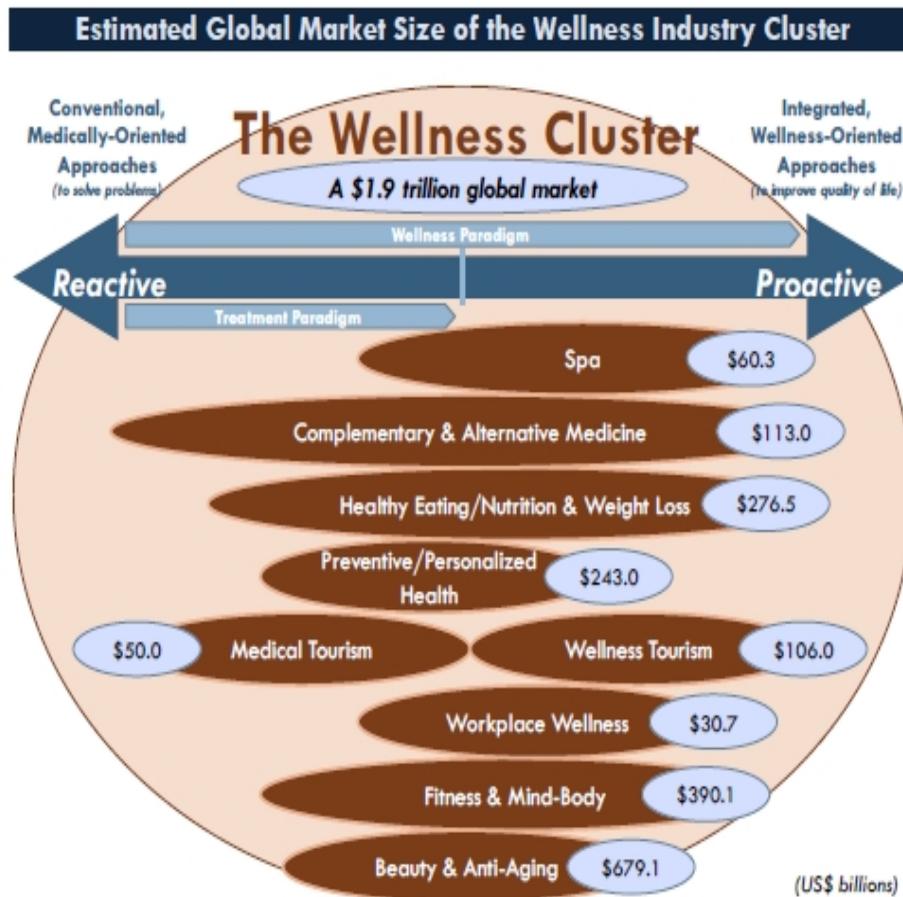


Figure 2: (Source: Spas & the Global Wellness Market: Synergies and Opportunities - May 2010)

Defining Wellness Traveler

There is much that is unwell about travel today. Wellness tourism is travel associated with the pursuit of maintaining or enhancing one's personal well-being^{15,29}.



Figure 3: (Source: Spas & the Global Wellness Market: Synergies and Opportunities May 2010)

Evolution, growth and significance of medical and wellness tourism in Tamilnadu

Siddha system is one of the oldest systems of medicine in India. The term Siddha means achievements and Eighteen Siddhars were saintly persons who contributed towards the development of this medical system.^{17,18}

The first documented text for siddha was found in 6th or 7th century AD in the scripts of Tirumular's "Tirumandiram".

But most of the scholars agree that Siddha, as it is now in theory and practice, began around 16th century in Tamilnadu, Till 1994, there was no council to monitor and standardize the Traditional healing systems in India. The traditional medical systems were practiced by vaithiyars or Individual medical practitioners and handed over secretly to their next generations. Department of Indian System of Medicine and Homeopathy (ISM&H) was created by Government of India on March 1995 and later re-named as Department of Ayurveda, Yoga & Naturopathy, Unani, Siddha and Homoeopathy (AYUSH) in November 2003 with a view to providing focused attention to development of Education and Research in Ayurveda, Yoga & Naturopathy, Unani, Siddha and Homoeopathy systems¹⁸.

