



Heal in India

Catalysing medical and wellness tourism for a healthier global future



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Foreword by The Federation of Hotel and Restaurant Associations of India (FHRAI)

India is steadily gaining recognition as a key destination for medical and wellness tourism, reflecting the country's robust healthcare and holistic well-being ecosystem. At the heart of this transformation lies the 'Heal in India' initiative—a visionary platform that integrates India's modern clinical excellence with its ancient healing wisdom, offering the world a truly holistic healthcare experience.

This report, 'Heal in India: Catalysing medical and wellness tourism for a healthier global future,' presents a comprehensive blueprint to position India as the preferred global destination for medical value travel. It examines India's competitive advantages, identifies key policy and regulatory enablers, highlights case studies and global benchmarks, and proposes actionable recommendations for scaling up both allopathic and AYUSH-based wellness ecosystems.

As the apex body of the hospitality sector in India, FHRAI is proud to be a key stakeholder in this mission. Our member hotels and restaurants—from major metros to emerging Tier II and III hubs—are prepared to support medical travelers and their families with high

standards of care, comfort, and culturally responsive services. The report's emphasis on building medical value travel clusters, accreditation frameworks, digital facilitation, and public-private partnerships strongly aligns with FHRAI's vision for a resilient, tech-driven, and inclusive hospitality sector.

We believe the convergence of healthcare and hospitality can make India not just a destination for treatment, but a sanctuary for healing and rejuvenation. FHRAI remains committed to supporting this transformative national vision by fostering an ecosystem where every guest—whether a tourist or a patient—feels cared for, respected, and at home.

Let us work together to make India the world's most trusted and holistic destination for health and wellness.

K. Syama Raju

President, FHRAI

Federation of Hotel and
Restaurant Associations of India

Foreword by KPMG in India

India's healthcare and wellness sector is undergoing a change in thinking – one that blends modern clinical excellence with centuries-old traditions of holistic healing. At KPMG in India, we recognise the growing global significance of India's healthcare and wellness ecosystem - not merely as a source of treatment but as a beacon of holistic healing, cultural wisdom, and inclusive economic growth. The 'Heal in India' initiative reflects this evolving narrative, where clinical excellence converges with traditional wellness to shape a new paradigm in global medical value travel. It is with great enthusiasm that I present this thought leadership report, Catalysing medical and wellness tourism for a healthier global future.

Over the years, India has established itself as a preferred destination for international patients, owing to its renowned medical institutions, highly trained healthcare professionals, and affordable treatment options. What sets India apart today is its ability to offer an integrated experience – where advanced tertiary care coexists with wellness therapies rooted in Ayurveda, Yoga, and other AYUSH systems. This convergence of science and tradition positions India uniquely in the global healthcare landscape.

This report provides an extensive analysis of the evolving medical and wellness tourism market, both globally and within India. It highlights key enablers such as digital health platforms, infrastructure development, accreditation frameworks, and policy support.

It also examines emerging trends – from personalised care and telemedicine to bundled treatment packages and cross-border insurance integration – that are reshaping patient expectations and delivery models.

The 'Heal in India' initiative is more than a branding exercise, it is a strategic mission to make India a trusted, accessible, and inclusive destination for global healthcare. Through curated case studies, stakeholder insights, and actionable recommendations, this Thought Leadership aims to support policymakers, healthcare providers, wellness institutions, and technology partners in co-creating a future-ready ecosystem.

We believe that medical and wellness tourism can serve as a catalyst for economic growth, cultural exchange, and public health innovation. This report captures our progress and sparks bold ideas, practical solutions, and a shared commitment to healing the world - one visitor at a time.

We look forward to continued collaboration with FHRAI and other stakeholders to help realize the full promise of 'Heal in India'.

Vivek Agarwal

**Partner and Lead - Industrial and Infrastructure Development,
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Table of Abbreviations

AI	Artificial Intelligence
AIIMS	All India Institute of Medical Sciences
ASCI	Advertising Standards Council of India
AYUSH	Ayurveda, Yoga and Naturopathy, Unani, Siddha, and Homeopathy
CABG	Coronary Artery Bypass Grafting
CDSCO	Central Drugs Standard Control Organisation
FHRAI	Federation of Hotel and Restaurant Associations of India
EMR	Electronic Medical Records
EMI	Equated Monthly Installment
FDI	Foreign Direct Investment
FTA	Foreign Tourist Arrivals
GDP	Gross Domestic Product
GCC	Gulf Cooperation Council
HNI	High-Net-Worth Individual
HRH	Human Resources for Health
HWC	Health and Wellness Center
IPD	International Patient Department
ISO	International Organisation for Standardisation
JCI	Joint Commission International
KRW	South Korean Won
MDA	Marketing Development Assistance
MHTC	Malaysia Healthcare Travel Council
MoHFW	Ministry of Health and Family Welfare
MoT	Ministry of Tourism
NABH	National Accreditation Board for Hospitals and Healthcare Providers
NBFC	Non-Banking Financial Company
NCR	National Capital Region
NMC	National Medical Commission
OECD	Organisation for Economic Co-operation and Development
PPP	Public- Private Partnership
SEZ	Special Economic Zone
SOP	Standard Operating Procedure
UPI	Unified Payments Interface

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1. Introduction

India has emerged as a leading hub for medical tourism, drawing global patients with its access to advanced healthcare technology, skilled professionals, and cost-effective treatments. Alongside its cultural appeal, the country offers a wide range of high-quality medical procedures to both domestic and international visitors. Furthermore, India's emergence as a preferred destination for medical and wellness tourism is being actively shaped by its government's strategic vision under the 'Heal in India' initiative. This vision seeks to position the country as a global center for medical value travel by leveraging its strengths in both **modern healthcare** and traditional wellness systems such as **ayurveda, yoga, unani, siddha, and homeopathy**.

The initiative is being developed as a **sub-brand of Incredible India**,¹ with a focus on creating a

seamless experience for international patients through improved infrastructure, digital platforms, and coordinated stakeholder engagement. 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 Centers, while the MoHFW continues to strengthen primary healthcare delivery through Ayushman Bharat and the National Health Policy 2017.**² Together, these efforts aim to enhance India's appeal as a destination that offers accessible, affordable, and high-quality care.



¹National Strategy and Roadmap for Medical and Wellness Tourism (Office Memorandum- No. NT-703/1/2020-NT) | MoT, Government of India | Jan 2022

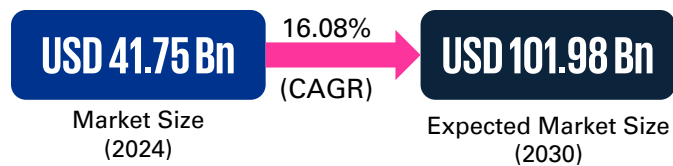
²Update on Heal in India, Heal by India Initiatives- MoHFW | Press Release: Press Information Bureau | Jul 2023

2. Global Landscape for Medical and Wellness Tourism

2.1 Global Market Size and Growth Trends

(A) Medical Tourism:

The medical tourism market is experiencing rapid growth, driven by rising demand for affordable, high-quality care across borders.³



This growth is largely attributed to the high cost of healthcare in developed countries,⁴ and long wait times for elective procedures,⁵ prompting patients to seek affordable treatment abroad. Procedures not covered by insurance such as cosmetic surgery, dental care, and infertility treatments are significant contributors to this trend.

(B) Wellness Tourism:

In parallel, the global wellness tourism market is also witnessing sustained expansion, driven by rising awareness of health and well-being, increasing disposable incomes, and the integration of digital technologies. **The market valued at USD 954.14 billion in 2024 and is expected to reach USD 2,054.90 billion by 2034.**⁶ North America currently leads the market, while **Asia-Pacific is expected to grow at the fastest pace** due to infrastructure development and growing interest in wellness-focused travel.⁷



³Medical Tourism Market Size & Share, Industry Report, 2030 | Grand View Research | (Accessed: Jul 2025)

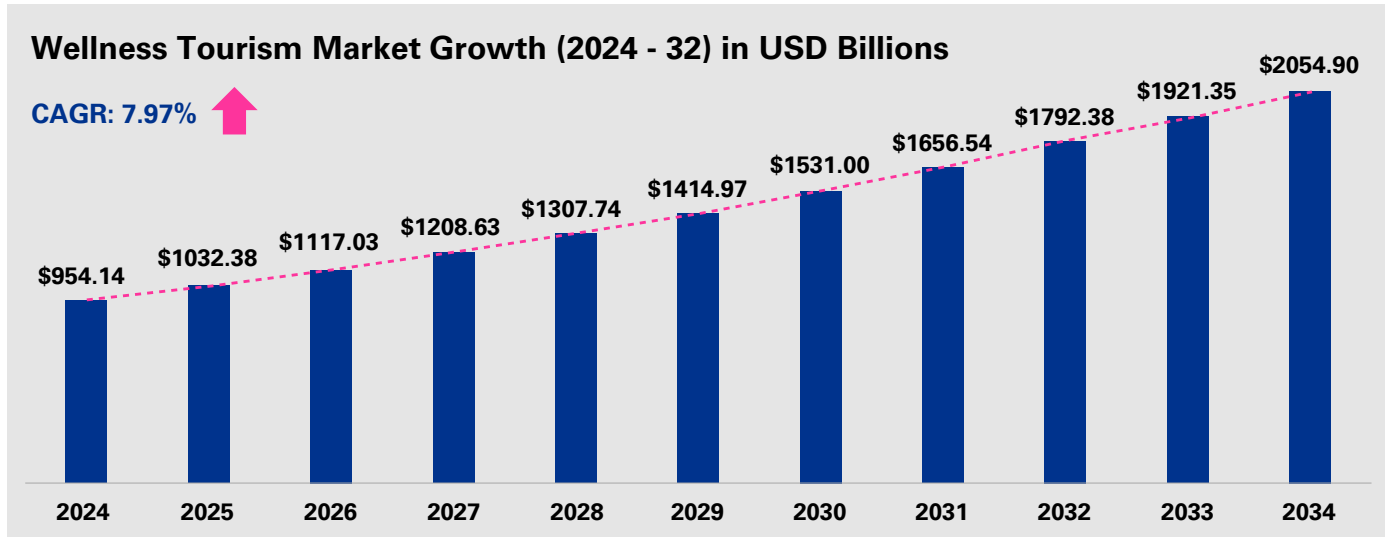
⁴Understanding rising healthcare costs | Marsh McLennan Agency | June 2024

