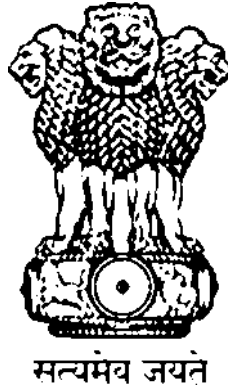


Draft
National Strategy& Roadmap
for
Medical and Wellness Tourism



June 12, 2021

Ministry of Tourism
Government of India

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Chapter 1 – Introduction

1.1. Medical Tourism

Medical tourism may be defined as ‘activities related to travel and hosting a foreign tourist who stays at least one night at the destination region for the purpose of maintaining, improving or restoring health through medical intervention’

Such medical intervention may be broadly classified into following three categories:

(i). Medical Treatment

Treatment for curative purpose that may include cardiac surgery, organ transplant, hip and knee replacement etc.

(ii). Wellness & Rejuvenation

Offerings focused on rejuvenation or for aesthetic reasons such as cosmetic surgery, stress relief, spas etc.

(iii). Alternative Cures

Access to alternative systems of medicines such as India’s offering of AYUSH (Ayurveda, Yoga & Naturopathy, Unani, Siddha and Homeopathy).

Medical tourism is now often referred as **Medical Value Travel (MVT)** as it captures patient’s healthcare seeking behaviour as well as the wider economic impact of such travel on nations hosting them.

1.2. Wellness tourism

Global Wellness Institute has defined wellness tourism as “travel associated with the goal of maintaining or enhancing one’s personal well-being and includes the pursuit of physical, mental, spiritual or environmental ‘wellness’ while traveling for either leisure or business.”

Primary wellness traveller: A traveller whose trip or destination choice is primarily motivated by wellness.

Secondary wellness traveller: A traveller who seeks to maintain wellness while traveling or who participates in wellness experiences while taking any type of trip for leisure or business.

1.3. Medical Tourism Vs. Wellness Tourism

Wellness tourism is often clubbed with medical tourism but wellness tourism is not medical tourism. Some overlap notwithstanding, the two sectors operate largely in separate domains and meet different consumer needs.

Medical tourism primarily addresses the “poor health” end of the market, with patients traveling to another place for specific medical treatments or enhancements. Top medical tourism procedures include cosmetic surgery, orthopaedic surgery, cardiac surgery, and dental procedures. Patients and their families are attracted by the availability, better quality, and/or price of care at the destinations. Therefore, successful medical tourism depends upon the status of a country’s broader medical sector, along with appropriate government regulations, patient safeguards, training standards, insurance frameworks, travel and visa restrictions, and other issues that drive the patient’s experience and treatment outcomes.

Wellness tourism, on the other hand, attracts consumers who are at the opposite end of the wellness continuum — those seeking activities and destinations that extend their wellness lifestyle and help them proactively maintain and improve their health and wellbeing. The appeal and success of wellness tourism depends on an entirely different set of factors, business models, customer mindsets, human resources, and industry culture, and it is more closely aligned with leisure, recreation, and hospitality.

1.4. **Medical Value Travel and Wellness Tourism – a Global opportunity**

Healthcare and Tourism are the fastest growing industries in the world. Medical value travel is being promoted as a fusion product of these industries. Medical value travel has grown across the globe and numerous possibilities still remain unexplored. The key drivers of growth of MVT are:

- (i) Affordability and Accessibility of good healthcare services
- (ii) Facilitation around hospitality services
- (iii) Minimal waiting time
- (iv) Availability of latest medical technologies and Accreditations

Thailand, Mexico, US, Singapore, India, Brazil, Turkey, and Taiwan are the top destinations in terms of number of patients for Medical Value Travel. The global medical value travel market size is in the range of USD 60-80 Billion and some 14 million people travel across the borders for medical tourism¹.

¹ There is wide variation in the estimates for market size and number of people undertaking medical value travel due lack of standard definitions and lack of robust mechanisms for data collection

India has been ranked 10th in Medical Tourism Index (MTI) for 2020-21 out of 46 destinations of the world by Medical Tourism Association.

Global Wellness Institute has estimated global wellness tourism market to be USD 639 Billion in 2017 with Secondary wellness travellers accounting for 89% of the trips and 86% of the expenditure. Domestic wellness travel contributing 82% of total trips and 65% of expenditure.

