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ORIGINAL ARTICLE

Measuring the Quality, Cost, and Accessibility in India's Medical Tourism Sector

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ABSTRACT

The purpose of this study article is to investigate the various aspects of medical tourism, best practices, and case studies that are targeted at international medical travellers, as well as the underlying reasons for the flourishing of this industry in India. Medical tourism has emerged as a significant sector within global healthcare services, driven by rising costs of medical procedures in developed nations, long waiting periods, and increasing awareness of high-quality medical care available abroad. India has positioned itself as one of the leading destinations for medical tourism, offering a unique combination of advanced medical technology, highly skilled healthcare professionals, and cost-effective treatment options. This study investigates the current state of healthcare delivery to medical tourists in Indian hospitals, highlighting key challenges and areas for improvement. Through a comprehensive literature review, data analysis, and case study methodology, the study dives into the growing recognition of India as a hub for affordable and high-quality medical procedures, including but not limited to cardiac surgery, orthopaedics, organ transplants, cosmetic procedures, and fertility treatments. This study also explores the contributing factors to India's competitive edge in this industry, such as the widespread use of English in the medical community, cultural compatibility, government initiatives like e-medical visas, and the proliferation of internationally accredited hospitals.

A significant portion of this study is dedicated to examining the strategies employed by leading Indian hospitals namely Medanta - The Medcity, Indraprastha Apollo Hospitals, Fortis Healthcare, and Manipal Hospitals to attract and retain international patients. These case studies reveal how hospitals are investing in infrastructure tailored to foreign patients, creating dedicated international patient departments, offering concierge services, multilingual support, and streamlined

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treatment processes from admission to discharge and follow-up care. Marketing strategies such as medical travel partnerships, digital outreach, and patient testimonials are also analysed. Furthermore, the research identifies gaps in policy implementation, ethical concerns, and infrastructural inconsistencies that could hinder sustainable growth in this sector. Issues such as regulatory oversight, medical malpractice, and the need for standardized quality control mechanisms are examined critically. By synthesizing data and insights from these institutions, the study elucidates key lessons learned and actionable recommendations that can inform future initiatives aimed at improving quality of care, patient experience, safety, and trust in the Indian medical tourism sector. The findings have broader implications for policy makers, healthcare administrators, and private stakeholders interested in enhancing India's global competitiveness in the health tourism market.

KEYWORDS

• Medical Tourism • Medical Visas • International Patients

INTRODUCTION

Medical tourism often called Medical Value Travel (MVT) in India is simply people travelling across borders to get medical care such as surgery, specialist treatment, or wellness services they either can't get at home, can't afford there, or would wait months for. It's a mix of healthcare and travel in which patients usually buy medical treatment and a travel package of the heritage destinations of the country at the same time.

Why does this matter now? Healthcare costs and long waits in some countries, better clinical capabilities in others, and easier online research and booking have all made medical travel far more common. What used to be a niche is now a growing global industry and India is one of the places people look to for affordable, high-quality care. Market and policy reports show that demand is rising and that India's role is expanding. India's strengths are straightforward: internationally accredited hospitals, experienced English-speaking clinicians, advanced tertiary centres (think cardiac, oncology, robotics), and costs that are often a fraction of prices in wealthier countries. The government has also started to package this story under initiatives like "Heal in India" and easier medical visas, making it simpler for patients and families to choose India. But it's not all smooth sailing. A few big challenges remain, the market depends heavily on a few nearby countries for patients, data on inbound patients is patchy, and services vary a lot between regions. Fixes many policy papers recommend include better accreditation and standardisation, smarter digital patient journeys, and patients from diverse geography ensures less vulnerability to any unforeseen circumstances.

This study is an attempt to understand the complete ecosystem of government policies, services of hospital service providers and patients expectation coming from diverse geographical region for medical tourism.

Outlook of the Market

India's medical tourism industry is shows remarkable growth path. Recent forecasts estimate that the sector valued at around USD 10.2 billion in 2024, is set to grow more than fivefold and reach USD 58.2 billion by 2035.[1] This impressive rise reflects a steady compound annual growth rate (CAGR) of roughly 12–12.3% between 2025 and 2035. Long-term projections suggest an even broader growth range of 12–14% per year, underscoring India's expanding role as a preferred global healthcare destination.

At present, India ranks around 10th globally in the Medical Tourism Index, but it is steadily moving up the ranks by strengthening its reputation as a trusted, world-class healthcare hub. A detailed report by the Federation of Hotel & Restaurant Associations of India (FHRAI), in collaboration with KPMG, predicts that the sector could reach USD 58.2 billion

by 2035.[2] This projection aligns with India's broader national vision to more than triple the industry's size over the next decade, boosting both economic growth and international confidence in Indian healthcare.

