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AYUSH

Affordable and Integrative System of Healthcare

ANALYTICAL REPORT ON “CONSUMER’S PERSPECTIVE ON AYUSH”



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EXECUTIVE SUMMARY

Relevancy: The prevalent trends in the traditional system of medicines can only be changed effectively after an in-depth analysis on how citizens view the sector, their opinions and perspective on various aspects of the sector and their recommendations from the grass root level to identify loopholes that need to be plugged by a team of experts.

Purpose: The survey was conducted to measure the awareness level of the common man regarding AYUSH system of medicines that includes the traditional and optional systems of medicines such as Ayurveda, Yoga & Naturopathy, Unani, Siddha, Homeopathy and the like.

Methodology: A questionnaire was developed, designed, tested, and commissioned by experts of the subject by a group of aware consumers, as a tool to collect and collate the feedback from the respondents through an online survey. This final survey tool was commissioned not just across India but also overseas with responses from Australia, USA and others. The universe was determined amongst the contacts available with the networking partners of Consumer Online Foundation (COF) of India, which is an affiliate member of International Alliance of Patients' Organisations (IAPO), having official relationship with World Health Organisation (WHO) and with partners in India and overseas. The results of over 600 responses were used as the core data to analyse the perspective of the citizens on AYUSH. The outcome was intended to develop a communication and marketing strategy on AYUSH to be submitted to the policy makers based on the outcomes from the study.

Highlights: The key highlights of the survey report are that while 87% of the respondents are aware about AYUSH but around 55% are not sure why AYUSH is not popular as an option to public health. The positive responses in favour of the AYUSH system of medicines and its potential development as a credible option to the citizens to adopt preventive healthcare and by doing so become less vulnerable to avoidable diseases in the public healthcare system. The detailed analysis of over 600 responses from across the globe has been collated in 5 distinct categories for systematic conceptualizing in terms of identifying loopholes and gaps that need immediate attention to build a foundation for the traditional system of medicines.

INTRODUCTION

The ancient Indian System of Medicine is of great value. It is the culmination of Indian thought of medicine which represents a way of healthy living valued with a long and unique cultural history, as also amalgamating the best of influences that came in from contact with other civilizations be it Greece (resulting in Unani Medicine) or Germany (Homeopathy) or Indian scriptures/sages which gave us the science of Ayurveda, Siddha as well as Yoga & Naturopathy to the world. Like the multifaceted culture of India, traditional medicines and traditional healing have evolved over centuries blessed with a plethora of remedies and practices.

The COVID-19 pandemic triggered the consumer/patient organisations in India to think on out-of-box solutions to tackle the menace by engaging with experts on our traditional system of healthcare solutions, while the world was talking about discovery of vaccine to manage the emergency caused by the unknown virus. We believe that prevention is always better than cure, which motivated us to virtually consult experts during the lockdown period on how AYUSH can play a role to keep citizens healthy. We reached out to the community to seek their views on the way forward with a weeklong consultation with more than 1000+ participants. Thanks to the experts and The Ministry of AYUSH, Government of India, to support the implementation of the recommendations emerging from the MAHAMANA DECLARATIONS ON AYUSH (MDoA).

With an increase in lifestyle-related disorders there is a worldwide resurgence of interest in holistic systems of health care, particularly with respect to the prevention and management of chronic, non-communicable and systemic diseases. It is increasingly understood that no single health care system can provide satisfactory answers to all the health needs of modern society. Evidently there is an urgent need for a new inclusive and integrated health care regime that should guide health policies and programmes in future. India has an advantage in this global resurgence of interest in holistic therapies as it has a rich heritage of indigenous medical knowledge coupled with strong infrastructure and skilled manpower in modern medicine. Medical pluralism is here to stay and the AYUSH sector has a critical role to play in the new and emerging situation.¹

¹ Ministry of AYUSH. (n.d.). *Introduction to AYUSH*. Ayush.Gov.In. Retrieved 2021, from https://main.ayush.gov.in/sites/default/files/Introduction_2.pdf

