



# Being Well in Thailand

Assistant Professor Dr. Pansak Sugkraroek  
Bumrungrad International Hospital

# Medical Tourism VS Wellness Tourism

- Medical Tourism is still the main target in Thailand
- Wellness Tourism is going to surpass Medical Tourism soon

# Medical Tourism VS Wellness Tourism

Poor Health

Health Continuum

Optimal State Of Well being



|                         |                           |
|-------------------------|---------------------------|
| Treat & cure illness    | Maintain & improve health |
| Corrective              | Preventive                |
| Episode                 | Holistic                  |
| Clinical-responsibility | Individual responsibility |
| Compartmentalized       | Integrated into life      |





# Medical Tourism VS Wellness Tourism

## Medical Tourism

Focusing mainly on receiving medical treatment , however, leisure activities and sight seeing are slightly included

## Wellness Tourism

Focusing mainly on wellness, rehabilitation or enhancing health to optimum level

# What do Wellness travelers seek ?

## Wellness Travelers...



- Health Enhancement: Aesthetic Spa, Healthy eating, Fitness
- Mind-Body : Yoga, Tai Chi
- Spiritual : Meditation
- Stress Therapy
- Eco & Adventure

# Thailand Medical Tourism Hospital



**Bumrungrad International Hospital**



**Bangkok Dusit Medical Hospital**

**Samitivej Hospital**



# Wellness in Thailand



Chivasom



Aksorn Rayong Resort



The Sanctuary Spa Resort Koh Phangan

The Pavana Chaing Mai Resort



ANANTARA

TRIA  
WE ENHANCE YOUR LIFE



# World Best Hospital 2018



Asklepios Klinik Barmbek



Clemenceau Medical Center



The Specialty Hospital



Anadolu Medical Center



สมิติเวช

ที่มา: The Medical Travel Quality Alliance (MTQUA)

## จุดหมายปลายทางการท่องเที่ยวเชิงสุขภาพ



**1** อินเดีย  
**75.94**  
คะแนน



**2** โคลอมเบีย  
**74.96**  
คะแนน



**3** เม็กซิโก  
**74.17**  
คะแนน



**4** แคนาดา  
**74.13**  
คะแนน



**5** สาธารณรัฐ  
โดมินิกัน  
**73.85** คะแนน



**6** ไทย  
**73.25**  
คะแนน

ที่มา: The International Healthcare Research Center (IHRC)



# Wellness : Next Destination in Thailand



## Bumrungrad International

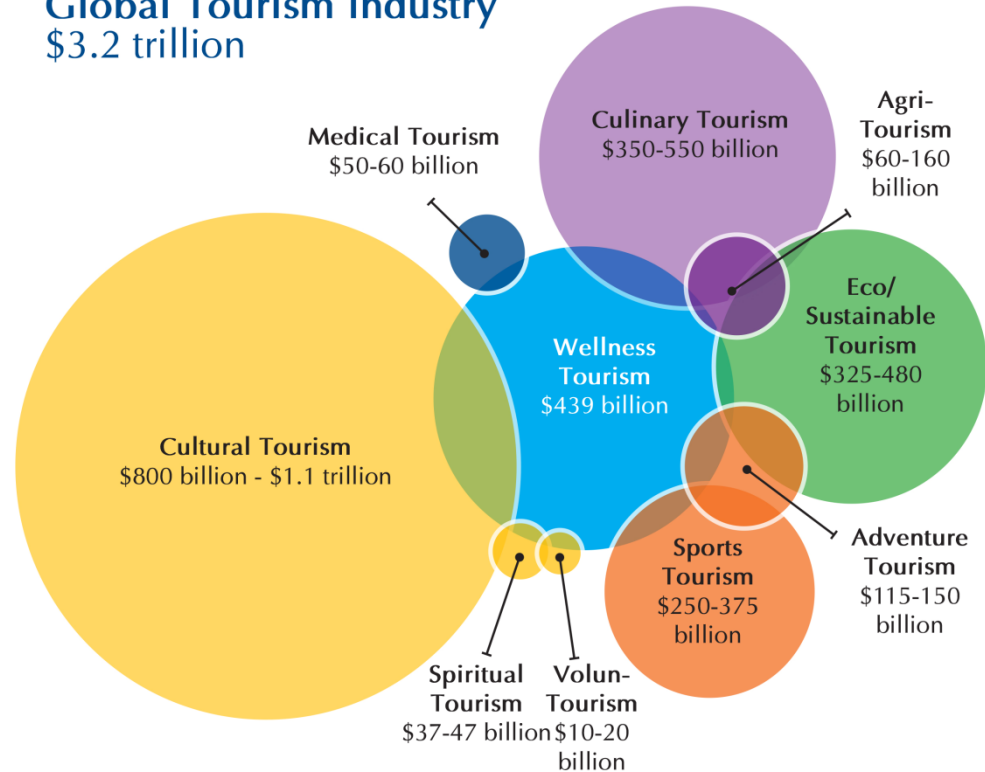
- has been awarded as “*World Best Hospital for Medical Tourists 2018*” by The Medical Travel Quality Alliance (MTQUA)
- 2018 Asia Pacific Healthcare & Medical Tourism Awards offered 10 awards to Bumrungrad Hospital

