



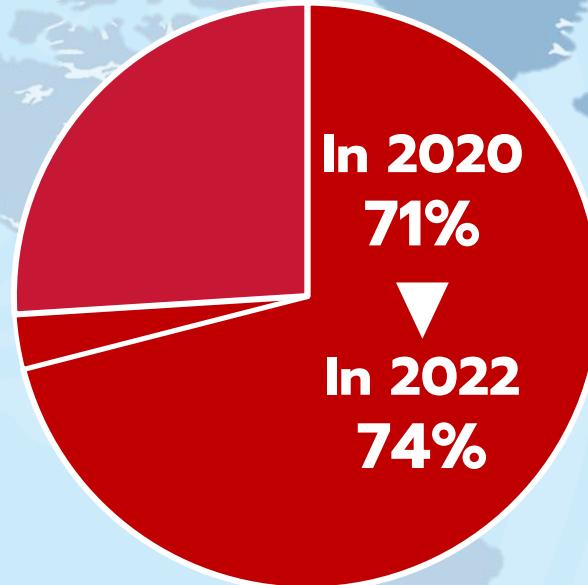
# Wellness Tourism Thailand

**Tanupol Virunhagarun, M.D.**

Chief Executive Officer of BDMS Wellness Clinic &  
President of Bangkok Association of Regenerative  
Health and the Study of Obesity (BARSO)



# NCDs are the Leading Cause of Death Worldwide



**41 million people in 2020**

**45 million people in 2022**

# COVID-19 and NCDs Risk Factors

people with NCDs were more likely to have severe symptoms or die from COVID-19



# Why Is Wellness Important To People, Business, and Government?



- Worldwide obesity has nearly doubled since 1980.



- Almost **10.5%** of the world's adult population has diabetes.



- NCDs are responsible for **74%** of all deaths. (**77%** in Thailand)



- Over half the global business population has experienced an appreciable rise in workplace stress in recent years.



- From 2002-2020, health spending in OECD countries will more than triple, to **\$10** trillion.



- Between 2000 and 2050, the proportion of the world's population over 60 years will double.



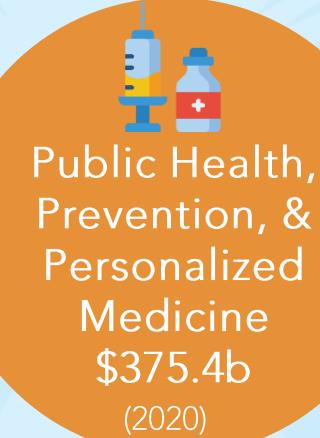
- In 2021, **20%** of Thais aged over 60, compared to **14%** of the entire world's population.