United States, Germany, China, France, Japan, Austria and India are the leading countries for wellness tourism in terms of the size of wellness tourism market.

1.5. **India as a destination for Medical Value Travel & Wellness Tourism**

Over the years, India has grown to become a top-notch destination for medical value travel because it scores high over a range of factors that determines the overall quality of care. The high-end healthcare system in India is as good as the best in the world. Complex surgical procedures are done in a world class global hospital by acclaimed medical specialists at a much lower cost than what it normally takes in other countries.

India has also become a favoured destination for Yoga and Wellness with its focus on traditional therapies through AYUSH.

The number of international patients increased from 4.3 lacs in 2016 to 7 lacs in 2019 with estimated market size in the range of USD 5-6 Billion for 2019¹.

Southern and Western States of India have greater concentration of MVT service providers as is evident from number of JCI accredited hospitals:

- (i). Delhi (JCI accredited hospitals:9)
- (ii). Mumbai (6)
- (iii). Bangalore (3)
- (iv). Chennai (2)
- (v). Hyderabad (2)
- (vi). Ahmedabad (2)
- (vii). Kolkata (1)
- (viii). Nagpur (1)
- (ix). Cochin (1)
- (x). Pune
- (xi). Nashik

As per estimates by Global Wellness Tourism, India ranked 7th position in 2017 with 56 million trips in wellness tourism and total revenue of USD 16.3 Billion.

1.6. **National Strategy for Medical Value Travel and Wellness Tourism**

The Government of India recognizes medical value travel and wellness tourism as one of the important sectors having the potential of accelerating the country's development and attaining the objective of Aatmanirbhar Bharat. In order to provide impetus to the growth of Medical Value Travel and wellness tourism in India and maintain India's competitive advantage, a comprehensive strategy and roadmap has been prepared.

The National Strategy aims at providing an institutional framework, strengthening the ecosystem for medical and wellness tourism, developing a brand and ensuring quality assurance.

Chapter 2 – SWOT Analysis and Stakeholders

2.1. SWOT Analysis

In order to identify the key initiatives and strategies for development of medical value travel in the Country, it is important to carry out SWOT analysis of medical and wellness tourism sector.

2.1.1. Strengths

The strengths of India as a Medical Value Travel destination are:

(i). State of the Art Medical Facilities

Top of the line medical and diagnostic equipments from global international conglomerates are available at many Indian hospitals.

(ii). Reputed Healthcare Professionals

Most of the medical practitioners and surgeons at Indian Hospitals have a reputation for high-quality medical training and have worked at some or other time in the leading medical institutions of the world. Most of medical practitioners and nurses are fluent in English.

(iii). Financial Savings

The cost of quality of medical procedures and services are low in India when compared to other competitors in the field.

(iv). Fast track appointments

There is no waiting time and the patients can get immediate treatment.

(v). Traditional Healthcare Therapies – AYUSH

India has a unique advantage of offering Yoga, Ayurveda & Naturopathy for treatment and enhancing the well-being to the medical value traveller. With recent focus of the Government, India has built tremendous capacity in AYUSH.

(vi). Accreditation of Hospitals

India has a good number of JCI (Joint Commission International) accredited hospitals and compares well with other countries in Asia. In addition, there are a large number of NABH accredited hospitals. These set of approved hospitals in India provide care at par or above global standards.

(vii). Diversity of tourism products and experiences

India offers a range of tourism opportunities to Medical Value Traveller to combine the treatment with visit to tourist destinations.

2.1.2. Weaknesses

The Indian Medical Value Travel sector suffers from the following weaknesses:

(i). Lack of Government regulations for MVT sector

There are no regulations to govern MVT sector, which leaves the sector unorganised and lack of monitoring the quality of services by the Stakeholders such as MVT facilitators and Service Providers. There is need for greater support from the Government towards regulation, facilitation and marketing India as Medical Value Travel destination

(ii). Lack of a nodal body to spearhead Medical Value Travel

There are various Ministries and organizations involved in the promotion and development of Medical Value Travel but there is no nodal body to spearhead Medical Value Travel. There is low coordination amongst the stakeholders such as Airlines, Hospitals and Hotels

(iii). No campaign for India as a MVT destination

India has not been promoted as medical value travel destination by the Government. Individual Hospitals are carrying out their publicity but there is no effective campaign to establish India as a brand for medical value travel.

