HEALTH & WELLNESS TOURISM

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Deputy Governor for International Marketing
Europe, Americas, Middle East and Africa

By: Europe Americas Middle East and Africa Markets Group


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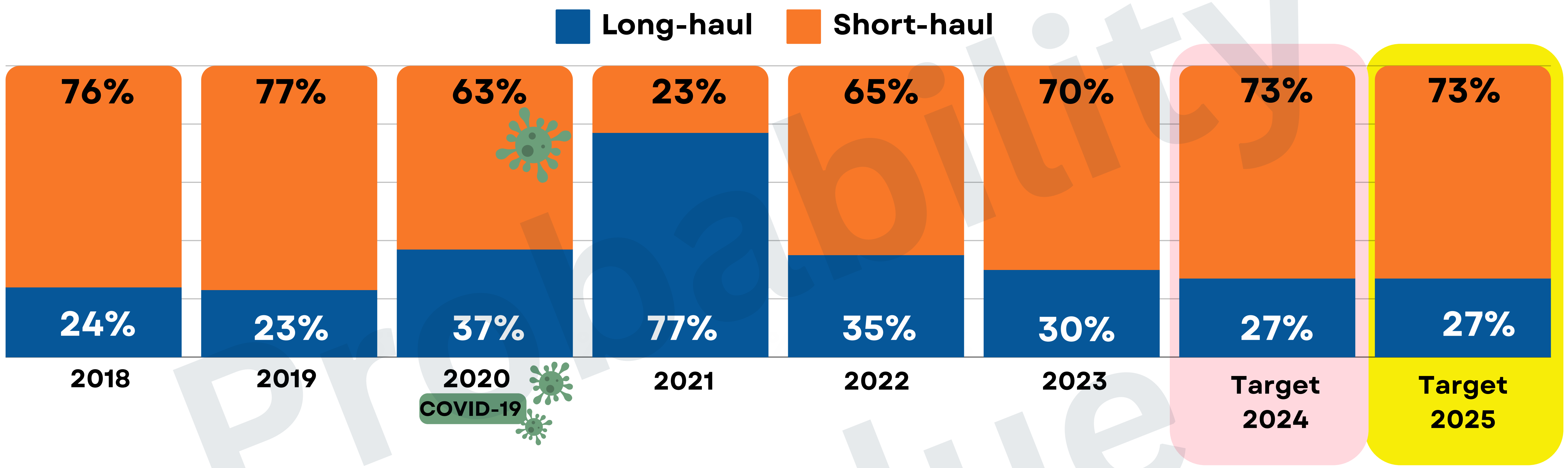
TOURISM STATISTICS

Long-Haul and Short-Haul **Visitors** in 2018-2025



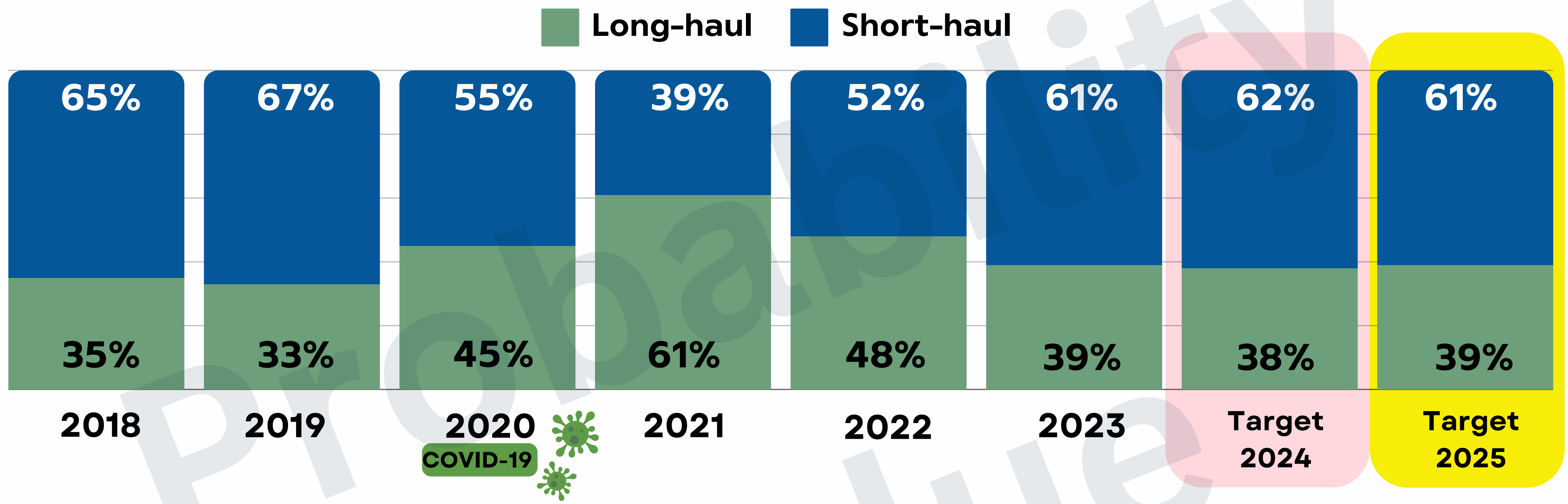
	2018	2019	2020	2021	2022	2023	2024 Jan – 31 Jul	Target 2024*	Target 2025*
Long-Haul Markets	9,105,827 (24%)	9,015,157 (23%)	2,457,305 (37%)	331,312 (77%)	3,883,824 (35%)	7,972,258 (28%)	5,529,924 (27%)	9,629,399 (27%)	10,622,000+ (27%+)
Short-Haul Markets	29,072,367 (76%)	30,901,094 (77%)	4,234,269 (63%)	96,557 (23%)	7,269,202 (65%)	20,177,758 (72%)	15,074,779 (73%)	26,282,384 (73%)	28,378,000 (73%)
Total	38,178,194	39,916,251	6,691,574	427,869	11,153,026	28,150,016	20,604,703	35,911,783	39,000,000+