## VitalLife Wellness Center

- 1st Wellness Center in the world to be accredited by DNV GL’s International Accreditation Standard for Out Patient Specialist Center
- 1st Anti-Aging and Wellness in Southeast Asia
- Winner 2017-2018 Best Integrated Health and Wellness Provider of the year in Asia Pacific

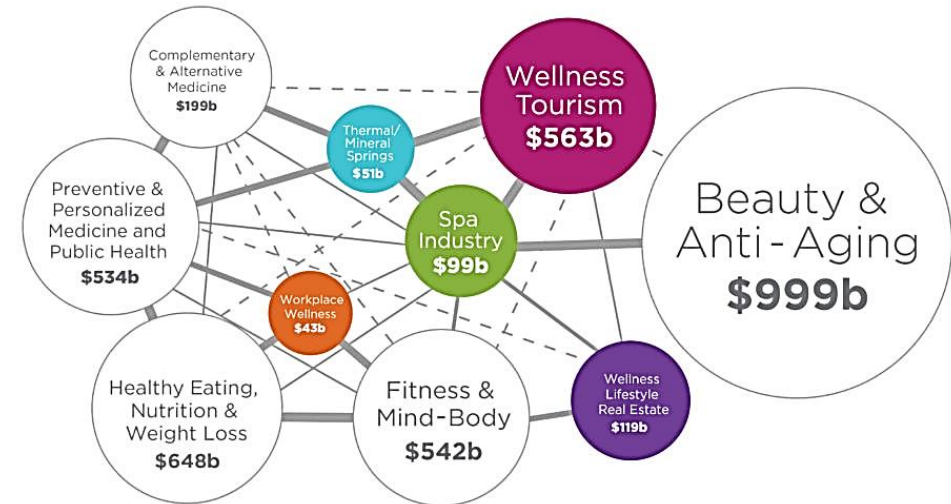
# Integrated Wellness Tourism

## Global Tourism Industry \$3.2 trillion



© Global Wellness Institute. Originally published in "The Global Wellness Tourism Economy," 2013

## GLOBAL WELLNESS ECONOMY: \$3.7 trillion in 2015



Source : Global Wellness Institute 2014

# Top ten wellness tourism Market in Asia Pacific

**Top Ten Wellness Tourism Markets in Asia-Pacific, 2015**

|             | Number of Trips<br>(millions) | Receipts/Expenditures<br>(US\$ millions) |
|-------------|-------------------------------|--|
| China       | 48.2                          | \$29,465.4                               |
| Japan       | 37.8                          | \$19,837.4                               |
| India       | 38.6                          | \$11,782.4                               |
| Thailand    | 9.7                           | \$9,417.2                                |
| Australia   | 8.5                           | \$8,159.2                                |
| South Korea | 18.0                          | \$6,831.9                                |
| Indonesia   | 5.6                           | \$5,334.3                                |
| Malaysia    | 5.0                           | \$3,118.9                                |
| Vietnam     | 6.4                           | \$2,887.3                                |
| Hong Kong   | 1.8                           | \$2,309.0                                |

*Note: These figures combine both international/inbound and domestic wellness tourism spending, and also include both primary and secondary wellness trips. Source: Global Wellness Institute*