(iv). Lack of awareness about NABH accreditation at international level

India maintains a robust accreditation system through National Accreditation Board for Hospitals (NABH). There is however not much awareness about NABH in foreign countries and international patient still attach much greater value to JCI accreditation.

(v). Unorganised MVTF

The MVT facilitators have an important role but they are not well organized. NABH has a system of accreditation of MVTF but the same has not been very effective.

(vi). Lack of uniform pricing policies across the Hospitals

Pricing is an important consideration for medical treatment and there is lack of broad consistency in pricing across the hospitals. Due to unavailability of broad price range, the MVT facilitators sometimes cheat the patients.

(vii). Customer perception as unhygienic country

While India is a popular country for tourists but there is a perception about India not being a very hygienic country. This impacts the choice of India as MVT destination.

2.1.3. Opportunity

The Medical Value Travel will continue to grow and offer opportunity to benefit from the sector:

(i). Demand from Countries with Aging population

There will be increased demand for healthcare services from countries with aging population.

(ii). Demand for Wellness and Alternate cures

With fast paced modern lifestyle, there is greater demand for wellness and alternate cures. India has invested heavily in AYUSH and is in a unique position to attract medical value travellers for cure through AYUSH and also for enhancing wellness.

(iii). Long waiting periods in developed countries

In many developed countries, there is shortage of supply, which results in long waiting periods

(iv). Demand from countries with undeveloped medical facilities

There are many countries, which still do not have adequate medical facilities and they will be attractive source markets for medical value travel.

(v). Tourists visiting home countries

India has a huge diaspora and they can combine their visit to India with medical treatment.

(vi). Improved Connectivity

There has been substantial improvement in connectivity from various source markets, which provides better opportunities for Medical Value Travel.

(vii). Post COVID-19

In post COVID-19, demand for wellness travel will increase and it provides a great opportunity to India with its varied offerings.

2.1.4. Threat

India does face following threats:

(i). Regional Competition

Strong competition from Malaysia, Thailand and Singapore.

(ii). Lack of international accreditation

India still has relatively a smaller number of JCI accredited hospitals and there is limited awareness about NABH accreditation.

(iii). Overseas medical care not covered by insurer

Most of the medical care is not covered by insurance and it makes medical value travel less attractive.

(iv). Exploitation by middlemen

The MVT facilitators are not well organized and accredited. Many unprofessional agents exploit the medical value traveller.

2.2. Challenges in Wellness Industry

Recruitment and retention of skilled manpower is the biggest challenge faced by the wellness industry. There is a dearth of good training institutes, with standardized and accredited courses. The vocational training programs often impart theoretical knowledge with little hands-on experience. There is a very limited pool of skilled professionals available in the country whereas the demand is huge. The attrition rate in the industry is high and retaining experienced professionals has become a key challenge.

The wellness services industry does not have a well-defined regulatory framework. Lack of adequate regulation has resulted in lower barriers to entry, thus making it quite easy for small and unprofessional players to enter the market, which often lack hygiene and quality, standardized services, back-end infrastructure, transparent pricing and a pro-customer behaviour.

2.3. Stakeholders

2.3.1. Key Stakeholders

Promotion and development of medical value travel involves a diverse set of stakeholders, whose role is crucial for the success of the Strategy. The key stakeholders are:

- (i). Central Ministries
- (ii). State Governments
- (iii). Healthcare Industry
- (iv). Industry Associations
- (v). MVT Facilitators
- (vi). Commercial players such as Airlines and Hotels

The role and responsibilities of the stakeholders are given below.

2.3.2. Central Ministries

Various Central Ministries are involved in promoting India as Medical Value Travel Destination. The following Ministries of Central Government have important role:

(i). Ministry of Tourism

Ministry of Tourism is responsible for promoting inbound tourism to the Country and can play a significant role in establishing India as Medical Value Travel destination. Ministry of Tourism has set up Medical and Wellness Tourism Promotion Board comprising of wide-ranging stakeholders, which acts as an umbrella body to deliberate on various aspects of the Medical Value Travel and provides direction and guidance.

(ii). Ministry of Commerce

Ministry of Commerce is responsible to frame policies for growth of services sector and has identified Medical Value Travel as one of the Champion Sector for services. Effective support by the Ministry to Medical Value Travel sector can provide big impetus for growth of India as MVT destination.

(iii). Ministry of Health

Ministry of Health is the nodal body for developing healthcare system in the country in partnership with private sector. Ministry of Health may provide the necessary regulatory framework for the hospitals and clinics to ensure patient safety and trust in Indian medical services, which will go a long way to promote medical value travel.