(%) Shares of Foreign Tourists

Sources: 2024 Statistics Economics Tourism and Sports Division .
*target: TAT Marketing Strategy Division as of 29 July 2024

By: Europe Americas Middle East and Africa Markets Group

Long-Haul and Short-Haul Receipts in 2018-2025



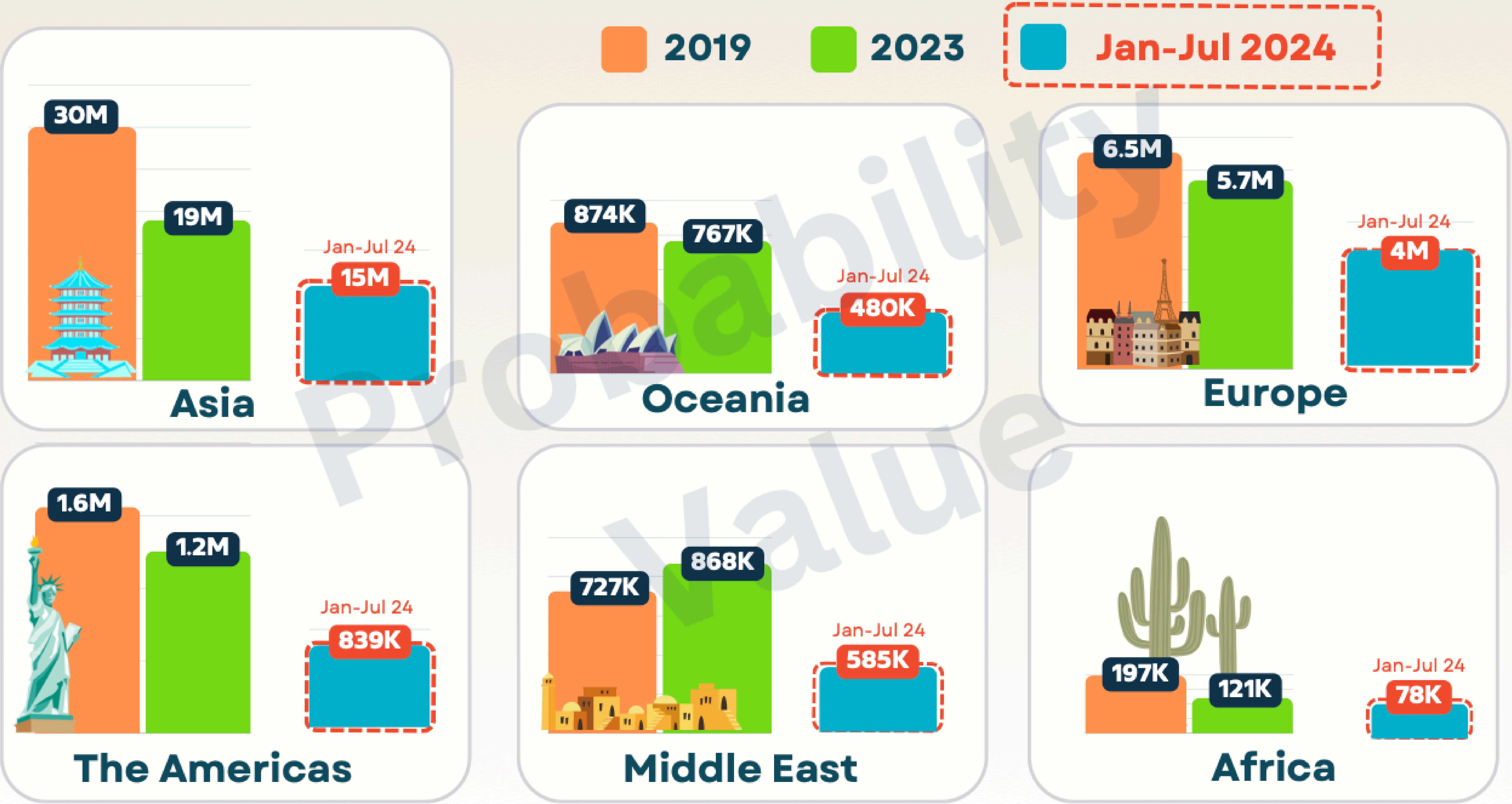
Unit: Million Baht	2018	2019	2020	2021	2022*	2023*	Target 2024**	Target 2025**
Long-Haul Markets	652,594 (35%)	624,518 (33%)	160,489 (45%)	59,584 (61%)	280,000 (48%)	536,468 (39%)	696,788 (38%)	869,200 (39%)
Short-Haul Markets	1,223,543 (65%)	1,287,290 (67%)	194,878 (55%)	38,502 (39%)	309,000 (52%)	835,269 (61%)	1,121,881 (62%)	1,362,800 (61%)
Total	1,876,137	1,911,808	355,367	98,086	589,000	1,371,737	1,818,669	2,232,000