Targeted Customer Cohort

India's medical tourists come from diverse parts of the world, but the majority originate from the Middle East, Africa, South Asia, and Southeast Asia. In recent years, the country has also seen growing interest from North American and European patients, reflecting India's rising global appeal. Among these regions, patients from the Middle East and African nations form the largest segment, drawn by India's combination of affordable costs, skilled doctors, and high-quality facilities. However, industry experts point out a concentration risk, most of India's inbound medical travellers still come from a handful of nearby countries, particularly those in the Gulf Cooperation Council (GCC) and South Asia. This dependence makes the sector somewhat vulnerable to regional factors such as visa policy changes, travel disruptions, or geopolitical instability. To ensure long-term growth and stability, India is now working toward diversifying its patient base and attracting more visitors from new regions, including Western countries.

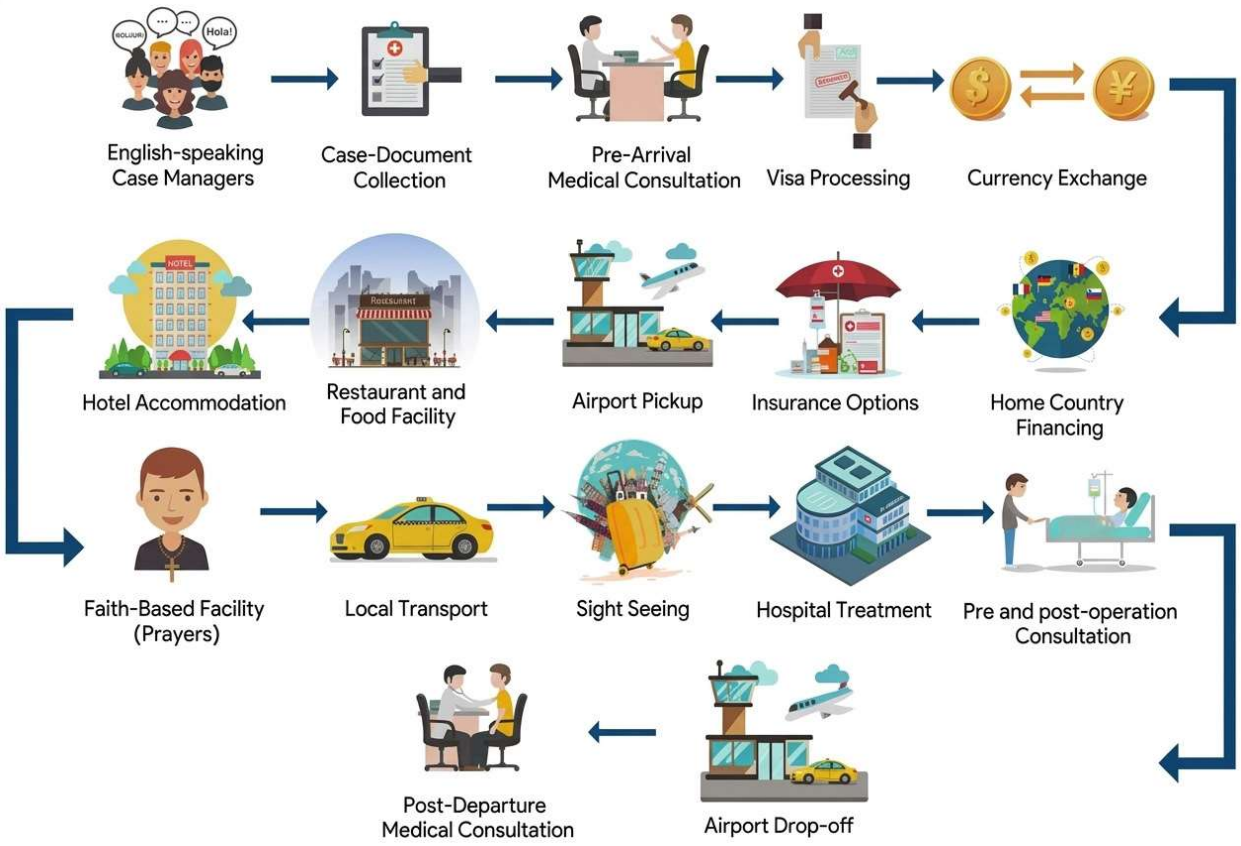


Figure 1: Process for the inbound patients. ***Source:*** Apollo hospitals

Patients from diverse geographical region

India attracts patients seeking a wide range of treatments, but certain areas see especially high demand. Cosmetic and aesthetic procedures lead the list, accounting for roughly 30% of total medical tourist demand. Other popular categories include dental care, orthopaedic surgeries, infertility treatments (IVF), eye care, and cardiac procedures. Moreover, there is growing interest in organ transplants and advanced cancer treatments, both of which represent high-value and specialized segments. Patients choose India not only for affordability but also for the quality and accessibility of care. Advanced medical technology, highly skilled specialists, and shorter waiting times make it an appealing choice for both elective and complex treatments. Some patients travel

for low-cost aesthetic or dental procedures, while others come seeking life-saving interventions, such as heart surgeries, cancer therapies, or organ transplants, which might be unaffordable or delayed in their home countries. This blend of cost-effectiveness and clinical excellence positions India as one of the most competitive players in the global healthcare tourism market.

