



Bangkok Dusit Medical Services (BDMS)

Thailand Focus 2022

“Thailand Destination of Living”

24 August 2022

Member of
**Dow Jones
Sustainability Indices**
Powered by the S&P Global CSA

The Largest Private Healthcare Operator in Thailand



54
Hospitals



8,400+
Beds



11,000+
Doctors
(Full time ~3,000)



7,000+
Registered
Nurses



11
Center of
Excellence

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- Hub-and-Spoke model with an established patient referral system with the patients volume of
 - OPD visit ~ 30,000 patients a day
 - Average daily census ~ 3,800

Brand	No. of Hospitals	No. of Beds*
Bangkok Hospital	26	4,086
Samitivej Hospital	7	1,315
Phyathai Hospital	5	1,131
Paolo Hospital	8	1,027
BNH Hospital	1	115
Royal Hospital	2	133
Local Hospital	5	605

* Maximum number of beds according to structure of the hospitals

Non-Hospital Business



Global Medical Tourism by Revenue

In 2020 (excluding expats)

Unit: USD

	1. USA	3,500m
	2. South Korea	655m
	3. Thailand	600m
	4. Turkey	600m
	5. Germany	575m
	6. India	450m
	7. UK	350m
	8. Malaysia	350m
	9. Mexico	350m
	10. Rest of the World	5,570m



59 JCI-Accredited Facilities

Most Popular Destinations in Thailand

(Sampled 1,000 fly-in patients in Thailand)



Bangkok	62%
Phuket	15%
Pattaya	11%
Chiangmai	7%
Samui	3%
Hua Hin	2%

Local Competition	Thailand	Malaysia	Singapore
	\$600m	\$350m	\$150m

Opportunity in Thailand

Medical Hub of Asia

With government support, Thailand's position as the **"Medical Hub of Asia"**

Clinical Excellence

Strong healthcare infrastructure with highly-skilled medical professionals

Healthcare Technology

Artificial intelligent and block chain for healthcare



Affordability

Thailand medical treatments are approx. 40-70% cheaper than those offered in other medical tourist destinations