(%) Share of Tourism Revenues
By: Europe Americas Middle East and Africa Markets Group

Remarks: * 2022-2023 Receipts are Trending Numbers
*target: TAT Marketing Strategy Division as of 29 July 2024

By: Europe Americas Middle East and Africa Markets Group

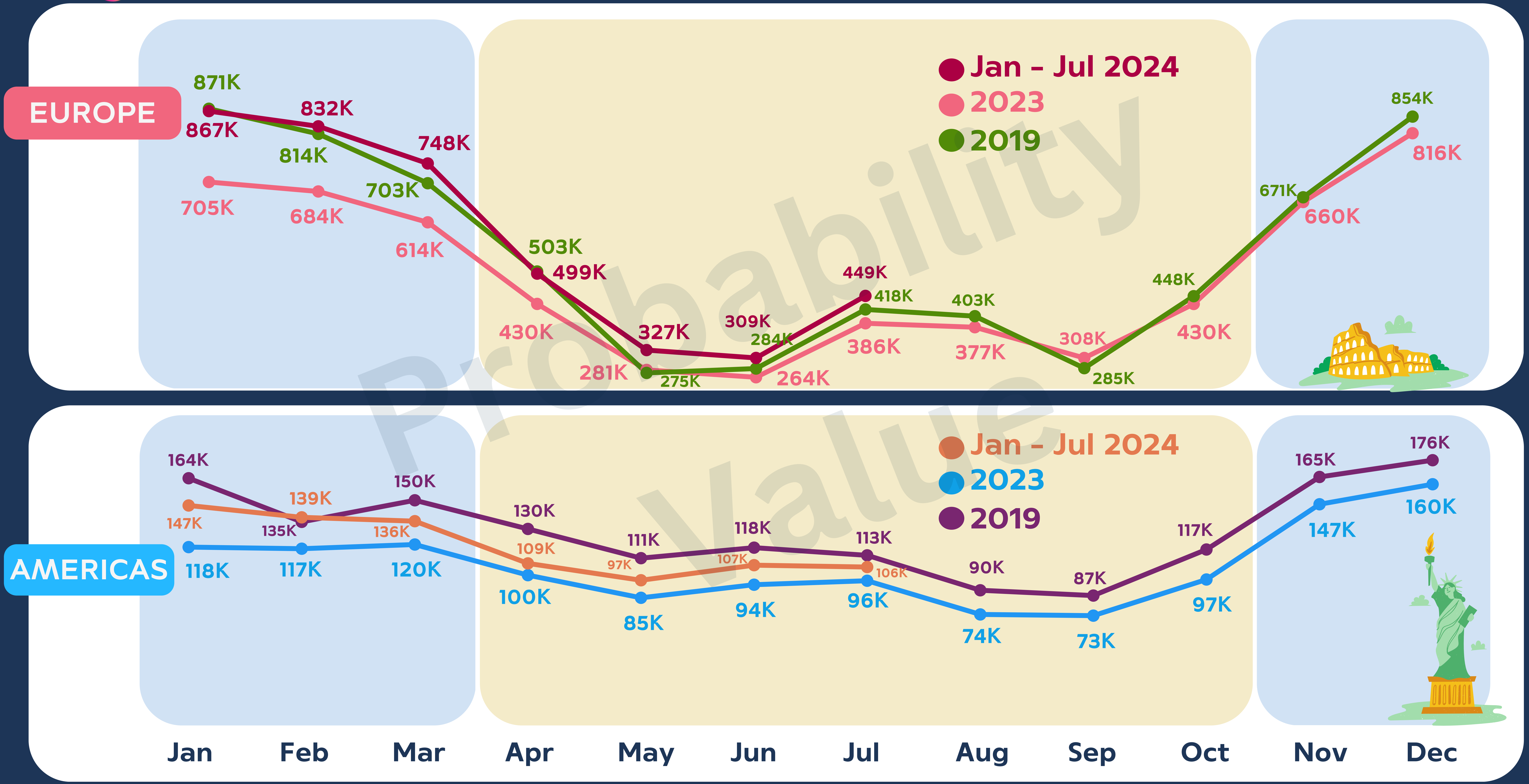
TOURIST ARRIVALS 2019/2023/2024



Source: TAT-Intelligence Center as of 1 Aug 2024

By: Europe Americas Middle East and Africa Markets Group

MONTHLY TOURIST ARRIVAL 2019/2023/2024



Source: TAT-Intelligence Center

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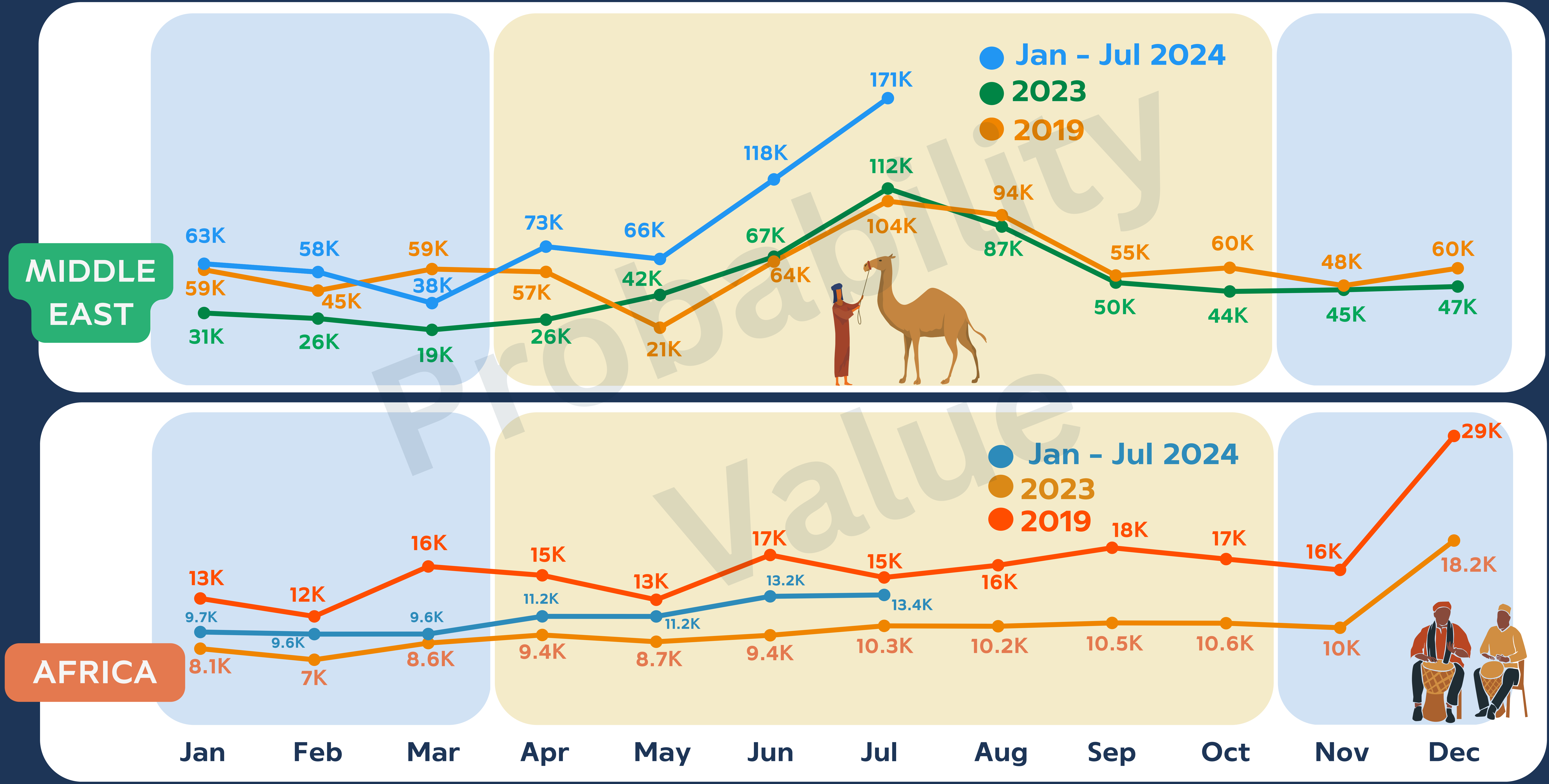
MONTHLY TOURIST ARRIVAL 2019/2023/2024



Source: TAT-Intelligence Center

By: Europe Americas Middle East and Africa Markets Group

Tourist Arrivals from 1 January - 31 July 2024
Europe America Middle East and Africa Markets

TAT Dubai	
Saudi Arabia	131,839
U.A.E.	94,761
Oman	58,133
Kuwait	50,808
Iran	36,711
South Africa	35,652