It was agreed that COF and Patient Safety and Access Initiative of India Foundation (PSAIIF) will reach out to Ministry of AYUSH (MoA), Government of India, Faculty of Ayurveda, Institute of Medical Sciences (IMS), Banaras Hindu University (BHU), Quality Council of India (QCI) and the AYUSH Committee of Federation of Indian Chamber of Commerce and Industry (FICCI) to publish a comprehensive study on the various aspects of AYUSH with focus on the need for the promotion of traditional healthcare practices in India and go global in the interest of public health. As we are all fully aware about the havoc played by Non-communicable diseases (NCDs) in the 21st century, not only in terms of human suffering but also the harm they inflict on the socioeconomic development of India, it was decided to work together to address the challenges. NCDs kill approximately 41 million people (71% of global deaths) worldwide each year, including 14 million people who die too young between the ages of 30 and 70. The majority of premature NCD deaths are preventable. According to World Health Organization (WHO) projections, the total annual number of deaths from NCDs will increase to 55 million by 2030, if timely interventions are not done for prevention and control of NCDs. In India, nearly 5.8 million people (WHO report, 2015) die from NCDs (heart and lung diseases, stroke, cancer, and diabetes) every year before they reach the age of 70. In a report by Ministry of Health and Family Welfare (MOHFW), Government of India (GOI), it was found that there was an increase in the contribution of NCDs from 30% of the total disease burden in 1990 to 55% in 2016.

In the wake of the COVID-19 outbreak, citizens around the world were suffering from disease and death. There was an urgent need to establish a robust communication between the Governments and the citizens to enhance the natural body defence system (immunity), which plays an important role in maintaining optimum health. As mentioned earlier, prevention is better than cure. It was observed that while there is no medicine for COVID-19 as of now, it will be good to take preventive measures which boost immunity in these times. This study was commissioned by the four partners as mentioned earlier by the Faculty of Ayurveda, IMS (BHU) and others, as Ayurveda being the science of life, propagates the gifts of nature in maintaining healthy and happy living. It is a medicinal plant-based science. The simplicity of awareness about oneself and the harmony everyone can achieve by uplifting and maintaining his or her immunity is emphasized across Ayurveda's classical scriptures. Boosting immunity with special reference to respiratory health

became a buzz word globally, which made the group to carry out further work with the concepts of the MDoA.

OBJECTIVES

The purpose and intention behind conducting a cross-sectional survey on the AYUSH system of medicines is specific but wide ranging. They are enumerated as follows:

- To understand the general level of awareness amongst citizens about the AYUSH sector.
- To assess the beliefs and attitudes of the global citizens towards the traditional system of medicines as an equal option to the existing modern system of healthcare.
- To emphasise the current practice of Ayurveda, Yoga, Naturopathy, Unani, Siddha and Homeopathy medicines amongst the citizens.
- To observe the most common misconceptions regarding the said system of medicines existing in the perceptions of the common citizen.
- To analyse the reasons for lack of growth of the traditional system of medicines in India that has had the richest legacy in this sector since ages.
- To identify gaps and loopholes that need to be plugged, to facilitate the robust and strong establishment of the foundation of the AYUSH system of medicines.
- To capture the outreach and penetrability of the AYUSH system of medicines across the globe.
- To understand the affordability and availability of AYUSH products in terms of the demand and supply forces prevailing in the commercial space.
- To forecast the potential of the traditional system of medicines in the healthcare sector from the grass-root levels.
- To analyse the recent trending patterns in the healthcare sector with specific focus on the AYUSH system of medicines.

METHODOLOGY

An all-inclusive and cross-sectional survey was prepared with the aid of a team of experts that included healthcare practitioners from both the traditional and Allopathic systems of medicines, Patients' Groups, policy makers, academicians, and experts.

The survey was commissioned by COF and PSAIIF and administered online amongst more than 1000+ participants. The duration of the survey for respondents was for 30 days. A total of 637 responses from different cities of India and few from overseas were received belonging to various age groups and socio-economic backgrounds.

From a draft list of over 50 questions and suggestions, the final survey tool was administered with 22 questions and circulated worldwide, divided in the following manner to assess 5 categories of data for easy understanding. The five categories in which the data has been collated on the AYUSH system of medicines in the contemporary world are as follows:

A. **BASIC INFORMATION:**

This section of the survey included 5 questions namely, full name, email address, phone number (optional), gender and age of the respondent for demographic understanding.

B. **OUTREACH:**

This section included 7 questions namely, city, country, education, monthly income, number of family members and proximity of AYUSH stores and practitioners of the respondent for analysing the outreach, penetrability, affordability and availability of the AYUSH system of medicines.