# Global Wellness Economy:

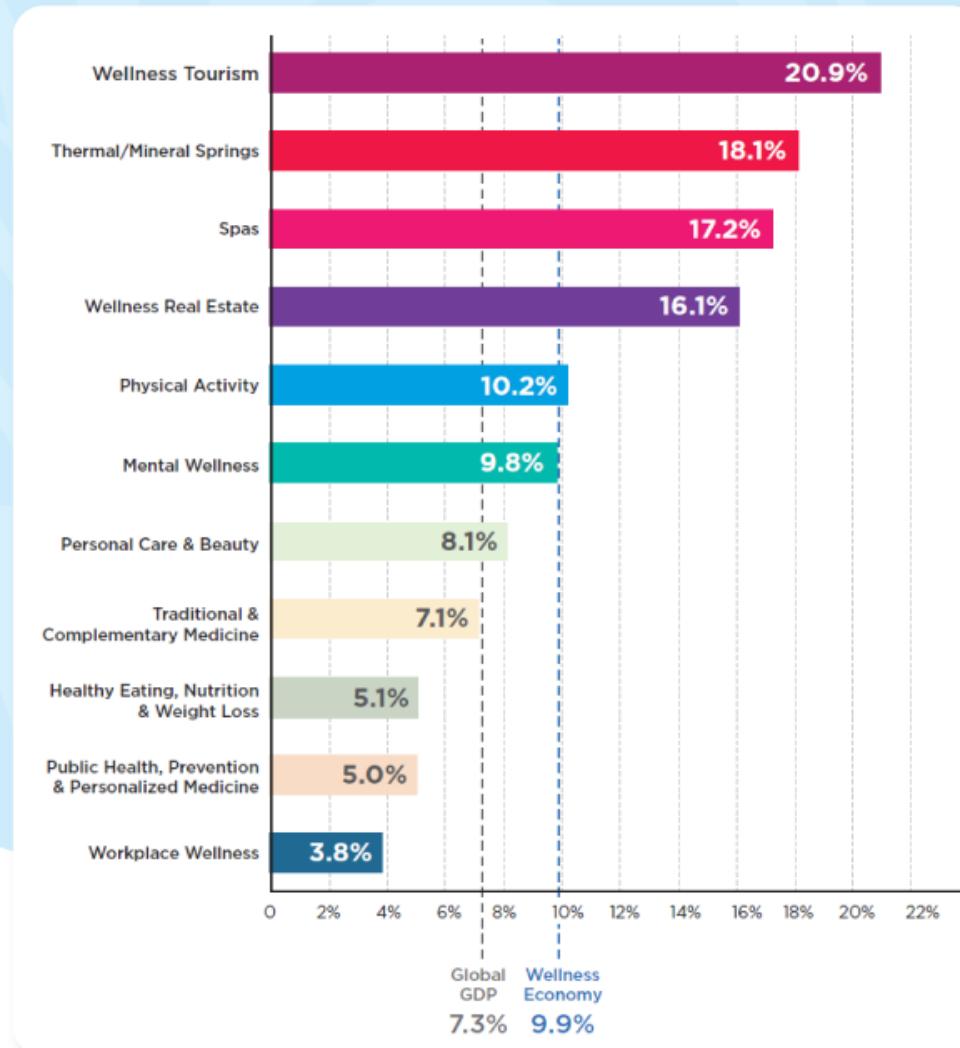
2019: \$4.9 Trillion

2020: \$4.4 Trillion

2025: \$6.9 Trillion



# Projected Average Annual Growth Rate by Sector, 2020-2025



As the global economy rebounds from the shock of the pandemic (exceeding its 2019 prepandemic peak),

**Global Wellness Institute predicts that the wellness economy will grow at a robust rate of**

**9.9%**  


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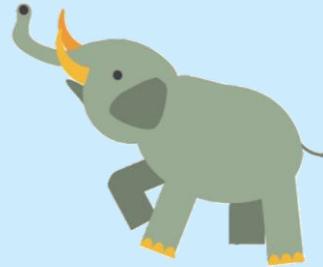
**annually**

# Projected Market Size





# Wellness Economy Sectors in Thailand, 2017, 2019, 2020



|   | Market Size<br>(US\$ millions) |                   |  | Average Annual<br>Growth Rate |               |
|---|--------------------------------|-------------------|--|-------------------------------|---------------|
|   | 2017                           | 2019              | 2020                                   | 2017-2019                     | 2019-2020     |
| Healthy Eating, Nutrition,<br>& Weight Loss           | \$7,391.9                      | \$8,925.4         | \$8,662.5<br><i>Rank: #18</i>          | 9.9%                          | -2.9%         |
| Personal Care & Beauty                                | \$5,584.0                      | \$6,745.6         | \$6,523.1<br><i>Rank: #27</i>          | 9.9%                          | -3.3%         |
| Wellness Tourism                                      | \$12,018.4                     | \$16,945.4        | \$4,694.7<br><i>Rank: #15</i>          | 18.7%                         | -72.3%        |
| Physical Activity                                     | \$2,703.0                      | \$3,512.7         | \$2,910.5<br><i>Rank: #28</i>          | 14.0%                         | -17.1%        |
| Traditional & Complementary<br>Medicine               | \$2,654.2                      | \$3,211.9         | \$2,833.2<br><i>Rank: #17</i>          | 10.0%                         | -11.8%        |
| Public Health, Prevention,<br>& Personalized Medicine | \$1,490.9                      | \$1,631.0         | \$1,737.2<br><i>Rank: #24</i>          | 4.6%                          | 6.5%          |
| Spas  | \$1,317.4                      | \$1,631.4         | \$1,053.9<br><i>Rank: #15</i>          | 11.3%                         | -35.4%        |
| Mental Wellness                                       | N/A                            | \$423.5           | \$421.7<br><i>Rank: #32</i>            | N/A                           | -0.4%         |
| Wellness Real Estate                                  | \$277.0                        | \$353.5           | \$388.6<br><i>Rank: #32</i>            | 13.0%                         | 9.9%          |
| Workplace Wellness                                    | \$122.5                        | \$125.4           | \$121.8<br><i>Rank: #39</i>            | 1.2%                          | -2.9%         |
| Thermal/Mineral Springs                               | \$16.9                         | \$19.9            | \$13.1<br><i>Rank: #67</i>             | 8.8%                          | -34.5%        |
| <b>Wellness Economy</b>                               | <b>\$33,376.5</b>              | <b>\$43,049.3</b> | <b>\$28,961.2<br/><i>Rank: #24</i></b> | <b>13.6%</b>                  | <b>-32.7%</b> |

