

AYURVEDA

IN SWITZERLAND

FIRST NATIONAL SURVEY AMONG AYURVEDA PROFESSIONALS

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September 2020

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How did this market research come about?

Motivation:

- No market data on Ayurveda in Switzerland available
- Create transparency and evidence base for Ayurveda medicine in Switzerland
- Identify “pains and gains” for Ayurveda practitioners

Data Sources:

- Qualitative Interviews with Ayurveda medicine practitioners and Ayurveda therapists
- Electronic survey among 170 Ayurveda medicine practitioners and therapists
- Desktop research of VSAMT/AMVS members

The typical Ayurveda practitioner in Switzerland

> 60%

50-60 years old

78%

Swiss origin

82%

Female

10+

Years of practice

Medical background

Ayurveda certificate from
European Ayurveda Academy/
HPS

Naturopathy, health and therapeutic practices are the most common locations for Ayurveda practitioners

>75%

Top 3

Naturopathy, health and
therapeutic practices

22%

Home practice

86%

**„One woman/
man shows“**

40%

**No referral
relationships**

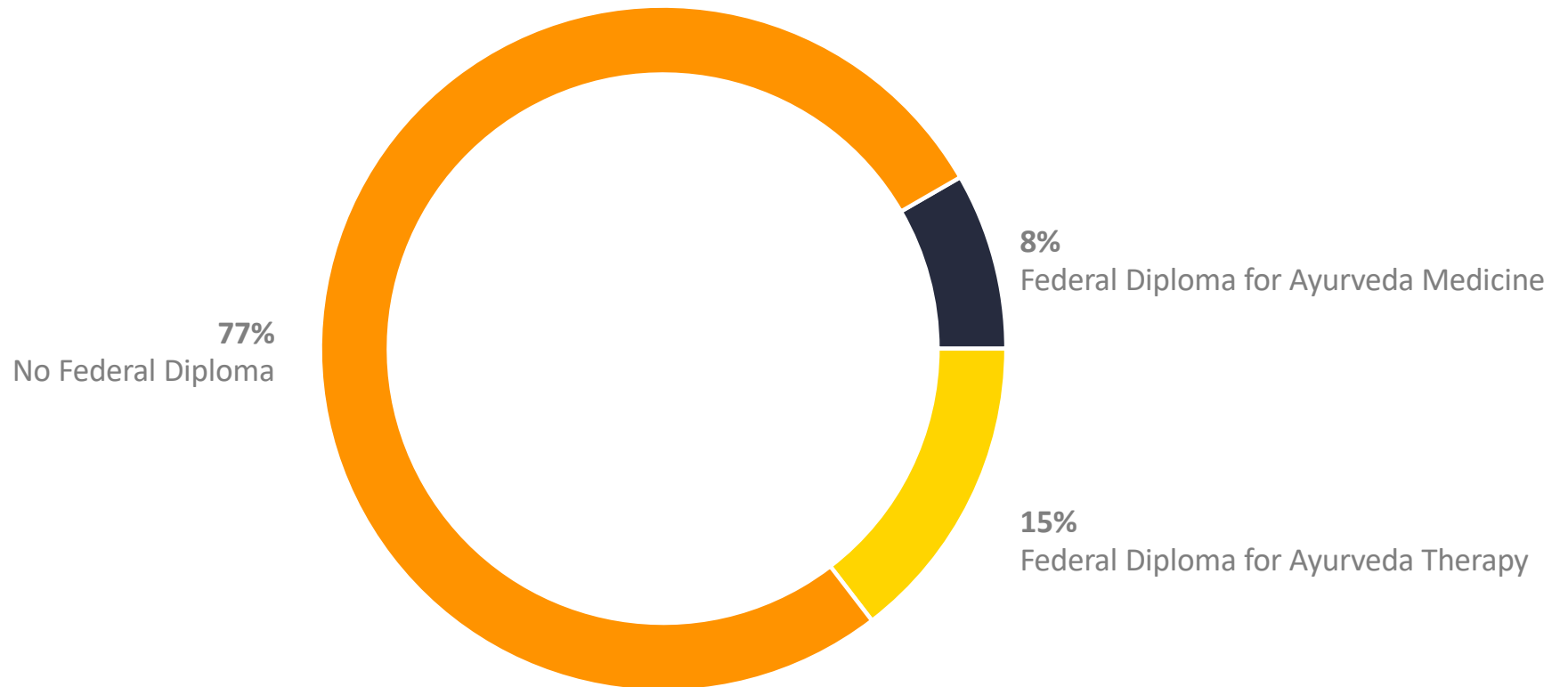
Top 10 Ayurveda service offerings

- 1 Nutrition advice (89%)
- 2 Abhyanga (89%)
- 3 Lifestyle advice (82%)
- 4 Svedana (58%)
- 5 Marma Therapy (58%)
- 6 Pranayama (58%)
- 7 Kati Basti (53%)
- 8 Shirodhara (51%)
- 9 Herbal remedies (51%)
- 10 Meditation facilitation (51%)