⁵Waiting times for elective surgery - Health at a Glance 2023 | OECD | Nov, 2023

⁶Wellness Tourism Market Size, Share and Trends 2025 to 2034 | Precedence Research | Apr 2025

⁷Wellness Tourism Market Size, Share and Trends 2025 to 2034 | Precedence Research | Apr 2025

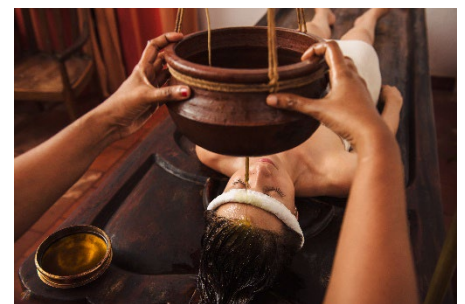
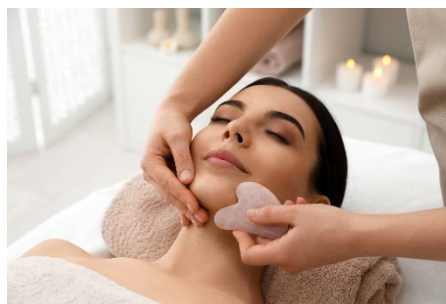
2.2 Leading Medical and Wellness Tourism Destinations



(Source: Wellness Tourism Market Size, Share and Trends 2025 to 2034 | Precedence Research | Apr 2025)

Thailand maintained its leading position in the medical tourism industry in 2024, capturing 24.40% of the global market.⁸ Its appeal lies in the combination of cost-effective treatments and high-quality healthcare, with some facilities offering procedures at nearly half the price compared to Western countries such as the United States. Meanwhile, Mexico has also become a prominent choice for North American patients, particularly for affordable dental and cosmetic services.

In recent years, countries such as Turkey and South Korea have become prominent destinations for international patients seeking specialized medical treatments. **Turkey's reputation for affordable and experienced hair transplant services,**⁹ has attracted individuals from across Europe and beyond, **while South Korea continues to lead in aesthetic skincare procedures, bolstered by its global influence in beauty standards.**¹⁰



India is gaining prominence in the medical and wellness market by integrating modern healthcare with traditional systems such as AYUSH. **Government initiatives, including the AYUSH mark and infrastructure development in regions like Jammu and Kashmir (J&K),** e.g., four Integrated AYUSH Hospitals approved by the Government of India for the Union Territory (UT) of J&K, scheduled to become operational during the FY 2024 - 25,¹¹ enhancing India's position in the global medical tourism landscape.

Even within India, **states like Kerala are drawing increasing attention for their deep-rooted Ayurvedic therapies.**¹² Kerala has been long recognized for its integrated approach to wellness, offering traditional treatments, supported by skilled practitioners and a strong local belief in preventive care. Together, these regions reflect how medical travel is being shaped by regional expertise and patient trust.

⁸Medical Tourism Market Size & Share, Industry Report, 2030 | Grand View Research | (Accessed: Jul 2025)

⁹How Istanbul Became the Global Capital of the Hair Transplant | GQ Magazine | July 2022

¹⁰K-Beauty Treatments Are Trending In 2025, According To Experts | Forbes Magazine | Nadja Sayej | Mar 2025

¹¹4 Integrated Ayush Hospitals to be made functional in J&K UT during 2024-25 FY | Daily Excelsior | Feb 2024

¹²India's ancient tradition that aligns mind, body and spirit – and where to experience it | BBC | Teja Lele | Apr 2024

2.3 Key Factors Influencing Medical and Wellness Tourism¹³

Affordability of Medical Services

One of the primary drivers of medical tourism is the significant cost difference between treatments in developed and developing countries. Procedures such as surgeries, diagnostics, and rehabilitation are often available at a fraction of the cost in countries like India, Thailand, and Malaysia. For instance, a **knee replacement surgery costs ~USD 6,600 in India, and USD 14,000 – 16,000 in Thailand and Singapore**, making these destinations substantially more affordable than many Western countries.¹⁴

Digital Health Infrastructure and Technology Adoption Ecosystem:

Countries with advanced digital health systems featuring AI diagnostics, telemedicine, and robotic care are attracting global patients by improving efficiency, access, and trust in care delivery. For instance, **Estonia digitised over 99% of patient records, while Denmark and Sweden offer integrated EHRs and app-based diagnostics.**¹⁸ India is also advancing through **platforms like e-Sanjeevani and the upcoming 'Heal in India' portal**, linking hospital EMRs, visa systems, and multilingual support, positioning these nations as future-ready medical tourism hubs.

Quality of Healthcare and Wellness Services

The presence of internationally accredited hospitals and highly qualified medical professionals enhances a destination's credibility. Factors such as modern medical technologies, reputation of physicians, and patient satisfaction play a critical role in shaping perceptions of quality. For example, countries such as Thailand and India have established strong international credibility with **64 and 63 hospitals respectively accredited by the Joint Commission International (JCI).**¹⁵

Policy Ecosystem and PPP Collaboration

Effective policy frameworks and public-private partnerships are critical for growing medical and wellness tourism. **Thailand's 2023 - 2027 wellness strategy** integrates traditional medicine, certification, and sustainability, while **Malaysia's MHTC, under the Ministry of Health, coordinated a healthcare travel ecosystem that generated over RM 1.7 billion by 2019,**¹⁹ showcasing how strong governance enhances global competitiveness and service quality.

Favourable Visa Policies and Patient Mobility

Streamlined visa policies significantly enhance a country's attractiveness for medical tourism by reducing entry barriers and improving patient experience. For example, **India's e- Medical Visa and AYUSH Visa policies allow triple entry and extended stays for citizens of over 160 countries,**¹⁶ Furthermore, Liberalized entry norms, and dedicated airport desks helped **boost inbound medical tourism to over 610,000 in 2023**¹⁷ highlighting India's institutional readiness to serve international patients.

Integrated Care Experiences and Personalized Support Services

Seamless patient journeys supported by concierge services, language assistance, and cultural orientation are emerging as key differentiators in medical and wellness tourism. For example, **dedicated International Patient Departments** that manage everything from **travel logistics to personalized recovery plans**, significantly enhancing satisfaction and repeat visits, this underscores the value of integrating hospitality with healthcare to build trust and deliver high-quality, end-to-end experiences.

¹³Identification of Factors for the Development of Medical | International Journal of Environmental Research and Public Health | Viktoriia Vovk, Lyudmila Beztelesna, and Olha Plashko | Oct 2021

¹⁴What is the cost of Knee Replacement Surgery in India? | SafeMedTrip.com (Accessed: Jul 2025)

¹⁵Joint Commission International - Search for JCI-Accredited Organizations (Accessed: Jul 2025)

¹⁶DETAILS OF VISAS GRANTED BY INDIA | Ministry of Home Affairs- Government of India - AnnexIII_01022018 (Accessed: Jul 2025)

¹⁷Medical Tourism Market Size, Share, Global Growth Report, 2032 | Fortune Business Insights | Jignesh Rawal | Jun 2025

¹⁸6 Countries That Are Transforming Healthcare Sector | inVerita | Yuliia Fedyk (Accessed: Jul 2025)

¹⁹About Us | Malaysia Healthcare Travel Council (MHTC) | (Accessed: Jul 2025)

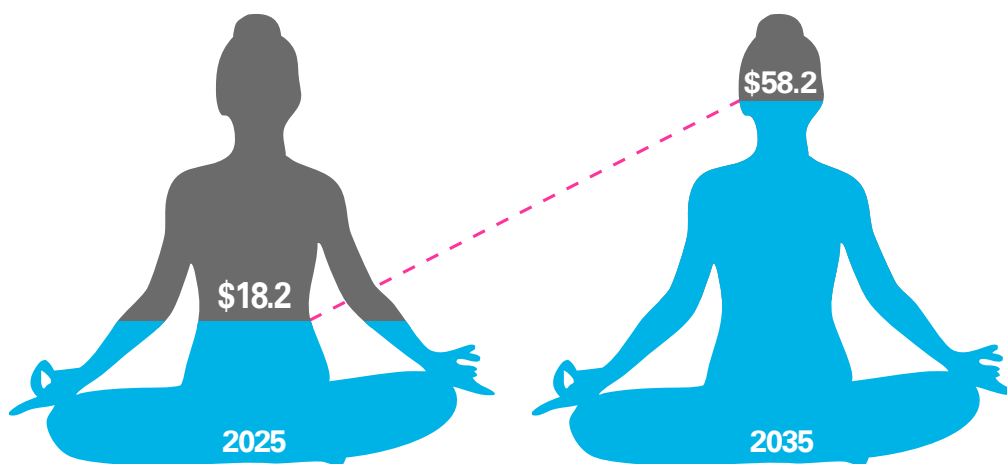
3. India's Medical and Wellness Tourism Landscape

3.1 Global Market Size and Growth Trends

India's medical tourism market is projected to reach approximately **USD 18.2 Billion in 2025**, with estimates indicating a rise to **USD 58.2 Billion by 2035, at a CAGR of 12.3%.**²⁰ The country ranks 10th globally in the Medical Tourism Index and **7th in wellness tourism**,²¹ reflecting its growing stature in both curative and preventive healthcare segments.