Qatar	26,050
Bahrain	17,590
Ethiopia	10,050
Egypt	8,929
Jordan	7,690
Morocco	6,030
Yemen	5,603
Lebanon	3,286
Iraq	2,805
Kenya	2,675
Syria	2,645
Tunisia	2,381
Algeria	1,649
Palestine	1,592
Nigeria	1,040
Libya	369
Total	508,288

TAT Los Angeles	
Brazil	33,184
Mexico	21,877
Argentina	14,643
Chile	10,862
Colombia	6,780
Peru	4,508
Uruguay	2,068
Ecuador	1,147
Costa Rica	1,091
Guatemala	537
Panama	408
Bolivia	385
Paraguay	285
El salvador	284
Honduras	212
Nicaragua	85
Belize	77
Guyana	47
Total	98,480

TAT New York / Chicago / Los Angeles	
U.S.A	588,585

TAT Chicago	
Canada	147,983

1 Jan - 31 July 2024
Long-haul Markets

Europe	4,027,782 PAX
The Americas	838,758 PAX
Middle East*	585,488 PAX
Africa**	77,896 PAX

Total 5,529,924 PAX

*Including Israel
**The number of other Africa countries = 20,068 PAX

By : Europe America Middle East and Africa Markets
Source : Immigration Bureau and Tourism Authority of Thailand as of Aug 2, 2024