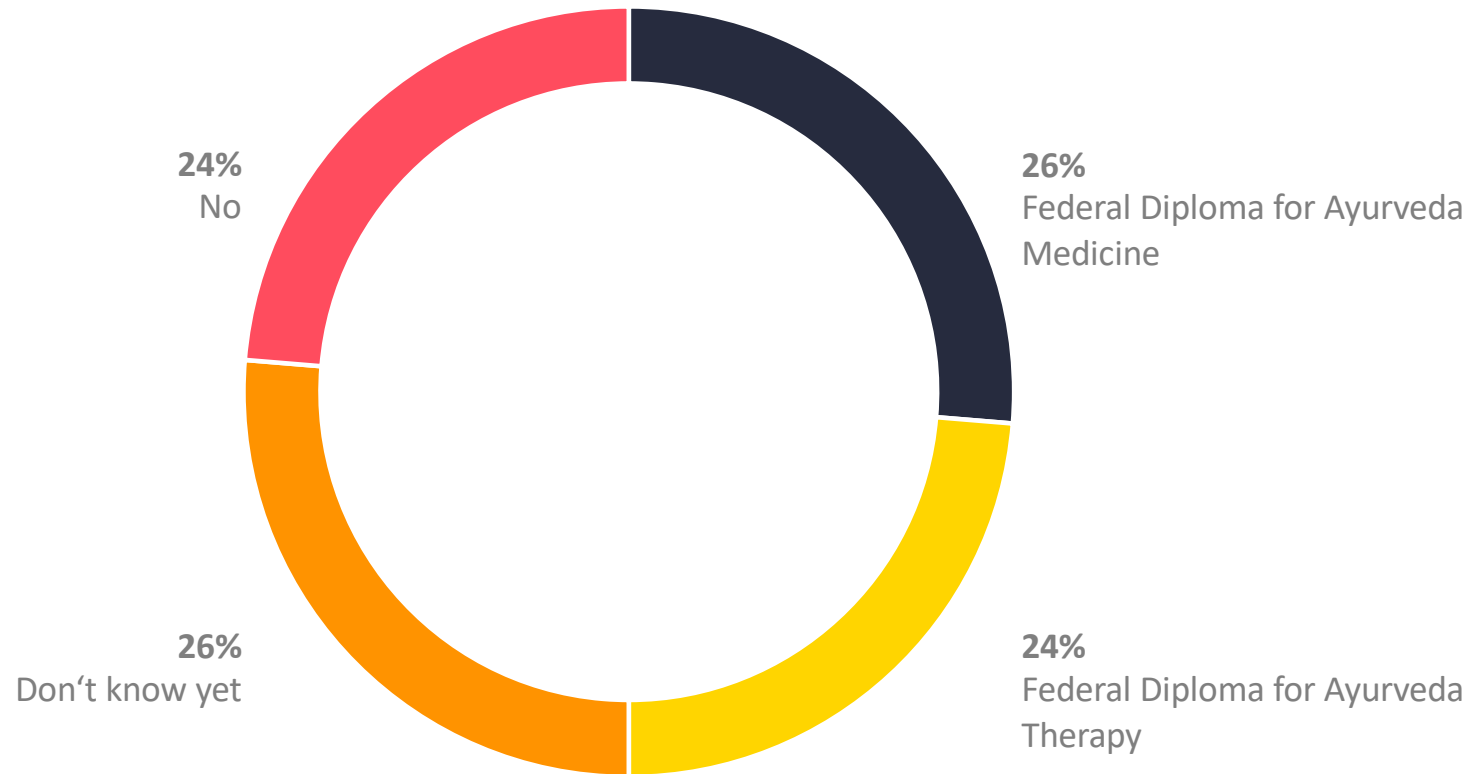
55%

offer other therapies than Ayurveda

Only 23% of the Ayurvedic Practitioners have a Federal Diploma today



50% plan to obtain a Federal Diploma in the future



The Ayurveda education is perceived as:

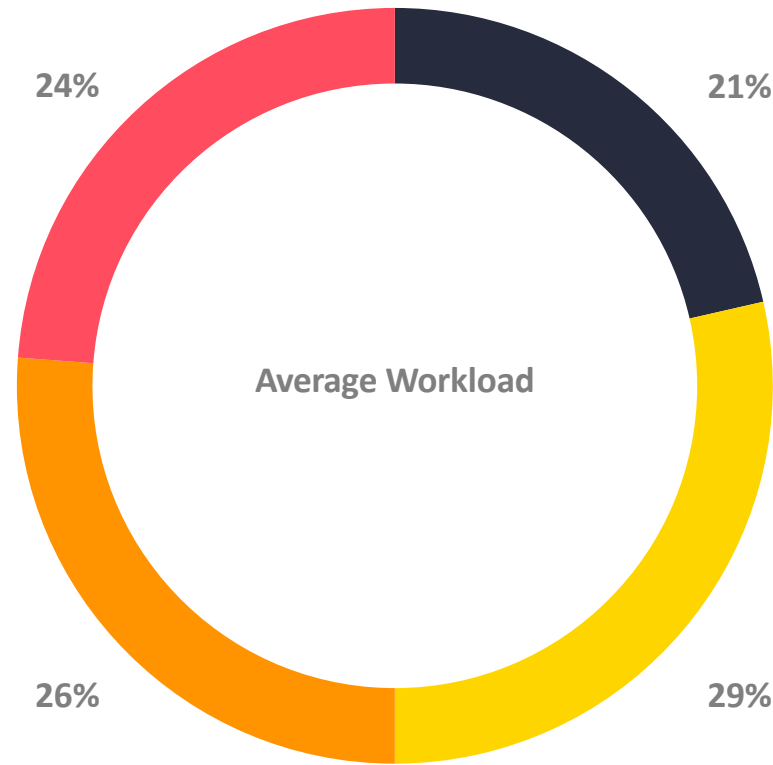
- 1 High costs (65%)
- 2 Time pressure (29%)
- 3 Insufficient preparation for professional challenges (29%)
- 4 Outdated methodology (100% face-to-face training) (20%)
- 5 Double burden “Ayurveda Medicine“ and „Western Medicine“ (20%)
- 6 Too theoretical (18%)
- 7 Duration of training (16%)

86% of practitioners are fulfilled by their work

21% can live well from Ayurveda

- 1 The work fulfills me (86%)
- 2 I would always choose again that career path (60%)
- 3 Attractive, I can live well from it (21%)
- 4 Financially unattractive, I can hardly make a living (19%)
- 5 Ayurveda is a hobby, I could not live on it (7%)

