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## "Thailand: Emerging as a Leading Medical Hub"

**Dr. Akrapon Kurusarttra, Assistant Director General, the Department of Health Service Support and  
Director of the Bureau of Medical Hub Industrial Promotion**

**Mr. Siripakorn Cheawsamoot, Deputy Governor for International Marketing  
Europe America Middle East and Africa, Tourism Authority of Thailand**

**Dr. Nipat Kulabkaw, Co-CEO, Bumrungrad International Hospital**

**Moderator: Mr. Tanawat Ruenbanterng, Head of Institutional Research, Tisco Securities**

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**Dr. Akrapon Kurusarttra**, the Department of Health Service Support and the Bureau of Medical Hub  
Industrial Promotion

- The government provides full support in driving Thailand to be the capital of healthcare for the region and the world. Such support includes setting the country's medical hub policy covering three main strategies (1) enhancing competitiveness, (2) developing the ecosystem and (3) promoting marketing and PR, the "Medical & Wellness Valley" initiative, as well as support for the private sector in negotiations with GCC (Gulf Cooperation Council) countries especially with new markets such as Saudi Arabia. Visa facilitation is also supported, for both medical tourism Visa and wellness tourism Visa.
- In terms of collaboration in medical tourism with the Middle East, currently 5 of 6 GCC countries already have in place a reimbursement process in Thailand. For the remaining country, which is Saudi Arabia, Thailand will sign an MOU with Saudi Arabia in the next 1-2 months, which will also include the subject of health insurance which will open doors to the market. Next steps will be discussions on details of public health fund and private insurance.

**Mr. Siripakorn Cheawsamoot, Tourism Authority of Thailand**

- To cover some key data on Thailand tourism, the best year for Thai tourism was 2019 (pre-pandemic) with nearly 40 million international travelers. The target for 2024 is set to be around 36 million international travelers (73% short haul visitors and 27% long-haul visitors). In terms of revenue long-haul visitors are targeted to be 38% of total revenue and is essential to keep momentum of high-value and high-quality tourists (which includes health and medical tourists).
- For the Middle East, tourist arrivals for the first 7 months of 2024 was more than the same period of last year, or even pre-pandemic years. Another insight is the seasonality of each market: during the summer season where tourist numbers drop in Europe and America markets, there is a rise in visitors from the Middle East. Top 5 countries in the Middle East tourist arrivals include Saudi Arabia, UAE, Oman, Kuwait and Iran. There is also positive momentum in the number of flights and load factor for the Middle East which is why TAT will be having airline-focused strategies moving forward (currently the Middle East has 12 airlines with more than 200 flights per week, and increasing, directly to Thailand). Thanks to the Thai government in the normalization of diplomatic relations with Saudi Arabia after 32 years of diplomatic suspension, which allowed the two kingdoms to reconnect 2 years ago and onwards.
- Four target market segments that TAT will focus on are (1) Family and Gen X travelers, (2) Millennial travelers, (3) Health and wellness travelers and (4) Honeymooners.
- Key trends to be focused on in the next year:
  - Gen X traveler - high earning, high spender, looking for 'bleisure' (business + leisure) trips
  - Luxury travelers with wellness and exclusive experience – high spending, travel during summer holidays
  - Slow holidays – shift in travel preference and mindset, longer stays
  - Sustainability – willing to pay more for environmentally sustainable accommodations
  - AI holiday planning – around 50% from UAE and Saudi Arabia use AI to help with travel planning
- As for data specifically on health and wellness tourism, the length of stay has increased from 10 to 12.5 days on average with spending of around 100k THB per trip.
- Regarding to the Thailand wellness hub, examples of projects currently underway are the Andaman Wellness Economic Corridor and Thailand Wellness Coast Hua-Hin Cha Am.
- Currently GCC countries and Middle East markets are looked over by only one office in Dubai, but within next year TAT will set up a new office in Riyadh. Also, the strategy for the Middle East is provide understanding and invite potential partners and customers to visit Thailand and see for themselves (seeing is believing) what Thailand has to offer in medical and wellness (through hosting familiarization trips to Thailand and hosting travel roadshows to the Middle East).

- Medical and wellness tourism is very important, but we should not forget the lifestyle of potential customers. The largest segment of Thailand's visitors are families, and large families for the Middle East in particular. Therefore, these visitors would be looking for a medical-wellness with leisure type of trip to Thailand.

**Dr. Nipat Kulabkaw, Bumrungrad International Hospital**

- Global medical tourism market is forecasted to grow at an average of 19.8% per year reaching 284 billion USD by 2032. Thailand, is no.1 in ASEAN in terms of the medical tourism, which is forecasted to grow at an average of 43% per year reaching 16 billion USD by 2030. The competitive advantages for Thai private health sector includes having safety and quality standards, world-class medical expertise, advanced medical technologies and affordable prices. Additionally Thailand has many popular tourist attractions and the convenience of medical Visa.
- Healthcare trend has been shifting from illness to wellness and cost of prevention is less than treatment. Genomics, AI-powered clinical decision and use of digital wearable devices is the future of medicine and health. Another key aspect moving forward is increased collaboration between private hospitals and academia which can support and complement each other.
- In attracting medical travel, it is essential to have in-depth understanding of international patients. For Bumrungrad, half are Thai patients, the other half are international patients majorly from South-East Asia. Patients from Middle Eastern countries are 2<sup>nd</sup> largest.
- Looking forward, Thailand strives to be a precision healthcare hub for the region. Not only can Thailand be a hub for advanced healthcare services with a strong healthcare ecosystem, but also has the potential to be a leader in precision medicine and wellness which is the future of medicine.
- For Bumrungrad, future opportunities would be China (focusing on cities with short-haul flights to Thailand) and Indonesia.
- With Government support and collaboration the sector can go further and continue to be a key revenue source for the country.