Despite a temporary dip during the COVID-19 pandemic, the sector has rebounded strongly, supported by policy reforms, infrastructure investments, initiatives such as Digital Health IDs, and Ayushman Bharat, along with introduction of specialized visa categories such as the **AYUSH visa**,²² **Skill Development Programs etc.**

Indian Medical Tourism Market (in USD Billion)



3.2 Most In-Demand Treatments and Inbound Patients Market

India attracts nearly **2 million patients from 78 countries**,²³ for a wide range of treatments (including elective treatments), with high demand in areas such as:²⁴

- Cardiac surgeries
- Cosmetic surgery
- Ophthalmology
- Ayurveda and Panchakarma therapies
- Orthopedic procedures (like knee and hip replacements)
- Dental care
- Fertility treatments (IVF)
- Oncology, neurology, and minimally invasive surgeries

Number of Medical visas issued by India – **463,725 in 2024**,²⁵ **from INR 3.75 lakh in 2019** (as per data from the MEA). **Even during the Covid-19 pandemic India issued 1.52 lakh medical visas.**²⁶

India's medical value travel sector attracts patients from a broad spectrum of countries, reflecting its growing global reputation for quality and affordability. **A substantial share of medical visas – more than half – are issued to individuals from Bangladesh (323,498 visas).**²⁷

²⁰India Medical Tourism Market- India Medical Tourism Industry Analysis from 2025 to 2035 | Future Market Insights | (Accessed: Jul 2025)

²¹National Strategy and Roadmap for Medical and Wellness Tourism (Office Memorandum- No. NT-703/1/2020-NT) | MoT, Government of India | Jan 2022

²²Ayush Visa for foreigners visiting India for availing treatment under Ayush system of medicine| Press Release: Press Information Bureau | Dec 2024

²³Medical Tourism in India Statistics 2024 | ClinicSpots | Priyanka Dutta Deb | Jun 2024

²⁴India | Medical Tourism

²⁵India emerges as medical tourism hub; grants 463,725 MVT visas in 2024 | Medical Buyer | Apr 2025

²⁶Wellness meets hospitality: India's \$10B medical tourism boom | Hotelier India | Dr P. Manikandan | May 2025

²⁷ISSUANCE OF MEDICAL VISA - UNSTARRED QUESTION NO- 403 | Rajya Sabha | MEA - Government of India | Feb 2025

3.3 What Makes India a Good Medical and Wellness Tourism Destination

Clinical Excellence at Affordable Cost

Treatments in India cost up to 90% less than in Western countries. For example, **Coronary Artery Bypass Grafting (CABG)**, one of the most frequently performed major surgeries in the United States, involves approximately **400,000 procedures annually**.²⁸ The average cost is around USD 151,271, with prices reaching as high as **USD 448,038**.²⁹ In comparison, the same procedure in India costs between **INR 1.8 Lakhs – INR 3.6 Lakhs (~USD 2,098 – USD 4,200)**.³⁰

Holistic Wellness Ecosystem

India's strength lies in its integration of Yoga, Ayurveda, Unani, and Naturopathy with modern medicine. The AYUSH visa and wellness hubs in states like Kerala and Uttarakhand further enhance this appeal. In 2024, **India issued 173 AYUSH visas, 221 AYUSH e-visas, and 17 AYUSH Attendant visas**.³¹ With the **AYUSH sector within healthcare expected to grow at a CAGR of ~17%**,³² and **India with its @2047 vision targeting 100 million foreign tourist arrivals**,³³ these figures are anticipated to rise significantly.

Multilingual and Culturally Sensitive Environment

Western research highlights that language barriers can hinder access to care, reduce understanding and adherence, and lower patient satisfaction and quality of care. **The Indian population speaks over 22 major languages with English used as the lingua franca for biomedicine**.³⁴ A large pool of English-speaking doctors, nurses, and support staff with medical education in India is **conducted in English, with standardized competencies set by the National Medical Commission (NMC)**³⁵ ensuring smooth communication and patient comfort.

Accredited Clinical Infrastructure

India has **1,700+ NABH-accredited hospitals**³⁶ and **63 JCI-accredited hospitals**, primarily located in major cities like Delhi, Mumbai, Chennai, and Bengaluru renowned globally for their excellence in healthcare. One such facility **performs more than 4,000 surgeries annually with half on pediatric patients, surpassing the surgical volume of leading U.S. hospitals**.³⁷ **Advanced procedures like bypass surgery are available for as little as USD 2,000**, significantly enhancing the accessibility of high-quality medical care.³⁸

e-Medical Visa and Air Connectivity

The government has expanded the e-tourism visa regime, allowing medical treatment (excluding organ transplants) under a six-month stay. The AYUSH visa introduced in 2023 further supports wellness travel. Improved air connectivity **with 50 international terminals connecting to Tier-II and Tier-III cities**,³⁹ is expanding the reach of medical tourism beyond metros.

Post-Treatment Care and Telemedicine

Several hospitals offer telemedicine services and rehabilitation centers, ensuring continuity of care after discharge. Patients can choose to recuperate in hospitals or nearby accommodations. For example, India's **free e-Sanjeevani telemedicine service has delivered 276+ million consultations**, helping bridge gaps in healthcare access.⁴⁰

Patient Rights and Safety Protocols

Patients in India are entitled to confidentiality, informed consent, and access to medical records. Hospitals follow stringent safety protocols and offer dedicated international patient services. **Medical data is protected under the Digital Personal Data Protection Act, 2023, alongside supporting IT regulations and healthcare regulations (such as Clinical Establishments (Registration and Regulation) Act, 2010, National Medical Commission Act, 2019)** that uphold patient rights across clinical and pharmaceutical sectors.

Government-Supported Ecosystem and Institutional Backbone

Advancements in India's medical tourism is developed on the foundation of strong government **support through initiatives like the 'Heal in India' campaign, the National Medical and Wellness Tourism Board, and the Digital Health Stack** including the **Ayushman Bharat Digital Mission**,⁴¹ **Unified Health Interface**, and **Ayush Grid**. These efforts ensure seamless care coordination, tech-driven services, and a patient-friendly ecosystem that positions India as a trusted global health destination.

²⁸Coronary Artery Bypass Graft | StatPearls - NCBI Bookshelf | Bradlee J. Bachar, Biagio Manna | Aug 2023

²⁹Association of Hospital Prices for Coronary Artery Bypass Grafting with Hospital Quality and Reimbursement | PubMed Central | Bria D Giacomino, Peter Cram, Mary Vaughan-Sarrazin, Yunshu Zhou, Saket Girotra | Apr 2016

³⁰Heart Surgery Cost in India: Types and Prices Explained | HDFC Ergo | HDFC Ergo Team | Nov 2024

³¹Ayush Visa for foreigners visiting India for availing treatment under Ayush system of medicine | Press Release: Press Information Bureau- AYUSH | Dec 2024

³²India's Ayush Industry & National AYUSH Mission | India Brand Equity Foundation (IBEF) | Feb 2025

³³Tourism Expansion in India | Press Release: Press Information Bureau | Oct 2024

³⁴Addressing language barriers to healthcare in India | PubMed | Lalit Narayan | Jul 2013

³⁵Medical education in Hindi and indigenous languages in India: Issues and challenges | The National Medical Journal of India | RAJESH GARG | Aug 2024

³⁶Heal in India | Health- VikasPedia | Sumathi Govindarajan | Dec 2024

³⁷Narayana Hrudayalaya Heart Hospital: Cardiac Care for the Poor (A) | Case - Faculty & Research - Harvard Business School | Tarun Khanna, V. Kasturi Rangan, Merlina Manocaran | Aug 2011

³⁸Narayana Hrudayalaya Heart Hospital: Cardiac Care for the Poor (A) | Case - Faculty & Research - Harvard Business School | Tarun Khanna, V. Kasturi Rangan, Merlina Manocaran | Aug 2011

³⁹Airports in India - List of Domestic & International Airports | Airport-Directory | IndiGo

⁴⁰Reimagining India's National Telemedicine Service to improve access to care | The Lancet Regional Health - Southeast Asia | Biswanath Ghosh Dastidar, Anant R. Janid, Shailesh Surid, Vikranth Harthikote Nagaraja | Nov 2024

⁴¹Ayushman Bharat Digital Mission - Home | Government of India

3.4 Key Challenges Facing Medical and Wellness Tourism in India

Fragmented Ecosystem and Lack of Integration

India currently lacks a **unified single-window medical tourism portal**, which poses challenges for international patients in accessing verified information and navigating healthcare options. While the government has announced plans to launch a centralized platform and expand services into Tier-II and Tier-III cities,⁴² implementation may take time.

Patient Trust and Follow up Care Gaps

A 2018 survey by a fitness device company revealed that over **92% of Indians distrust in the healthcare system**, with **hospitals (74%)** being the most distrusted, followed by **pharma and insurance firms (62.8%)**, **clinics (52.6%)**, **doctors (50.6%)**, and **diagnostic labs (46.1%)**.⁴³ Key concerns include negligence, lack of transparency, and unnecessary treatments, with this mistrust persisting **for three consecutive years**.⁴⁴ Furthermore, **Inadequate post-treatment follow-up following medical procedures, combined with the departure of foreign patients from the country**, can significantly undermine patient confidence.

Variability in Pricing and Care Quality

India's healthcare pricing varies widely due to fragmented policies, economic disparities, and infrastructure gaps. A Health Care Management Review study suggests, lack of standardized pricing and rigid price caps risk quality dilution – **hospitals under cap pressure saw a 15% rise in patient dissatisfaction**.⁴⁵ Innovation may suffer from affordability mandates, especially in tech-heavy fields. Furthermore, in some instances, healthcare facilities in India apply **differential pricing for international patients**.⁴⁶ While this reflects variations in service expectations and operational costs, it may inadvertently deter foreign nationals from choosing India as a preferred destination for medical tourism.

Limited Infrastructure Beyond Metros

Tier-II and Tier-III cities in India face mounting healthcare pressure, **with over 40 million more residents expected by FY27 and Tier-III growth reaching 2.6% - well above the national average of 0.7%**.⁴⁷ Despite contributing **50% to India's USD 216 billion healthcare ecosystem (FY23)**,⁴⁸ these regions remain under-served by hospital chains and lack scalable infrastructure, transport systems, advanced equipment, and skilled personnel. Although **600 investment opportunities worth USD 32 billion (INR 2.3 lakh crore) exist**,⁴⁹ much remains untapped, highlighting the urgent need for expansion and modernisation.