Table 1: India's share of Medical Tourism (%) in popular treatment Category

Treatment Category	Approximate Share (%)
Cosmetic / Aesthetic	30.0%
Dental	15.0%
Orthopaedics	12.0%
Infertility (IVF)	10.0%
Ophthalmic	8.0%
Cardiac / CV	10.0%
Other	15.0%

Table source; future market insights[4]

Market Composition and Booking Trends

The way international patients plan and book their treatments in India has also evolved. A growing number of travellers now use online medical tourism platforms and facilitators that handle everything, from teleconsultations and treatment scheduling to visa support and local logistics. This digital transformation has made the process more convenient, transparent, and reliable. As these platforms mature, more patients are choosing to book independently online, reflecting greater trust in India's healthcare ecosystem. Seasonal trends also influence the flow of patients. Studies show that winter and spring tend to attract more medical tourists, particularly for cosmetic, fertility, and dental procedures. However, the level of seasonality often varies depending on the patient's country of origin and the type of treatment they seek. When it comes to payment and insurance, most international patients still prefer out-of-pocket payments or private cross-border arrangements. While integration with international health insurance providers is still limited, efforts are being made to bridge this gap. Policymakers and industry leaders recognize that strengthening insurance partnerships and global payer systems will be crucial to expanding India's reach and ensuring smoother access for patients from all over the world.

LITERATURE REVIEW

- Dr. Daksha Dave | An Analytical Study of Medical Tourism in India | Medical tourism industry is rising industry and has changed the entire concept of tourism industry. India is also one of the favourable destinies for medical tourism because of world class health facilities with affordable price, Skilled Doctors, alternative treatment, personal care and government initiative.
- (Muhammad Zakaria, Muhammad Aminul Islam *et.al*) | Determinants of Bangladeshi patients' decision-making process and satisfaction toward medical tourism in India | The aims are to explore the factors influencing Bangladeshi patients decision-making process and their satisfaction level toward medical tourism in India.
- Ministry of tourism, Government of India| National Strategy and Roadmap for Medical and Wellness Tourism | The Ministry of Tourism has formulated a National Strategy and Roadmap for Medical and Wellness Tourism A copy of the Strategy and Roadmap is enclosed for ready reference and further action.
- Travel and Tour world (news article oct 18,2025) | The latest Future of Medicine 2.0 conference, hosted by the Tamil Nadu Dr. MGR Medical University, is an important forum for debating the future of the medical tourism industry in India.
- KPMG & FHRAI| HEAL IN INDIA |Strengthening this vision requires coordinated efforts across key ministries, including MoT, MoHFW, and MEA, for fostering an integrated ecosystem that positions India as a globally competitive destination. To advance value-based healthcare, the MoHFW is actively fostering Medical Value Travel (MVT) and the mobility of healthcare professionals through the comprehensive initiatives of 'Heal in India' and Heal by India. The Ministry of AYUSH has also expanded its network of Health and Wellness Centre, while the MoHFW continues to strengthen primary healthcare delivery through Ayushman Bharat and the National Health Policy 2017.