(iv). Ministry of Ayush

Ministry of Ayush has taken a number of steps to strengthen the infrastructure in the country and create awareness and conducive environment for growth of Ayush. Ayush can be a unique offering of India. The efforts of the Ministry of Ayush have to be synergised with other Stakeholders in offering India as holistic healing destination.

(v). Ministry of External Affairs

Ministry of External Affairs and Indian Missions abroad can play an important role in enhancing the visibility of India as a Medical Travel Destination in the source markets facilitating the VISAs to medical value travellers. The Missions abroad can also encourage NRI for medical value travel to India.

(vi). National Accreditation Board for Hospitals (NABH)

NABH has established a robust framework for accreditation of hospitals. The same needs to be highlighted in various source markets.

2.3.3. State Governments

State Governments have a crucial role in providing on the ground infrastructure and support for the growth of medical value travel. Some of the key States, which

have significant healthcare providers need to be proactive in promoting Medical Value Travel.

2.3.4. Healthcare Industry

Hospitals are the key providers of services and have to take steps to ensure latest treatment and patient safety and grievance redressal. Hospitals have to commit to quality of healthcare and transparency in the prices and outcomes to wind the confidence and trust of the international patients.

2.3.5. Industry Associations

(i). FICCI

FICCI as an industry body has been actively working with various Stakeholders to create awareness and highlight issues relating to medical value travel. FICCI has also been organizing annual global event on medical value travel.

(ii). CII

CII as an industry body has been actively working with various Stakeholders to create awareness and highlight issues relating to medical value travel. CII organises various events and activities regarding medical value travel.

2.3.6. Association of MVT facilitators

MVT facilitators play a crucial role to provide a bridge between the medical value traveller and the service provider.

2.3.7. Commercial players such as Airlines and Hotels

Airlines and Hotels also have important role to play in the promotion of Medical Value Travel. These commercial players have to coordinate with Hospitals and MVT facilitators to provide seamless experience to the international patients.

Chapter 3 – Vision, Mission and Objectives

3.1. Vision

To position India as a sustainable and responsible medical value travel and wellness destination.

3.2. Mission

To create a robust framework and synergy amongst the Ministries of Central Government and State Governments and Private Sector for promoting India as a Medical Value Travel and Wellness destination through a dedicated agency to promote Medical Value Travel and wellness tourism in India.

3.3. Key Strategic Pillars

In order to promote India as a destination for medical value travel and wellness tourism, the Strategy has identified the following key pillars:

- (i). Develop a brand for India as a wellness destination
- (ii). Strengthen the ecosystem for medical and wellness tourism
- (iii). Enable digitalization by setting up Online MVT Portal
- (iv). Enhancement of accessibility for MVT
- (v). Promoting Wellness Tourism
- (vi). Governance and Institutional Framework

Chapter 4 – Develop a brand for India as a wellness destination

4.1. Need for a brand for India as a wellness destination

India is currently promoted as a destination under the umbrella of “Incredible India”. Individual hospitals are also marketing themselves in the source market but there is no campaign for the country as a destination for medical and wellness tourism.

In order to grow India as a destination for medical and wellness tourism, there is an urgent need to highlight the wellness offerings of the Country for all visitors as well as medical tourism offerings for patients seeking such services.

4.2. “Heal in India” Brand for promoting India as Medical Value Travel destination

Apart from India’s high level of expertise in modern medical science, India is the birthplace of some of the most ancient and well-known branches of medicine and holistic healing. From yoga to ayurveda and naturopathy, the country’s expertise in alternative medicine and healthcare goes back centuries, and encompasses an overall focus on a healthy well-balanced life.

As modern life grows in complexity, the incidence of “lifestyle diseases” like diabetes, hypertension and heart disease are increasing. It had led to greater realization about the deep linkage of the mind and spirit to the body. There is now greater appreciation for the ancient science of Ayurveda, and its ability to promote long term health with no side effects not just in India but internationally as well. There is also a growing preference in the West for organic products, vegan diets and farm to table local produce.

India thus offers best of both, modern and traditional systems of medicines and can provide holistic healing to people from across the world. In order to highlight all the strengths of the Country, India will be marketed as a medical and wellness tourism destination under “Heal in India” brand.