Global Marketing and Positioning Gaps

Although India's healthcare industry is projected to reach USD 638 Billion by 2025,⁵⁰ providers particularly those in Tier II and III cities continue to face challenges in marketing and establishing strong brand recognition. **Limited budgets, lack of strategic expertise, regulatory constraints such as compliance with ASCI and CDSCO standards, and a fragmented, diverse audience** hinder effective marketing. The digital divide and mistrust in health system **digital health further complicate outreach**, while **uneven ROI and low patient engagement** continue pose a challenge despite growing demand.

Low Penetration of Digital Experience Platforms

Despite flagship initiatives like **Ayushman Bharat Digital Mission and e-Sanjeevani**, digital health adoption in India remains uneven.⁵¹ At present, the public sector accounts for approximately **70% of entries in the Health Facility Registry and 83% of records in the Healthcare Professional Registry (HPR) showing slower uptake in the private sector**.⁵² Challenges include unclear guidelines, limited interoperability, and subdued public engagement. These gaps hinder seamless digital care delivery for international patients.⁵³

⁴²Government to Launch Unified Digital Platform to Boost Medical Value Travel | MedicalTourismToday.in | (Accessed: Jul 2025)

⁴³92.3% of Indians do not trust the healthcare system in India: GOQii India Fit report 2018 | GOQii | Anusha Subramanian | Jan 2018

⁴⁴India - trust in healthcare system 2019 | Statista | (Accessed: Jul 2025)

⁴⁵The delicate balancing of health-care costs | The Hindu Newspaper | K. Madan Gopal | June 2024

⁴⁶How India is becoming a top destination for medical tourists | News Laundry | Nushaiba Iqbal, IndiaSpend | Apr 2025

⁴⁷Rising opportunity of healthcare delivery in Tier 2+ cities of India | Praxis Global Alliances | May 2024

⁴⁸Rising opportunity of healthcare delivery in Tier 2+ cities of India | Praxis Global Alliances | May 2024

⁴⁹Redefining healthcare in Tier 2, 3 cities: How new-age firms are driving business, expanding health cover in India's underserved regions | ET Now | Abhinav Ranjan | Oct 2023

⁵⁰Healthcare System in India, Healthcare India | IBEF | Apr 2025

⁵¹India can be a global pathfinder in digital health – here's how | World Economic Forum | Shobana Kamineni, Shyam Bishen | Jan 2025

⁵²CATALYZING DIGITAL HEALTH IN INDIA - Report 2024 | Arthur D. Little & Nathealth - Healthcare Federation of India | (Accessed: Jul 2025)

⁵³A review of medical tourism entrepreneurship and marketing at regional and global levels and a quick glance into the applications of artificial intelligence in medical tourism | Association for Computing Machinery - Digital Library | Maryam Sadat Reshadi, Azimeh Mohammadi Chehragh | Jan 2025

4. Current Trends and Future Outlook of Medical and Wellness Tourism

4.1 Evolving Consumer Preferences

Rise of Holistic and Preventive Health Journeys

With increasing wait times, for specialist and elective care in **European countries and other OECD countries from three weeks to over a year**,⁵⁴ there is a growing shift in consumer behaviour from curative to preventive and holistic health journeys. India's integration of modern medicine with traditional systems like ayurveda and yoga is attracting global patients seeking long-term with **India ranking third in wellness focused countries in the Asia-Pacific**.⁵⁵

offer biohacking, personalized health plans, and medical-grade treatments to meet rising demand for life-extending experiences especially among High-Net worth Individuals (HNI's).⁵⁸

Preference on Post-Care Wellness

Post-operative care is increasingly influencing destination choice. Medical tourists now prefer destinations offering structured post-treatment wellness programs. Indian hospitals and wellness resorts are responding with integrated packages combining surgery, physiotherapy, and Ayurvedic recovery. For example, **Ayurvedic resorts in Kerala have launched exclusive wellness packages combining Panchakarma with luxury stays**.⁵⁶

Digital-First Approach

Patients demand seamless digital interface for booking, consultation, EMRs, follow-ups. **The 'Heal in India' initiative also includes digital portals for appointment scheduling, EMRs, and patient navigation. Various online platforms are used to compare hospitals, read reviews, and book services.** Telemedicine and virtual consultations are now standard, especially for pre-treatment planning and post-operative follow-ups

Post-COVID Experiential Wellness and Personalized Longevity Focused Care

Post-Covid, there is a surge in demand for luxury wellness retreats focused on immunity, longevity, and mental well-being. High-income clients from Europe, the US, and the Middle East are opting for holistic packages. In 2024, **two prominent medical institutions in Thailand established wellness centers**,⁵⁷ while **another introduced a mental health facility specifically designed for international patients.** Furthermore, **Medical centers and resorts**



⁵⁴ Waiting Times for Health- Next in Line | OECD Health Policy Studies | 2020 | (Accessed: Jul 2025)

⁵⁵ India Ranked Seventh in the World for Medical Tourism | India E-Visa IT | (Accessed: Jul 2025)

⁵⁶ 14 Nights Panchakarma | Carnoustie Ayurveda & Wellness Resort | WellnessLoka.com | (Accessed: Jul 2025)

⁵⁷ VitalLife Celebrates 24th Anniversary with Grand Opening of New Building | Bumrungrad International Hospital | Sep 2024

⁵⁸ The Rise of Longevity-Focused Hospitality: Redefining Luxury in the Age of Wellness Tourism | Hospitality Financial and Technology Professionals (HFTP) | Nicolas Frangos | Apr 2025

4.2 Role of Wellness and AYUSH Systems

Certification and Quality Assurance

India's AYUSH systems are central to preventive care and post-treatment recovery, supported by initiatives like the **AYUSH Mark⁵⁹** and **Ayush Standard Treatment Guidelines⁶⁰**. These therapies are particularly effective for chronic conditions, stress management, and rehabilitation. **Urban awareness of AYUSH exceeds 86%, with Ayurveda being the most used system.** For example, following a lumbar discectomy, patients may face lower limb weakness and mobility issues. Ayurvedic management includes therapies like **Katibasti, Pindasweda,** and **Matra Basti** with medicated oils such as **Dhanwantaram Taila**, which pacify vata, reduce nerve compression, and strengthen spinal structures to restore functional balance.⁶¹

Institutional Growth

India has **3,844 AYUSH hospitals and 36,848 dispensaries**, along with a practitioner's base of over **755,780**.⁶² The Ministry of AYUSH aims

to operationalize 12,500 AYUSH Health and Wellness Centers (HWCs) by 2023–24. As of 2025, **167 integrated AYUSH hospitals** have been supported under the **National AYUSH Mission, with 52 functional**.⁶³

Globalisation of Traditional Medicine and Integration with Modern Care

There is growing global demand for wellness system as part of integrated healthcare approaches. Tourists from Europe and North America increasingly visit India for Ayurvedic-based detox, yoga retreats, and spiritual healing. At the same time, AYUSH exports have grown CAGR of 20.33%.⁶⁴ Furthermore, Many European yoga teachers are **increasingly traveling to India to deepen their practice and embrace integrated medical approaches like Ayurveda and traditional wellness systems**.⁶⁵ The Ayush Medical Value Travel Summit 2024 emphasized India's positioning as a global hub for holistic wellness.⁶⁶

4.3 Role of the Financial Sector in Medical Tourism

Banks and NBFCs – Enabling Loans for Health Travel

Banks, insurance firms and NBFCs are offering health travel loans to domestic and international patients. These loans cover treatment, travel, and accommodation. EMI-based packages are being promoted for high-cost procedures like organ transplants and fertility treatments.

Remittance and Payment Integration

Cross-border payment systems are being integrated to support international patients, with digital payment providers playing a pivotal role **in enabling seamless healthcare transactions across borders**.⁶⁷ API enabled platforms are facilitating frictionless transactions within healthcare applications and portals, **while digital payment solutions offer user-friendly and efficient options**,⁶⁸ for both domestic and international users.

Opportunities for Health Fintech – Bundled Treatment and Recovery Plans

Health fintech platforms are emerging to offer bundled packages that include treatment, recovery, insurance, and travel. These platforms reduce financial friction and improve transparency. The National Strategy recommends digital platforms to integrate stakeholders and facilitate bundled offerings. Fintech solutions are supporting this by **offering health wallets that promote medical savings**, alongside digital lending tools that simplify **access to financing for healthcare expenses**.⁶⁹

⁵⁹Ayush Mark Certification Scheme | AYUSH- Press Release: Press Information Bureau | Jul 2022

⁶⁰Ayurvedic Standard Treatment Guidelines | Ministry of AYUSH - Government of India | (Accessed: Jul 2025)

⁶¹AYURVEDIC MANAGEMENT OF POST-SURGICAL COMPLICATION | Sree Subhramania Ayurvedic Nursing Home | (Accessed: Jul 2025)

⁶²Minister of State for New and Renewable Energy and Power, Shri Shripad Yesso Naik, Highlights Decadal Achievements of Ministry of Ayush | AYUSH- Press Release: Press Information Bureau | Dec 2024

⁶³Status of AYUSH institutes in the country - UNSTARRED QUESTION No. 1924 | Rajya Sabha | Ministry of AYUSH - Government of India | Mar 2025

⁶⁴India's Ayush Industry & National AYUSH Mission | IBEF | (Accessed: Jul 2025)

⁶⁵Most European doctors are open to integrated medical solutions: Dr. Vinayak Nair Radhakrishnan, Director, Wien | ET HealthWorld | Shahid Akhter | April 2023

⁶⁶Ayush Medical Value Travel Summit 2024, themed 'Global Synergy in Ayush: Transforming Health and Wellness through Medical Value Travel' inaugurated in Mumbai today | AYUSH- Press Release: Press Information Bureau | Sep 2024

⁶⁷Government has taken various steps to boost medical tourism: Sridhar Keppurengan, Business Head, Cross Border Payments, Visa India | Financial Express.com | Financial Express.com | Sushmita Panda | Aug 2023

⁶⁸The top 10 cross-border payments companies | BCC Research | Olivia Lowden | Apr 2023

⁶⁹Healthcare Fintech: How FinTech is Transforming the Healthcare | SPD Load | Anna Korotkova | Aug 2024

4.4 Infrastructure and Investment Opportunities

Growth of Health and Wellness Clusters

Indian healthcare providers are **expanding into multi-specialty hubs that combine medical care with hospitality and concierge-style services**. Several Indian states have strong potential to develop curated AYUSH based wellness offerings through a network of diverse treatment centers, collectively contributing to India's positioning as a premier destination for holistic healthcare.