*Note: Figures do not sum to total due to overlap in segments.* Rankings are out of 218 countries worldwide.  
Source: Global Wellness Institute, based on extensive primary research and secondary data sources.

# Defining Wellness Tourism



Wellness tourism is travel associated with the pursuit of maintaining or enhancing one's personal well-being.

## Unwell Travel

- Unhealthy & over-eating
- Travel stress
- Excessive drinking
- Poor sleeping
- Disruption of fitness routine

## Wellness Travel

- Healthy eating
- Healthy living
- Rejuvenation & relaxation
- Good sleep & physical activity
- Meaning & connection
- Authentic experiences
- Disease prevention & management

### Primary Purpose Wellness traveler:

Wellness is the sole purpose or motivating factor for their trip & destination choice.

### Secondary Purpose Wellness traveler:

Seek to maintain wellness while taking any type of trip.



# Medical and Wellness Tourism



## Top 4 Wellness Tourism Markets in Asia-Pacific, 2017

|          | Number of Arrivals/Trips (thousands) |          |          | Receipts/Expenditures (US\$ millions) |
|----------|--------------------------------------|----------|----------|---------------------------------------|
|          | Inbound/Intl.                        | Domestic | Total    |                                       |
| China    | 7,724.3                              | 62,442.2 | 70,166.5 | \$31,705.9                            |
| Japan    | 1,585.5                              | 38,900.0 | 40,485.5 | \$22,466.1                            |
| India    | 4,542.4                              | 51,426.3 | 55,968.6 | \$16,299.7                            |
| Thailand | 5,691.9                              | 6,764.1  | 12,456.0 | \$12,018.4                            |

American Express Travel® released



# 2023 Global Travel Trends Report

## A WELLNESS WAVE

**88%** of respondents say they plan to **spend the same or more on wellness vacations this year**, compared to previous years

**43%** of respondents **they have selected a hotel/accommodations based on the spa and wellness center amenities**

Among the top activities respondents are planning to do during their travels:

**39%** exploring hiking/beach trails    **34%** visiting a private beach    **33%** getting a massage or facial

# Thailand's Competitive Advantage



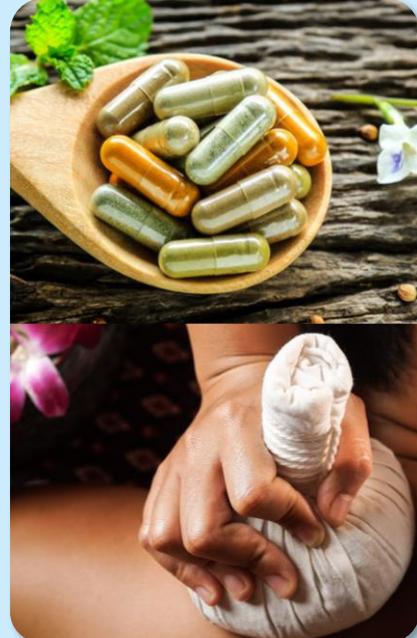
Nature &  
environment



Thai foods



Hospitality  
and service  
Thai culture



Thai  
traditional medicine

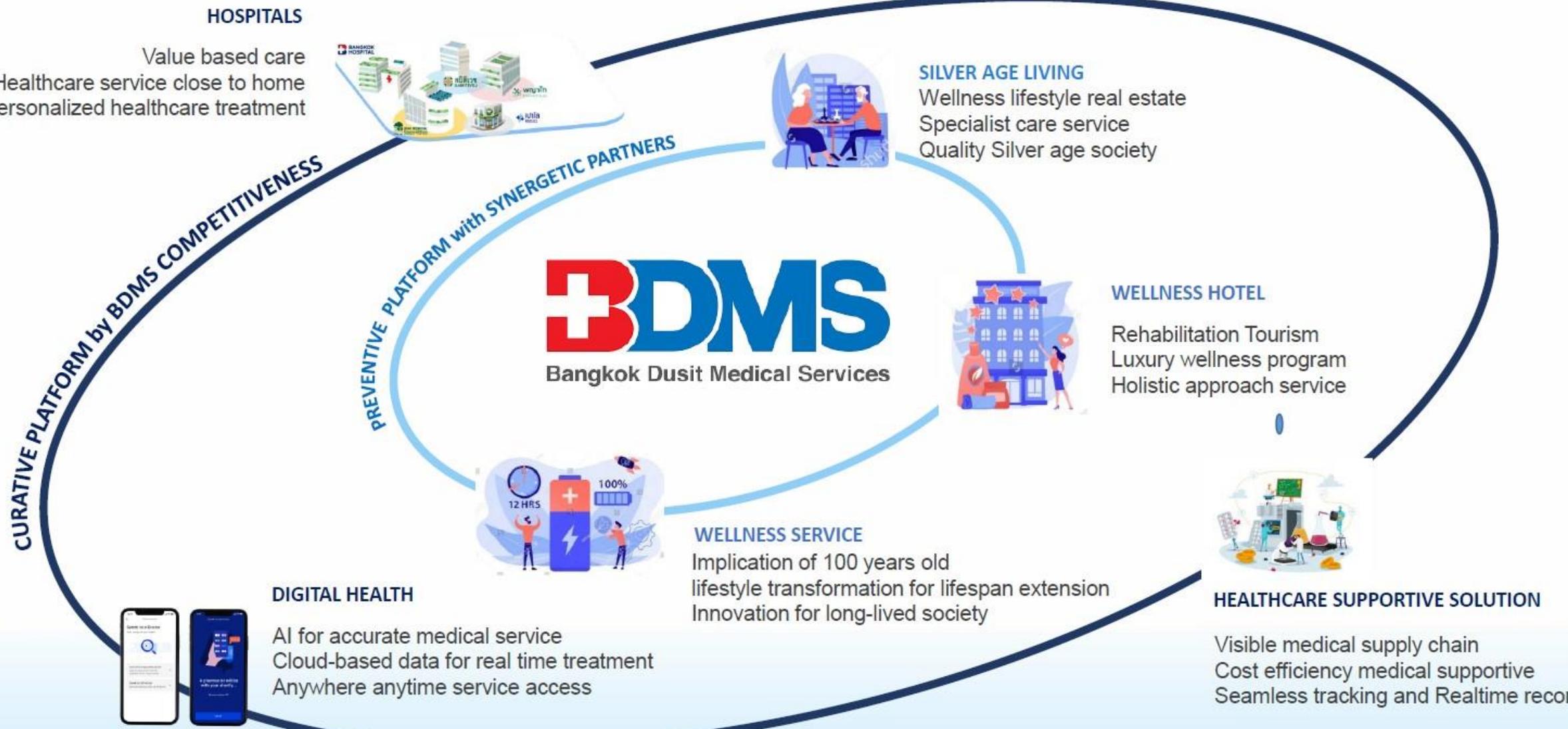


Medical hub

