

PATA[®]

Pacific Asia Travel Association

**Next
Gen**

‘Embracing the Complete Visitor Economy’

2013 PATA Annual Summit

25 - 28 April

Centara Grand & Bangkok Convention Centre at CentralWorld



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amadeus **VISA**
Your technology partner



41 BIARRITZ. — La Promenade de la Plage. — LL.

Impératrice Eugénie and Napoleon III



Transportation =
development of healthcare
away from home =
link to tourism

A vintage French railway poster for the Chemins de Fer d'Orléans et du Midi. The poster is divided into several sections: a top left section showing a large building in PAU; a top right section with the title 'ORLÉANS ET DU MIDI' in large yellow letters; a middle section with 'CHEMINS DE FER D'ORLÉANS ET DU MIDI' in a stylized font; a bottom left section showing a beach scene at BIARRITZ; a bottom right section showing a horse-drawn carriage and people, with the text 'L'HIVER A PAU' and 'LOURDES' in a circular inset. The bottom section contains text about winter stations and reduced fares.

PAU

ORLÉANS
ET DU
MIDI

CHEMINS DE FER D'ORLÉANS ET DU MIDI

BIARRITZ

L'HIVER A PAU

STATIONS HIVERNALES DES PYRÉNÉES ET DU GOLFE DE GASCOGNE
ARCACHON, DAX, PAU, BIARRITZ, ST JEAN DE LUZ, SALIES DE BÉARN, ETC.
BILLETS d'EXCURSIONS - BILLETS DE FAMILLE ET INDIVIDUELS A **PRIX RÉDUITS**

TRAINS RAPIDES ET DE LUXE

Pour plus amples renseignements envoi gratuit de prospectus détaillés et du livret-guide sur demande adressée à l'administration centrale de la C^o d'Orléans, 1, PLACE WALHUBERT, PARIS

Forwardkeys, to monitor Air traveller reservation trends worldwide in real time

True Destination (Inbound Chiang Rai)



Travellers' flow



True Origin (Source Markets)

	BR - Brazil
	FI - Finland
	SE - Sweden
	BE - Belgium
	PT - Portugal
	RU - Russia
	CH - Switzerland
	DK - Denmark
	NL - Netherlands
	GB - United Kingdom
	FR - France
	IT - Italy
	US - U.S.A.
	DE - Germany
	ES - Spain

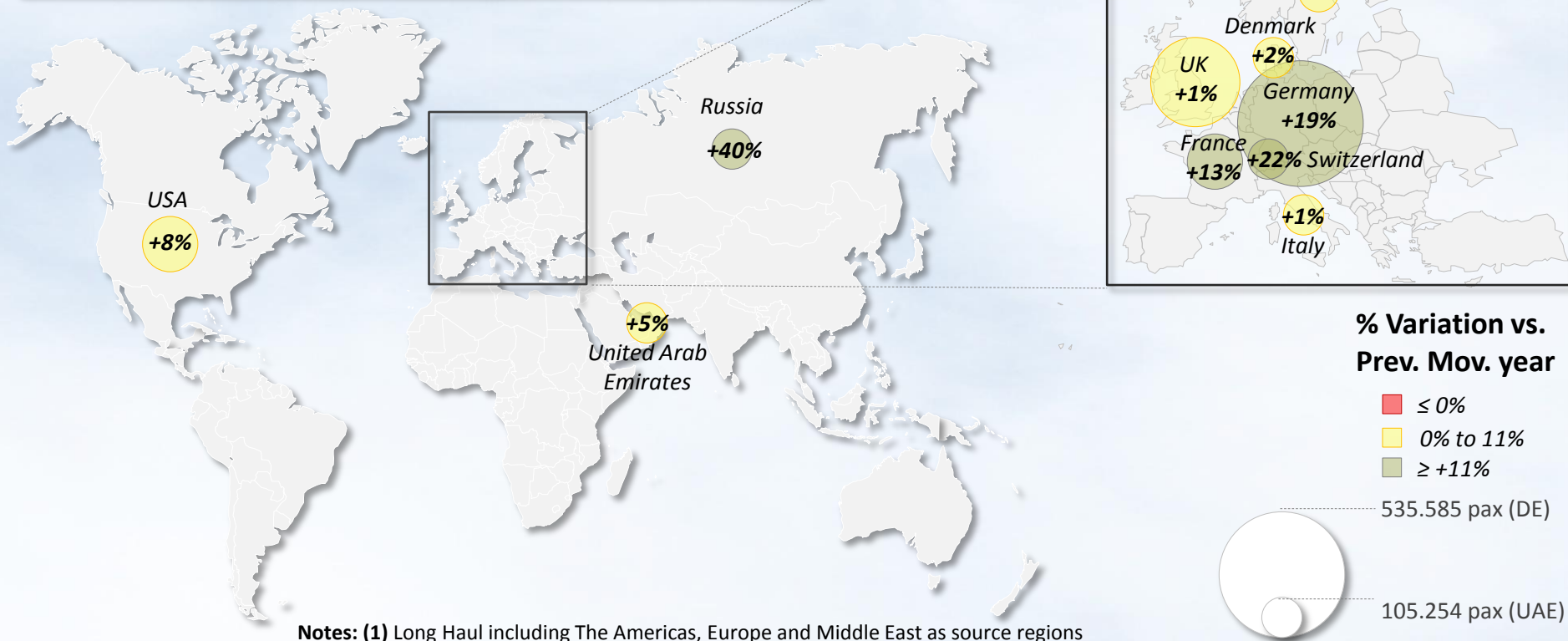
Monitor top source markets and measure ROI