Under “Heal in India” campaign, an integrated communication strategy to promote brand India will be prepared and executed in partnership with the industry. This will be promoted as sub brand of Incredible India on all the digital platforms and global media campaign of the Ministry.

4.3. Partnership with Indian Missions

Indian Missions can play a big role in establishing the “Heal in India” brand in their respective source markets. The Indian Missions will be engaged effectively to take their support in promoting India as medical value travel and wellness

destination. The Missions will be periodically briefed on policy and sectoral issues and on strengths of India's medical and wellness tourism.

4.4. Corporate Arrangements with Foreign Governments

In order to promote medical value travel from the source markets, the Government will also consider corporate/ institutional arrangements with Governments of countries where they (governments) are responsible for medical care of their citizens.

4.5. Attracting Diaspora

India has one of the largest diaspora population and they need to be targeted for visiting the country to meet their medical and tourism needs.

4.6. Marketing Development Assistance

The Ministry of Tourism will make market development assistance scheme more attractive so that Wellness Tourism Service Providers (WTSPs) and Medical Tourism Service Providers (MTSPs) may take full benefits from the Scheme.

Chapter 5 – Strengthen Ecosystem for Medical and Wellness Tourism

5.1. Need for strengthening the Ecosystem

The Ecosystem for medical and wellness tourism includes a host of service providers, facilitators, commercial agencies such as hotels and airlines, regulatory agencies and the Government. There is need to establish linkages and understanding amongst the stakeholders about the role and responsibilities of different stakeholders and forge partnerships for promoting the sector.

The wellness tourism is now getting into the mainstream and a large number of travellers are seeking wellness experience as secondary wellness travellers and to that extent it involves a large number of players in travel, hospitality and tourism destinations.

The Medical Value Travel is specialized services by Hospitals and Wellness centres including both modern medicine as well as traditional system of medicine. It involves healthcare service providers, VISA requirements, insurance, MVT facilitators etc.

5.2. Organizing Medical Value Travel Facilitators

5.2.1. Registration of Medical Value Travel Facilitators

A medical value travel facilitator is an organisation or a company, which seeks to bring together a prospective patient with a service provider usually a hospital or a clinic. Medical Value Travel Facilitators (MVTf) are an important stakeholder in the whole MVT value chain. They drive the business by generating leads in different source countries.

Medical value travellers look to these facilitators to provide information about quality, safety and legal issues. The facilitators also extend their services for accommodation, transport and medical VISA etc.

All medical value travel facilitators will be encouraged to register with the Government and efforts will be made to build their capacity and facilitate their growth and development. The registered medical value travel facilitators will be promoted on the sector specific portal as well as incredible India portal.

5.2.2. Setting up of Association of MVT Facilitators

Facilitate setting up of MVT Facilitators' Association to deliver quality services and standardize price among all facilitators. The Government can then engage with the Association for formulating policies and regulations and addressing the difficulties

being faced by the Facilitators. The Government can also work with Association for capacity building of the MVT facilitators.

5.2.3. Categorisation of MVT facilitators and their Accreditation

MVT facilitators can be suitably categorised based on well-defined criteria of turnover, experience etc. into silver, gold and platinum categories. This will provide more transparency to patients and other stakeholders in the system and help in determining the prices for the services.

NABH accreditation will be made mandatory after stipulated number of years of successful operations in the field. The facilitators operating in the industry must possess this accreditation to ensure their non-clinical services are of certain quality standards. This is important especially during post-operative care where patient might need accommodation and other services.

5.3. Organizing Medical Service Providers

5.3.1. Registration of Medical Service Providers

All medical service providers will also be registered so that correct and complete information about them is made available to the source markets through portal.

5.3.2. Transparency in rates and clinical outcomes by Service Providers

The medical service providers such as hospitals will be categorised based on factors like quality of health care, volume and range of services provided. This will help in standardization of prices for the services offered by the hospitals. It enables international patients to decide on the hospital based on their requirement.

In order to strengthen India's position, the service providers will undertake the following:

- (i). For key procedures, MVT focused hospitals should share clinical outcomes on their website with details on total procedures performed and procedure wise mortality/ morbidity rates; this would help prospective patients benchmark Indian providers against other top destinations
- (ii). For key procedures, hospitals may also provide indicative price range so that patients are not fleeced by facilitators / agents
- (iii). Industry should devise a mechanism to approve or audit the above information shared by hospitals and penalize those deviating from them
- (iv). Providers may accept patients only from registered facilitators

- (v). Hospitals may charge same rates to all patients irrespective of whether they come via facilitators or through other channels, thereby addressing lack of trust among patients
- (vi). In addition, patients should be encouraged to reach out to designated facilitators in their respective countries so that they can avail value-added services (addressing of queries related to medical, cost, travel, support in data management, language barriers etc.) thereby leading to improved experience as well as incentivizing facilitators to invest in human resource, technology etc.