# BDMS Service Landscape

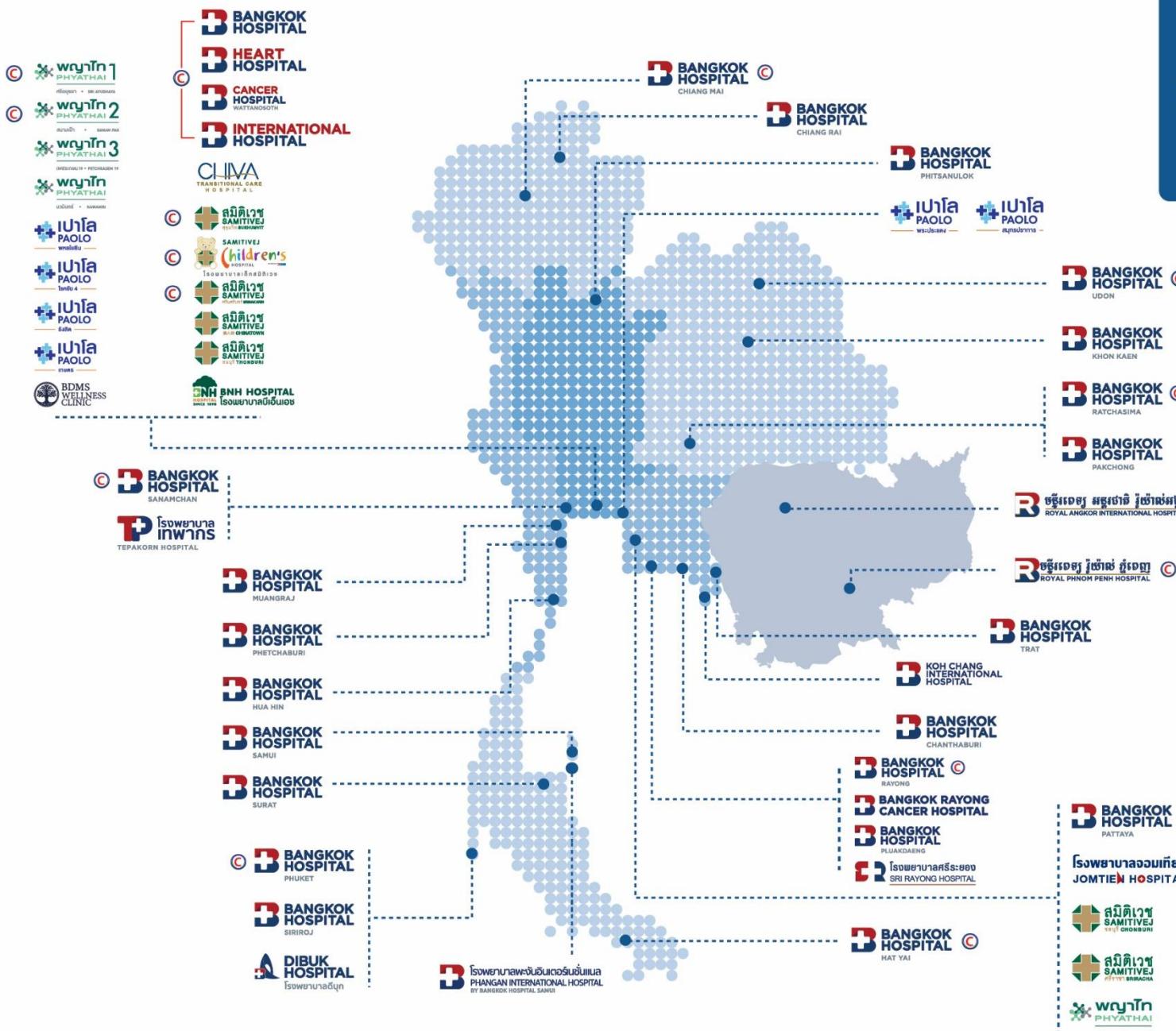


50<sup>+</sup>  
YEARS OF EXCELLENCE





**BDMS  
NETWORK**



© Center of Excellence  
as of July 2023



|   |                |
|---|----------------|
|    | <b>1 สาขา</b>  |
| <b>N Health</b>   | <b>12 สาขา</b> |
| <b>RoyalLife</b><br>by BDMS WELLNESS CLINIC   | <b>9 สาขา</b>  |
|  | <b>3 สาขา</b>  |