**Top Twenty Wellness Tourism Markets, 2015**

|                | Number of Trips<br>(millions) | Direct<br>Employment<br>(millions) | Expenditures<br>(US\$ billions) | Rank in 2015 |
|----------------|-------------------------------|------------------------------------|---------------------------------|--------------|
| United States  | 161.2                         | 1.87                               | \$202.2                         | 1            |
| Germany        | 58.5                          | 1.11                               | \$60.2                          | 2            |
| France         | 30.6                          | 0.32                               | \$30.2                          | 3            |
| China          | 48.2                          | 2.37                               | \$29.5                          | 4            |
| Japan          | 37.8                          | 0.18                               | \$19.8                          | 5            |
| Austria        | 14.6                          | 0.16                               | \$15.4                          | 6            |
| Canada         | 25.3                          | 0.25                               | \$13.5                          | 7            |
| United Kingdom | 20.6                          | 0.18                               | \$13.0                          | 8            |
| Italy          | 6.6                           | 0.15                               | \$12.7                          | 9            |
| Mexico         | 15.3                          | 0.48                               | \$12.6                          | 10           |
| Switzerland    | 9.2                           | 0.10                               | \$12.2                          | 11           |
| India          | 38.6                          | 5.32                               | \$11.8                          | 12           |
| Thailand       | 9.7                           | 0.50                               | \$9.4                           | 13           |
| Australia      | 8.5                           | 0.10                               | \$8.2                           | 14           |
| Spain          | 13.6                          | 0.08                               | \$7.7                           | 15           |
| South Korea    | 18.0                          | 0.13                               | \$6.8                           | 16           |
| Indonesia      | 5.6                           | 0.52                               | \$5.3                           | 17           |
| Turkey         | 9.3                           | 0.06                               | \$4.8                           | 18           |
| Russia         | 13.5                          | 0.15                               | \$3.5                           | 19           |
| Brazil         | 8.6                           | 0.12                               | \$3.3                           | 20           |

*Note: These figures combine both international/inbound and domestic wellness tourism spending, and also include both primary and secondary wellness trips.*

Source : Global Wellness Institute

# Spa – Main Health Tourism in Thailand ?



## Spa Facilities and Revenues by Region, 2013 and 2015

|                          | Number of Spas |                | Spa Facility Revenues<br>(US\$ billions) |               |
|--------------------------|----------------|----------------|--|---------------|
|                          | 2013           | 2015           | 2013                                     | 2015          |
| Europe                   | 32,190         | 37,420         | *\$29.8                                  | *\$27.5       |
| Asia-Pacific             | 32,451         | 38,819         | \$18.8                                   | \$21.4        |
| North America            | 26,510         | 28,306         | \$18.3                                   | \$20.6        |
| Latin America-Caribbean  | 9,007          | 10,269         | \$4.7                                    | \$4.9         |
| Middle East-North Africa | 3,889          | 4,465          | \$1.7                                    | \$2.1         |
| Sub-Saharan Africa       | 1,544          | 2,316          | \$0.8                                    | \$1.1         |
| <b>Total</b>             | <b>105,591</b> | <b>121,595</b> | <b>\$74.1</b>                            | <b>\$77.6</b> |

\*Note that the decline in US\$ revenues for Europe since the 2013 figures is indicative of currency depreciation against the U.S. dollar and not an actual decline in the market. Expressed in Euros, the European market grew from €22.7 billion in 2013 to €24.9 billion in 2015.

Source: Global Wellness Institute

## Spa Facilities and Revenues by Type, 2013 and 2015

|                                   | Number of Spas |                | Spa Facility Revenues<br>(US\$ billions) |               |
|-----------------------------------|----------------|----------------|--|---------------|
|                                   | 2013           | 2015           | 2013                                     | 2015          |
| Day/Club/Salon Spas               | 59,339         | 64,262         | \$30.5                                   | \$30.8        |
| Hotel/Resort Spas                 | 22,076         | 30,180         | \$22.2                                   | \$25.6        |
| Destination Spas & Health Resorts | 2,204          | 2,374          | \$8.4                                    | \$7.7         |
| Medical Spas                      | 5,009          | 5,502          | \$5.4                                    | \$5.7         |
| Thermal/Mineral Springs Spas      | 6,504          | 7,171          | \$4.8                                    | \$4.7         |
| Other Spas                        | 10,459         | 12,106         | \$2.7                                    | \$3.1         |
| <b>Total</b>                      | <b>105,591</b> | <b>121,595</b> | <b>\$74.1</b>                            | <b>\$77.6</b> |

Note: Revenue figures may not sum to total due to rounding. See Appendix A for descriptions of the spa categories.