C. **AWARENESS & ATTITUDES:**

This section included 5 questions namely, awareness of the said system with reasons, prior consultations with AYUSH practitioners, prior use/purchase of AYUSH products and the effectiveness of AYUSH for treating chronic health ailments to analyse the perceptions, attitudes, knowledge base and the misconceptions of the respondent with regard to the AYUSH system of medicines.

D. TRENDING PATTERNS:

This section of the survey included 2 questions namely, reasons for AYUSH system of medicines occupying a back seat in the contemporary world and use of AYUSH by respondent in the last 6 months to conceptually understand the pattern of the existing AYUSH system of medicines that are currently trending in the society at large.

E. POTENTIAL OF AYUSH:

This section of the survey included 3 rating questions namely, belief in the usefulness of the AYUSH system of medicines, level of trust placed if loopholes are duly fixed and the effective potential of AYUSH as an affordable and effective system of healthcare to analyse the growth potential of the AYUSH system of medicines from the grass root level.

The data interpretation and analysis has been done in the above-mentioned category/ order while the report is designed incorporating every key detail of the entire survey that has been conducted from scratch.

This report also includes a section on recommendations that further provides a course of action and gives the entire study a direction to move forward. The said recommendations are based on the analytical observations made from the collated data because of the AYUSH survey circulated worldwide that has received over 600 responses.

SURVEY RESULTS & ANALYSIS

I. Basic Information

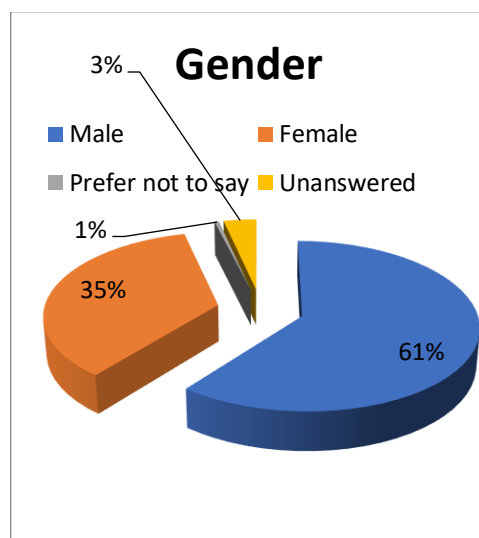
The demographic analysis of the respondents has been done about their gender and age group.

Response Options	Respondents	Percentage	Rank
<i>Category: Gender</i>			
Male	386	60.59%	Highest
Female	226	35.47%	2nd
Prefer not to say	3	0.47%	Lowest
Question left blank	22	3.45%	3rd
Total	637	100%	
<i>Category: Age Group</i>			
Below 18 years	0	Nil	Lowest
18-25 years	186	29.19%	2nd
26-40 years	140	21.97%	3rd
41-60 years	207	32.49%	Highest
Above 60 years	104	16.32%	4th
Total	637	100%	

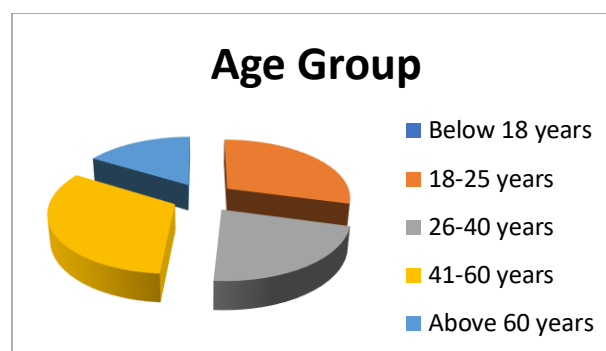
Table no. 1: Demographic Analysis of Respondents

As evident from **Table no. 1**, the collation of data, as regards the gender of the respondents, a total of 25.12% more males have responded as against the female respondents, i.e. about 160 more male individuals. Regarding the age group of the respondents, the highest numbers of respondents belong to the age category of 41-60 years of age while the lowest response is seen from minors (below 18 years of age).

The same is seen as graphically indicated on this **page Graph no. 1** and **page 10 Graph no. 1.1**:



Graph no. 1



Graph no. 1.1

II. Outreach

The analysis of the outreach in terms of penetrability, affordability, and availability of the AYUSH system of medicines at a global level has been done through the data collation of 7 questions in both tabular and graphical formats.