5.4. Organizing Wellness Tourism Operators

There are a large number of wellness tourism operators, who provide services to the wellness travellers. A mechanism for their registration and classification will be laid down to ensure quality of service and promote them through the portal and other digital channels. Registration of Wellness Operators will help in greater interaction and assessment of the needs of the industry towards framing suitable policies and programs for their development and growth.

5.5. Capacity building of enterprises and staff

In order to ensure quality of services, capacity building programs will be undertaken to train paramedical and non-medical staffs of the service providers for cross-cultural sensitivities. There should be focused language training for select countries from where tourists are coming in larger numbers.

Similar capacity programs will also be organized for MVT facilitators, Wellness tourism operators.

5.6. State and Destination Assessment for MVT and Wellness Tourism

The Ministry of Tourism will conduct assessment and ranking of the States and Destinations, with the key objective to foster competitiveness and encourage States to work proactively towards developing MVT and Wellness Tourism. It will be implemented as a capacity development exercise to encourage mutual learning among all states and to provide support in policy formulation and implementation.

The broad areas and action points for ranking exercise will be taken from global rankings of countries. This will also help prepare a State Specific Report containing analysis of respective ecosystems for promotion of Wellness tourism, strengths and priority areas for future and best practices adopted by the States.

Chapter 6 – Enable Digitalization by setting up of Online MVT Portal

6.1. MVT Portal – One stop solution to facilitate international patients

The existing portal set up by Services Export Promotion Council will be revamped to provide one stop solution to facilitate international patients in their entire journey of medical value travel to India. It will help him in exploring, planning, booking of services, payments and post-operative services. The portal will have end-to-end mapping of the services by each stakeholder.

The portal will also help exercise oversight on the functioning of industry players and will be better able to enforce rule and regulations.

6.2. Main features of the Portal

The main features of the portal will include:

- (i). Provision of login accounts for every stakeholder working in the industry like Immigration, Governmental body, service providers, facilitators, insurance companies/TPAs and international patients
- (ii). Capturing of data about international patients and services provided by facilitators, hospitals and patient self-declaration
- (iii). Ease in streamlining marketing and branding initiatives taken up by the governmental body by promoting the portal and the players registered on it
- (iv). Assistance in better maintaining stringent regulations in the industry
- (v). Better able to capture industry data which can be useful in making important decisions
- (vi). Facilitators' rating can be done based on user experience. This rating will be visible to all patients seeking treatment in India at the portal. The rating will help in maintaining service quality and patients will have better information to select the preferred facilitator.

6.3. Advantages of online MVT portal

The online MVT portal, apart from being one stop solution to foreign patients, will also help the MVT sector tremendously. Some of the benefits of the portal will be:

- (i). Assistance in formalization of the industry
- (ii). Ability to effectively enforce regulations and policies

- (iii). Boost to the industry growth coupled with high foreign exchange earnings
- (iv). Reduction in incidence of illegal foreign nationals operating in the industry
- (v). Better healthcare service offerings to foreign patients
- (vi). One stop solution for foreign patients looking for treatments in India
- (vii). Focussed and concentrated efforts from government and industry regarding branding, marketing, institutional tie-ups, investments etc.
- (viii). Better data capturing through which various analysis can be drawn which can assist in further sound decisions
- (ix). Implementation of payment system can also be arranged on the portal. This will help in reducing default risks

Chapter 7 – Enhancing Accessibility for medical value travel

7.1. Liberalized VISA policy

India has already introduced e-VISA and other measures to facilitate medical value travellers to visit India. India will further liberalize and put in place a holistic and transparent visa regime to make it more patient friendly.

7.2. Better Air Connectivity

In many cases, especially for tourists from Africa and Middle East, there is no direct air connectivity. Patients must break journey at some Middle East airports which is tiring and could be uncomfortable for patients. A lot of tourists coming from these countries are seeking intensive procedures and journey breaks are all the more distressing. Hence, better air connectivity to these areas will make India a more attractive destination for medical value travel.