Wellness Corridors with Ayurvedic, Yoga, Panchakarma Zones – Medical Hotels, Recovery Resorts

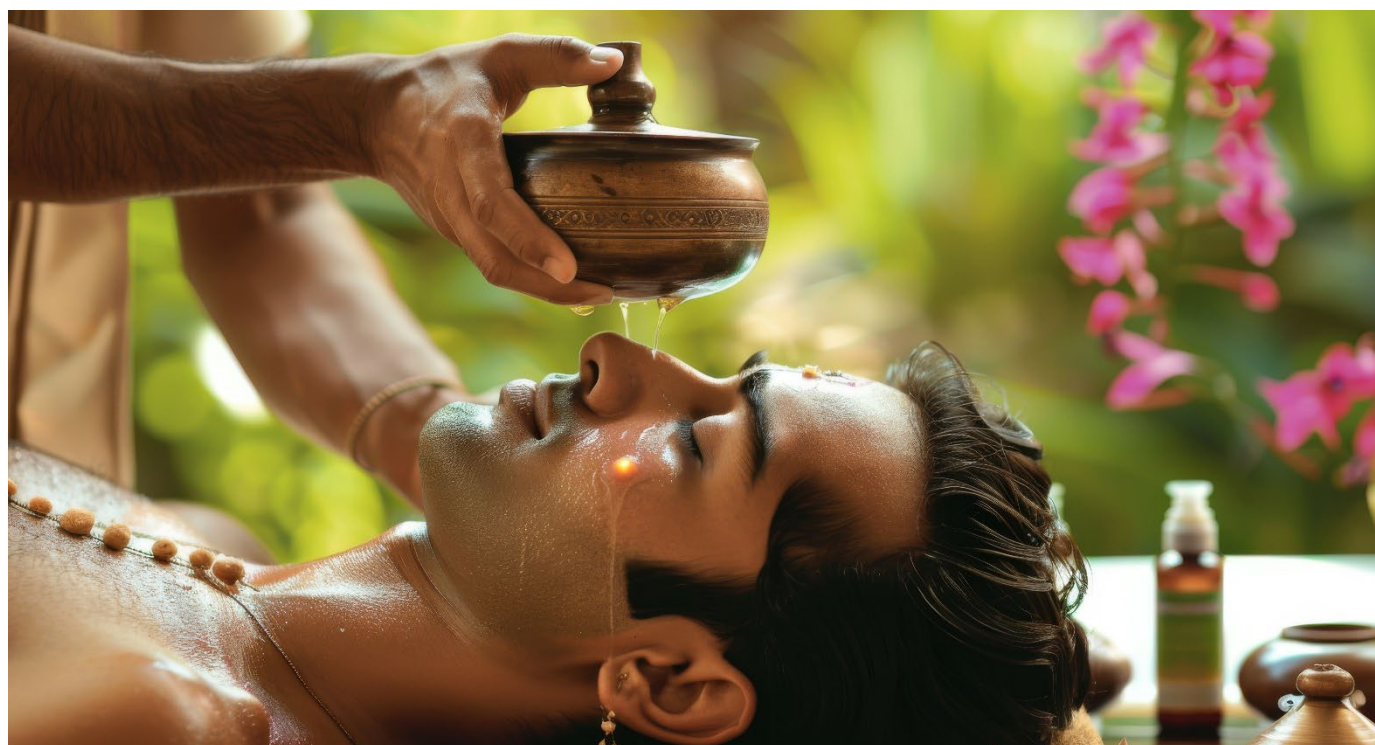
The National Strategy,⁷⁰ proposes developing Special Wellness Tourism Zones.⁷¹ These zones will include Ayurvedic centers, Yoga retreats, Panchakarma clinics, medical hotels, and recovery resorts. These **zones are modeled after successful international examples⁷² that integrate healthcare and wellness services across expansive areas,⁷³ combining clinical facilities, recreational spaces, hospitals, and skilled professionals.⁷⁴ With supportive policies and provisions for foreign investment, such **well-structured zones demonstrate the potential to attract global healthcare providers and stimulate economic growth**.**

PPP Opportunities in Tier II and III Cities

Public-Private Partnerships (PPP) are being encouraged in Tier-II and Tier-III cities to expand access and infrastructure. Maharashtra's Medical Tourism Cooperation, in collaboration with FICCI, is an example of a **successful PPP model to deliver value for money health care with human touch** to foreigners in Mumbai.⁷⁵ Additionally, the Government of India has announced a PPP initiative to establish **over 4,500 cancer daycare beds in district hospitals** over the next three years, starting with **200 in 2025-26, while exploring PPP and hub-and-spoke models** to address workforce challenges and match private sector capacity.⁷⁶

SEZ or Tourism Hub Models

The Government of India is exploring Special Economic Zones (SEZs) and tourism hubs for medical and wellness tourism. These hubs may offer tax incentives, streamlined regulatory frameworks, and infrastructure support. **While some existing models focus on medical technology manufacturing,⁷⁷ similar frameworks could be adapted to create hospital clusters that integrate advanced healthcare technologies with high-quality clinical services, fostering a comprehensive and efficient ecosystem.**



⁷⁰National Strategy and Roadmap for Medical and Wellness Tourism (Office Memorandum- No. NT-703/1/2020-NT) | MoT, Government of India | Jan 2022

⁷¹National Strategy and Roadmap for Medical and Wellness Tourism (Office Memorandum- No. NT-703/1/2020-NT) | MoT, Government of India | Jan 2022

⁷²DUBAI HEALTHCARE CITY DHCC Phase I - Development Guidelines for Architects, Developers & Contractors - 4th Edition | Dubai Healthcare City (Accessed: Jul 2025)

⁷³Dubai Healthcare City (Official Website) - www.dhcc.ae | About - The City (Accessed: Jul 2025)

⁷⁴Dubai Healthcare City (Official Website) - www.dhcc.ae | Home Page (Accessed: Jul 2025)

⁷⁵Public-Private Partnerships for Sustainable Growth of Medical Tourism | Medical Tourism Magazine (Accessed: Jul 2025)

⁷⁶Hub & spoke, PPPs likely to help manage 4,500 new daycare cancer | Business Standard | Sohini Das | Feb 2025

⁷⁷Andhra Pradesh MedTech Zone Limited - Official Website | (Accessed: Jul 2025)

5. Supporting the Medical and Wellness Tourism Eco-system in India

5.1 Accreditation and Standards

As of 2025, India boasts **1,700+ hospitals accredited by the National Accreditation Board for Hospitals and Healthcare Providers (NABH)**, affirming their commitment to stringent clinical and operational standards. Additionally, **63 hospitals have earned international recognition through Joint Commission International (JCI)**⁷⁸ accreditation, further reinforcing the country's global reputation for excellence in healthcare. Many facilities also conform to **ISO 9001:2015** standards for quality management systems, ensuring robust governance and patient-centric care. Furthermore, states such as **Kerala received a United Nations award**⁷⁹ in recognition of its outstanding contribution toward achieving sustainable development goals related to non-communicable diseases further affirming India's position as a premier and trusted destination.

Leading hospitals in India have established specialized International Patient Departments (IPDs) to enhance the experience of medical travelers. These units provide multi-lingual support, visa and travel assistance, personalized care coordination, and concierge services, ensuring that international patients receive seamless and culturally sensitive care throughout their stay.

To further elevate patient satisfaction, hospitals are increasingly investing in staff training programs focused on integrating hospitality with clinical excellence. Standard Operating Procedures (SOPs) have been developed to manage admission and discharge protocols, promote cultural sensitivity, ensure hygiene and dietary standards, and support post-operative wellness. However, scaling these initiatives in Tier-II and Tier-III cities poses challenges due to a shortage of skilled workforce and the absence of standardized vocational frameworks.

In parallel to efforts in medical tourism, the Ministry of AYUSH, in collaboration with NABH, has introduced structured certifications for traditional wellness providers.⁸⁰ These include accreditation for Panchakarma clinics, guidelines for Yoga and Naturopathy centers, and quality benchmarks for Ayurvedic resorts for the wellness tourism areas. Such measures aim to build credibility and standardisation in AYUSH services, reinforcing India's appeal as a global destination for holistic healing.



⁷⁸ Joint Commission International - Search for JCI-Accredited Organizations (Accessed: Jul 2025)

⁷⁹ Kerala wins UN award on prevention, control of non-communicable disease | Business Standard | Press Trust of India - Thiruvananthapuram | Sep 2020

⁸⁰ AYUSH Certification Programme - NABH (Official Website) | (Accessed: Jul 2025)

5.2 International Collaborations and Partnerships

Bilateral MoUs and Regional Collaborations

Memorandums of Understanding (MoUs). Agreements with GCC nations like the **UAE; India is emphasising advancements in precision health**, offering personalized care tailored to an individual's unique genetic and biological makeup for optimal well-being.⁸¹ Similar partnerships with countries like **Germany enable seamless exchange of information and collaboration in Occupational Diseases, Rehabilitation and vocational training of Insured Persons with disabilities.**⁸² Collaborations with African nations in areas like **telemedicine, pharmaceutical access, and health infrastructure development** expand India's reach while boosting healthcare delivery across borders.⁸³ Meanwhile, tie-ups with neighboring countries, such as Bangladesh, Nepal, and Sri Lanka can facilitate smoother cross-border **patient care and medical exchanges**, further reinforcing India's commitment to accessible, affordable, and high-quality healthcare for the region and beyond.