Response Options	Respondents	Percentage	Rank
<i>Category: Country</i>			
India	602	94.50%	Highest
Question left blank	22	3.45%	2nd
USA	3	0.47%	4th
Australia	4	0.62%	3rd
Malaysia, Philippines, Nigeria, Sri Lanka, Ireland, Nepal	6 (1 from each)	0.15%	Lowest
Total	637	100%	

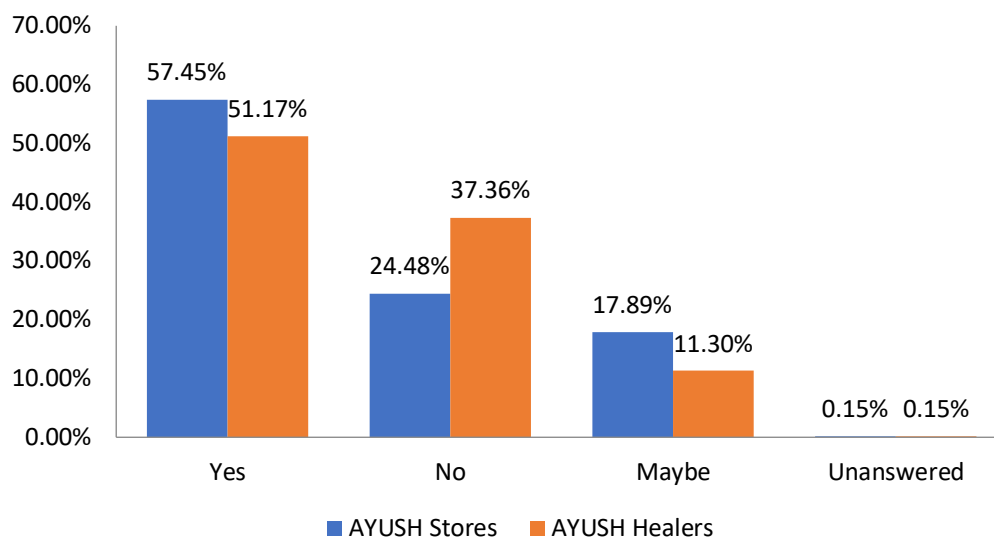
Table no. 2: Global Penetrability of AYUSH

In terms of penetrability of AYUSH, the countries covered are wide while an overwhelming majority are Indian respondents **see Table no.2**. In terms of the availability of AYUSH products and practitioners/ healers in the proximity and network web of the respondents, the following are the results as reflected in **Table no. 2.1**.

Response Options	Respondents	Percentage	Rank
<i>Category: AYUSH Stores in Proximity</i>			
Yes	366	57.45%	Highest
No	156	24.48%	2 nd
Not Sure	114	17.89%	3 rd
Question left blank	1	0.15%	Lowest
Total	637	100%	
<i>Category: AYUSH Practitioners/ Healers in Network</i>			
Yes	326	51.17%	Highest
No	238	37.36%	2 nd
Maybe	72	11.30%	3 rd
Question left blank	1	0.15%	Lowest
Total	637	100%	

Table no. 2.1: Availability of AYUSH

As is evident from **Table no.2.1** that only 50% of individuals have AYUSH stores in their close proximity as well as they know of AYUSH practitioners and/or healers in their own network of friends and family out of 87% aware about AYUSH. It should be noted here that there is an urgent need to improve on the availability of AYUSH products and practitioners in the public healthcare delivery system of our country. The same has been graphically represented below in **Graph no.2**.



Graph no. 2

III. Awareness & Attitudes

The analysis of this section has been carried out in 3 sub-sections:

1. Awareness of respondents regarding the AYUSH system of medicines and the top 5 reasons chosen by them for the said lack of awareness.
2. Prior consultations and/or use of AYUSH system of medicines by the respondents.
3. Analysis of level of misconceptions regarding the AYUSH system of medicines amongst the respondents.

More importantly, henceforth, this shall give us an ultimate result as to the attitude towards the AYUSH system of medicines by citizens, as shall be denoted through either a positive slope indicating a positive attitude or a negative slope indicating a negative attitude.