NUMBER OF FLIGHTS SUMMER SLOTS 2019/2023/2024

REGION	2019	2023	2024	2019 / 2024 %Resumption	2023 / 2024 %Resumption
Asia Pacific	245,265	190,087	243,844*	99.42%	128.28%
Middle East	11,252	13,407	15,825	140.64%	118.04%
Europe	13,348	11,572	13,779	103.23%	119.07%
Oceania	3,395	3,095	3,839	113.08%	124.04%
Africa	1,143	532	930	81.36%	177.81%
Americas	-	1	30	-	-
TOTAL	274,403	218,694	278,247	101.4%	127.23%

Source: CAAT as of 5 July 2024
By: Europe Americas Middle East and Africa Markets Group

Remark: Charter flights are excluded
Summer : 30 weeks April-October 2024

NUMBER OF FLIGHTS WINTER SLOTS 2019/2023/2024

REGION	2019	2023	2024	2019 / 2024 %Resumption	2023 / 2024 %Resumption
Asia Pacific	315,820	281,668	390,692	123.71%	138.71%
Europe	17,054	13,647	18,102	106.15%	132.64%
Middle East	8,821	10,494	13,305	150.83%	126.79%
Oceania	2,538	1,836	4,202	165.56%	228.87%
Americas	4	505	879	-	174.06%
Africa	739	500	814	110.15%	162.8%
TOTAL	344,976	308,650	427,994	124.06%	138.67%

Source: CAAT as of 5 July 2024
By: Europe Americas Middle East and Africa Markets Group

Remark: Charter flights are excluded
Winter : November 2024 - March 2025

Source: CAAT as of 19 July 2024
By: Europe Americas Middle East and Africa Markets Group

LOAD FACTOR 2024

ภูมิภาค	ไตรมาส 1 (ม.ค.-มี.ค. 67)	ไตรมาส 2 (เม.ย.-มิ.ย. 67)	TOTAL
Americas	0.96	0.97	0.96
Europe	0.91	0.76	0.85
Asia Pacific	0.84	0.80	0.82
Africa	0.78	0.82	0.80
Middle East	0.83	0.73	0.79
Oceania	0.72	0.78	0.75
Total	0.85	0.79	0.82

Remarks 1. Data source from AOT, DOA, PG and UTP.
2. Load Factor of Flight to Airports of PG calculated from Seat Capacity based on information from Cirium: Fleet Analyzer Module.

Remark: Conversion from percentage (%) to decimals

REGULAR FLIGHTS SUMMER 2024 MIDDLE EAST (TAT DUBAI)

Royal Jordanian
AMMAN - BKK
3 flights/week

Kuwait Airways
KUWAIT CITY - BKK
Daily flight

Gulf Air
BAHRAIN - BKK
Daily flights

Mahan Air
TEHRAN - BKK
2 flights/week

Saudia
JEDDAH - BKK 6 flights/week
RIYADH - BKK 3 flights/week
9 FLIGHTS/WEEK

Qatar Airways
Doha - BKK 35 flights/week
Doha - HKT 21 flights/week
56 FLIGHTS/WEEK

Emirates
Dubai - BKK 35 flights/week
Dubai - HKT 14 flights/week

flydubai
Dubai - UTP/KBV
14 flights/week
63 FLIGHTS/WEEK

Etihad
ABU DHABI - BKK/HKT
21 flights/week

UPCOMING FLIGHTS IN WINTER 2024

Saudia
JEDDAH-HKT
RIYADH-HKT
6 flights/week
(start from 2 Dec 24)