50% have a capacity utilization of less than 50%

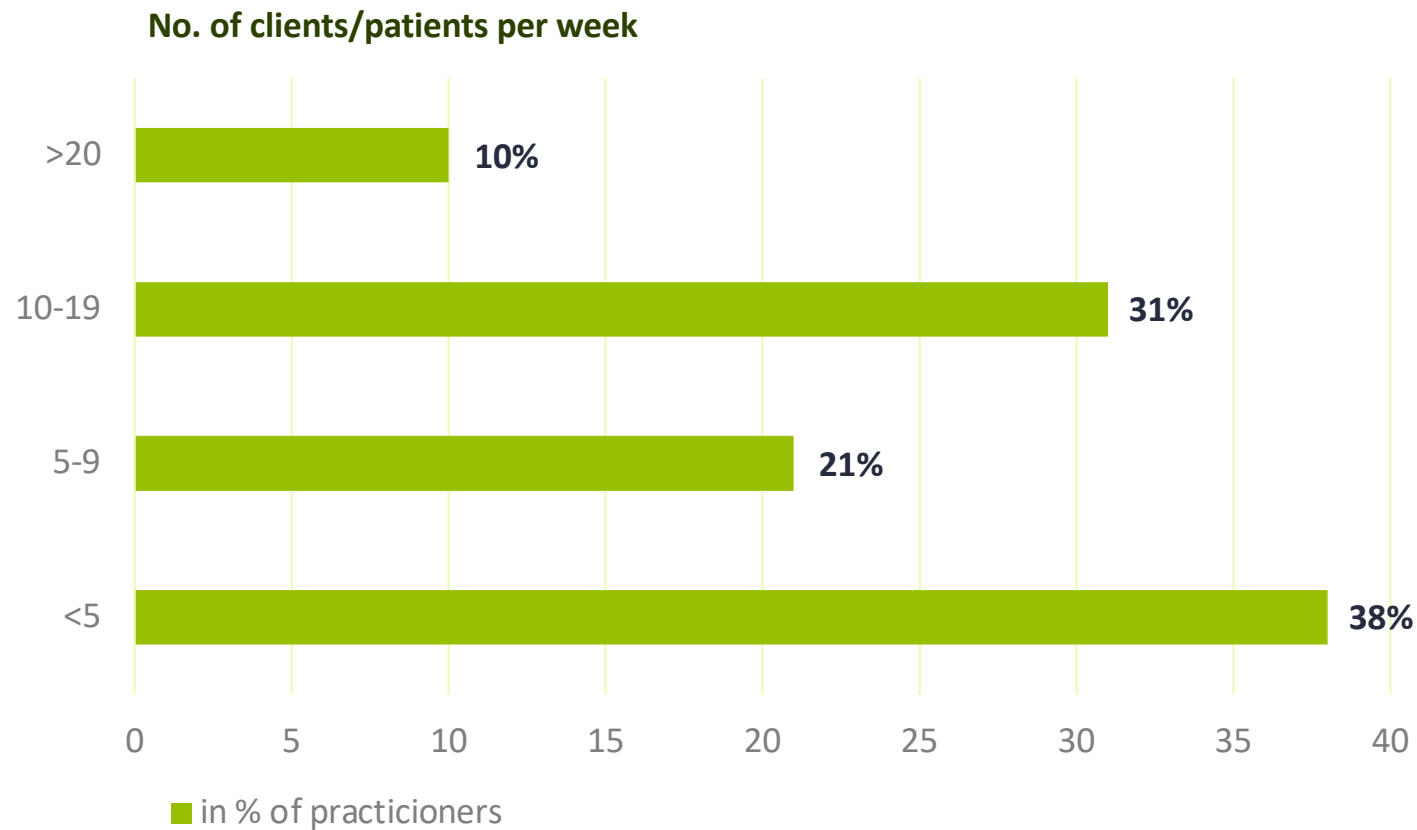


Capacity utilization in %

■ <30% ■ 30-49% ■ 50-79% ■ >80%

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38% see less than 5 clients/patients per week



Biggest hurdles for running a successful Ayurveda practice

- 1 Health insurance companies (61%)
- 2 Wrong perception of Ayurveda (60%)
- 3 High costs and time expenditure for continuous training and certification at „Intermediate bodies“ such as EMR, ANCA, etc. (41%)
- 4 Consumer attitude of people, “hopping from system to system“ (30%)
- 5 Lack of awareness of Ayurveda (27%)
- 6 Lack of financial means to invest (24%)
- 7 Training offers insufficient preparation for professional reality (16%)
- 8 Too few Ayurveda offers (14%)
- 9 Oversupply of alternative medicine methods (14%)

Key issues with health insurance companies

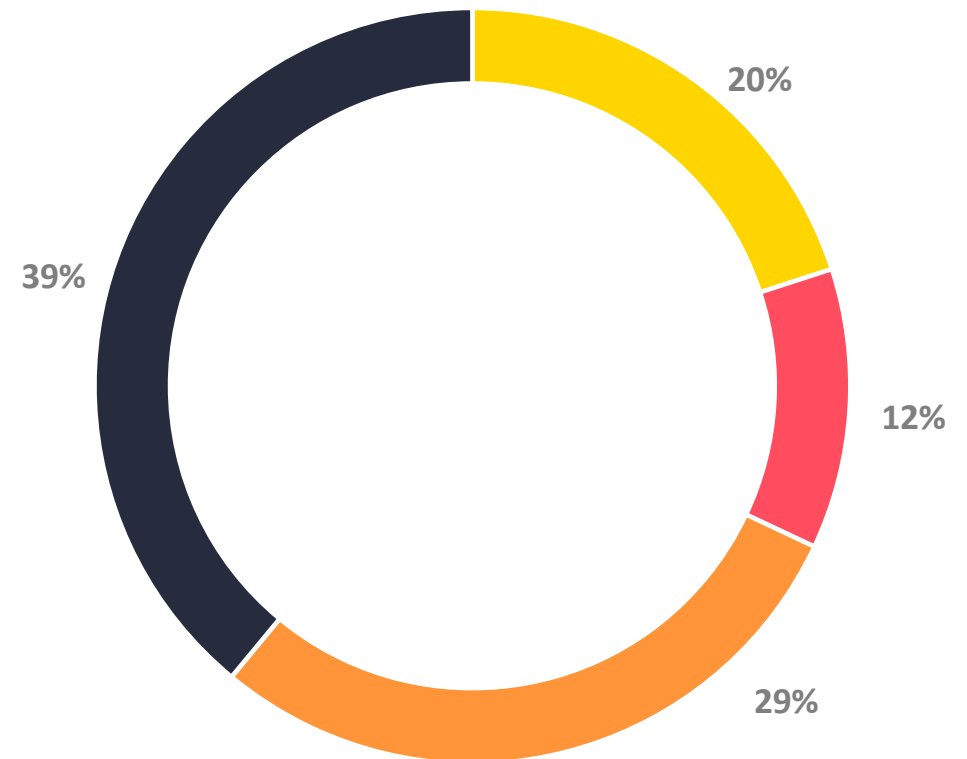
- 1 Missing or inadequate reimbursement of Ayurveda (64%)
- 2 Reimbursements provided by insurance companies vary widely (56%)
- 3 Arbitrariness and ever changing conditions (22%)
- 4 Tariff 590 complicated and difficult to reconcile with Ayurveda (13%)

