

Review Article

Medical Tourism in India: An Analysis of Buying Behaviour of International Patients in the Changing Healthcare Paradigm

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Article History

Received: 17.02.2026

Accepted: 02.04.2026

Published: 06.04.2026

Abstract: Medical tourism has emerged as a rapidly growing segment of the global healthcare industry, with India becoming one of the leading destinations for international patients due to its cost-effective treatment, skilled healthcare professionals, advanced medical technology, and minimal waiting time. The changing healthcare paradigm, characterized by increased healthcare costs in developed countries and rising awareness of alternative treatment destinations, has significantly influenced the buying behaviour of international patients. The market has shown consistent growth, with millions of international patients visiting India annually for medical treatment, making it a major hub for medical tourism in Asia. This paper analyses the buying behaviour of international patients in India by examining key decision-making factors such as cost, quality of healthcare services, hospital accreditation, doctor expertise and availability of international patient services. The study also explores patient experience and satisfaction as crucial determinants of loyalty and repeat visits, as well as the challenges faced by medical tourists, including language barriers, cultural differences, and infrastructure issues. The research concludes that patient satisfaction and service quality are becoming the new competitive advantages in the medical tourism sector, shifting the focus from traditional healthcare delivery to patient-centred care and global healthcare marketing strategies.

Keywords: Medical Tourism, Buying Behaviour, Patient Satisfaction, Quality.

INTRODUCTION

Medical tourism in India has emerged as a significant economic sector, representing a convergence of healthcare excellence and cost-effectiveness that attracts millions of international patients annually.

India attracts patients from more than 100 countries, with varying demographics and treatment preferences. The diversity of source countries reflects India's growing global reputation as a healthcare destination.

This review examines the evolving landscape of medical tourism in India from 2020 to 2025, focusing on market dynamics, patient behaviour patterns, and factors influencing international patients' healthcare purchasing decisions.

The period 2020-2025 has been particularly transformative, marked by the COVID-19 pandemic's initial disruption followed by a robust recovery that has seen the industry exceed pre-pandemic levels.

The Pre-Travel Decision-Making Matrix: Beyond the Price Tag

While India's reputation for cost-effective medical procedures remains a primary magnet—with treatments for complex surgeries like cardiac surgeries, transplants and knee replacements costing as little as one-tenth of US prices—the decision-making process of international patients has matured.

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CITATION: Mohd Khateeb Arshi, Jwaad Akhtar Khan, Sakhi John (2026). Medical Tourism in India: An Analysis of Buying Behaviour of International Patients in the Changing Healthcare Paradigm. *South Asian Res J Nurs Health Care*, 8(2): 61-65.

International patients in the post-pandemic era are meticulous researchers. Online platforms, hospital websites and digital health aggregators have become the primary sources of information. After initial online research, they are increasingly likely to engage in direct communication with hospital representatives, often through dedicated international patient departments. The responsiveness, transparency and empathy displayed during these initial interactions are critical in converting an inquiry into a visit.

A 2024 study emphasized that while affordable expenses are a significant predictor of a patient's intention to travel, clinical trust and a sense of well-being are what ultimately determine their willingness to revisit.

Market Overview and Growth Trajectory

India's medical tourism market has demonstrated remarkable resilience and growth during the 2020-2025 period. The market was valued at \$7.69 billion in 2024, with approximately 7.3 million foreign patients traveling to India in 2024, up from 6.1 million in 2023 for medical treatment, representing a substantial 19.7% year growth and it is estimated that 8.9 million patients travelled to India in 2025. This figure matches and exceeds pre-pandemic levels of 2019, when approximately 7 million medical tourists visited India.

This represents a significant recovery from the pandemic-induced downturn, with the industry projected to reach \$58.2 billion by 2035.

Effective management of large numbers of international patients requires continued investment in infrastructure and support services.

The "Heal in India" Initiative: A Paradigm Shift in Patient Acquisition

The "Heal in India" initiative is a strategic program by the Government of India designed to establish the nation as a premier global destination for medical value travel. This initiative aims to showcase India's world-class healthcare infrastructure, highly skilled medical professionals and the significant cost advantages of treatments, encompassing both modern medicine and traditional wellness systems like AYUSH. Central to the program is the creation of a seamless ecosystem for international patients, facilitated by a dedicated digital portal for accessing verified information on hospitals and treatments, simplified medical visa procedures, and a strong emphasis on internationally accredited healthcare facilities (NABH, AACI and JCI). By streamlining the entire patient journey from discovery to post-operative care, "Heal in India" seeks to boost healthcare exports and position India as a trusted, affordable, and holistic global hub for health and wellness.

Treatment Categories and Specializations

In 2025, cosmetic procedures dominate India's medical tourism landscape, commanding the largest market share at approximately 30%, driven by global demand for high-quality treatments like rhinoplasty, facelifts, and liposuction. While this aesthetic segment leads, the country also remains a preferred destination for a wide range of complex medical specializations. Patients frequently travel to India for critical procedures including advanced cardiac surgeries, orthopaedic treatments, transplants, comprehensive cancer care, and fertility treatments, attracted by the compelling combination of state-of-the-art medical capabilities and competitive pricing.