In the past two decades, Tamilnadu has positioned itself as a Medical Hub of South India with various super specialty hospitals which attracts many people from all

around the world for economical, advanced and reliable medical treatments.

Siddha and Wellness Tourism in Tamilnadu: Opportunities and Challenges

Even though Tamilnadu has positioned itself as a prominent medical tourism hub in India, when it comes to wellness tourism, it is outsmarted by its neighboring state Kerala in all aspects including destination positioning, infrastructure and brand image.

The Indian alternative medical services namely Ayurveda, Homeopathy, Unani, naturopathy and related wellness services including meditation and yoga are becoming increasingly popular among patients from abroad as non-surgical alternative treatment for various ailments.

Goa for holistic living, Uttarakhand for meditation and yoga, Kerala for Kairali massage and Ayurveda, Rajasthan for heritage living and spas, are some of the world-renowned places in India for alternative medicine¹⁹.

With Excellent Hill Stations such as Ooty, Kodaikanal, Yercaud, Yelagiri, Javvadhu Hills, Kolli Hills, Sirumalai Hills, Valparai, Top Slip, Kalrayan Hills and Pachamalai Hills, there is a great potential to further expand the Wellness Tourism framework in the State by positioning Tamilnadu as a Siddha and Wellness Tourism Destination by incorporating wide variety of private and public sector entities together to advance these opportunities.



Figure 5: (Source: Spas & the Global Wellness Market: Synergies and Opportunities May 2010)

Building 'Brand Tamilnadu': A unique destination for wellness needs through Siddha

With the array of healthcare services that are available in Tamilnadu and its other strengths, in the past ten years Tamilnadu has positioned itself into a unique destination brand for medical and wellness tourism. The term 'destination branding' gained popularity around the year

1998 and has eventually become a highly used word today. Of late, countries such as United Arab Emirates, Singapore, China, Malaysia and Thailand have developed a niche market and positioned themselves as Asia's medical tourism destinations. Indian Government has also created the 'India Brand Equity Fund' of branding India to provide support for exporters to promote the India Inc. label.

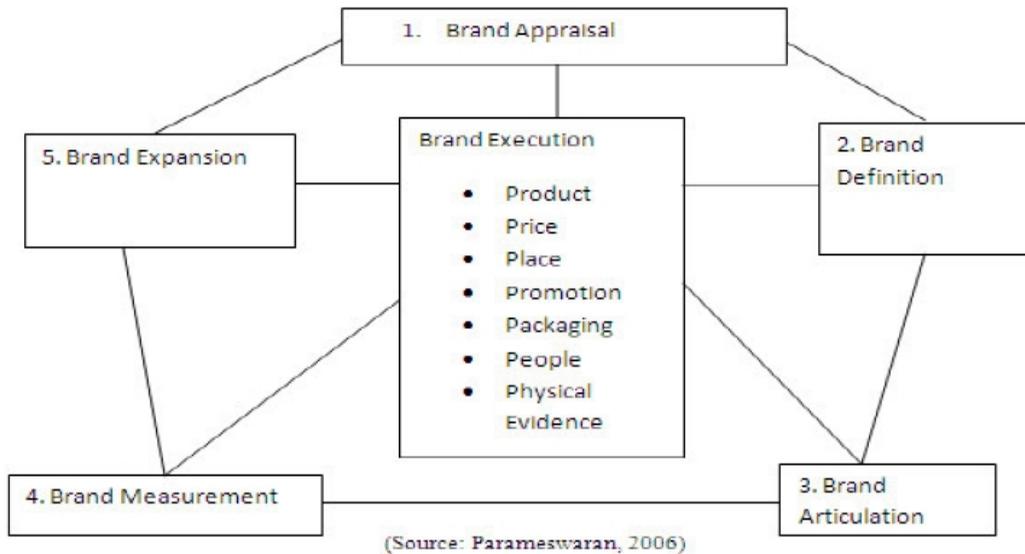


Figure 6: Brand Execution (Source: Parameswaran, 2006)