Oman Air
MUSCAT - BKK/HKT
21 flights/week

SalamAir
Muscat - BKK 7 flights/week
Muscat - HKT 4 flights/week

32 FLIGHTS/WEEK

Air Arabia
SHARJAH - BKK/HKT
15 flights/week

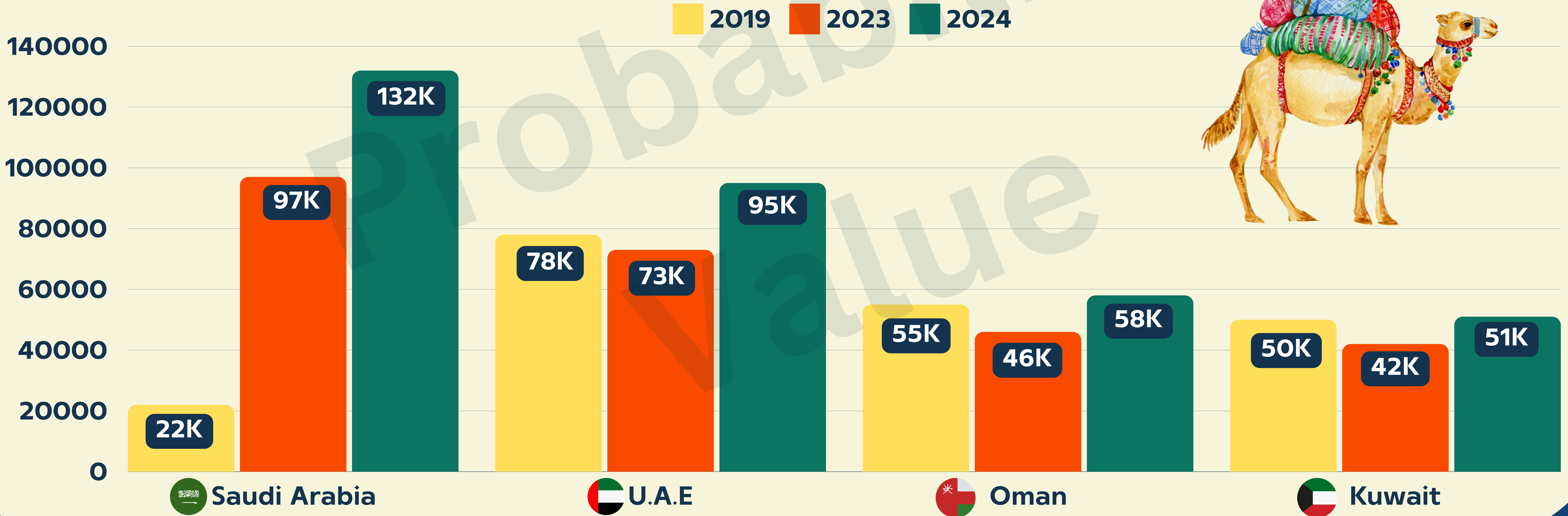
Source: TAT Dubai
as of 27 Aug 2024

By: TAT Europe Americas Middle East and Africa Markets Group

MIDDLE EAST MARKETS

MIDDLE EAST TOURIST ARRIVALS

Tourist Arrivals January - July



Source: TAT-Intelligence Center as of 27 July 2024

By: TAT Europe Americas Middle East and Africa Markets Group

THE ME KEY MARKET SEGMENTS

To boost tourism revenue and ensure sustainability, 4 key market segments will be the focus in 2024/2025. These will be supported by the Thailand's soft-power pillars, including Food, Film, Festival, Fight, and Fashion, to increase both distribution and supply of tourism income throughout the country.

FAMILY + GEN X

Market Size: Approx. 50%

Desired Options:
- Beaches
- Shopping
- Entertainment

MILLENNIAL

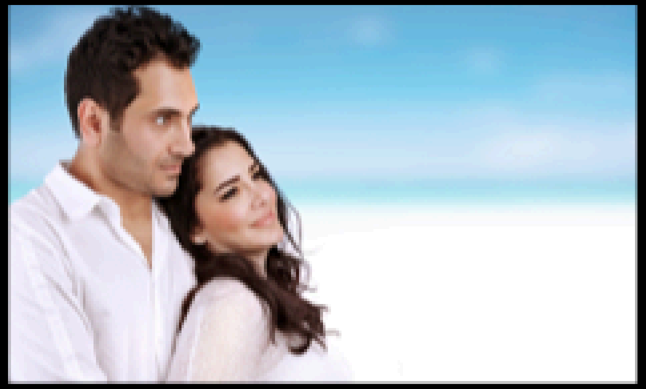
Market Size: Approx. 20%

Desired Options:
- Exotic & Nature
- Outdoor & Sports
- Events

HEATLH & WELLNESS

Market Size: Approx. 20%

Desired Options:
- Hospitals
- Spa & Wellness
- Rehabilitation



HONEYMOONER

Market Size: Approx. 10%

Desired Options:
- Luxury& Privacy
- Personalized
- Authentic Expr.

TRENDS 2024/2025

TRENDS 2024/2025

01

Gen X Traveler (1965-1980)

The GCC outbound market is forecast to grow exponentially over the **next 5 years**, driven by Gen X travellers, according to according to findings by New York headquartered Research Nester

SENIOR POSITIONS

Have high earning potential and disposable income and can afford to travel frequently.

GROWING BLEISURE SEGMENT

Now looking for a more sustainable work life balance. Spending more leisure time with families including holidays and combining business with leisure.

HIGH SPENDING

KSA Gen-X will spend 41% of total outbound market value of $27 billion and UAE Gen-X will spend 60% of $30 billion by 2028

TRENDS 2024/2025

02

Luxury Traveler with Wellness & Exclusive Experience

Noticeable rise in trends like health and wellness tourism, tours, cruises, event travel, and exclusive encounters with a **14% increase in GCC** spending on a year-to-year basis

ESTIMATE MARKET SIZE:

Approx. 6- 9 million
(10-15% of GCC Population)

TRAVEL TIMES

- Their most popular times to go on international trips are June to August
- Luxury travelers from the Middle East are more likely to travel with their children
- GCC travelers spend 6.5 times more than the global average, with 40% of GCC travellers spending more than US$10,000 on their last trip to Europe (According to the UNWTO)

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TRENDS 2024/2025

03
Slow Holidays

Middle East & South African travelers starting to take their time, connect with the local culture, disconnect from technology and minimize their impact on the environment.

SHIFT IN TRAVEL PREFERENCES:

There's a growing desire among Middle Eastern travelers for more meaningful, immersive experiences rather than rushed sightseeing trips. 86% of South African Travel Providers have seen a rise in consumer demand for experiential travel.

POST-PANDEMIC MINDSET:

The COVID-19 pandemic has led to a reevaluation of travel priorities, with many people now seeking more relaxed, less crowded experiences that allow for better work-life balance

LONGER STAYS:

Travelers from the Middle East are extending their trips by an average of 3 extra days compared to pre-pandemic levels. This trend supports the slow travel concept of spending more time in their chosen destinations

TRENDS 2024/2025

04

Sustainability

Over the next 3 years, sustainability will be on the agenda more than ever before. More than **83% from the UAE** would be happy to pay more for environmentally friendly accommodation.