- Apollo Hospitals Information Centre |10 Reasons to Choose India for Medical Tourism |From affordable treatment to highly advanced medical technology, the reasons for India's success in this field are numerous. In this article, we'll explore the top 10 reasons, backed by analytics and data, that make India an ideal destination for medical tourism.
- Geethanjali Nataraj Nityasree Muralitharan | Medical Tourism in India: Challenges and Way Forward Post the Pandemic | India has become a popular destination for foreign tourists seeking the quality treatment at a cheaper price. With further investments in building infrastructure, technology and services and by ensuring a seamless experience for international patients, this sector has the potential to become a leading foreign exchange earner for the country and has the potential to be integrated into a much larger tourism eco-system.
- Future Market Insight Inc. | Indian Medical Tourism Market Demand & Forecast 2025 to 2035
- A detailed analysis of the India medical tourism industry and growth outlook covering Treatment Type, Age Group, Tourist Type, Service Provider, Demography, Booking Channel.
- The Minister of Tourism (Shri Gajendra Singh Shekhawat) |Parliamentary questions - Lok Sabha - Unstarred Question No. 2677 Answered On
- 17.03.2025 | It has been conveyed by the Ministry of Health and Family Welfare that it has launched India's official portal for Medical Value Travel (MVT) for those who want to avail medical treatment in India. This portal helps streamline the information and patient journey of international medical travellers to India.
- Nisha Taneja, Sanjana Joshi, Nirlipta Rath, Vasudha Upreti |ICRIER
- Policy Brief#29 Looking Beyond Bangladesh: Making India's Medical Value Travel Sector More Resilient | India is also becoming increasingly popular for alternative medications and wellness tourism, offering traditional medical care services through AYUSH (Ayurveda, Yoga & Naturopathy, Unani, Siddha, and Homeopathy).
- Press release Ministry of Tourism | Tourism as a Key Driver for Employment and Growth Budget 2025-26 Focuses on Infrastructure, Medical Tourism, and Heritage Conservation | Recognizing the immense potential of India's healthcare sector, the Union Budget 2025-26 prioritizes medical tourism as a key growth driver. Finance Minister Smt. Nirmala Sitharaman announced that medical tourism and the "Heal in India" initiative will be promoted in partnership with the private sector, enhancing India's position as a premier global healthcare destination.
- Kritane & Pandit |Analysing India's medical tourism boom | India's success as a medical tourism hub is mainly attributed to highly skilled and experienced doctors and nurses, advanced medical technology and state-of-the-art facilities, internationally accredited hospitals, low cost of medical treatment as compared to the cost of the same treatments in other countries.
- KPMG | Strengthening healthcare workforce in India: the 2047 agenda | The Indian healthcare sector continues to face the challenge of the availability of human resources with demand continuing to accumulate. India has already paved the way to significantly improve the quality of medical education in India
- Government Of India, Ministry Of Tourism | revised guidelines for the promotion of wellness and medical as niche tourism products | Support under the Marketing Development Assistance (MDA) scheme for Wellness Tourism Service Providers (WTSPs) and Medical Tourism Service Providers (MTSPs).

DATA COLLECTION METHODS

This study is a Secondary sourced, desk-based, evidence synthesis government reports, market forecasts, academic papers, press releases and parliamentary material. The goal was to extract consistent, policy-relevant measures Like market size, growth projections, source markets, treatment mix, accreditation counts, policy initiatives, and digital enablers.

Sources and inclusion criteria

- **Included documents:** official policy briefs and press releases (Heal in India / MoHFW), commercial market reports, peer-reviewed or conference papers on medical tourism, and parliamentary/administrative records where relevant. Examples used for headline figures, the commercial market snapshot and projection, the academic review, and policy briefs.
- **Inclusion criteria:** documents had to explicitly report numeric estimates or descriptive findings about India's medical-tourism sector e.g., market value, treatment shares, accreditation counts, visa/visa-policy descriptions.

RESULTS DISCUSSION

Market comparison

India stands out for its cost-effectiveness, advanced medical technology, and highly qualified doctors, especially in specialized treatments such as cardiac surgery, orthopaedics, and organ transplants. Thailand, on the other hand, excels in hospitality, patient comfort, and aesthetic or wellness treatments, supported by its (Table 3) world-class hospital infrastructure and tourism-friendly environment. Malaysia offers a balanced combination of affordability, quality healthcare, and regulatory oversight, with strong government initiatives promoting international healthcare standards. Overall, India's combination of affordability and clinical excellence gives it a significant competitive edge in attracting international patients.

Table 2: Comparison of Medical Tourism market among Thailand, India & Malaysia

Parameter	India	Thailand	Malaysia
Estimated Market Value (2024)	USD 10.2 billion	USD 7–8 billion	USD 1.2–1.5 billion
Projected 2035 Market Value	USD 58.2 billion	USD 25–30 billion	USD 3–4 billion
Key Strengths	Highly qualified doctors, advanced tertiary care, affordability, English speaking professionals	Hospitality, recovery environment, strong private sector	Affordable elective surgeries, Muslim- friendly healthcare
Accredited Hospitals (JCI/NABH)	55 JCI + 1,245 NABH	60 JCI	15 JCI
Major Source Regions	Middle East, Africa, South Asia, Europe, North America	Middle East, ASEAN	Indonesia, Brunei, Singapore
USP (Unique selling points)	Affordable quality + Holistic care (Ayurveda, Yoga)	Strong hospitality	Muslim-friendly affordability

Source: Global health accreditation[5], Geethanjali Nataraj & Nityasree[6]

The Cost Benefits

One of the strongest pillars of India's medical tourism success is its significant cost advantage compared to developed nations. India offers world-class medical treatment at a fraction of the price charged in countries such as the United States, the United Kingdom, or even regional competitors like Singapore and Thailand. Despite the lower costs, Indian hospitals maintain high standards of care, advanced technology, and internationally accredited facilities, making the country an attractive destination for cost-conscious medical travellers.

The cost differential can be as high as 60–90% lower than treatments in Western countries. For example, complex procedures such as cardiac bypass surgery, organ transplants, or joint replacements are performed in India for a fraction of the international price, without compromising on quality. This makes India especially appealing to patients from regions where healthcare is either too expensive or has long waiting times.