In author opinion on similar lines ‘Brand Tamilnadu’ can be marketed for export of Siddha and wellness tourism services. This basically warrants a relook at the approach towards the industry and the marketing strategies to be adopted. For Tamilnadu to become a unique destination for Alternative medicine and wellness needs, primarily it is imperative to build ‘Brand Tamilnadu’ through the five stages of ‘Brand Building Pentagon’ (Figure 6) given below:

Stage One

Brand Appraisal: This stage is about exploring the various wellness opportunities for branding Tamilnadu as a unique destination. This stage requires accomplishment of five activities in order to build up a complete picture of the brand potential the state possesses.

Market Analysis: Involves an understanding of international wellness market in terms of its size, growth prospects, market segments, geographic differences and distribution issues.

Competition Analysis: It warrants a thorough analysis of the key players operating in the international market and those playing a complementary or supplementary role; for instance Thailand for massage and wellness, Sri Lanka for Ayurveda and spa, etc

Consumer analysis: Involves a closer look at the consumers’ buying behavior and influencing factors. E.g. People from Gulf Countries, West Asia and Europe have varied buying behaviors.

Competency analysis: Requires a dispassionate look at the skills and knowledge within the state covering strengths in R and D, production, selling, and distribution of Siddha Medicines.

Socio-economic analysis: Involves operational environmental analysis, comprising societal changes, global trends, and macroeconomic implications. Indian economy and Indians are undergoing a sea change and this has to be acknowledged during tourism planning.

Stage Two

Brand Definition: It is about developing a description regarding what is on offer. How will it be positioned in the consumers’ minds? What will be the brand personality? This stage comprises the following four activities:

Brand reasons: Why should the consumers choose Tamilnadu for their Wellness? The reasons could be: the Siddha treatment is expensive, unavailable, or high waiting time in home country.

Brand positioning: Involves identifying gaps existing in the market and locating ‘Brand Tamilnadu’ in the consumers’ minds. Creative advertising campaigns would be helpful in promoting the image.

Brand mapping: What are the attributes that ‘Brand Tamilnadu’ and its Vision Statement “Enchanting Tamilnadu” stand for? The issues of launch and growth stages need to be articulated.

Brand image: Involves measuring ‘Brand Tamilnadu’s’ scores on specific attributes, tourists of which socio-economic profile and geographical regions are visiting Tamilnadu for seeking healthcare services, the benefits they expect and so on, and the future image desired.

Stage Three

Brand Articulation: It explores the various facts by which a brand presents itself to the consumers, how it

articulates its offer and how it connects. This stage in turn is split into three steps:

Brand Identity: Requires providing an identity to 'Brand Tamilnadu' with the help of innovative logos, ancient stories and mystic aura of the Dravidian Culture and so on.

Brand Communication: Involves various promotional elements to be employed in communicating 'Brand Tamilnadu' to the target consumers. A brand brief has to be formulated addressing questions such as- who is the target consumer (demographics, psychographics). What is the consumer's current disposition (beliefs and attitudes about the product category and brand)? What does Tamilnadu offer that is different from other competitors? What should the tone and manner of the communication be (sophisticated, simple, friendly, aggressive, etc.)?

Brand service: Deals with how the country must go beyond its physical presence and connect with the consumer. This calls for complete coordination with vertical and horizontal partners (hospitals, spas, hotels, facilitators, transportation systems etc.) in offering the service.

Stage Four: Brand Measurement: The task is not just to create and launch 'Brand Tamilnadu' but to track the brand in real market conditions and ensure that it succeeds. The following metrics must be measured on a monthly, quarterly, and annual basis: Sales, market share, consumer loyalty, healthcare pricing etc.