Medical Diplomacy and Strategic Outreach

As part of its global health engagement, India has the potential for embracing medical diplomacy through the deployment of health attachés in its embassies and missions abroad. For example, **India's Vaccine Maitri Initiative, led by MEA use diplomatic channels to provide vaccines, medical aid, and healthcare support to over 100 countries**, reinforcing global health solidarity.⁸⁴ Furthermore, Indian embassies can serve as vital links in promoting Indian medical expertise, facilitating patient referrals, and supporting visa processes aligning with the 'Heal in India' campaign, reinforcing India's position as a trusted hub for international healthcare.

Role of Digital Aggregators in Patient Facilitation:

Various digital platforms like are transforming access for international patients by connecting them directly with Indian hospitals. These aggregators offer comprehensive support – ranging from treatment comparisons and cost estimates to booking logistics and verified patient reviews. Their seamless interface plays a key role in expanding India's digital medical tourism ecosystem.



5.3 Policy and Regulatory Ecosystem

India's medical tourism policy is anchored in **the National Strategy and Roadmap for Medical and Wellness Tourism**, launched by the Ministry of Tourism in 2022 outlining six foundational pillars:

Develop a brand for India as a wellness destination	Strengthen the ecosystem for medical and wellness tourism	Enable digitalisation by setting up Online MVT Portal
Enhancement of accessibility for MVT	Promoting Wellness Tourism	Governance and Institutional Framework

⁸¹UAE and India sign agreements for investment cooperation across multiple sectors | Ministry of Foreign Affairs - United Arab Emirates (Official Website) | Oct 2024

⁸²Cabinet approves MoUs signed between India and German Agency in the field of Occupational Diseases, Re-habilitation and vocational training | Ministry of Labour & Employment- Press Release: Press Information Bureau | Nov 2019

⁸³India-Africa Cooperation in the Healthcare Sector | GDCIN | Amb. Manju Seth | Nov 2019

⁸⁴A roadmap for global health diplomacy by India in the era of climate change | Global Policy Journal - GP Opinion | Neethi V Rao | Sep 2024

Policy execution is coordinated across multiple ministries to ensure coherence and efficiency. **The Ministry of Tourism** leads branding and international promotion under the 'Heal in India' campaign, while the **Ministry of Health and Family Welfare** oversees clinical standards and hospital infrastructure. **The Ministry of AYUSH** promotes traditional systems such as Ayurveda and Yoga, and the **Ministry of External Affairs** facilitates visa processing and medical diplomacy through health attachés. This inter-ministerial collaboration ensures that medical tourism is not siloed but integrated across sectors, resulting in:

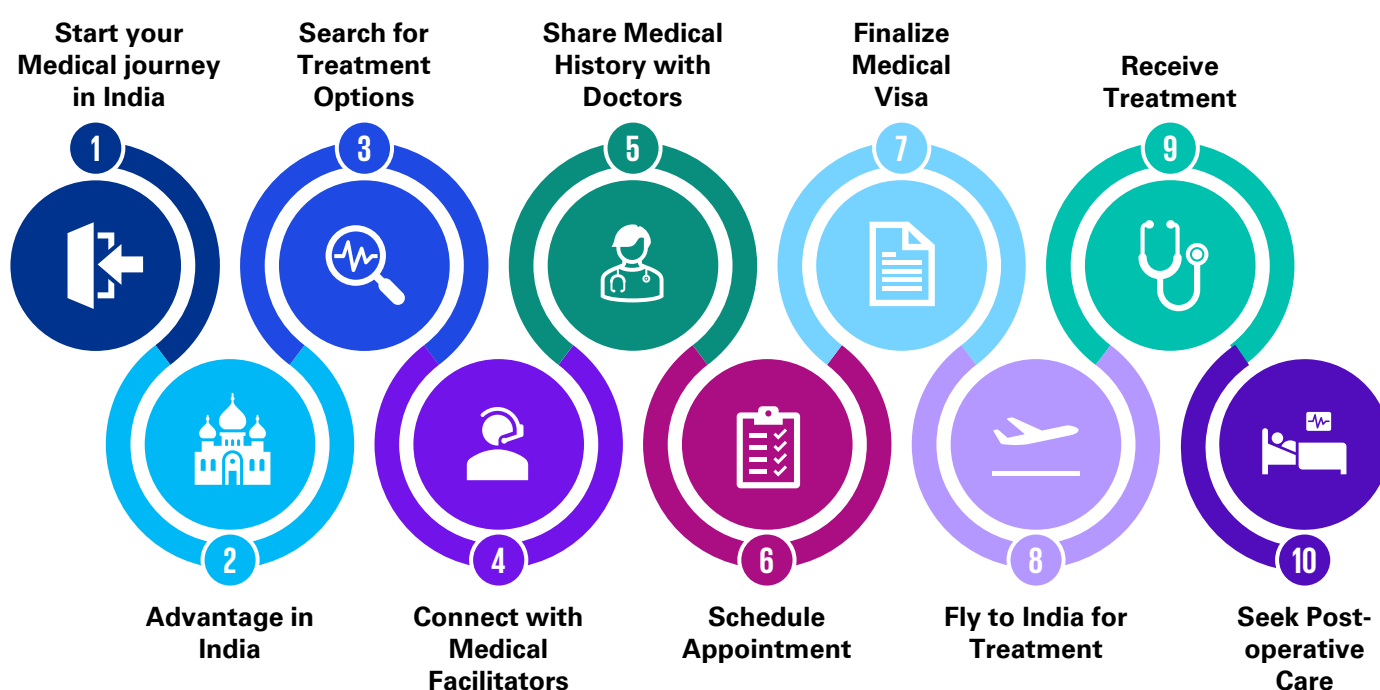
- **E-Medical Visa:** Extended to nationals of 165 countries to ease travel for treatment purposes.⁸⁵
- **National Medical and Wellness Tourism Board:** Established with the tourism minister as chairperson to coordinate efforts across ministries and stakeholders.⁸⁶
- **Marketing Support:** Financial assistance provided under the Market Development Assistance (MDA) Scheme for promotion of wellness tourism to accredited service providers for capacity building, participation in global medical and wellness events.⁸⁷

- **Digital Promotion:** Campaigns under the Incredible India brand is actively promoting medical tourism across digital and traditional media platforms.

Furthermore, India's medical tourism sector is advancing through a multi-tiered strategy that combines targeted state-level initiatives with robust national policies and stakeholder coordination. States like Kerala, Tamil Nadu, Maharashtra, and Delhi are leveraging their regional specialties – **ranging from Ayurveda and wellness to advanced oncology and multi-specialty care** – to attract global patients. At the national level, incentives such as the **e-Medical Visa, AYUSH Visa, tax benefits, and 100% FDI permissions**,⁸⁸ are bolstered by marketing support through the MDA scheme. Anchoring these efforts is the **National Medical and Wellness Tourism Promotion Board**, which drives **public-private partnership (PPP)**,⁸⁹ quality assurance, and investment, particularly in underserved regions, ensuring a holistic and inclusive ecosystem for international healthcare travel.

5.4 Digital Ecosystem for Medical Tourism⁹⁰

Figure: Complete Patient Journey (Source: Heal in India | Health- VikasPedia | Sumathi Govindarajan | Dec 2024)



⁸⁵Indian e-Medical Visa | India E-Visa IT | (Accessed: Jul 2025)

⁸⁶National Strategy and Roadmap for Medical and Wellness Tourism focuses to develop India as brand for wellness destination: Shri G. Kishan Reddy | MoT - Press Release: Press Information Bureau | Jul 2022

⁸⁷Wellness & Medical Tourism | Ministry of Tourism - Government of India (Official Website) | (Accessed: Jul 2025)

⁸⁸FDI Entry Routes Into India: Role of FDI and The Growth of Medical Tourism | India Health by Informa Markets | (Accessed: Jul 2025)

⁸⁹National Strategy and Roadmap for Medical and Wellness Tourism (Office Memorandum- No. NT-703/1/2020-NT) | MoT, Government of India | Jan 2022

⁹⁰Revolutionizing Healthcare: Digital Innovations in India's Health Sector | Press Note Details: Press Information Bureau | Jan 2024

The **'Heal in India' portal, currently under development**, is envisioned as a one-stop digital platform for international patients. The portal will guide international patients end-to-end, enable oversight, stakeholder access, data tracking, and service ratings. Additionally, to strengthen the medical tourism ecosystem, medical value **travel facilitators will be encouraged to register with the government**, which will support their growth through capacity-building initiatives. Once registered, these facilitators will gain **promotional visibility on both the sector-specific medical tourism portal and the Incredible India platform**.⁹¹

Approximately 35% of hospitals in India⁹² – mostly private institutions in Tier-I cities have implemented Electronic Medical Records (EMR) systems. In contrast, countries like **the U.S. have a 96% adoption rate**,⁹³ underscoring the substantial potential for growth in India's digital health infrastructure. Flagship government programs such as **Ayushman**

Bharat Digital Mission including the Ayushman Bharat Health Account (ABHA ID) and the Unified Health Interface (UHI) along with **e-Sanjevani, CoWIN, and Aarogya Setu**⁹⁴ are accelerating the shift by expanding secure, tech-enabled care – such as digital records and tele-consultations nationwide

India's healthcare landscape is being reshaped by a **data and AI-driven ecosystem**, significantly enhancing its medical tourism appeal. AI is expected to **contribute USD 25–30 billion to India's GDP by 2025**,⁹⁵ by improving precision, accessibility, and cost-effectiveness. For example, one major hospital group is allocating over **3.5% of its digital of its digital budget to AI initiatives**.⁹⁶ Other leading healthcare providers are also **adopting AI for robotic surgeries, clinical documentation, and predictive analytics**.⁹⁷ Combined with **multilingual telemedicine and streamlined patient pathways**⁹⁸ these innovations are positioning India as a cost-effective, AI-enabled global hub for quality healthcare.