Thai Hospitality

Thai hospitality with Thai culture for holistic services

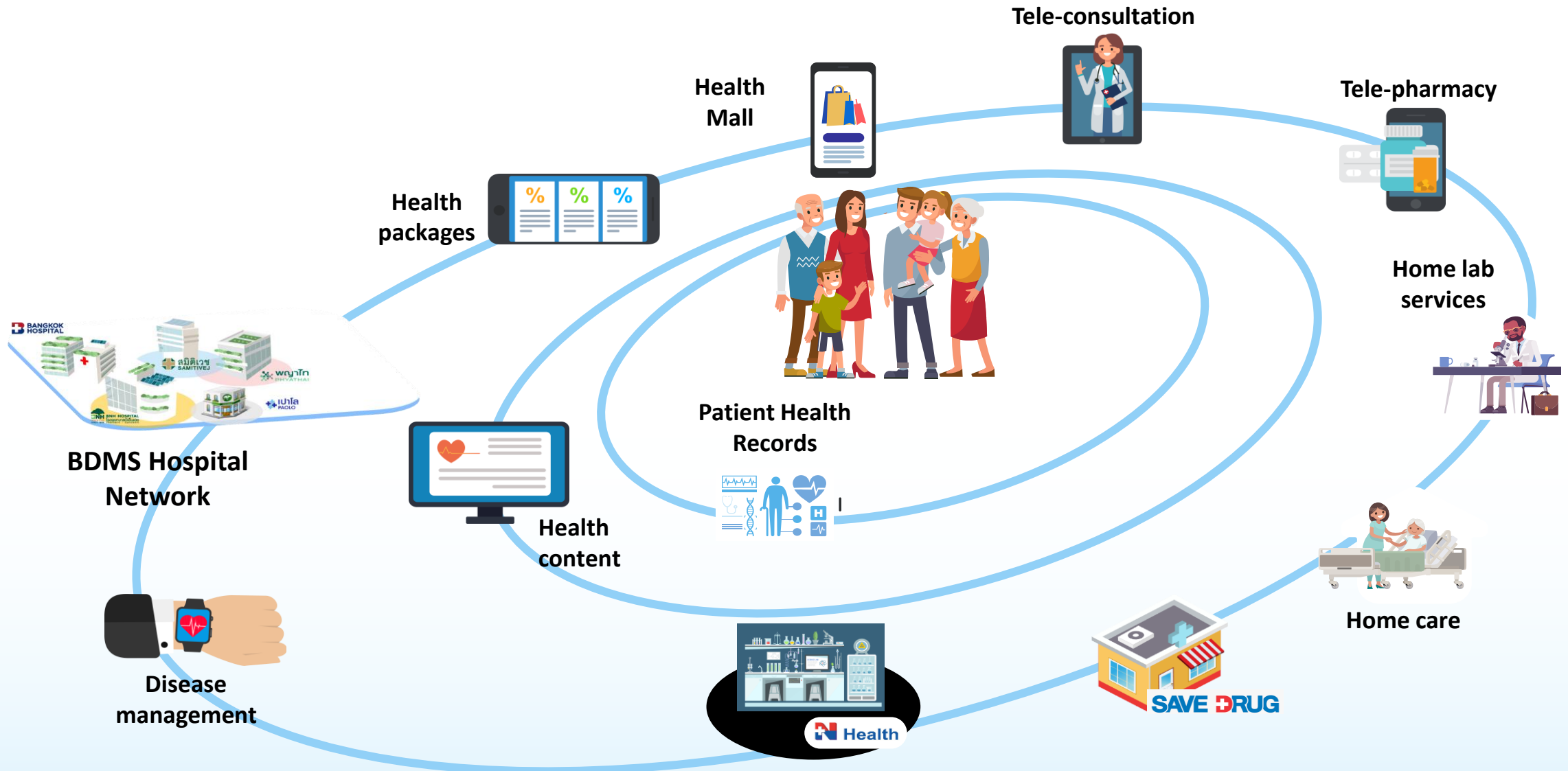
Tourist Destination

Thailand is among the top tourist destination in the world

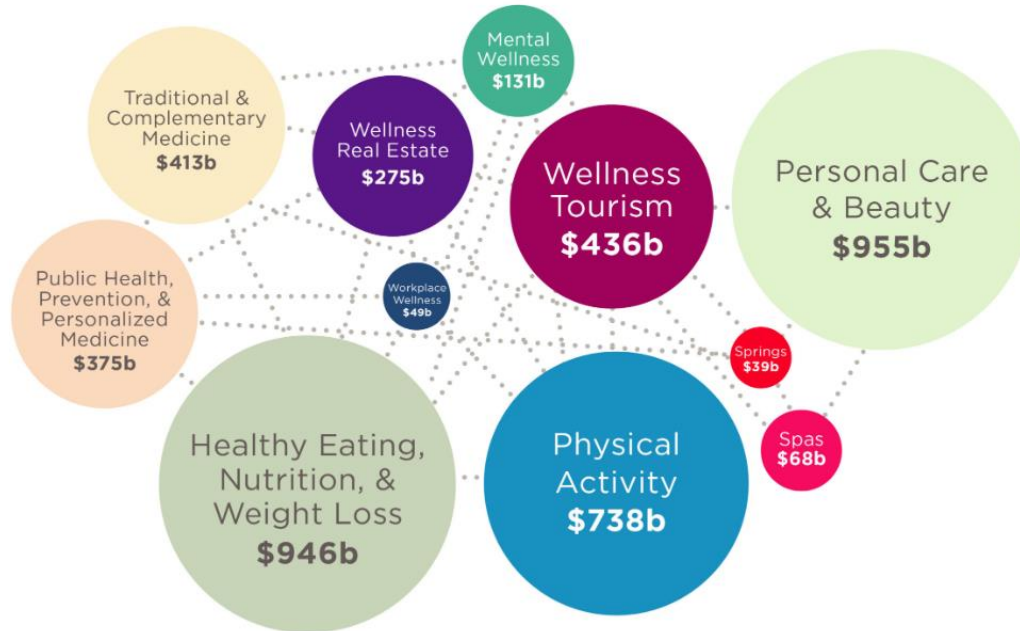
Impact from COVID-19 in Healthcare System