# BDMS Complete Continuum of Healthcare



Medical Lab



Sterile Drug Manufacturer & Distributor



Generic Drug Manufacturer



Drug Store

Non-Hospital Strategic Investment

# Domestic and Inbound Wellness Tourism Trips and Expenditures in Thailand: 2017, 2019, 2020



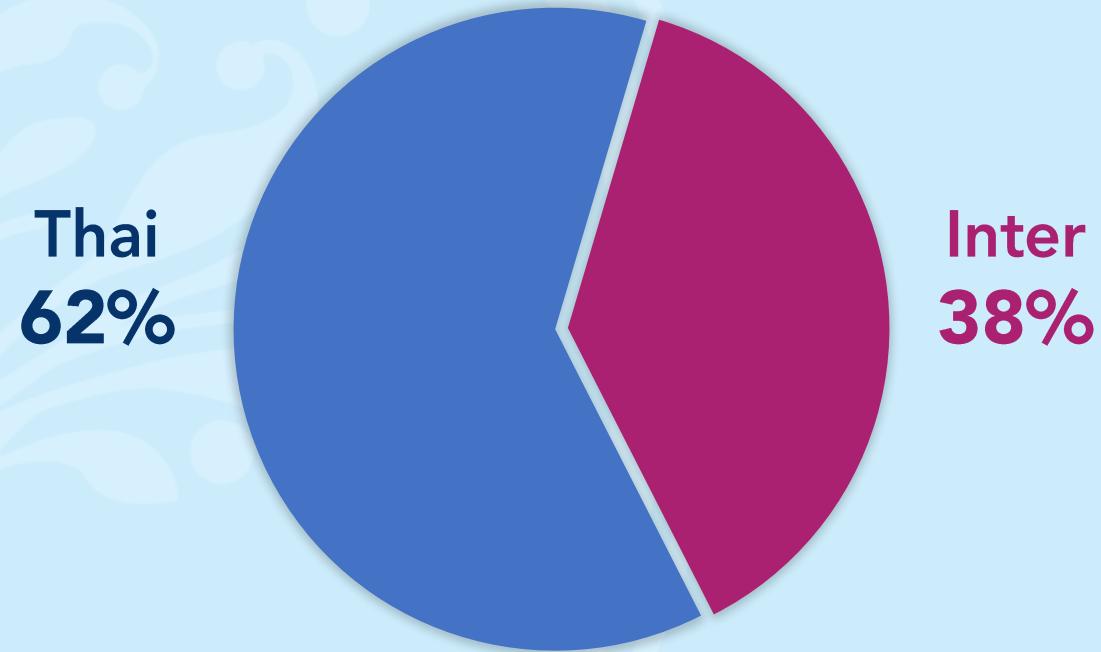
|   | Domestic and Inbound Wellness Trips |            |           | Average Expenditures Per Trip |
|---|-------------------------------------|------------|-----------|-------------------------------|
|   | 2017                                | 2019       | 2020      |                               |
| <b>Domestic</b>                                     |                                     |            |           |                               |
| Domestic Wellness Trips (millions)                  | 6.764                               | 8.203      | 4.576     | \$208                         |
| Domestic Wellness Trip Expenditures (US\$ millions) | \$1,290.6                           | \$1,891.0  | \$951.0   |                               |
| <b>Inbound/International</b>                        |                                     |            |           |                               |
| Inbound Wellness Trips (millions)                   | 5.692                               | 7.315      | 1.893     | \$1,978                       |
| Inbound Wellness Trip Expenditures (US\$ millions)  | \$10,727.8                          | \$15,054.4 | \$3,743.8 |                               |
| <b>Total Wellness Tourism</b>                       |                                     |            |           |                               |
| Total Wellness Trips (millions)                     | 12.456                              | 15.518     | 6.470     | \$726                         |
| Total Wellness Trip Expenditures (US\$ millions)    | \$12,018.4                          | \$16,945.4 | \$4,694.7 |                               |

Note: These figures include both primary and secondary wellness tourism trips. Figures may not sum to total due to rounding. See Appendix for wellness tourism category descriptions and definitions. Source: Global Wellness Institute, based on tourism data from Euromonitor.

# Revenue & OPD Visit



# Performance 2023



| Growth   | ▲%     |
|--|--------|
| Saudi Arabia   | 1,555% |
| CLMV<br>Cambodia, Laos, Myanmar, and Vietnam               | 232%   |
| GCC<br>UAE, Qatar, Bahrain, Kuwait, Oman                   | 220%   |
| Other<br>USA, Japan Singapore, Bangladesh, UK, Switzerland | 137%   |
| China  | 67%    |