⁹¹National Strategy and Roadmap for Medical and Wellness Tourism (Office Memorandum- No. NT-703/1/2020-NT) | MoT, Government of India | Jan 2022

⁹²Electronic Medical Records in India: Current State, Challenges, and Future Prospects | Electronic Medical Records in India: Current State, Challenges, and Future Prospects | Logic Loom | Oct 2024

⁹³Electronic Medical Records in India: Current State, Challenges, and Future Prospects | Electronic Medical Records in India: Current State, Challenges, and Future Prospects | Logic Loom | Oct 2024

⁹⁴Revolutionizing Healthcare: Digital Innovations in India's Health Sector | Press Note Details: Press Information Bureau | Jan 2024

⁹⁵How AI is transforming the future of Healthcare in India | Nasscom | (Accessed: Jul 2025)

⁹⁶India's Apollo Hospitals bets on AI to tackle staff workload | The Hindu | Reuters | Mar 2025

⁹⁷India's Apollo Hospitals bets on AI to tackle staff workload | The Hindu | Reuters | Mar 2025

⁹⁸How AI Is Impacting India's Healthcare Industry | Forbes | Karan Kashyap | Feb 2025

6. Case Studies

6.1 Kerala: Wellness-Focused Inbound Tourism

Kerala has emerged as a premier destination for wellness-focused medical tourism, particularly in Ayurveda, by leveraging its robust healthcare infrastructure, skilled workforce, and rich cultural heritage. The state boasts **8,439 health facilities, including 1,284 government hospitals and 700 Ayurvedic drug manufacturing units.**⁹⁹ With a life expectancy **averaging 75.2 years, with women living up to 77.8 years,**¹⁰⁰ Kerala's health indicators are comparable to those of developed nations. The state also maintains a strong **HRH ratio of 2.18 doctors per 1,000 population and a Staff Nurse Ratio of 1:1.39 (sanction for 1:0.66),**¹⁰¹ significantly above the national average of 1.07. Kerala's medical tourism sector currently generates INR 30 – 40 crore per month, with the **potential to reach INR 100 crore monthly.**¹⁰² Ayurveda tourism alone has been growing at 20–25% annually, supported by a rise in traditional medicine practitioners from 41,606 in 2018 to **45,395 in 2021.**¹⁰³ The integration of wellness with tourism, supported by Kerala's natural landscape and cultural appeal, has positioned the state as a global hub for holistic healing.

Furthermore, Kerala's growing prominence in medical and wellness tourism is backed by strong policy support and strategic initiatives. With the **Government of India's 'Heal in India' initiative, the state has raised**

its global visibility and streamlined its visa process, gaining accolades from major healthcare providers for sector potential and economic viability. Kerala is now **establishing medical hubs in government colleges to attract foreign patients,**¹⁰⁴ through **Kerala Medical Value Travel Society (KMVTS), to promote global outreach.**¹⁰⁵ **The Kerala Public Health Act 2023,**¹⁰⁶ enforces high standards of care, and the **KARE project (2024)** provides free therapies for rare diseases, early detection, home-based care, and psychological support – **anchored by a Government Hospital in Thiruvananthapuram now a Centre of Excellence.**¹⁰⁷ Blending tradition with innovation, Kerala aims to be globally recognized as the **'Wellness Hub of the World'.**¹⁰⁸ By offering Ayurvedic therapies in conjunction with modern allopathic treatments, it attracts patients from regions such as the Middle East, Europe, and the U.S. Ongoing investments in digital health infrastructure,¹⁰⁹ further enhance its appeal. Additionally, the **'Look East' campaign aims to expand outreach** by tapping into emerging markets like China, Australia, and Malaysia.¹¹⁰

A supportive ecosystem, including treatment support groups, nutritional assistance, and culturally familiar care environments further enhances Kerala as a leading contributor to India's medical tourism ambitions.¹¹¹

6.2 Delhi NCR: Hub for Organ Transplant and Advanced Care

Delhi NCR has established itself as both a national and international hub for advanced medical care, particularly in organ transplants with **10% of organ transplant recipients being foreigners. In 2023, 108 the region performed 1,445 organ transplant procedures for foreign nationals, accounting for 78% of all such transplants in India.**¹¹² This leadership is reinforced by a robust network of private multi-specialty hospitals alongside prominent public institutions offering advanced treatments in fields such as oncology, cardiology, and neurology. Notable examples include facilities in Delhi like a

premier national medical institute and other major government hospitals. The city's inclusion in the National Medical and Wellness Tourism Roadmap has helped simplify visa procedures and improve services for international patients. The availability of dedicated International Patient Departments, multi-lingual support, and concierge services further improves the patient experience. Delhi's strategic location as the national capital, and direct air connectivity to major international cities, and infrastructure make it a preferred destination for high-value medical procedures.

⁹⁹Kerala Medical Value Travel Vision 2030 Report | KPMG in India & CII | Aug 2024

¹⁰⁰Average Life Expectancy | MoFW - Press Release: Press Information Bureau | Mar 2020

¹⁰¹Human Resources for Health in District Public Health System of India: State-wise Report-2023 | National Health System Resource Centre | MoFW - Government of India | 2023 | (Accessed: Jul 2025)

¹⁰²Kerala's medical value tourism has potential to generate ₹100-cr. revenue per month | The Hindu | The Hindu Bureau | Aug 2024

¹⁰³National Health Profile 2023- 18th Issue | CENTRAL BUREAU OF HEALTH INTELLIGENCE | July 2024

¹⁰⁴Kerala health sector bullish on 'Heal in India' | The New Indian Express | Anna Jose | Feb 2025

¹⁰⁵Kerala Medical Value Travel Society Launched | The New Indian Express | Nov 2015

¹⁰⁶The Kerala Public Health Act, 2023 | Act No. 28 of 2023 | PRS Legislative Research | (Accessed: Jul 2025)

¹⁰⁷State's Advancement in Rare Disease Treatment, Free Growth Hormone Therapy Under KARE Project | Information Public Relations Department, Govt. of Kerala | Mar 2025

¹⁰⁸Kerala aims to become a global wellness hub: CM | Kerala Travel Mart Society- Press Release | Sep 2024

¹⁰⁹Kerala e-Health Initiative Improves Access to Quality Healthcare Services and Strengthens Healthcare System | Niti Ayog | (Accessed: Jul 2025)

¹¹⁰Kerala to launch 'look east campaign' on April 9 to tap East Asian tourism market | The Hindu | Dhinesh Kallungal | Apr 2025

¹¹¹Kerala to launch 'look east campaign' on April 9 to tap East Asian tourism market | The Hindu | Dhinesh Kallungal | Apr 2025

¹¹²10% of organ transplant recipients in India are foreigners | The Times of India | Durgesh Nandan Jha | Aug 2024

6.3 Maharashtra: Multispecialty Chains and Wellness Integration

Maharashtra is actively developing its medical tourism ecosystem through multispecialty hospital chains and wellness integration. In **2023, Maharashtra had the highest number of Foreign Tourist Arrivals (FTA's) with 3.39 million visitors.**¹¹³ Maharashtra currently receives an **estimated 700–1,000 medical tourists monthly**, with the potential to **scale up to 10,000 per month over the next five–seven years**,¹¹⁴ for patients seeking treatment for heart, orthopedic, cancer, and other ailments.

The Maharashtra Tourism Development Corporation's Vision 2047 includes medical tourism

as a key pillar, with projects like the **>100-acre Integrated Tourism Hub in Gorai** featuring resorts, wellness centers, and MICE facilities.¹¹⁵ The state is formulating a Health Tourism Policy to **accredit private hospitals.**¹¹⁶ Top hospitals¹¹⁷ have collaborated¹¹⁸ and partnered with renowned global institutions, to elevate service standards. Maharashtra's strategy blends high-quality clinical care with wellness services, supported by strategic infrastructure development and public-private partnerships.

6.4 International: South Korea (Skin Care and Health-Tech)

South Korea has emerged as a global leader in combining health-tech with medical tourism, particularly excelling in medical aesthetics and device innovation. The **medical aesthetics market, valued at USD 572.14 Million in 2023, is projected to double by 2029 reaching USD 1.14 Billion**¹¹⁹ due to advanced technologies, top-tier practitioners, and growing demand for non-invasive treatments like Botox and dermal fillers.

In 2024, the number of foreign visitors for medical treatment hit a **record-high 1.17 million**, nearly double that of 2023. Dermatology **led all medical fields with 705,000 patients (56.6%), followed by plastic surgery (11.4%),** internal medicine (10%) and medical checkups (4.5%).¹²⁰

In 2024, South Korea introduced a series of groundbreaking medical technologies through a government-supported innovation initiative. These advancements include the **first-ever device for eye cooling anesthesia, AI-driven software for embryo evaluation, and wearable systems designed to manage heart conditions.** Additional innovations feature **virtual reality therapies for visual impairments, cognitive support tools for elderly care, and high-intensity ultrasound technology aimed at enhancing targeted cancer drug delivery.**¹²¹

An AI-based tool designed to enhance IVF outcomes by providing objective embryo assessments is currently undergoing regulatory review, including

evaluation by international authorities. Meanwhile, other innovative medical devices have received both domestic and global certifications, reflecting strong potential for worldwide adoption.¹²²

To support this ecosystem, **the Korean government has invested KRW 12 trillion (~USD 9 billion) from 2020 to 2025 across the entire device development lifecycle.**¹²³ South Korea's mix of tech-savvy infrastructure, international recognition, and cultural tourism makes it a premier destination for patients seeking advanced, holistic care.