Disruptive Forces are Changing the Healthcare Landscape, Impacting Hospital Operators

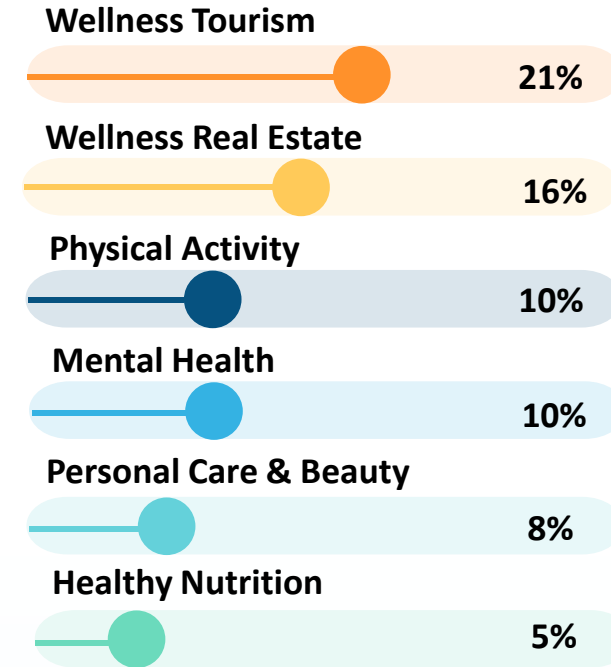




Global Wellness Market Size



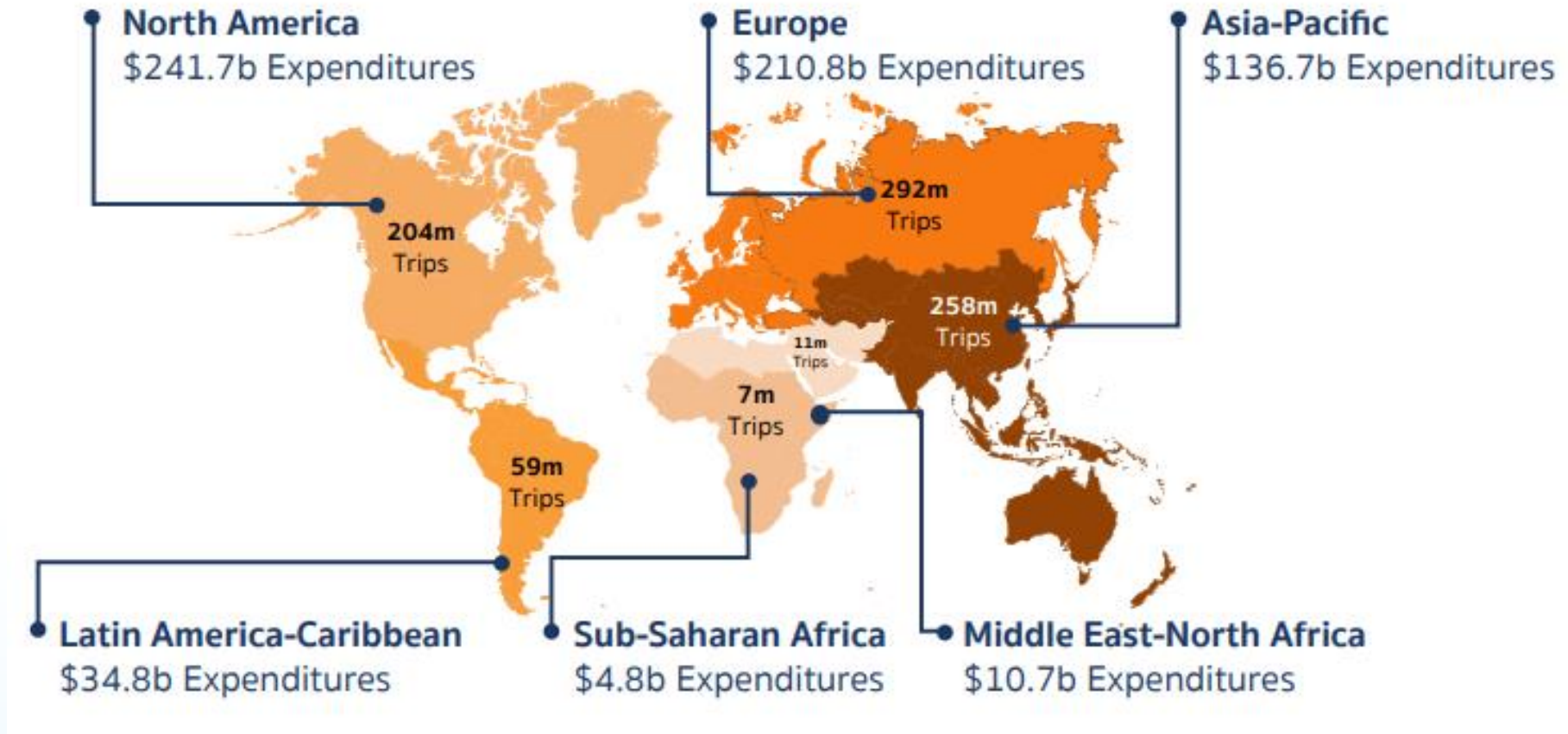
Project annual growth by Y2025



- Global wellness market valued USD 4.9 trillion pre COVID-19, then **USD 4.4 trillion** in 2020