Response Options	Respondents	Percentage	Rank
<i>Category: Awareness about AYUSH</i>			
Aware	553	86.81%	Highest
Unaware	84	13.18%	Lowest
Total	637	100%	

Category: Top 5 Reasons for Lack of Awareness about AYUSH

Not well known in area	12	14.28%	3rd
Lack of education on AYUSH	5	5.95%	Lowest
Lack of publicity of AYUSH	14	16.66%	2 nd
Not sure why	46	54.76%	Highest
Belief in Allopathy	7	8.33%	4 th
Total	84	100%	

Table no. 3: Awareness about AYUSH

As is evident from the data that an overwhelming majority of individuals are aware about the AYUSH system of medicines, with more than 86% of the respondents are aware about AYUSH, **see Table no. 3.** However, more than 54% were unable to provide a reason behind the lack of awareness amongst the citizens on AYUSH, **see Table no.3.1**, which is a matter of concern. We need to bring clarity on AYUSH and its benefits.

Response Options	Respondents	Percentage	Rank
<i>Category: Prior Consultation with AYUSH Practitioners</i>			
Yes	360	56.51%	Highest
No	250	39.24%	2 nd
Considered but did not	26	4.08%	3rd
Question left blank	1	0.15%	Lowest
Total	637	100%	
<i>Category: Prior Use/ Purchase of AYUSH Products</i>			
Yes	425	66.71%	Highest
No	211	33.12%	2 nd
Question left blank	1	0.15%	Lowest
Total	637	100%	

Table no. 3.1: Prior Use of AYUSH System of Healthcare

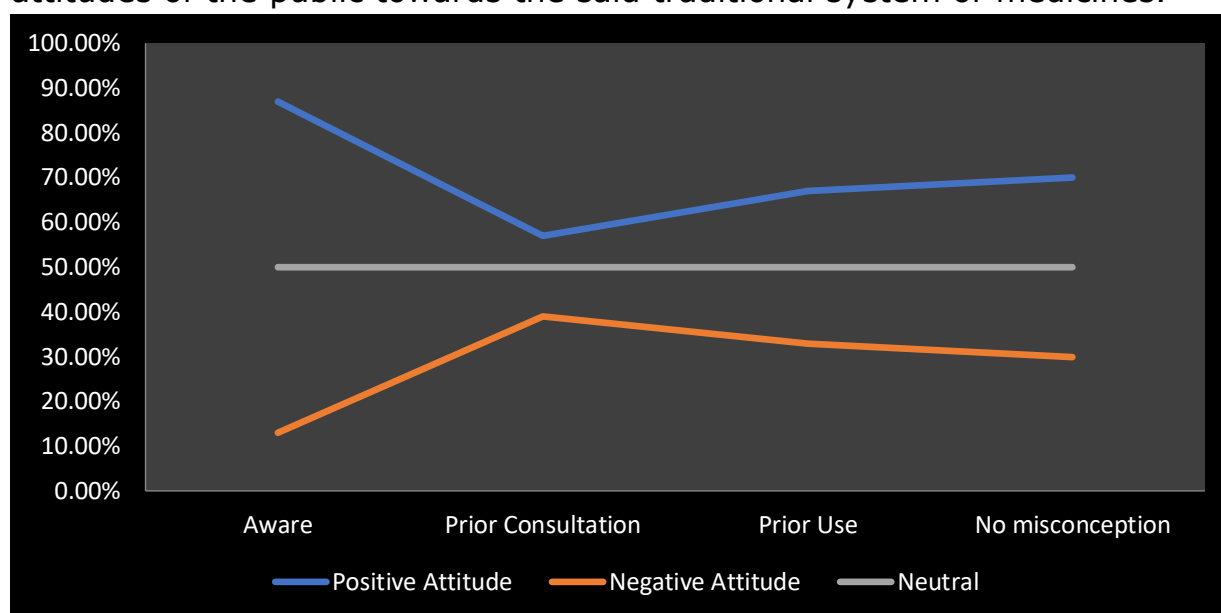
The above-mentioned data in **Table no. 3.2** indicates that only over 56% of respondents have consulted with AYUSH practitioners and/or healers but a higher percentage of respondents, around 67% respondents have used or purchased AYUSH products. This clearly reflects the need to improve accessibility and availability of more AYUSH practitioners and products made visible in the public healthcare system and integrate with the existing system as more than 50% of the respondents are accessing AYUSH practitioners and products. We should target to increase the percentage rapidly in the coming years in India and globally.