# Wellness Tourism Trends



1

## Sustainable Wellness Holiday

การท่องเที่ยวเพื่อสุขภาพ  
ที่เน้นความยั่งยืน

2

## Beyond Wellness

โปรแกรมเวลเนสที่ผสานรวมกับ  
กิจกรรมท่องเที่ยวอื่นๆ ที่น่าสนใจ

3

## Food & Herbal Immune Booster

ชุดอาหารและสมุนไพรพื้นถิ่น  
ที่มีสรรพคุณทางยา

4

## Science Based Wellness

โปรแกรมเวลเนส ที่อ้างอิง  
ผลการศึกษาทางวิทยาศาสตร์



CELESSAMUI



MÖVENPICK  
BDMS WELLNESS RESORT  
BANGKOK

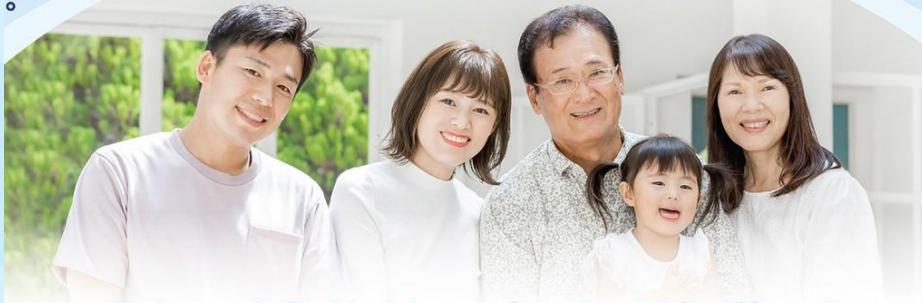
ANANTARA  
RIVERSIDE • BANGKOK  
RESORT







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We provide experienced medical teams, tailored to address your concerns and provide guidance, easing your worries.

|  |  |   |
|--|--|---|
|  Non-Pharmacological Lipid-Lowering Therapy |  Forgetfulness and Brain Health       |  Prepare for a Marathon                |
|  Constipation and Digestive Health          |  Hair Loss                            |  Menopause and Andropause              |
|  Improving Golf Performance                 |  Micronutrient Profile                |  Immune Booster                        |
|  Preventive Check-Up                        |  Insomnia and Sleep Health            |  Weight Loss and Body Contouring       |
|  Food Intolerance                           |  Sexual Health                        |  NCDs Prevention                       |
|  Liver Detox                              |  Mental Health                      |  Adrenal Fatigue and Burnout         |
|  Exercise in Pregnancy and Maternity      |  Maternity Supplementation          |  Fresh Breath Clinic and Oral Health |
|  Early Cancer Detection                   |  Rehabilitation and Office Syndrome |  Skin Health and Aesthetics          |
|  Gut Microbiome and Probiotics          |  Genetic Testing                    |   |

2/4 BDMS Wellness Clinic Building, Wireless Road, Lumpini, Pathumwan, Bangkok 10330  
[www.bdmswellness.com](http://www.bdmswellness.com) Call +66 2 826 9999



MEMBER OF  BDMS

Line : @bdmswellnessclinic

# A reason to smile about.

- According to Johns Hopkins University, **Thailand is ranked 5<sup>th</sup>** for the world's strongest health security. (Global Health Security Index, 2021)
- Thailand was ranked **2<sup>nd</sup> wellness destination**, after Australia. (Wellness tourism initiative 2020 global survey results from Global Wellness Institute, 2020)
- Bangkok Rank **1<sup>st</sup> out of 150 'Workation' Cities**. (Holidu.co.uk, 2021)
- Thailand ranked **5<sup>th</sup> best worldwide for retirement**. (Money.co.uk, 2021)
- The Visa Global Travel Intentions Study ranked **Thailand the 4<sup>th</sup> most chosen destination** for international tourists, behind the United States, the United Kingdom, and India.
- In the 2022 Readers' Choice Awards, **Bangkok held on to the 'Best City'** with **Phuket and Koh Samui being named 3<sup>rd</sup> and 4<sup>th</sup> 'Best Islands'**. (DestinAsian Magazine, 2022)
- **In Southeast Asia, Bangkok has been named the No.1 city. Phuket and Koh Samui ranked the 1<sup>st</sup> and 2<sup>nd</sup> best island.** ('Asia's Best Awards' 2022 from Travel + Leisure Southeast Asia) □





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WELLNESS  
CLINIC

# Thank You