16%

Aren't working with health insurance companies at all!

Cost contributions from health insurance

For 68% of practitioners, more than 50% of clients/patients receive cost contributions from health insurance



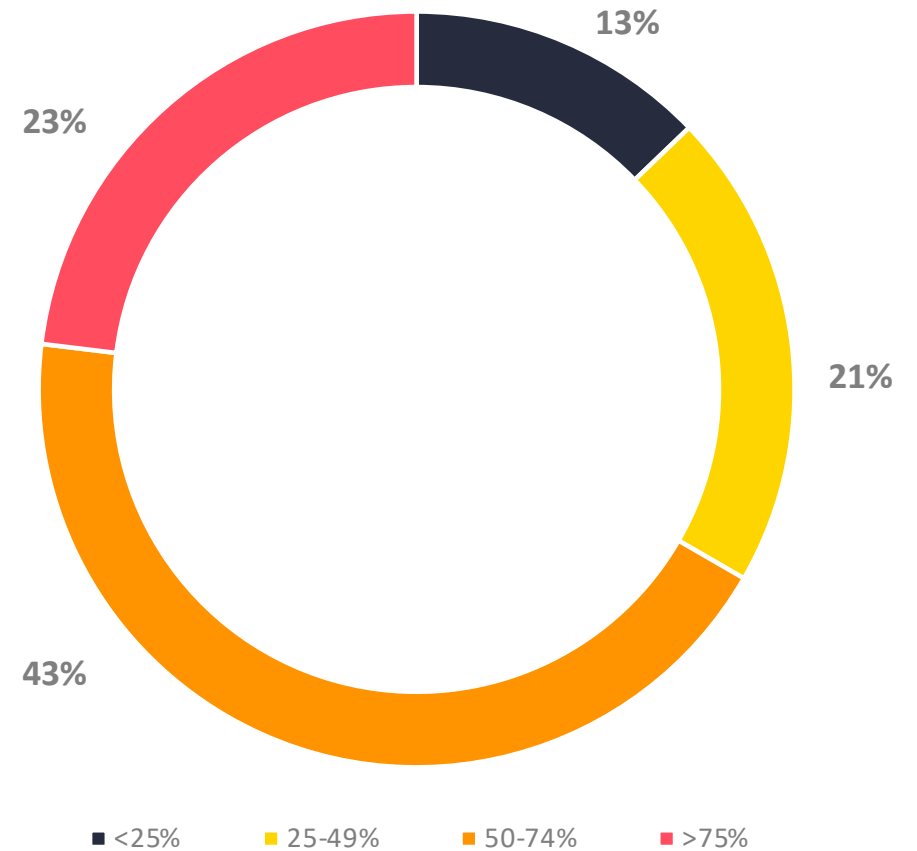
Average % of clients/patients receiving insurance payments