Response Options	Respondents	Percentage	Rank
<i>Category: Chronic Health Ailments can be Treated with AYUSH</i>			
Yes	443	69.54%	Highest
No	193	30.29%	2 nd
Question left blank	1	0.15%	Lowest
Total	637	100%	

Table no. 3.2: Misconceptions about AYUSH

About 70% of the respondents do not believe in myths about the AYUSH system of medicines and have trust on AYUSH to treat Chronic Health Ailments, **see Table no.3.3**, which is an encouraging indicator.

Therefore, the overall attitude towards the AYUSH system of healthcare is positive, which has been graphically depicted in **Graph no.3 on this page**. The blue line shows the positive attitude towards the AYUSH system of medicines while the orange line indicated the negative attitude which is far below the blue positive slope. The grey slope is the neutral base line at 50% to draw a clear comparison between the existing attitudes of the public towards the said traditional system of medicines.



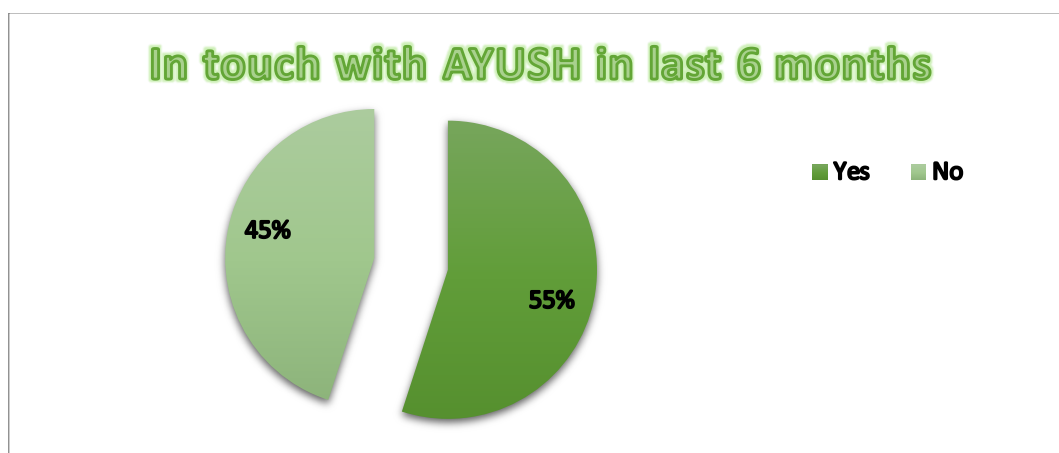
Graph no. 3: Attitude towards AYUSH

IV. Trending Patterns

To analyse and understand the prevailing pattern in the society with regard to the AYUSH system of medicines, the following observations have been represented, **see table no.4 and a pie chart, Graph no. 4** in the next page.

Response Options	Respondents	Percentage	Rank
<i>Category: Top 6 Reasons for AYUSH occupying the Backseat</i>			
Lack of awareness amongst citizens	325	51.1%	Highest
Well established modern system of medicines	262	41.2%	2 nd
Misinformation of lengthy treatments instead of quick relief	255	40.1%	3 rd
Absence of quality mark or certification	243	38.2%	4 th
Lack of infrastructural & diagnostic facilities	231	36.3%	5 th
Inadequate institutional training for AYUSH practitioners	209	32.9%	6 th
<i>Category: In touch with AYUSH in the Last Six Months</i>			
Yes	348	54.63%	Highest
No	288	45.21%	2 nd
Question left blank	1	0.15%	Lowest
Total	637	100%	

Table no. 4: Trending Pattern of AYUSH



Graph no. 4:

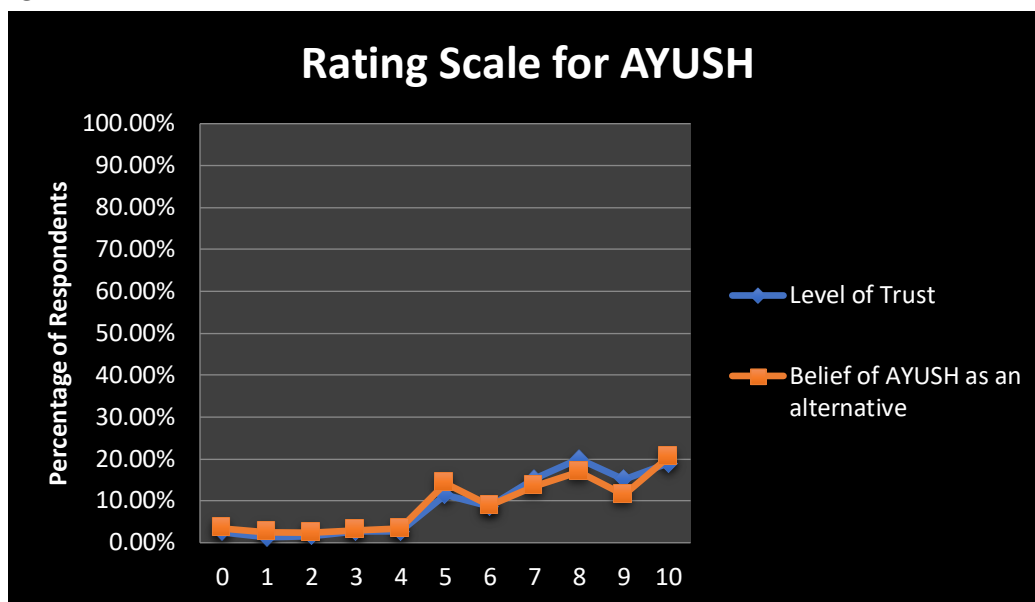
Current Trend in AYUSH

While the reasons for lack of popularity of the AYUSH system of medicines is clear from the data enumerated on this page that respondents strongly feel that due to lack of awareness on AYUSH more than 45% did not get in touch with AYUSH system of medicines in the last six months. This establishes the need to further strengthen the AYUSH system of

medicines by developing a robust communication and marketing strategy in India.

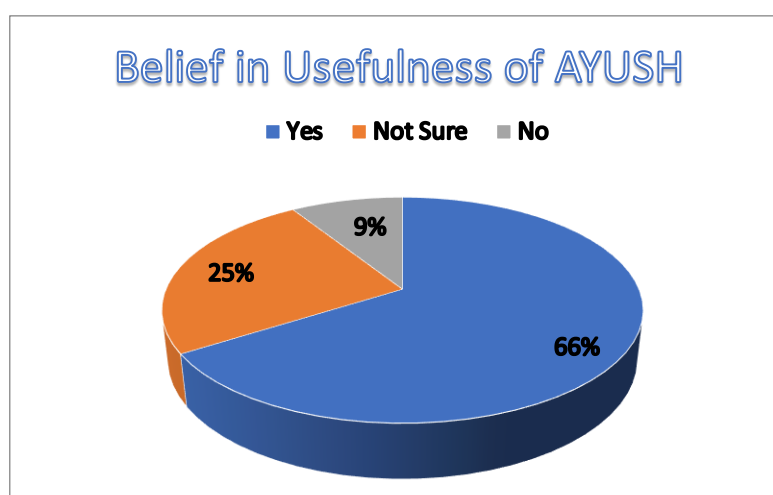
V. Potential of AYUSH

To analyse the future potential of the AYUSH system of medicines, all the 3 rating scale questions of the survey have been studied in the following manner.



Graph no. 5: Potential of AYUSH

As is evident from the representation **in graphs no.5 and 5.1**, in terms of placing their trust and belief on the AYUSH system of medicines as an affordable and effective integrative system of health care, respondents have indicated a high positive response as the rating scale has spiked significantly towards the end of the rating scale. It should be noted here that the rating scale starts from 0 being the lowest and 10 being the highest, which was also explained in the questions themselves.