Other contributing factors include lower operational costs, competitive pricing of pharmaceuticals, and affordable skilled manpower. Additionally, the favourable exchange rate of the Indian rupee further enhances India's price competitiveness for foreign patients.

Table 3: Prices of Common Medical Procedures Across Major Destinations for Medical Value Travel (USD)

Medical Procedure	India	Thailand	Malaysia	Singapore	Turkey	South Korea
Heart Bypass	7,900	15,000	12,100	17,200	13,900	26,000
Angioplasty	5,700	4,200	8,000	13,400	4,800	17,700
Heart Valve Replacement	9,500	17,200	13,500	16,900	17,200	39,990
Hip Replacement	7,200	17,000	8,000	13,900	13,900	21,000
Hip Resurfacing	9,700	13,500	12,500	16,350	10,100	19,500
Knee Replacement	6,600	14,000	7,700	16,000	10,400	17,500
Spinal Fusion	10,300	9,500	6,000	12,800	16,800	16,900
Dental Implant	900	1,720	1,500	2,700	1,100	1,350
Lap Band	7,300	11,500	8,150	9,200	8,600	10,200
Gastric Sleeve	6,000	9,900	8,400	11,500	12,900	9,950
Gastric Bypass	7,000	16,800	9,900	13,700	13,800	10,900
Hysterectomy	3,200	3,650	4,200	10,400	7,000	10,400
Breast Implant	3,000	3,500	3,800	8,400	4,500	3,800
Rhinoplasty	2,400	3,300	2,200	2,200	3,100	3,980
Rhytidectomy	3,500	3,950	3,550	440	6,700	6,000
Liposuction	2,800	2,500	2,500	2,900	3,000	2,900
Abdominoplasty	3,500	5,300	3,900	4,650	4,000	5,000
Lasik (Both Eyes)	1,000	2,310	3,450	3,800	1,700	1,700
IVF Treatment	2,500	4,100	6,900	14,900	5,200	7,900

Low Price **Moderate Price** **High Price**

Source: Medical Tourism Association 2019.

Clinical and Supply capabilities

- Public spending on healthcare in India stood at two percent of GDP in 2022 versus 1.2 percent in 2020. The Indian government has proposed increasing this to 2.5 percent by 2025 which is meant to substantially increase the capabilities and numbers of Indian medical professionals.
- Complete overhauling of the regulatory architecture in Modern Medicine, Indian Systems of Medicine (Ayurveda, Yoga) and Homeopathy which is now considered a USP (unique selling point) of India's medical tourism.[8] The objective of these reform efforts is to ensure uniform standards of medical education, create a curriculum relevant to the Indian context and improve the doctor-population ratio in the country.
- India imports nearly 80 percent of its medical devices, India remains highly dependent on foreign suppliers, particularly with respect to higher end equipment such as cancer diagnostics, medical imaging, ultrasonic scans, and PCR technologies.[9] Imports are growing rapidly as world-class hospital groups build high-end infrastructure, which are on the same standards as of some foreign counterparts and even better in some instances to spur on India's medical tourism sector.
- India's supply side combines world-class tertiary centres with an extensive network of smaller private and chain hospitals that serve domestic and inbound patients. Strengths repeatedly are in specialised centres for cardiac, oncology, orthopaedics, fertility and ophthalmology; dedicated International Patient Concierge units in large hospitals and a professional pool of English-speaking medical staff and cost advantages versus Western providers.
- NITI Aayog has proposed a model which enables the upgradation of District Hospitals to medical colleges using the VGF scheme (Viability Gap Funding) for development of clinical capabilities of medical professionals in country.[10]

- Large private tertiary hospitals provide highly complex care such as robotic surgery, advanced oncology, interventional cardiac procedures, transplants that attract higher-value inbound patients, while smaller hospitals focus on high-volume, low complexity procedures like cosmetic, dental, IVF and this explains the two-tier demand profile seen across reports.
- Many hospitals now run dedicated International Patient Departments or MV medical-value desks for scheduling, language support and logistics which is an important operational adaptation that improves conversion of enquiries into visits.