CHANGING TRAVELER PREFERENCES:
Middle Eastern travelers are showing a greater interest in authentic, immersive experiences that benefit local communities. Many are willing to pay a premium for environmentally friendly accommodations - up to 21% more in the UAE and 22% more in Saudi Arabia.

INCREASING ENVIRONMENTAL AWARENESS:
Middle Eastern & South African travelers are becoming more environmentally conscious and willing to spend on sustainable travel practices. There's a growing desire to minimize the negative impacts of tourism on destinations.

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TRENDS 2024/2025

05
AI Holiday Planning

More than **50% from the UAE & KSA** have used AI to help them plan or research a holiday. Meanwhile, 77% in both countries say they are likely to use it in the future, showing the trend is set to grow further still.

PERSONALIZATION AND EFFICIENCY

AI can analyze vast amounts of data to provide highly personalized travel recommendations based on individual preferences, past behavior, and real-time data. This ensures that travelers receive tailored itineraries that match their specific interests, whether it's exploring cultural sites, enjoying luxury accommodations, or finding off-the-beaten-path experiences

COST AND TIME SAVINGS

AI tools can optimize the booking process by comparing prices across multiple platforms, predicting travel trends, and suggesting the most cost-effective times to book flights and accommodations. This helps travelers save money and time, making the planning process more efficient and less stressful.


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WELLNESS HUB

HEALTH & WELLNESS (JAN-JUN 2023)

Length of stay

10.39 nights

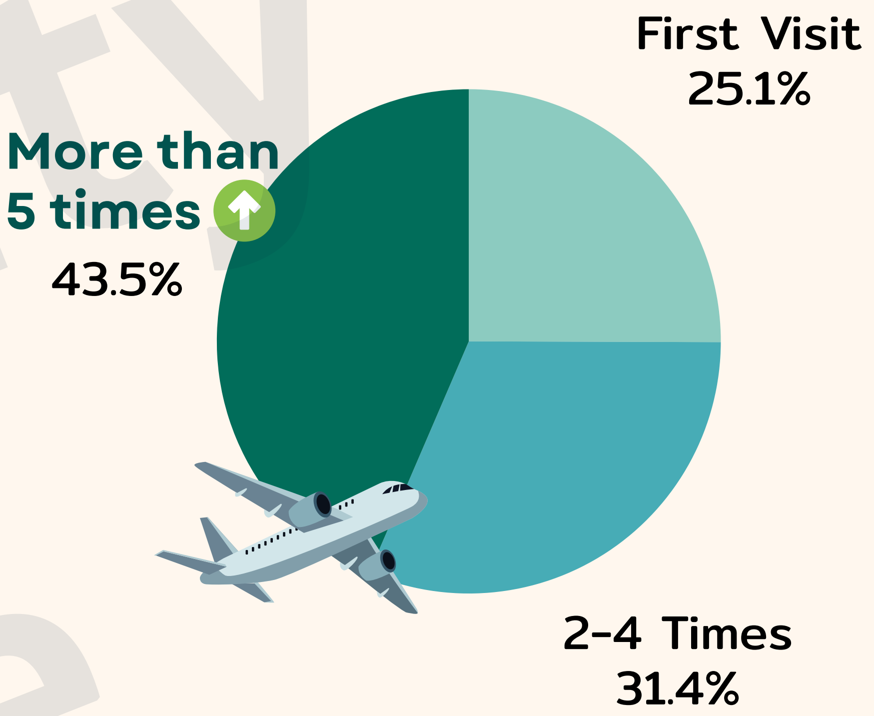
Spending per trip

105,938 baht/person/trip

Main Factors to Visit Thailand

Medical Care & Treatment	Variety of attractions	Thai food and drinks
43.74%	42.71%	37.58%

Experiences in Thailand

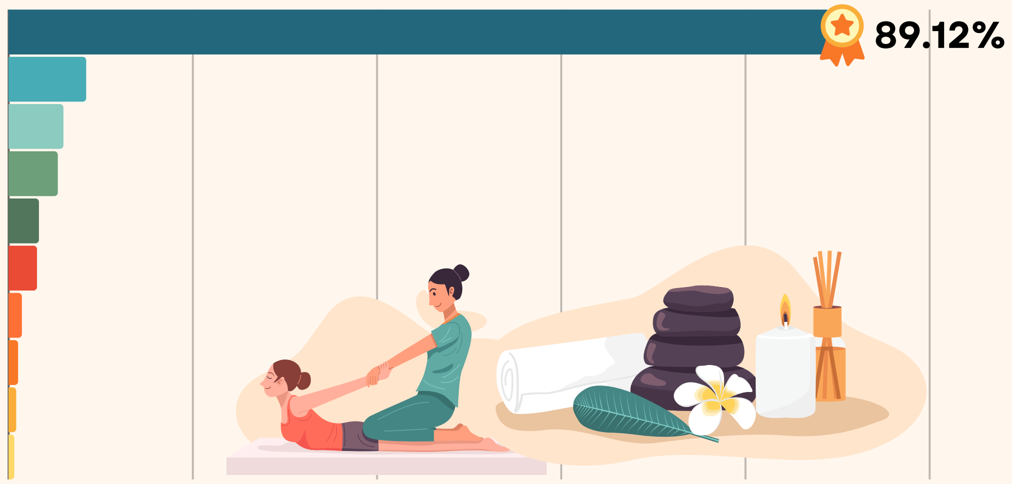


Ways to book a trip

TO/TAs	Online booking	Booking via Airline	Booking via Hotel
31.42%	29.98%	28.75%	19.10%