Geographic Distribution and Key Destinations

Chennai continues to dominate India's medical tourism landscape, attracting approximately 45% of international health tourists and 30-40% of domestic health tourists. The city's success is attributed to its specialized hospitals, minimal waiting periods, and cost-effective treatment options. Other major medical tourism hubs include Delhi NCR, Mumbai, Bangalore and Kolkata, each offering specialized medical services and infrastructure tailored to needs of international patients.

Decision-Making Factors

The decision-making of medical tourists are heavily influenced by the caliber of India's healthcare system. A significant portion, approximately 45% of patients, choose India primarily for the high quality of medical care, which is a testament to the country's world-class facilities and highly skilled healthcare professionals that have built a formidable global reputation. This perception of quality is further reinforced by the availability of advanced medical technology and state-of-the-art equipment, making the presence of modern treatment procedures a crucial factor that significantly influences patients' decisions to travel to India for their healthcare needs.

The Digital Transformation: Telemedicine and AI in the Patient Journey

The COVID-19 pandemic acted as a significant catalyst, accelerating the integration of digital health technologies into the medical tourism sector and fundamentally altering the patient experience. Telemedicine has shifted from a niche offering to a standard component, with international patients now expecting pre-travel virtual consultations to build rapport with surgeons and obtain remote second opinions. This digital connection extends post-treatment, where remote follow-

ups provide crucial continuity of care, emerging as a significant value proposition. Beyond telemedicine, leading Indian hospitals are actively marketing the use of Artificial Intelligence (AI) in diagnostics and treatment planning, attracting patients with the compelling promise of more accurate diagnoses and personalized care protocols, further positioning India as a destination for advanced medical solutions.

Patient Experience and Satisfaction: The New Currency of Loyalty

In the current landscape of medical tourism, the holistic patient experience has become the new currency of loyalty, serving as a critical differentiator beyond expected clinical excellence. Hospitals are now heavily investing in non-clinical aspects to enhance patient satisfaction, implementing cultural sensitization training for staff to cater to diverse needs from key markets like the Middle East and Africa, providing professional language interpretation services, and offering personalized concierge assistance for travel and accommodation. Recent studies conducted over the 2024-2025 period confirm a direct correlation between these experiential factors and a patient's willingness to recommend the facility. This trend has established positive word-of-mouth, amplified through online reviews and social media, as the most powerful marketing tool for Indian healthcare providers today.

Analysis

The study conducted by Ngalle (2025) highlights the evolving dynamics of international patients' experiences in medical tourism, particularly emphasizing age-based differences in perception and satisfaction. The findings reveal that different age groups exhibit distinct patterns in how they discover healthcare services, evaluate hospital facilities, and assess their overall treatment experience. The study further concludes that hospitals must move beyond a "one-size-fits-all" approach and instead adopt targeted, age-specific strategies. This is especially important for middle-aged and older patients, who tend to be more critical of healthcare services and demand higher levels of communication, personalized care, and service quality.

Paul (2024) examines the economic impact of medical tourism in India and identifies it as a significant contributor to the country's economic growth. The study indicates a strong and consistent growth trajectory in the sector, supported by improvements in India's Medical Tourism Index (MTI), which increased from 75 in 2019 to 81 in 2023. This upward trend reflects India's strengthening position in the global medical tourism market and highlights its increasing attractiveness among international patients seeking affordable and quality healthcare services.

Zakaria (2023) focuses on the decision-making behaviour of Bangladeshi patients choosing India for medical treatment. The study identifies "facility and services" as one of the most influential factors driving patient choice, reinforcing the importance of hospital infrastructure and service quality in attracting international patients. However, the study also highlights key challenges, including language barriers, high airfare costs and affordability issues. It recommends that the Indian government take strategic measures to improve accessibility and affordability, particularly for patients from neighbouring and developing countries. These findings align with broader research indicating that cost, quality and accessibility are critical determinants of medical tourism decisions.

Delana (2021) explores the impact of telemedicine on healthcare access and patient behaviour, particularly within the Aravind healthcare network. The study demonstrates that the introduction of telemedicine centers significantly enhanced healthcare accessibility, resulting in a 31% increase in overall patient visits, with a substantial proportion of new patients. The impact was particularly pronounced for patients with simpler medical needs, such as vision-related issues, where visits increased by 47% and prescriptions rose by 18.5%. These findings highlight the growing role of digital healthcare solutions in expanding access and influencing patient behaviour in the medical tourism ecosystem.

Manjula (2022) emphasizes India's position as a rapidly growing and highly competitive destination for medical tourism. The study identifies several key growth drivers, including cost-effectiveness, high-quality healthcare infrastructure, skilled human resources and the integration of alternative medicine systems such as AYUSH. Additionally, government initiatives such as e-visas, digital health portal and marketing support schemes have significantly contributed to the sector's expansion. These factors collectively enhance India's global competitiveness and strengthen its appeal to international patients.