Source: Global Wellness Institute

# Hotel Spa - a growing business in Thailand



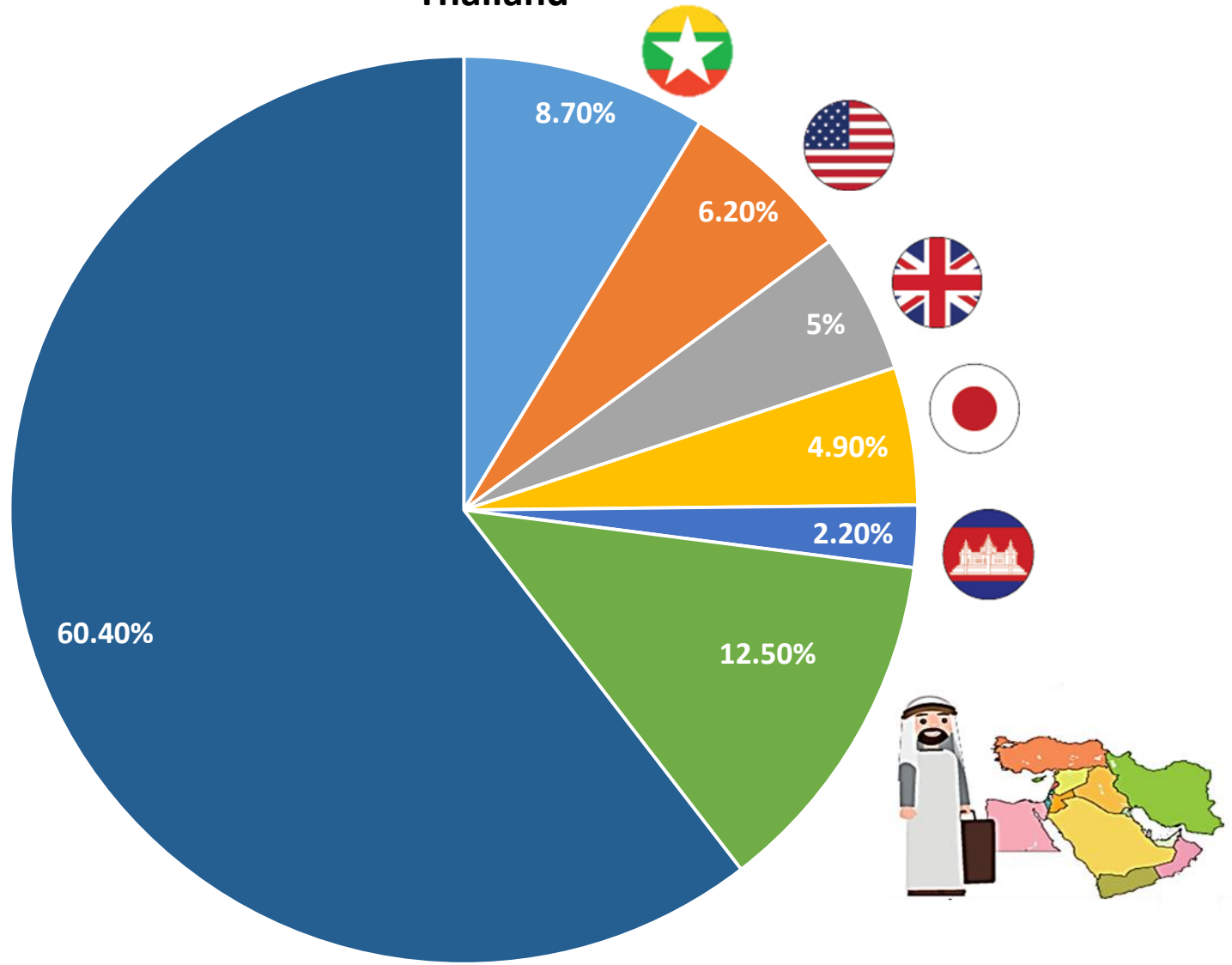
Chivasom



Aksorn Rayong Resort

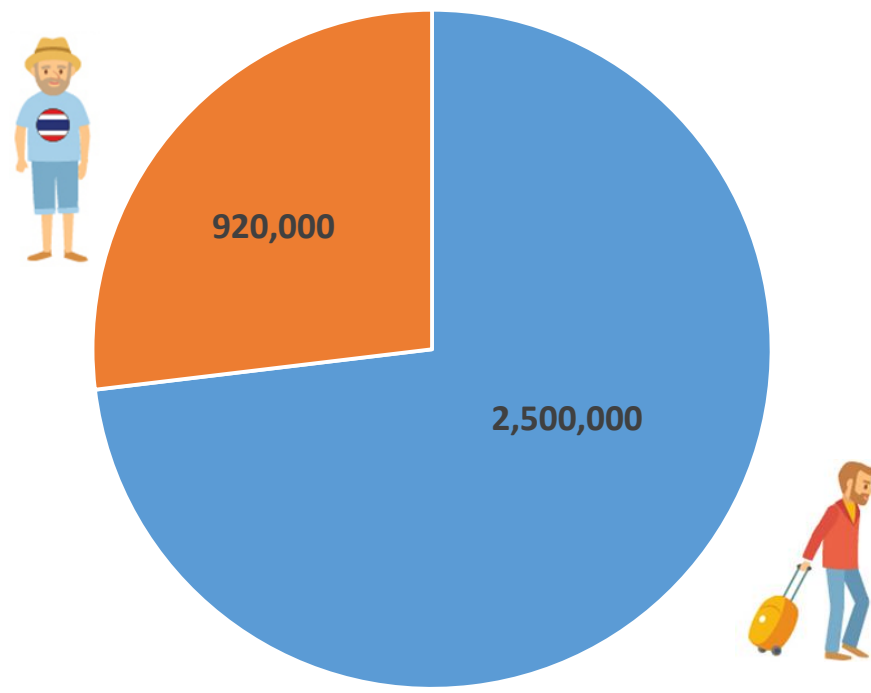


# Contribution of international Visitors at Private Hospitals in Thailand



■ Myanmar ■ USA ■ UK ■ Japan ■ Cambodia ■ Middle East ■ Others