Top 10 destinations

1. **Bangkok**
2. Chonburi
3. Surat Thani
4. Phuket
5. Chiang Mai
6. Krabi
7. Udon Thani
8. Nhong Kai
9. Prachuap Khiri Khan
10. Trat



Source: TAT Intelligence Center Progress Report

By: Europe Americas Middle East and Africa Markets Group

HEALTH & WELLNESS (JAN - JUN 2024)

Length of stay

12.57 nights

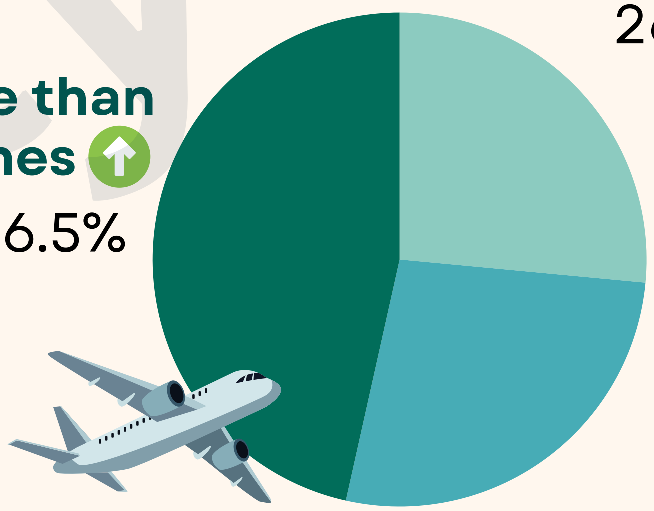
Spending per trip

113,059 baht/person/trip

Main Purpose of visiting Thailand

- Medical Care & Treatment **91.08%**
- Variety of attractions **54.59%**
- Thai food and drinks **34.43%**

Experiences in Thailand

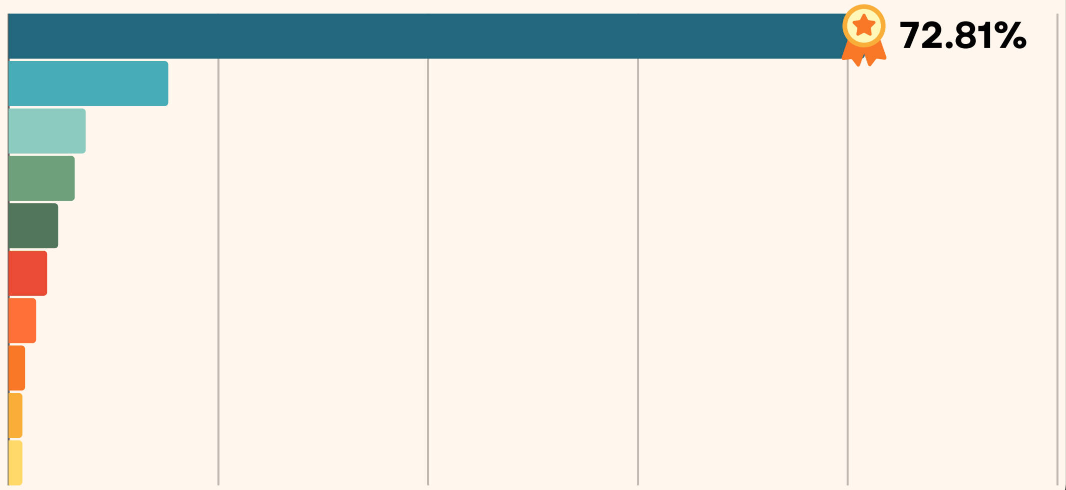


Ways to book a trip

- **40.68%** Online booking
- **37.80%** TO/TAs
- **18.11%** Booking via Airline
- **15.49%** Booking via Hotel

Top 10 destinations

1. **Bangkok**
2. Chonburi
3. Phuket
4. Surat Thani
5. Chiang Mai
6. Krabi
7. Sa Kaew
8. Chiang Rai
9. Prachuap Khiri Khan
10. Rayong



Source: TAT Intelligence Center Progress Report

By: Europe Americas Middle East and Africa Markets Group

THAILAND WELLNESS HUB

ANDAMAN WELLNESS ECONOMIC CORRIDOR (AWC)

- Increasing the competitiveness of health tourism in **6 Andaman provinces,** consisting of Phuket, Krabi. Phang Nga, Ranong, Trang and Satun
- This is to recover the economy after the pandemic and to **enhance the capacity of the health business** to support the high growth in health tourism services.

THAILAND WELLNESS COAST HUA-HIN CHA AM

- Hua Hin and Cha Am to be internationally recognised as a **health and wellness destination,** which officials hope will attract **high spending tourists and boost the local economy**.

By: TAT Europe Americas Middle East and Africa Markets Group
Sources: SawasdeeThailand, Hua HinToday