■ <25% ■ 25-49% ■ 50-74% ■ >75%

Reimbursements

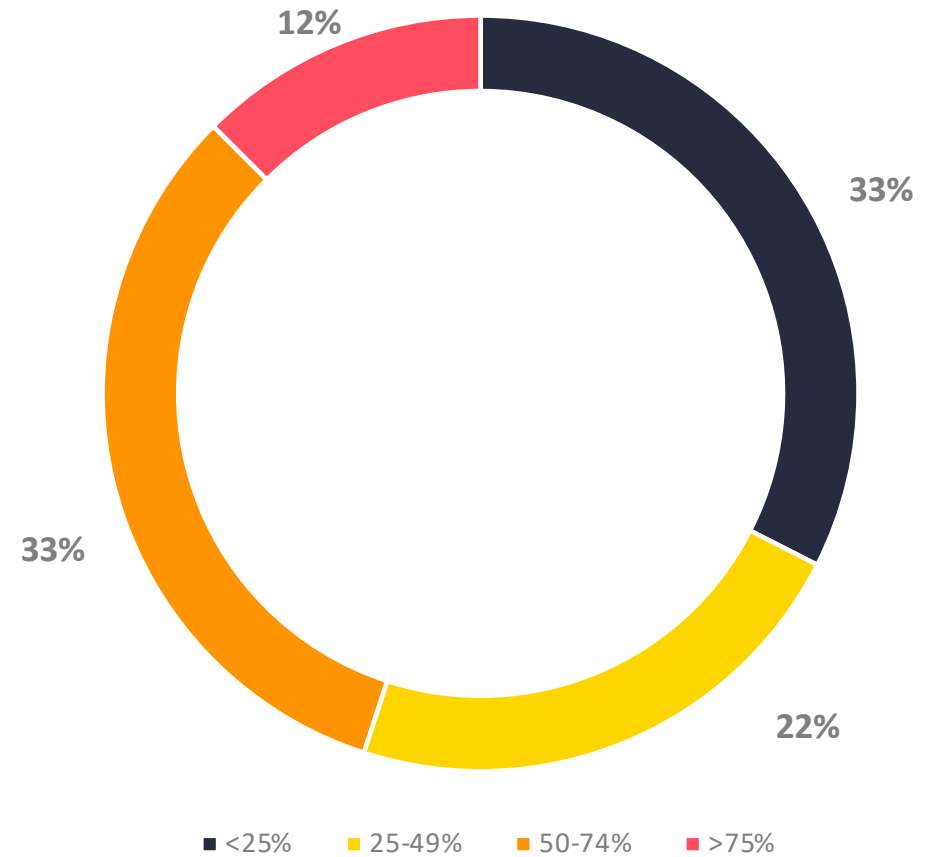
66% of clients/patients receive reimbursement of more than 50%

Average % of health insurance reimbursements



Anticipation of practitioners

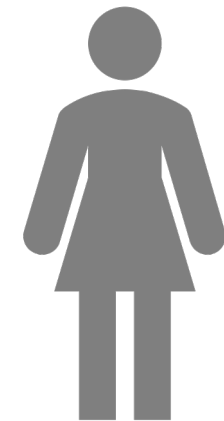
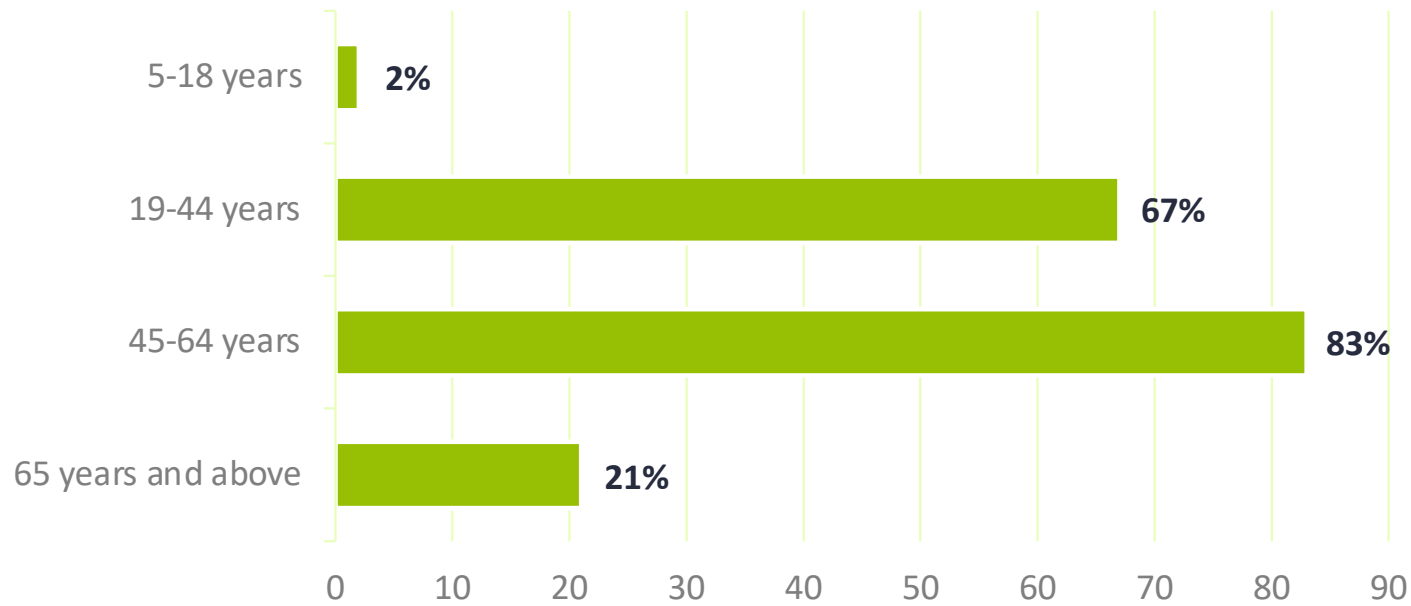
45% of practitioners anticipate they would lose more than 50% of clients/patients without reimbursements