We expect to have more than 3.42 millions visits from international patients in 2018

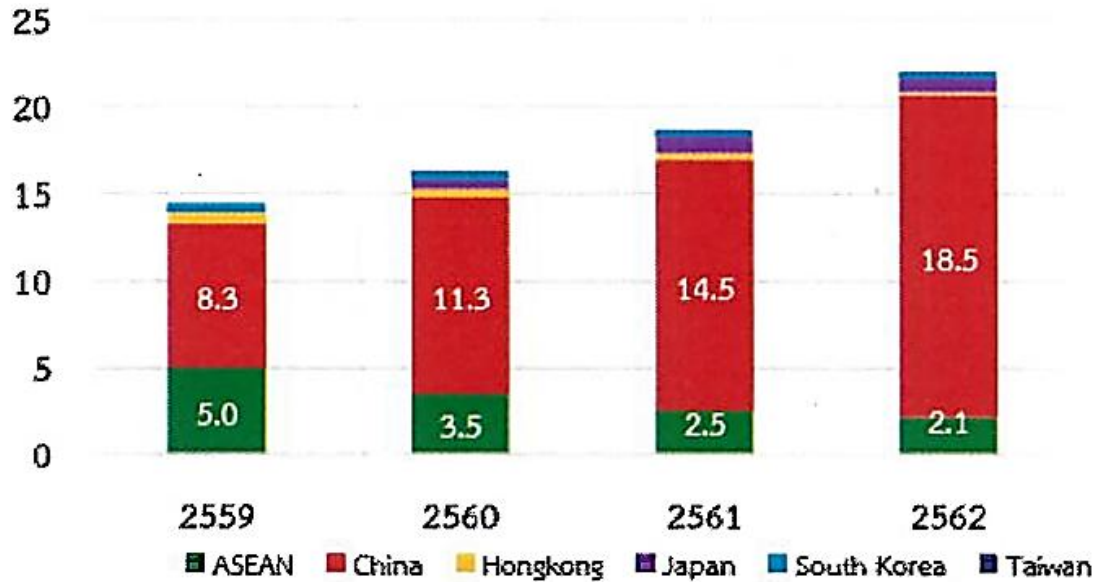


■ Medical Tourism/Visit ■ EXPAT/Visit

# China is our main target !!



Contribution to Growth from East Asia Tourists



We expect to have more than 40,000 visits from Chinese tourists visiting our hospitals in Thailand. Top 2 interested treatments are :