- Global Wellness Institute* predicts that the wellness market will return to its robust growth with **9.9%** average annual growth reaching nearly USD 7 trillion in 2025

Wellness Industry : Increasing Global Demand for Wellness

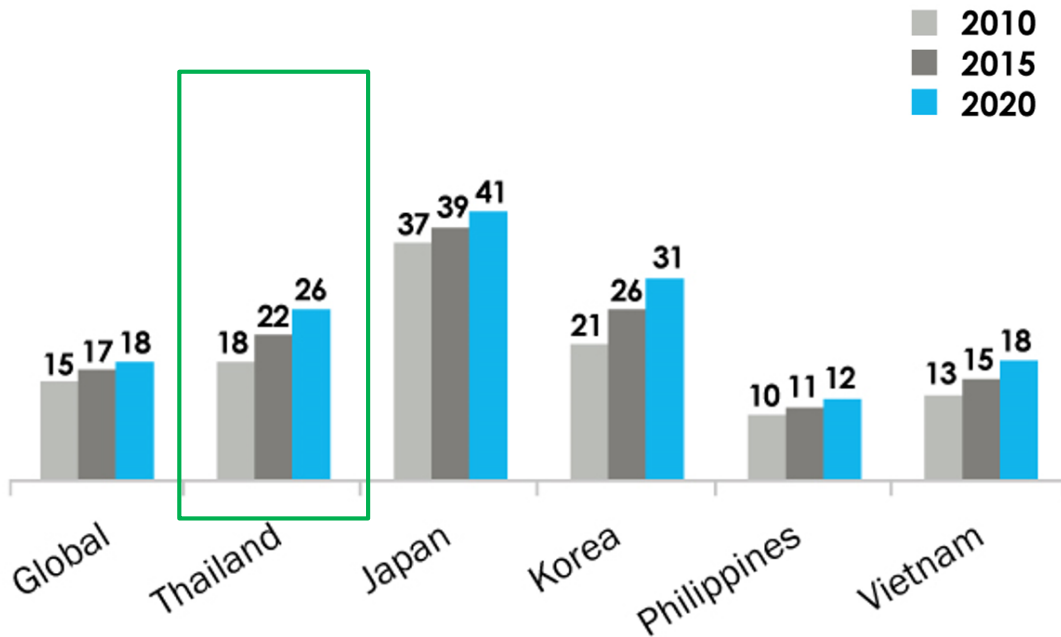
More than USD 640 Billion Wellness Expenditures with More than 820 Million Trips