Sethi (2021) underscores the critical role of trust in building long-term relationships with international patients. The study finds that while factors such as price and service quality contribute to patient satisfaction, trust is the most significant determinant of patient loyalty. It identifies multiple drivers of satisfaction, including perceived value, interactive relationships, service quality, timely communication and the use of self-service technologies. The findings suggest that hospitals must prioritize trust-building strategies to convert satisfied patients into loyal advocates, thereby enhancing repeat visits and positive word-of-mouth promotion.

Keerthana (2020) identifies key determinants influencing international patients' choice of healthcare facilities, particularly emphasizing the importance of service quality and diagnostic capabilities. The study highlights that advanced diagnostic facilities and high standards of care are crucial factors shaping patient decision-making. This aligns with broader literature indicating that quality of care, availability of advanced medical technology, and overall service excellence are central to attracting international patients and sustaining growth in the medical tourism industry.

Challenges and Opportunities:

Opportunities

- **Exceptional Market Growth:** The sector has demonstrated remarkable resilience, with the market valued at \$7.69 billion in 2024 and projected to reach \$58.2 billion by 2035. This trajectory presents a massive economic opportunity.
- **High Patient Volume:** With 7.3 million international patients in 2024—a 19.7% year-over-year growth that surpasses pre-pandemic levels—there is a clear opportunity to further expand global market share.
- **Strategic Government Backing:** The "Heal in India" initiative provides a powerful framework to streamline patient acquisition through a central digital portal and simplified visa processes, enhancing India's appeal as a trusted global hub.
- **Digital Advancement as a Differentiator:** The accelerated adoption of telemedicine for consultations and follow-ups, along with the integration of AI in diagnostics, offers a chance to attract patients seeking not just affordable, but technologically advanced medical care.
- **Experience-Driven Loyalty:** The proven correlation between a positive non-clinical experience (concierge services, cultural sensitivity) and patient recommendations provides an opportunity to leverage word-of-mouth, the "most potent marketing tool," for sustainable growth.

Challenges

- **Scaling Infrastructure:** The rapid 19.7% annual growth in patient arrivals presents the critical challenge of ensuring that infrastructure, technology and support services receive continued investment to manage the high volume without compromising the quality of care.
- **Evolving Patient Expectations:** The modern patient's decision-making has matured beyond cost. The challenge is to consistently deliver on non-price factors such as transparency, responsive communication and demonstrable clinical trust, which are now crucial for converting inquiries and earning repeat visits.
- **Standardizing the Digital Experience:** While leading hospitals are adopting digital tools, the challenge lies in ensuring that telemedicine and other technologies are seamlessly and widely integrated across the ecosystem to meet the new standard of patient expectation for continuous digital engagement.
- **Maintaining a Reputation for Quality:** As the volume of patients increases, the foremost challenge is to uphold the high standards of clinical excellence and quality of care across all providers. Any lapse could damage the "formidable global reputation" that is a primary driver for attracting patients.

Future Growth Potential

The future growth potential of medical tourism in India remains highly promising, supported by the country's strong competitive advantages in cost-effective treatment, quality healthcare services and availability of advanced medical technology. However, to sustain long-term growth and global competitiveness, effective collaboration between the government and private sector is essential. Such collaboration can help address existing challenges including infrastructure gaps, regulatory issues, standardization of services and international marketing of Indian healthcare services. Government initiatives, policy support and private sector investment in hospital infrastructure, technology and patient services will play a crucial role in strengthening India's position as a global medical tourism hub. The integration of healthcare with tourism, hospitality and digital health services will further enhance the overall value proposition for international patients.

India operates in a highly competitive global environment where countries such as Thailand, Turkey and Singapore are major players in the medical tourism market. Despite this competition, India maintains a competitive edge due to its unique combination of affordability, high-quality treatment, skilled medical professionals and a wide range of medical procedures. The industry's contribution to the Indian economy extends beyond hospital revenue, as it generates foreign exchange earnings, creates employment opportunities and supports the growth of related sectors such as hospitality, transportation and tourism services. Future projections indicate a strong double-digit growth rate for the industry, reflecting robust expansion potential driven by increasing global demand for affordable and quality healthcare services, as well as India's strategic advantages in accessibility, cost competitiveness, and medical expertise.

CONCLUSION

The 2020-2025 period has been transformative for India's medical tourism industry, marking a robust recovery and growth beyond pre-pandemic levels. The modern international patient, while still drawn by significant cost advantages,

now demonstrates a more sophisticated buying behaviour, prioritizing demonstrable quality of care, digital integration like telemedicine, and a holistic, personalized patient experience. Supported by strategic government initiatives like "Heal in India," the sector is poised for exceptional growth, projected to reach \$58.2 billion by 2035. However, realizing this potential hinges on the industry's ability to address critical challenges-scaling infrastructure to meet surging demand and consistently delivering on the new currencies of loyalty: clinical trust and experiential satisfaction. By effectively leveraging its competitive advantages in cost and quality while adapting to these evolved patient expectations, India is well-positioned to solidify its status as a dominant leader in the global healthcare landscape.

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