Stage Five

Brand Execution

Insight-1: Current marketing practices:

- i. End-to-end solution promised by wellness tourism facilitators to foreign visitors through user-friendly websites.
- ii. Expert Siddha doctor visits are arranged by facilitators to potential target market countries, for instance, 'Forerunners Healthcare' has scheduled a visit by medical experts to Nigeria, Ghana and Cameroon in November, 2012.
- iii. Facilitators also provide list of associate hospitals and wellness centers in the State.
- iv. Hospitals such as National Institute of Siddha should set up exclusive marketing departments for medical tourism.
- v. Ministry of Tourism initiatives. The various healthcare services offered in the state must be clearly and consistently communicated through significant communication channels in the potential country markets (albeit, in different popular languages) and connect it to in house marketing. Heavy reliance on web-based interactive marketing is helpful in spreading awareness and promotion of services in various convenient locations.

Marketing 'Brand Tamilnadu': Recommendations:

Rising demand for wellness tourism has led to development of innovative facilities in the sector ranging from providing information about the treatment facilities and consultation, to arranging patient's travel, accommodation, surgery schedules (If needed) and also a vacation. However, all the efforts made by individual entities are disintegrated. What essentially needs to be adopted is a brand building exercise followed by aggressive marketing strategies implemented in the true sense. Therefore, after building 'Brand Tamilnadu' the following strategies may be adopted to market the state in the international market for medical and wellness tourism:

A unified and coordinated effort by the Central and State Governments, tourism departments, and facilitators is essential. Tamilnadu could emulate the practice of tourism centric countries which set up DMOs (Destination Management Organizations). DMOs in Tamilnadu may include wellness tourism facilitators, transport organizations, hospitals and wellness clinics, government bodies etc. They are required to impart training to their first-line personnel so as to address operational issues confronting the medical tourists.

The State Government may rope in various Embassies and High Commissions to get support of Health Ministries in foreign countries and promote medical and wellness tourism aggressively, suggests a Siddha and Yoga Practitioner from Varkala, Kerala.

According to a tourism operator from Chennai, State Government need to play a key role in setting up 'Eco Friendly Siddha Farm Houses' that have been proposed on a public-private partnership basis by the Ministry of Tourism at all the popular hill stations (especially Kolli Hills) across the state, albeit in eco-friendly atmosphere with highly trained English speaking Siddha and health care professionals at affordable prices.

Although the other alternative medicines in India are popular among those in western countries, a review of marketing practices in other competitor countries such as Malaysia, Thailand and China is to be done.

Tamilnadu Government should also consider promoting FDI (Foreign Direct Investment) in building Siddha medical and treatment infrastructure. A similar exercise is being undertaken by the Government of Kerala. The State is organizing a conference on 'Emerging Kerala' to attract investors from the Gulf region by promising investor-friendly policies and administration.

Siddha Center in Kolli Hills perceives that medical tourism is not only about treating the sick. India can thus be marketed as the ideal destination for kick starting a lifestyle change with alternative therapies available such as yoga and meditation training that India is world-renowned for.

A well-connected, well-facilitated, and clean state will enhance the image value of 'Brand Tamilnadu'. The synergy of Indian Railways and Tourism Ministry to promote tourism in India under the campaign 'Clean

India', if effectively carried out, will facilitate in branding the country as a major tourist destination in the international market.

CONCLUSION

Tourism is growing rapidly in India. Increase in the growth rate of tourism is observed both in domestic and foreign tourism. However the benefits can be fully tapped when tourism sector responds positively to the changing scenario. Projecting the Brand image of Tamilnadu as a land of Siddha and wellness destination is essential and it is necessary to grab the world's fastest growing wellness tourism segment. Proper policy framework, developing adequate infrastructure and professional marketing are required to be initiated to benchmark Tamilnadu as a Land of Wellness.

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