Human resources & digital tools

- Physician availability and language skills are advantages in source markets that prefer English communication. Rapid Technology adoption is improving but incomplete. EMR adoption and digital patient-record systems are growing (telemedicine and AI are highlighted as levers for diagnostics, planning and post-op follow-up), yet EMR penetration remains low which is an operational bottleneck for seamless cross-border continuity of care.
- Government is also expanding the number of medical and nursing colleges for meeting the demand for health professionals. In November 2025, the number of medical colleges in India increased to over 783 from 412 in 2017. Further, the Government is implementing a scheme for establishing medical colleges attached with district hospitals. The number of registered medical doctors increased to 1,386,150 in November 2025 from 827,006 in 2010.
- The Pradhan Mantri Ayushman Bharat Health Infrastructure Mission (PM-ABHIM) is a Centrally Sponsored Scheme, launched with a total outlay of ₹64,180 crore for the period 2021–22 to 2025–26. 11This transformative initiative aims to strengthen and integrate health service delivery across all levels primary, secondary, and tertiary care while building a robust health system capable of effectively responding to current and future scenarios in the mean while enabling India to cater to foreign patients.
- The patients start with teleconsultation for initial triage, scheduling and pre-travel documentation, interoperable EMRs for continuity of care, and tele-follow-up once patients return home. India's telemedicine policy and growth of telehealth vendors create opportunities to secure pre-and post-treatment relationships with international patients.
- Major hospitals (Apollo, AIIMS, Narayana Hrudayalaya) have adopted telemedicine services, Portea, CallHealth, Medwell Ventures and Healthcare at Home offer home healthcare services. A number of companies offer online consultations: Practo, Novocura Tech Health Services (mfine), DocPrime, DocsApp, Click2Clinic, iCliniq. Digital health and telemedicine are emerging as key growth drivers.[12]
- The Indian digital health market, valued at Rs. 75,658 crore (US$ 8.79 billion) in 2024, is projected to reach Rs. 4,11,275 crore (US$ 47.80 billion) by 2033 at a CAGR of 17.67%. The telemedicine market is expected to reach Rs. 47,130 crore (US$ 5.4 billion) by 2025[13], supported by demand for remote healthcare and advances in technology. This boom in telemedicine services in a core enabler in development as these are the starting factor for a medical tourist.

Accreditation and geographic patterns

Accreditation is a central trust signal for patients. NABH and JCI accreditations are repeatedly cited as important. One set reports NABH in the hundreds/1,000+ and JCI counts in the tens

- **Chin in the armour:** accreditation is concentrated in Tier-I private hospitals; many district hospitals and smaller private facilities lack formal accreditation or standardised patient- safety processes. This unevenness constrains the scale-out of safe, consistent services across regions.[14]
- Supply is concentrated in major metros / medical tourism hubs (Delhi NCR, Mumbai, Chennai, Bengaluru, Hyderabad, Kerala) which possess

clusters of accredited hospitals, international connectivity and hospitality infrastructure. Many smaller cities lack comparable capacity, limiting regional diffusion of inbound flows. This leads to a major supply-side risks i.e. Quality variation outside top centres, incomplete digital records for cross-border continuity, limited empanelment of regulated facilitators, and workforce distribution gaps. These make it harder to scale beyond urban hubs and to give foreign payers the confidence needed for insurer partnerships.

- These certifications show that hospitals follow strict international standards for quality care, patient safety, cleanliness, and ethical practices. When a hospital is NABH or JCI accredited, it gives foreign patients confidence that they'll receive safe and reliable treatment—often at a much lower cost than in their home countries. Such recognition also reflects the hospital's commitment to using modern technology, skilled doctors, and transparent systems, which together create a positive treatment experience. NABH and JCI accreditations act as a stamp of trust and excellence, helping India stand out globally and attract more people seeking affordable, high-quality medical care.

Policy & digital enablers

- "Heal in India" efforts have created a visible national brand and pushed for visa facilitation (e-medical/AYUSH visas), promotional support, and coordination mechanisms (National Medical & Wellness Tourism Board / nodal agencies). These are intended to simplify the inbound patient journey and improve international marketing. Government releases and parliamentary materials highlight a policy focus on market promotion, easing regulatory friction for foreign patients, and public–private coordination. These moves have improved visibility and logistics but implementation varies across states.
- To make medical travel more convenient and comfortable, the Government of India introduced the e-Medical Attendant Visa scheme. This visa allows up to two attendants or family members to accompany a patient traveling on an e-Medical Visa. The attendants can be close relatives, ensuring emotional and physical support during treatment. The application process for the attendant visa is the same as the patient's simple, online, and paperless ,making it easier for families to travel together. The validity and number of entries are also synchronized with the patient's visa, allowing attendants to stay as long as the patient requires medical care in India.

Table 4: Number of Medical Visas issued

Year	Number of Medical Visa Given
2014	184298
2015	233918
2016	427014
2017	495000
2018	523894
2019	375535
2020	152673
2021	338400
2022	436204
2023	597196
2024	463725

- The government also revamped the e-Visa portal to make the application process user-friendly and efficient. All stages from filling out the application form to uploading documents and making payments are conducted entirely online, eliminating the need to visit embassies or handle excessive paperwork. The portal supports multiple international currencies and payment gateways, ensuring a seamless transaction process for applicants worldwide. Real-time tracking and status updates make the system transparent, while a 24x7 helpline offers assistance to applicants facing difficulties. This digital transformation has greatly reduced processing times and improved the overall experience for medical travellers.
- Originally, the e-Visa facility was available to a limited number of countries. However, recognizing India's growing reputation as a global hub for affordable and high-quality healthcare, the government progressively expanded the e-Visa scheme to over 170 countries. This expansion made it possible for the majority of international patients —

especially from Africa, the Middle East, South Asia, and CIS nations — to access Indian medical facilities with ease. The widened eligibility not only boosted patient inflow but also strengthened India's position in the global medical tourism market by improving accessibility and inclusivity.