## 1. Infertility



## 2. Aesthetic



## Our competitors for Chinese market !!



Japan



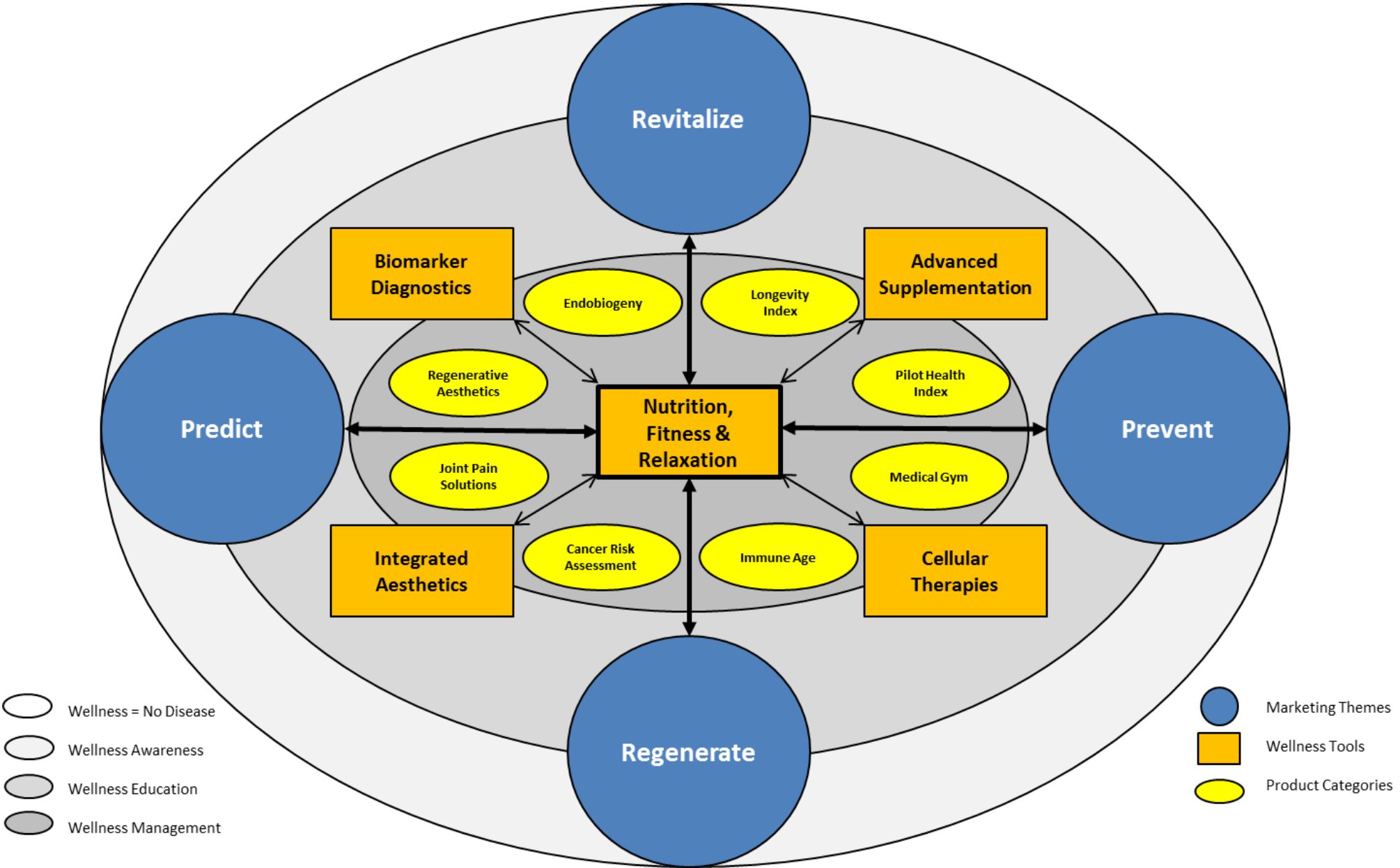
South Korea