Graph no. 5.1: Belief in AYUSH

ANALYTICAL HIGHLIGHTS

- ✚ Even though the highest responses have come from India, responses have also been received from countries such as Nigeria, Australia, Ireland, United States of America, Philippines, Malaysia, Sri Lanka and Nepal.
- ✚ More than 50% of people have said that they have AYUSH stores in their proximity and that they also know of AYUSH practitioners and/or healers in their individual network of family and friends, which is not an encouraging indicator. We must assure more visibility and availability of AYUSH practitioners and products in India and globally.
- ✚ Overwhelming 87% respondents are aware about the AYUSH system of medicines while from the remaining 13%, respondents could not point out any specific reason for such unawareness. Lack of education on AYUSH was the last reason for such unawareness, which calls for awareness amongst school and college students on the benefits of AYUSH and as a well-recognised career for the youth of our country.
- ✚ More than 50% individuals have consulted AYUSH practitioners and/or healers while more than 60% individuals have, at some point, used or purchased AYUSH products for themselves or for their family members.
- ✚ On a similar line, about 55% individuals have been in active touch with AYUSH in the last 6 months, during the COVID-19 pandemic.
- ✚ About 70% individuals said that they have no misconceptions regarding AYUSH as they were factually aware of the facts that even chronic health ailments can be treated with AYUSH.
- ✚ The top reasons for AYUSH occupying a backseat are lack of sufficient awareness, insignificant investment in the AYUSH sector compared to the Allopathic system of medicine, misinformation of lengthy treatments instead of quick relief, absence of quality mark and certification, lack of infrastructural and diagnostic facilities and inadequate institutional training for AYUSH practitioners.

- ✚ Overwhelming trust and belief have been placed on AYUSH as an affordable, effective, and useful system of medicines.

RECOMMENDATIONS

- ♣ AYUSH should be promoted on a global level through our trade offices and private overseas investors where India is already recognized for Yoga, Ayurveda and other traditional and ancient forms of treatment.
- ♣ Focus should be laid on reforms in the educational system of AYUSH in our country to attract talented youths to opt for AYUSH system of healthcare as a rewarding career. We should also promote voluntary standards and global best practices by increasing educational and training facilities in all the Universities and colleges of India.
- ♣ Already existing AYUSH practitioners and/or healers that have a certain years of practice in their respective regions or localities should be duly registered and provided a license to practice with certification provided by certified traditional accredited healers and qualified assessors and certification bodies.
- ♣ Quality assurance standards should be developed for AYUSH products and services starting from farming, manufacturing, distribution and dispensing to the end users.
- ♣ Misconceptions on AYUSH treatments should be duly busted by designing a robust communication/marketing strategy by the patient/consumer organisations, Trade/Industry associations and Governments to promote credible information on AYUSH to the citizens to enable them to make informed choice on their healthcare needs.
- ♣ More infrastructural and diagnostic facilities are needed to increase the outreach of the AYUSH system of medicines in India.
- ♣ AYUSH practitioners and/or healers who have gained decades of experience in the field, through academics or practice, should be included in core teams to create scientific evidence to build the trust and belief of the global citizens in the AYUSH system of medicines.

CONCLUSION

With an increase in lifestyle related disorders, there is a worldwide resurgence of interest in holistic systems of healthcare, particularly with respect to the prevention and management of chronic, non-communicable and systemic diseases. It is increasingly understood that no single health care system can provide satisfactory answers to all the health needs of modern society. Evidently, there is a need for a reformed, inclusive and integrated health care regime that should guide health policies and programmes in the public health care system to achieve Universal Health Coverage by 2030 and the only way forward is to adopt AYUSH as the most viable option to the citizens in India and globally.

While the contribution of AYUSH so far is in preventive, promotive and curative care, its importance in the 'public health' delivery system is not matching with the benefits it can provide to the citizens and the poor to overcome poverty by reducing the disease burden and out of pocket expenditure to access quality healthcare. We must recognise AYUSH as an integral part of the public healthcare system of our country. AYUSH having its origin from the oldest scriptures was the only health care mechanism that was used in the ancient times when no technology was available. Now that we have such supportive technology, AYUSH should not be thrown away but instead improved and built upon.

With an abysmally commercial health care infrastructure, the role of the AYUSH system in delivering health care services is palpable. The health workforces especially in remote areas across the globe are hugely replenished by AYUSH doctors and paramedics. Many of the therapeutics are being used in different forms for the administration of community health problems which are safe and efficient. Many of the principles described in the classical texts of Ayurveda and other systems of medicine such as Yoga and Naturopathy are being utilized and many of them are projected in the state program implementation and planning (PIP). Although this scenario is not the same in all the states as health, in India, is a state concern. This predicament has to be sorted out for the successful operation of mainstreaming of the AYUSH system of medicines and revitalization of local health tradition in a more homogenous manner throughout the nation and even beyond the borders. We need a multimedia campaign similar to the JAGO GRAHAK JAGO promoted by Ministry of AYUSH, Government of India.