Facilitation & intermediary regulation

- Facilitator/intermediary market remains fragmented and partially unregulated. Only a small number of facilitators are formally empanelled or certified. A stronger empanelment/oversight regime for Medical Value Tourism Facilitators to protect patients and standardise service quality.
- The government (MoT & MOHFW) also plans to launch a one-stop online MVT portal, which will include mapping of all medical facilitators including government and private hospitals, booking of services, payments and post-operative services. For better visibility, the MVT portal will be integrated with India's tourism website - Incredible India.
- To boost the growing market and regulation of then medical tourism service providers government also plans to Support under the Marketing Development Assistance (MDA) scheme for Wellness Tourism Service Providers (WTSPs) and Medical Tourism Service Providers (MTSPs). The Wellness Tourism Service Providers including Wellness Centres, SPAs and Wellness Tourism Facilitators (WTFs) i.e., Travel Agents and Tour Operators engaged in Wellness Tourism and Medical Tourism Service Providers (including Hospital and Medical Tourism Facilitators (MTFs) i.e., Travel Agents and Tour Operators engaged in Medical Tourism and will be provided financial assistance as per the provisions of the Marketing Development Assistance (MDA) scheme administered by the Ministry of Tourism, Government of India for the Fairs/ Events/ Road Shows approved by the Ministry of Tourism, Niche Tourism Division.

Strategic recommendations

- Standardize and Certify Medical Value Tourism Facilitators

To build greater credibility and trust in India's medical tourism ecosystem, there is a strong need to standardize and certify Medical Value Tourism (MVT) facilitators. Doing so will help reduce instances of fraud, improve the overall patient experience, and ensure that international patients feel safe and well-supported throughout their medical journey. A uniform certification process would also bring more professionalism and accountability to the sector, which currently varies widely in quality and transparency.

Recommendation: This can be achieved through the creation of a national empanelment framework under reputed authorities such as the NABH (National Accreditation Board for Hospitals & Healthcare Providers) or the Ministry of Health and Family Welfare (MoHFW). Facilitators should follow mandatory disclosure norms, including clear information on services, pricing, and hospital affiliations. Introducing a simplified accreditation level for smaller operators can make compliance easier while maintaining high service standards and ethical practices.

Develop a Best-Practice Playbook for Hospitals

Creating a best-practice playbook for hospitals that cater to international patients can ensure consistency and excellence across all accredited healthcare centres. Such a guide would help hospitals offer concierge-level service, ensuring that every medical traveler—regardless of which hospital they visit—receives a smooth, transparent, and reliable experience. This initiative would eliminate inconsistencies in service quality and strengthen India's global image as a dependable destination for healthcare.

Recommendation: The playbook could feature a comprehensive checklist covering crucial aspects such as patient navigation, visa assistance, availability of interpreters, transparent pricing, and post-treatment follow-ups. Disseminating this guide through NABH and state health departments would encourage widespread adoption, helping hospitals align with the best global practices in patient care.

Launch Targeted Market Diversification Campaigns

India's medical tourism currently depends heavily on a few specific regions for patient inflow. To make the sector more resilient

and future-ready, the government and industry must focus on diversifying source markets. Relying too much on a handful of countries makes India vulnerable to regional disruptions, such as visa policy changes or political instability. Expanding outreach to new markets will stabilize growth and reduce risks.

Recommendation: Authorities can use data analytics to identify high-potential regions—including ASEAN countries, Africa, and Indian diaspora communities worldwide. Focused digital marketing, teleconsultation programs, and partnerships with international healthcare bodies can be used to attract patients from these emerging markets and promote India as a global medical hub.

- Promote Interoperable Electronic Medical Records (EMR)

A crucial step toward seamless international healthcare delivery is building interoperable electronic medical record systems. When hospitals can securely share patient information, both pre- and post-treatment care become much smoother and more effective. Streamlined data exchange leads to better medical outcomes and increases the confidence of international insurers and payers who want transparency in patient care.

Recommendation: The government can incentivize hospitals to adopt a national EMR interoperability standard by providing technical and financial support, particularly for mid- sized institutions. Pilot programs can explore cross-border data exchange within strict privacy and consent frameworks, ensuring that patient data remains secure while improving coordination between Indian and foreign healthcare providers.

- Build Insurance and Fintech Partnerships for Cross-Border Payments

Developing insurance and fintech collaborations is key to making India's medical tourism sector more accessible and financially inclusive. Many international patients face difficulty paying for high-value procedures upfront. Integrating insurance and digital payment systems can remove this barrier and open doors to more advanced treatments.