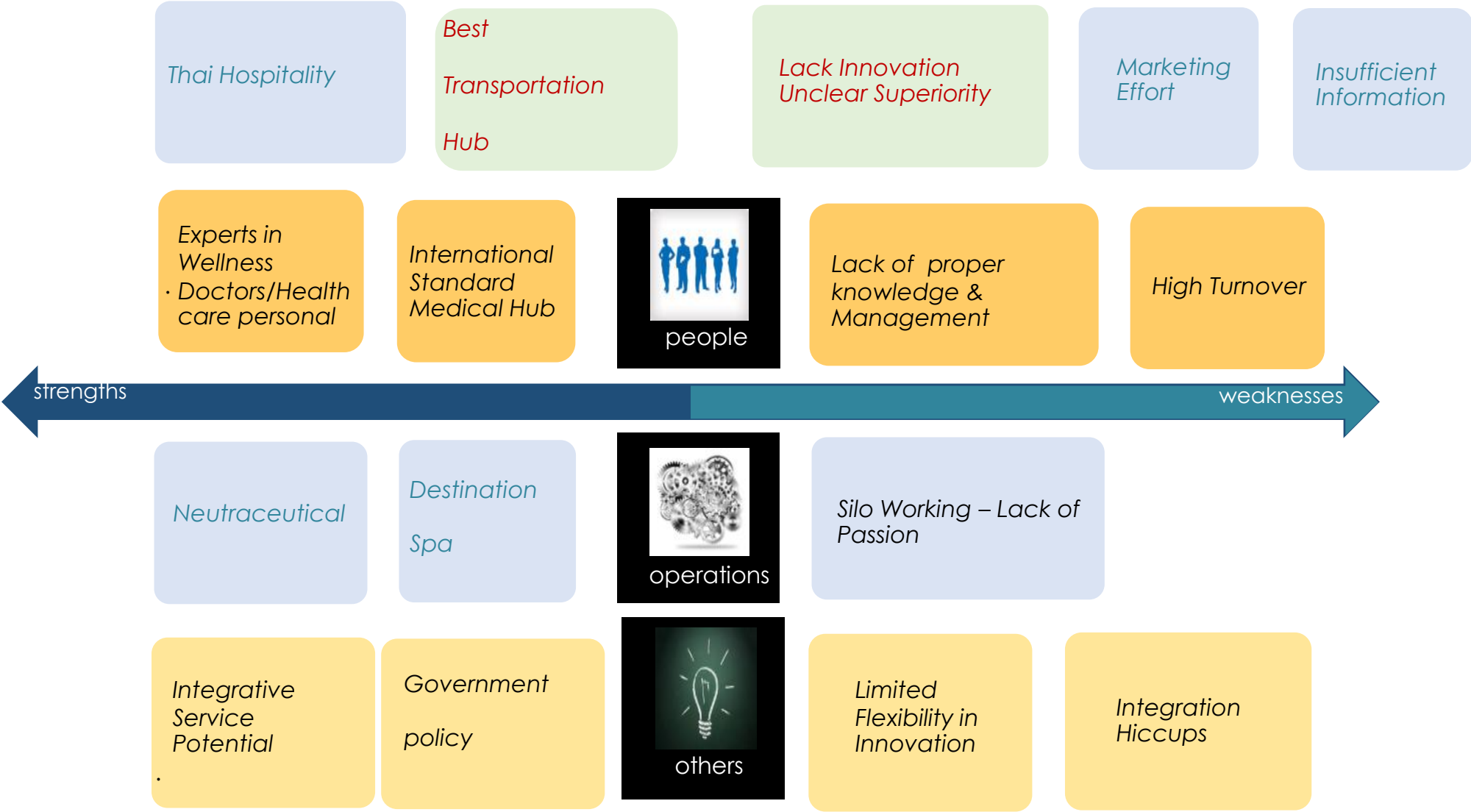
Malaysia



Service model should allow for a lifelong ability to manage wellness for a sustainable growth



# strengths & weakness





Thank you