Average % of lost clients/patients without Ayurveda reimbursements

The typical Ayurveda client/patient

In the age group of 45-64 years (83%)



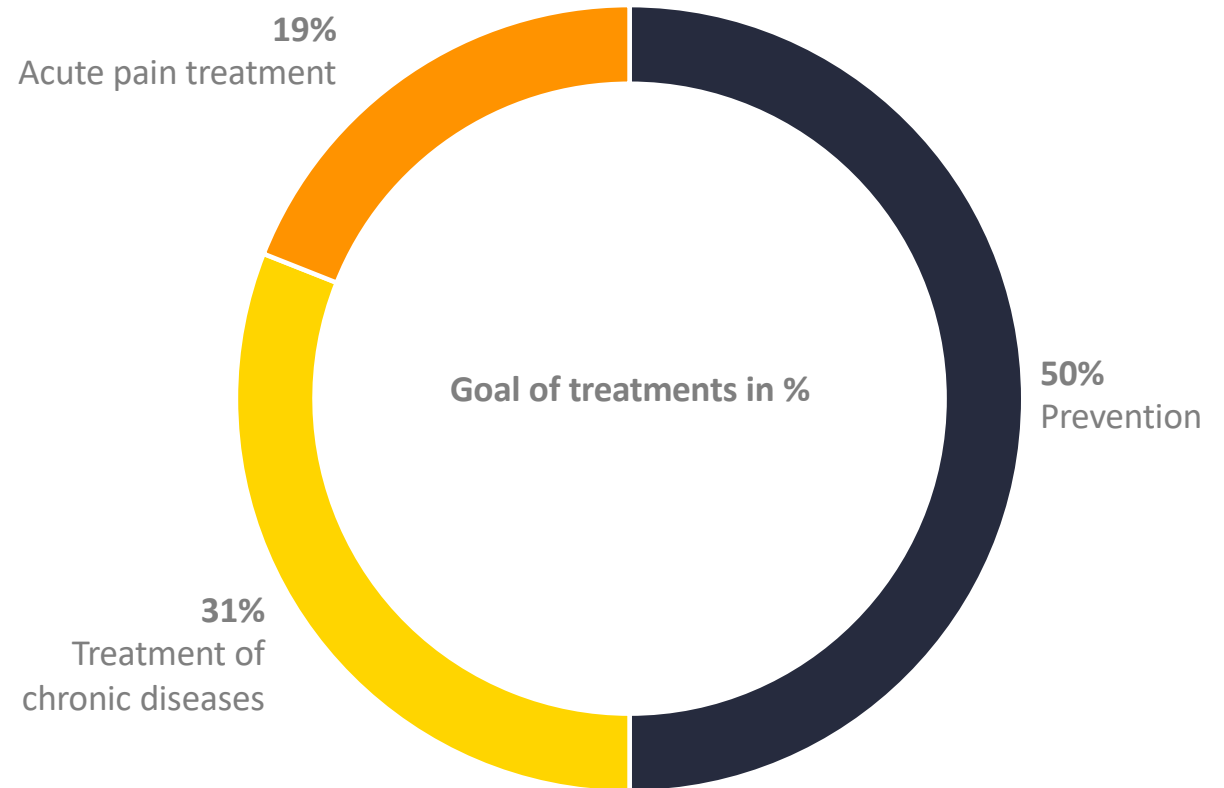
72%

Female

% of practitioners who often treat the respective age groups

Primary goal of treatments

Prevention is the primary goal of treatments (50%)