Recommendation: Pilot programs could be launched with international insurance companies to simplify claims and reimbursement processes. Additionally, the use of standardized invoice formats and escrow payment systems can ensure secure and transparent financial transactions, benefiting both hospitals and patients.

- Expand Accreditation Beyond Metro Cities

To make high-quality medical services more widely available, accreditation programs must be extended to regional and smaller cities. This will allow patients to access trusted care without having to travel to major metropolitan areas, while also easing the burden on big- city hospitals.

Recommendation: The government can set up mobile accreditation teams to visit and assess regional hospitals, offer fast-track improvement grants to those seeking certification, and establish regional training centres to help hospitals meet required standards. This approach promotes balanced growth and ensures that quality healthcare reaches every corner of the country.

- Create Integrated Medical and Wellness Corridors

India has a unique advantage in being able to combine modern medical treatments with its traditional AYUSH wellness systems (Ayurveda, Yoga, Unani, Siddha, and Homeopathy). Creating integrated medical and wellness corridors can make India's healthcare offering stand out globally. Combining conventional and holistic medicine enhances recovery, attracts more international patients, and positions India as a destination for total well-being rather than just treatment.

Recommendation: The initiative can include package-based programs, such as "cardiac surgery plus Ayurvedic rehabilitation," and develop regional clusters that specialize in both medical and wellness services. For instance, Kerala's successful model can serve as a blueprint for building similar corridors across other states.

- Build a National MVT Data and Market Intelligence Platform

Accurate and comprehensive data is the backbone of any successful industry strategy. Establishing a national Medical Value Tourism (MVT) data platform will allow policymakers and stakeholders to make informed, evidence-based decisions. A unified data system enables better policy planning, precise market

targeting, and the ability to measure return on investment (ROI) for various initiatives.

Recommendation: This could take the form of a centralized digital dashboard that brings together data from hospitals, visa applications, and booking platforms, all while maintaining strict privacy safeguards. Publishing regular quarterly market reports would help track progress and identify emerging opportunities within the sector.

- Strengthen International Quality Branding and Partnerships

To move beyond competing solely on affordability, India must position itself as a trusted global healthcare brand known for both quality and reliability. Building international recognition and forming partnerships with reputed payers will elevate India's standing as a world-class medical destination.

Recommendation: India can pursue mutual accreditation recognition agreements with other countries, join international hospital networks, and maintain an active presence in global trade and healthcare forums. Strengthening these relationships will help India shift its reputation from being a low-cost option to being a high-value, trusted healthcare provider on the world stage.

CONCLUSION

This study synthesises available policy documents, market reports and academic literature to produce a practical, evidence-based assessment of India's medical tourism (Medical Value Travel — MVT) sector. India's comparative strengths are clear: a broad base of tertiary-level clinical capability (cardiac, oncology, orthopaedics, IVF, dental and cosmetic care), a large pool of English-speaking clinicians, internationally accredited centres, and a compelling cost advantage that together have positioned the country as a leading value destination for inbound patients. At the same time, the analysis identifies structural constraints that limit the sector's sustainable scale-up — notably geographic concentration of accredited services in metro hubs, uneven quality outside leading private chains, fragmented facilitator ecosystems, and important data gaps that undermine market intelligence and policy design.

The evidence reviewed suggests that short-to-medium term growth will be driven by two parallel tracks: high-volume, elective procedures (cosmetic, dental, IVF) that rely on affordability and convenience, and higher-value tertiary care (cardiac, oncology, transplants) that depends on centres of clinical excellence and formalised payer relationships. Digital enablers like teleconsultation, better EMR interoperability and online booking platforms which are already shifting how demand is discovered and converted, but incomplete EMR penetration and weak cross-border data flows limit continuity of care and post-discharge follow-up. Policy interventions and private-sector partnerships that reduce friction (visa, transparency, facilitator accreditation, insurer linkages) will therefore have outsized impact on both patient safety and market confidence.

To translate potential into resilient growth, the paper's recommendations — standardising/empanelling facilitators, expanding accreditation beyond metros, investing in EMR interoperability, and developing insurer/fintech pilots for cross-border payments aiming for target precisely the market failures identified. If implemented together, these measures would move India from a price-led arbitrage model toward a reputation-and-quality model that can attract diversified source markets and higher-value patients. Finally, the study cautions that available evidence is largely secondary and that better routine data collection (a national MVT dashboard, hospital-reported inbound patient metrics) is essential both to monitor outcomes and to evaluate policy impact.

Limitations of this analysis include reliance on desk-based, secondary sources with variable methodological transparency and inconsistent public statistics on inbound patient volumes and case- mix. Future primary research should collect hospital-level outcome and patient-experience data, explore payer-led cross-border pilots, and test accreditation/empanelment models for facilitators empirically. Overall, the balance of evidence is optimistic: India has the clinical base and policy momentum to be a durable global MVT leader, but only if quality, continuity and governance gaps are closed while market diversification is actively pursued.

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