Rise of Silver Age Population Around the World – The New Blue Ocean with High Income and High Needs

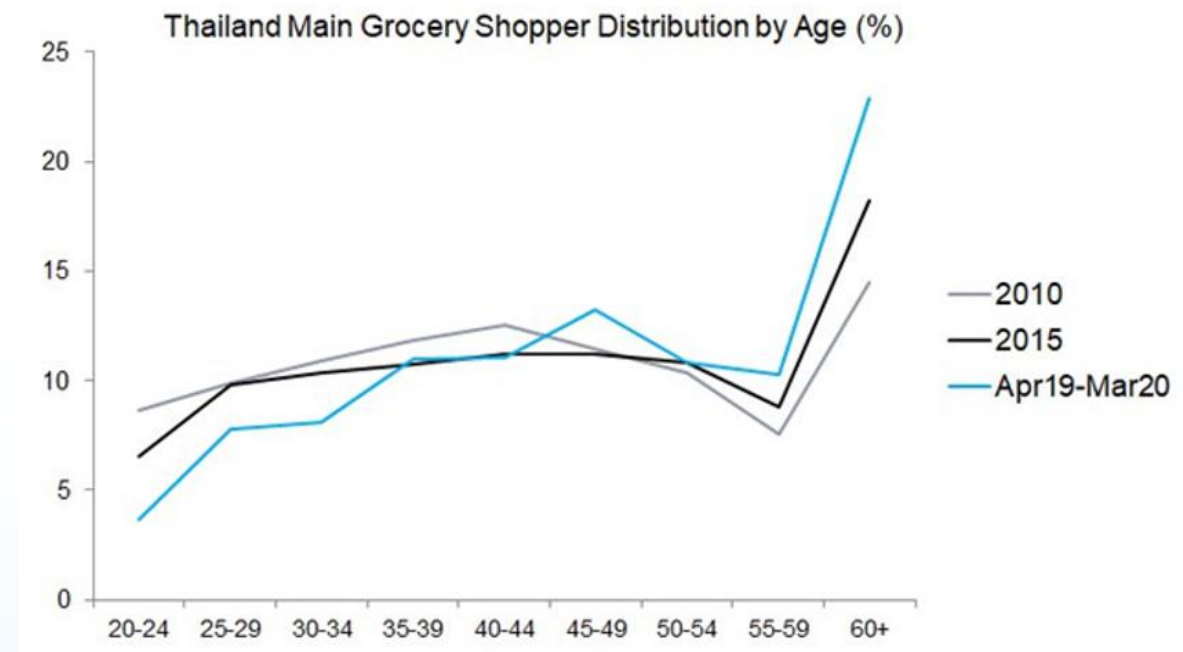
Rise of Silver Age

Population aged 55 yrs to total population (%)