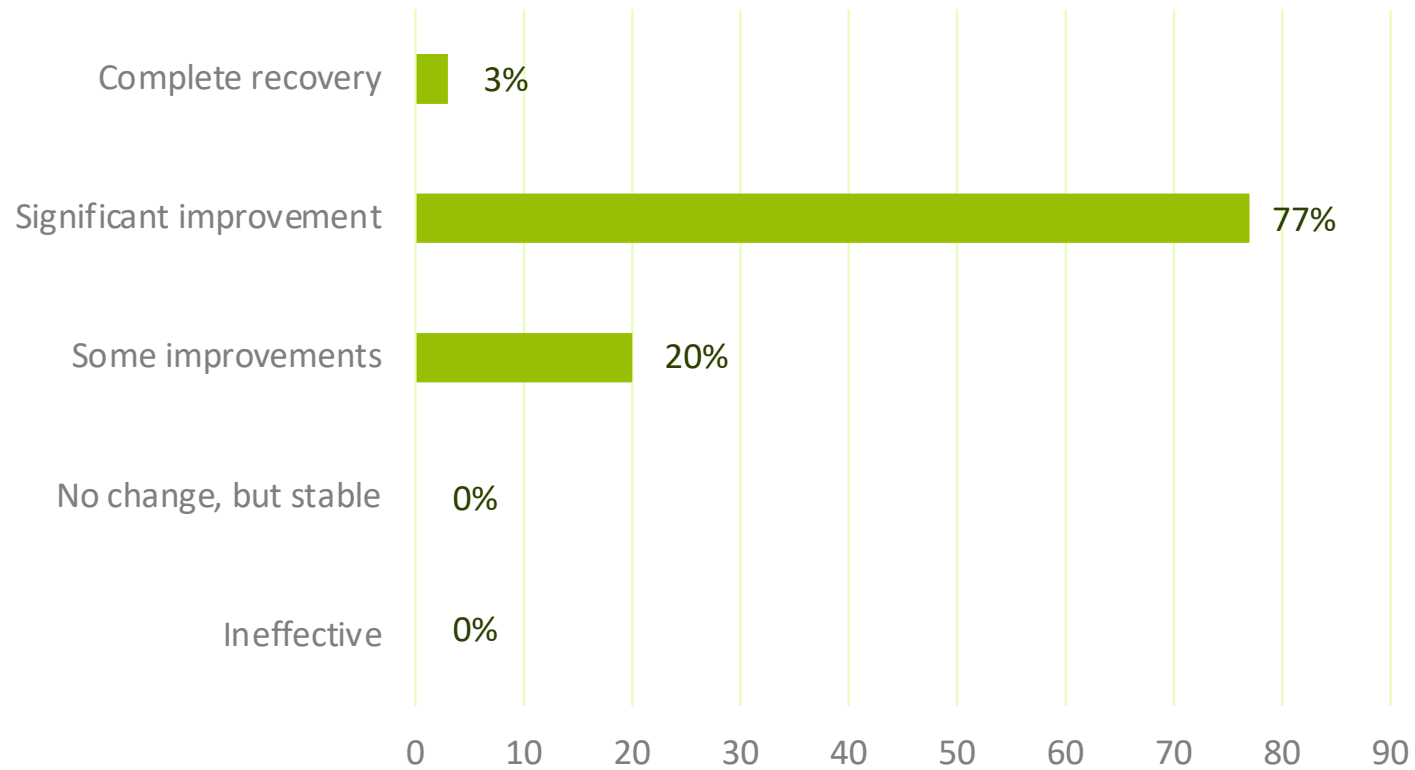
Top 10 health issues most often treated with Ayurveda

- 1 Back pain (77%)
- 2 Indigestion (72%)
- 3 Sleep problems (62%)
- 4 Constipation (51%)
- 5 Fatigue (50%)
- 6 Stress/burnout (48%)
- 7 Headache (42%)
- 8 Acidity (38%)
- 9 Menopausal symptoms (37%)
- 10 Chronical pain (34%)

Effectiveness: best results are achieved with female health

- 1 Pregnancy
- 2 Digestive problems
- 3 Musculoskeletal system
- 4 Weight issues
- 5 Fertility

77% of practitioners achieve a significant client/patient health improvement through Ayurveda treatments



Key areas of interest for collaboration

- 1 Exchange of expertise (62%)
- 2 Dealing with health insurance companies (45%)
- 3 Joint purchase of materials (e.g. oils, herbs, equipment) (31%)
- 4 Marketing (26%)
- 5 Administration (19%)
- 6 IT (systems, support) (19%)

What the VSAMT should focus on

1 Get health insurance companies on board for Ayurveda and negotiate solutions with them (89%)

- Recognize treatments from certified Ayurvedic medicine practitioners and therapists
- Set realistic rates and limits so that treatment goals can be achieved
- Remuneration system which allows to earn an adequate income

2 Public relations (increase awareness of Ayurveda, correct false perception) (66%)

3 Participation in the committees (TO, OdA etc.) (57%)

4 Revision of professional profiles and curriculum for the training of Ayurveda medicine practitioners/therapists (48%):

- Reduction of training costs and duration
- Possibility for online/mixed learning, intensive formats
- Better prepare students for practical work with clients/patients and running a successful practice
- De-bureaucratization

5 Political lobbying (41%)

6 + engaging the members!

Thank you for your attention!