¹¹³The India Tourism Data Compendium 2024 | MoT- Government of India | (Accessed: Jul 2025)

¹¹⁴Maharashtra's Medical Tourism Sector set to boom post Covid-19 | ET Hospitality World | Mihir Vora | Apr 2021

¹¹⁵Gorai tourism push revived: MTDC plans new amusement park and eco-friendly attractions | Mumbai news - Hindustan Times | Ateeq Shaikh | May 2025

¹¹⁶Maha to accredit private hospitals under Health Tourism Policy | Hindustan Times | Vicky Pathare | Feb 2025

¹¹⁷Wockhardt Hospitals Group | IndiaHospitalTour.com - A division of We Care Health Services | July 2025

¹¹⁸Indian Partner Organizations | Gupta-Klinsky India Institute at Johns Hopkins University | (Accessed: Jul 2025)

¹¹⁹South Korea Medical Aesthetics Market Report 2024-2029: Growing Role of Medical Tourism, Popularity of Male Aesthetics, Injectables to Influence Future Growth Prospects | Globe News Wire | Research and Markets | Oct 2024

¹²⁰Medical tourism in 2024 attracts record 1.17M int'l patients | Korea.net | Apr 2025

¹²¹South Korea showcases 10 innovative medical devices | Medical Buyer | Feb 2025

¹²²South Korea showcases 10 innovative medical devices | Medical Buyer | Feb 2025

¹²³South Korea showcases 10 innovative medical devices | Medical Buyer | Feb 2025

7. Roadmap and Recommendations

7.1 Launch a National and State-Level Medical - Wellness Tourism Mission

To reinforce India's leadership in global medical and wellness tourism, a structured mission should be initiated at both national and state levels, aligned with the National Strategy and Roadmap for Medical and Wellness Tourism. This mission should be anchored by the National Medical and Wellness Tourism Promotion Board and encompass the following key components:

Establish a Unified Mission

Elevate the existing National Medical and Wellness Tourism Promotion Board into a comprehensive national mission that facilitates strategic policy execution and inter-ministerial coordination. This initiative shall actively involve the Ministries of Health and Family Welfare, AYUSH, External Affairs, and respective state governments. Initial efforts may focus on states with high inbound wellness traffic such as Kerala, Maharashtra, and Delhi to ensure scalable, transparent, and regionally tailored implementation.

Enhance Capacity Building

Launch comprehensive training programs for medical tourism facilitators, healthcare institutions, and wellness centers. Focus areas include international patient management, cultural sensitivity, multi-lingual communication, digital literacy, and adherence to global accreditation norms.

Integrate Traditional and Modern Health Care

Promote the convergence of India's traditional medical systems - Ayurveda, Yoga, Naturopathy - with contemporary clinical practices under the 'Heal in India' initiative. This integration seeks to build upon the momentum of the AYUSH Visa programme launched in 2023 and leverage the expanding network of accredited AYUSH healthcare centers. The goal is to position India as a destination for holistic, culturally enriched, and globally relevant healthcare experiences.

Standardize Services Nationwide

Develop and implement SOPs across clinical and hospitality touchpoints to deliver seamless patient experiences. Prioritise improvements in Tier-II and Tier-III cities by monitoring KPIs like international patient inflow, treatment outcomes, and infrastructure development to close existing service gaps and elevate India's global standing in medical tourism.

7.2 Establish State-Wise Medical Tourism Clusters

Establish state-specific medical and wellness tourism clusters that leverage regional healthcare strengths. States like Kerala can showcase Ayurveda and holistic wellness, while states such as Maharashtra, Tamil Nadu, and Delhi NCR can focus on specialized care – including oncology, cardiac services, organ transplants, and advanced tertiary care – integrating these with multi-specialty wellness offerings.

These clusters should be supported by robust infrastructure, hospital accreditation, and strong public-private partnerships. Initiatives such as

Maharashtra's over 100-acre Integrated Tourism Hub in Gorai,¹²⁴ under Vision 2047,¹²⁵ and Kerala's Medical Value Travel Vision 2030,¹²⁶ can be replicated in Medical Tourism to capitalize on the opportunity for a well-developed Ayurvedic ecosystem and the rapid growth of wellness tourism.

To enhance global competitiveness, patient experience should be elevated through the provision of international care units, multi-lingual services, and concierge style support.

¹²⁴Gorai tourism push revived: MTDC plans new amusement park and eco-friendly attractions | Mumbai news - Hindustan Times | Ateeq Shaikh | May 2025

¹²⁵Maharashtra Vision Document – 2047 | Department of Tourism, Government of Maharashtra | (Accessed: Jul 2025)

¹²⁶Kerala Medical Value Travel Vision 2030 Report | KPMG in India & CII | Aug 2024

7.3 Global Branding Campaigns under ‘Heal in India’

- To enhance **India’s positioning as a premier destination for integrated healthcare**, it is recommended that a nationally coordinated branding initiative be **launched under the ‘Heal in India’ umbrella**. While several healthcare providers currently undertake independent promotional efforts, the absence of a unified national campaign limits global visibility and coherence.
- The proposed campaign should emphasize India’s key strengths – **affordable high-quality care, world-class medical infrastructure, and the globally recognized value of traditional health systems such as AYUSH**. Promotional strategies may include India’s participation in international health expos, targeted digital outreach, and leveraging medical diplomacy tools through health attachés in key embassies and missions abroad.
- The **upcoming ‘Heal in India’ digital portal**, aligned with the **Incredible India brand**, can serve as the central hub for prospective patients by offering **multi-lingual content, accredited healthcare provider listings**, curated treatment packages, visa facilitation guidance, and user-friendly navigation. Additionally, strategic partnerships with **international tour operators** can play a pivotal role in enhancing inbound medical tourism.
- Based on core healthcare offering and taking references from international cases, India can shape a nuanced national strategy that **leverages its regional healthcare strengths: Kerala and Goa as premier wellness destinations** rooted in Ayurveda and coastal therapies, and metro cities like **Delhi, Mumbai, and Chennai as global hubs for advanced tertiary care** and multi-specialty excellence. Emphasising distinct identities could enable India to diversify its appeal across wellness, surgical care, and cutting-edge clinical expertise.

7.4 Fiscal and Non-Fiscal Incentives for Infrastructure

To attract investment and improve service delivery, India should offer a mix of fiscal and non-fiscal incentives. These include tax exemptions for hospitals treating international patients, increased subsidies under the **MDA scheme, technical support for marketing and promotion** including on **digital platforms**, and **100% FDI¹²⁷ in broader medical infrastructure** including wellness centers.

The Union Budget 2025 allocated **INR 95,957.87 crore to the MoHFW, an approximate 10.8% increase from the previous year’s revised estimates**.¹²⁸ supporting infrastructure expansion, including 200 daycare cancer centers¹²⁹ and 10,000 new medical education seats.¹³⁰ Non-fiscal incentives should include fast-track approvals, land allotment for wellness zones, and accreditation support.

States like **Maharashtra and Tamil Nadu** are already drafting health tourism policies with accreditation frameworks and dedicated departments. More states can be **incentivized to create dedicated Medical Tourism policy/integrate medical tourism** in their existing state tourism policy. These incentives will catalyze the development of medical tourism clusters and improve India’s global competitiveness.

Introduction of targeted **subsidies and grants** for start-ups and organisations working in **health-tech, medical research, and digital health solutions** that directly support medical tourism. These incentives can accelerate innovation in diagnostics, telemedicine, AI-based treatment planning, and patient experience platforms. Additionally, the **government can organize global-scale health-tech summits and innovation expos to showcase Indian advancements in medical technology**. These events can attract international patients seeking innovative treatments and position India as a hub for next-generation healthcare solutions.



¹²⁷Union Minister of State for Health and Family Welfare, Smt. Anupriya Patel addresses 21st CII Health Summit 2024 | MoHFW- Press Release: Press Information Bureau | Dec 2024

¹²⁸Notes on Demands for Grants, 2025-2026 | MINISTRY OF HEALTH AND FAMILY WELFARE DEMAND NO. 46 Department of Health and Family Welfare (<https://www.indiabudget.gov.in>) | (Accessed: Jul 2025)

¹²⁹Health Ministry to set up 200 daycare cancer centres in district hospitals this year; starts survey to assess needs | The Hindu | Bindu Shajan Perappadan | Feb 2025

¹³⁰Will India’s 10,000 New Medical Seats Solve the Doctor Shortage Crisis? | The Times of India | TOI Education | Feb 2025

7.5 Cross-Border Insurance and Digital Integration

Enable Insurance Portability: Collaborate with international insurance providers to include Indian hospitals in their coverage networks. This could reduce financial barriers for foreign patients and make India a more viable destination for insured medical travelers.

Addressing Gaps in Visa-Insurance Linkage: Initiatives such as AYUSH and e-Medical Visas have enhanced patient mobility, the absence of insurance portability continues to pose barriers. Addressing this issue is key to promoting seamless care continuity and improving financial access for patients across regions.

Promoting Fintech-Driven Bundled Packages: Encourage health fintech platforms to offer integrated packages covering treatment, recovery, insurance, and travel. These solutions simplify logistics and improve transparency for international patients.

Integrate Digital Infrastructure: Ensure the 'Heal in India' portal connects with hospital EMRs, visa systems, and secure payment gateways. This will enable seamless data exchange, real-time tracking, and efficient financial transactions.

Deploy Multi-lingual Digital Tools: Use AI-powered chatbots, virtual consultations, and telemedicine platforms to enhance patient engagement. These tools reduce language barriers and support pre- and post-treatment continuity.

Expand Telehealth Services for Foreign Patients: Extend government platforms like Telemanas and e-Sanjeevani to international users through dedicated service lines. This will promote India's leadership in mental health and digital care while generating additional revenue.

Benchmark Global Innovation Models: India should draw inspiration from global leaders like Estonia, Canada, Denmark, Spain, etc. which have successfully integrated digital health,¹³¹ and personalized care into their healthcare systems. These models show how innovation, driven by R&D, agile regulation, and private sector support can boost outcomes, cut costs, and improve patient care. India can adopt similar strategies to fast-track its healthcare transformation.

¹³¹Digital Health: Europe is moving at different speeds | Bertelsmann Stiftung | Dr. Thomas Kostera | Apr 2019

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