7.3. Helpdesk and MVT Lounge at the airport

Helpdesk and MVT Concierge and Lounge will be set up at important airports for medical value travellers to assist the travellers from the aerobridge to the transportation of their next destination. It will have the following features:

- (i). The travellers will be greeted upon disembarkation at the aerobridge and assisted through Immigration and Customs, baggage claims, and hosted at the lounge till their departure to their respective hospitals/ hotels.
- (ii). The patients will be provided the information about the do's and don'ts during their stay in the country.
- (iii). The helpdesk will be responsible for capturing the information pertaining to name of the disease diagnosed, treatment sought and name of the service provider and facilitator
- (iv). The helpdesk will also assist in connecting with facilitators or service providers outside the airport.
- (v). It will reduce the chances of patients getting in hands of unorganized translators, touts etc. who tarnishes the image of MVT in India

Chapter 8 – Promoting Wellness Tourism

8.1. Every destination has something unique to offer to wellness travellers

Because wellness is multidimensional — spanning the physical, mental, social, emotional, spiritual, and environmental spheres — wellness travel is also multifaceted. It encompasses a large and diverse set of activities and pursuits, including preventive health services, spa, beauty, fitness, personal growth, nature, and much more. This in turn creates opportunities for all kinds of businesses and providers.

Destination Management Organizations shall make an effort to improve the wellness offerings of the destination, which will make the destination more attractive to the visitors both primary and secondary wellness travellers.

8.2. Convergence of Wellness, Hospitality and Travel businesses

Wellness, hospitality, and travel are converging in diverse and unprecedented ways, as businesses experiment with new partnerships and business models to offer expanded services and programming that will help travellers incorporate wellness into every aspect of their trips.

Following trends are emerging in wellness tourism:

(i). Encouraging partnerships between airports, airlines and wellness businesses

Recognizing that air travel can be an unhealthy and stressful experience, airports and airlines are promoting health and wellness programs for customers combating long travel times, disrupted sleep, cramped spaces, and stress. Collaborations among airports, airlines, and wellness businesses are taking many forms and need to be encouraged.

Established wellness enterprises are expanding their markets and services to travel venues. Social media and a variety of apps are enabling savvy air travellers to find the health and wellness services they need. These Apps provide efficient ways to search airports for healthy choices, including gyms, spas, and pools.

(ii). Healthy hotels go mainstream

As wellness travel becomes more mainstream, many hotels are incorporating wellness into their design, amenities, services, and programming. Wellness features may include bedding and lighting that promote better sleep; windows and shades that block out light and noise; in-room fitness

equipment and videos; healthy snacks, minibars, and menus at restaurants; or on-site spas and gyms.

An emerging trend in hotels is the adoption of design principles such as wellness architecture, biophilic design, and sustainability elements into entire design of the property.

(iii). Engineering new wellness travel experiences

Consumers are increasingly viewing vacations as an opportunity to experience wellness in new ways, and tourism-related businesses from cruise lines to tour operators and event organizers are engineering diverse new wellness travel experiences.

Cruise lines have not only brought sumptuous spas and workout spaces on board, but many are now showcasing other aspects of health and wellness including healthy food, relaxation, meditation, and wellness-themed excursions.

Meanwhile, tour operators and event organizers are helping travellers to find their desired wellness travel experiences. There are agencies that provide wellness travellers everything they need to create a tailored wellness vacation. They are combining wellness offerings such as yoga, meditation, massage, trail running, and healthy/local cuisine with traditional safari activities.

(iv). Wellness products and brands travel with their customers

As wellness routines become a daily lifestyle for many consumers, products and brands are following their customers on their travels to help them continue these routines wherever they go.

(v). A new nexus of travel, work, and wellness

For those who want longer time to experience a country than the standard vacation, several innovative companies have combined coworking and travel with wellness.

8.3. **Government Support for Tourism Wellness Companies**

The Ministry will highlight India's wellness offerings by the industry in its promotional material and incredible India campaign. The Ministry of Tourism will strengthen its Market Development Assistance Scheme for promoting wellness industry. The Ministry will also encourage development of tourism destinations and

products for promoting wellness tourism. It will also encourage public private partnerships for promoting wellness tourism in the country.

8.4. **Quality assurance system for wellness tourism**

The Ministry will work with Industry to have an effective quality assurance program through regulation, standardization, accreditation and streamlining of institutional procedures.