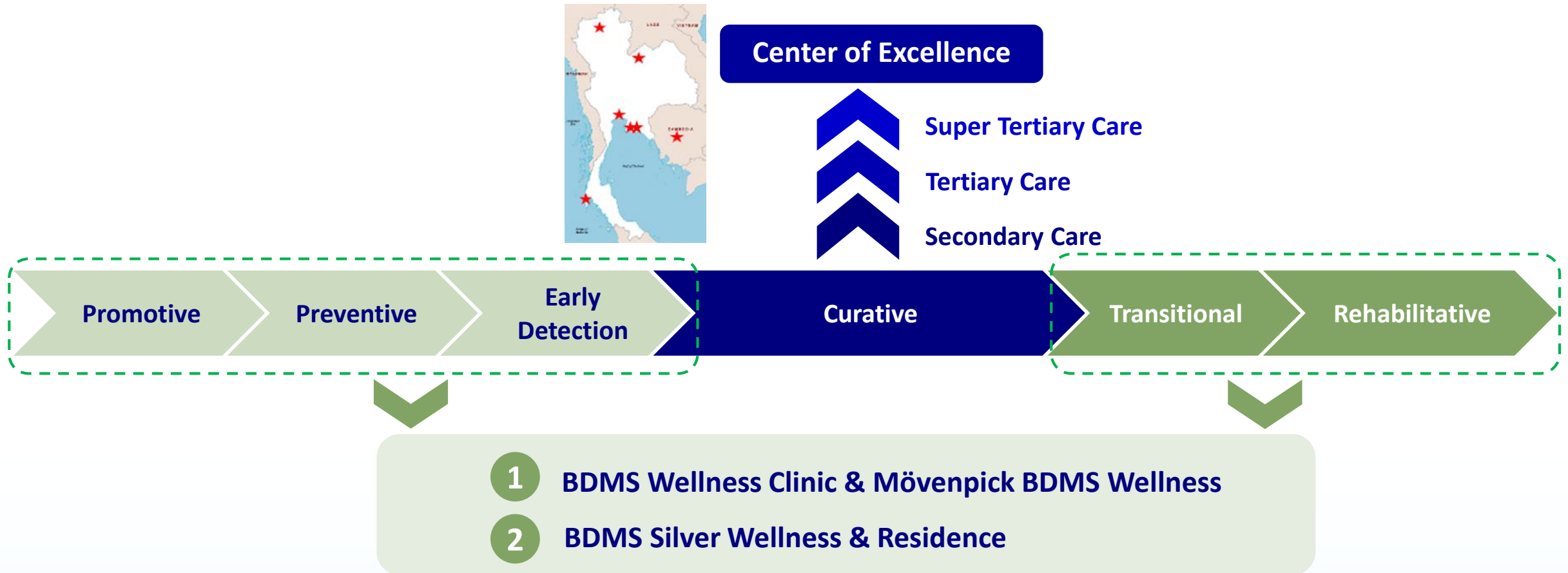
Silver Age in Thailand

High purchasing power



Source: Nielson Consumer Media view, 2020

BDMS Complete Continuum of Healthcare



- BDMS aims to become the leader in the Preventive Medicine, Longevity and Anti-aging in Asia which is in line with the Company's strategies that aim to enhance services capacity to cover all aspects of medical services from preventive medicine to the holistic healthcare

Target Customer of Wellness

Increasing Interested in Preventive Care

Work from Thailand professional



Profile

Work for oversea
Digital Nomad
30+ years old
50% population growth

Traits & Spending Profile

Nomadic lifestyle
Flexibility with remote work

Wealthy silver age



50+ years old
Retired and receive income

Have spending power
Plenty of time
Social-driven

Highly- skilled professional



Any age group
7% of health & wellness customer in Thailand

Have spending power
Flexible work place & time

Wealthy global citizen



Any age group
15% of Global wellness tourists

High income
Frequent traveler

Wide Range of Programs Specifically Focused on the Early Detection and Prevention of Disease

BDMS Wellness Clinic



Regenerative Wellness Clinic



Musculoskeletal and Rehabilitation Clinic



Brain Wellness Clinic



Preventive Cardiology Clinic



Digestive Wellness Clinic



Dental Wellness Clinic



Fertility & Women Wellness Clinic



Aesthetic Wellness Clinic



Mövenpick BDMS Wellness Resort Bangkok



- Recently under renovation to become the modern and complete holistic health and wellness resort and will be opened by 4Q22

2 BDMS Silver Wellness & Residence

Mixed - Use Project Located on the Corner of Sarasin and Lang Suan Road, Lumpini, Bangkok

- Project Highlights**
- To combine the health conscious theme and the green environmental living style that will help create a relaxing atmosphere for the customers and the residences

Wellness Tower

Clinic

Plaza

Hotel &
Serviced
Apartment



BDMS Silver Wellness & Residence (Construction period of 6.5 years)



Residence Tower