Chapter 9—Governance and Institutional Framework

9.1. National Medical & Wellness Tourism Promotion Board (NMWTB)

The Ministry of Tourism constituted National Medical & Wellness Tourism Board (NMWTB) with the Hon'ble Minister (Tourism) as its Chairman in 2015 to provide dedicated institutional framework to take forward the cause of promotion of Medical and Wellness Tourism including Indian system of medicine covered by Ayurveda, Yoga, Unani, Siddha and Homeopath (AYUSH). It was constituted to work as an umbrella organisation to promote medical and wellness tourism in an organised manner.

9.2. The Board to be a dedicated agency for Medical and Wellness Tourism

In order to have a 'patient centric' and 'tourist centric' approach and bring all stakeholders on one platform to promote medical value travel and wellness tourism, the Board will be positioned as a one-stop centre for the promotion, business development, facilitation, networking, regulation and grievance redressal for medical value travel in India

The Board in particular will have the following functions:

- (i). The Board will work towards establishing MVT as a distinct sector. It will provide a platform for consultation and exchange of ideas amongst all the Stakeholders to develop suitable policy recommendations and strategies for promotion of India as medical value travel destination
- (ii). The Board in consultation with National Accreditation Board for Hospitals (NABH) and other stakeholders frame suitable guidelines for registration, oversight and grievance redressal for MVT facilitators, Service Providers to ensure trust and confidence of medical travellers.
- (iii). All government benefits and incentives shall be given only to those MVT facilitators and Service Providers, who comply with the guidelines and suitable penalties may be levied for violation of the guidelines.
- (iv). The Board will encourage and facilitate institutional arrangements/ affiliations between source country governments/ institutions and healthcare service providers in India, rather than individual tie-ups between them.
- (v). Develop and promote "Heal in India" as brand for positioning India as Medical value travel destination on the world tourism map. Organise conferences, seminars, exhibitions and other networking events in India and abroad to showcase India as the medical value travel destination

- (vi). Provide necessary facilitation to the medical value travellers at the time of their arrivals at the airport
- (vii). Develop and maintain online MVT portal and database of hospitals, clinics, wellness centres, spas, Ayush companies, medical tourism companies, hotels and other stakeholders of medical value travel in India
- (viii). Connecting all the stakeholders in a retail chain to develop the complete package for medical value travel (service providers, government, agents, hotels, airlines, transfer services, tourist attractions etc)
- (ix). Coordinating and facilitating any other requirement for the promotion of medical value travel.

9.3. **The Board to be restructured to include all Stakeholders**

The Board will be restructured to streamline its functioning and discharge its responsibilities as one stop centre for medical value travel. The Board will have an advisory committee, a technical committee and an executive committee to discharge its functions.

(i) Advisory Committee

The Board will have an Advisory Committee comprising of all the relevant Ministries and key States, which have significant Medical Value Travel. The Advisory Committee will also have representation from Industry Associations, Healthcare Industry, MVT facilitators, Airlines, Hotels and other Stakeholders.

(ii) Technical Committee

The Board will have a Technical Committee having relevant experts for oversight, grievances and quality related matters.

(iii) Executive Committee

The Board will have an executive committee, which will approve various initiatives and projects for implementation.

(iv) Dedicated nodal agency to support the Board

India Tourism Development Corporation will be the nodal agency for medical and wellness tourism to support the National Medical and Wellness Tourism Promotion Board. The nodal agency will ensure follow up action and implementation of various decisions taken by the Board and the

Ministry of Tourism. The Ministry of Tourism will provide the nodal agency with the requisite funds for implementing the decisions of the Board and provide necessary support to the Board to promote India as Medical Value Travel and wellness destination.

9.4. State Medical and Wellness Tourism Promotion Board

States having significant presence of Medical Value Travel business or future potential may constitute a State Medical and Wellness Tourism Promotion Board or a dedicated cell in their Tourism Promotion Board for coordinating, facilitating and promoting medical value travel in their States.

9.5. Action Plan

Ministry of Tourism will prepare a detailed National Action Plan in consultation with relevant Ministries, State Governments and Industry Stakeholders for implementation of the Strategy. The Action plan will be reviewed and monitored by the Board in accordance with the laid down governance mechanism for the same. State Governments will prepare State specific policy and action plan for development of medical and wellness tourism. The Ministry will help with model policies and action plans for guidance of the States.