Destination: Thailand

Arrival period: From 1-April 2012 to 31-March 2013 (vs April 2011- March 2012)

Source Markets considered: Long haul¹ source countries with detail of top 10

Past Arrivals to Thailand from Long Haul Source Countries¹
(% Var. vs. Prev. Mov. Year): **+11,3%**



Notes: (1) Long Haul including The Americas, Europe and Middle East as source regions

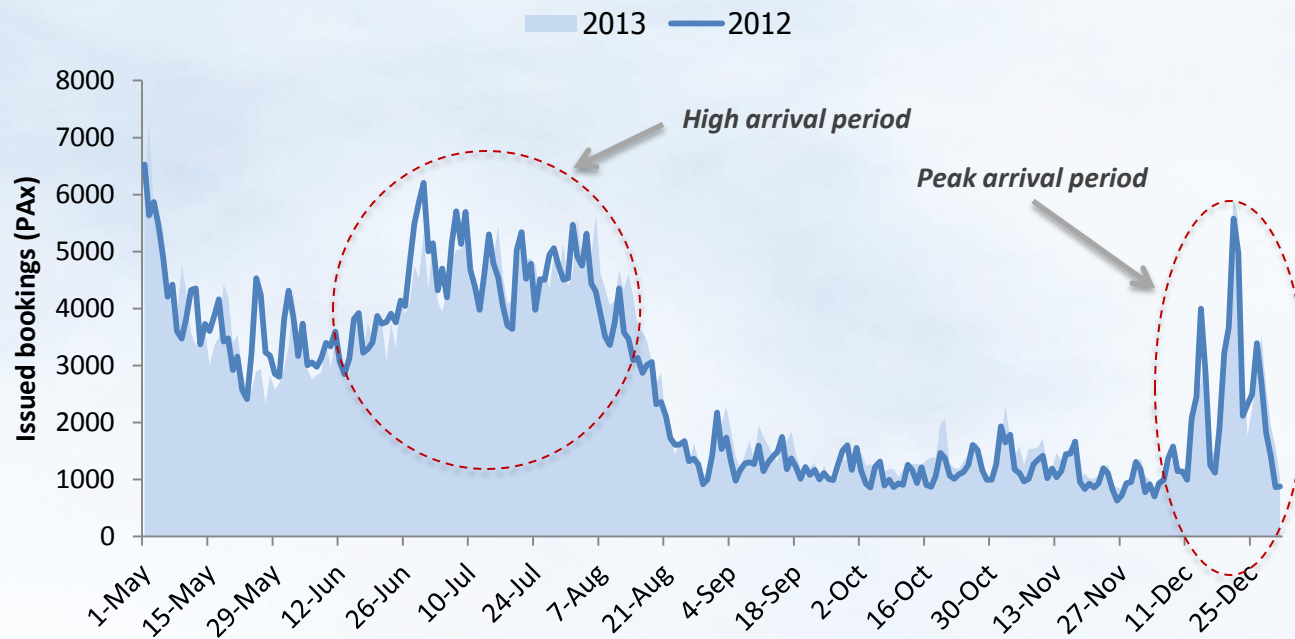
Adapt to future trends based on issued bookings

Destination: Thailand

Arrival period: May-December 2013 (vs same period 2012)

Source Markets considered: Long haul¹ source countries

Expected Arrivals to Thailand from Long Haul Source Countries¹
(% Var. vs. Prev. Year): **+3%**



Notes: (1) Long Haul including The Americas, Europe and Middle East as source regions

Qualifying a Medical traveller

Leisure traveller

LOS: 2 Weeks
Booking: 4 persons
Days: Sundays

Ethnic traveller

LOS: + 21 days
Booking: 1 person
Days: All

Medical Traveller

LOS: ??
Booking: ?? person
Days: ??

Business traveller

LOS: 3 days
Booking: 1 person
Days: Week days

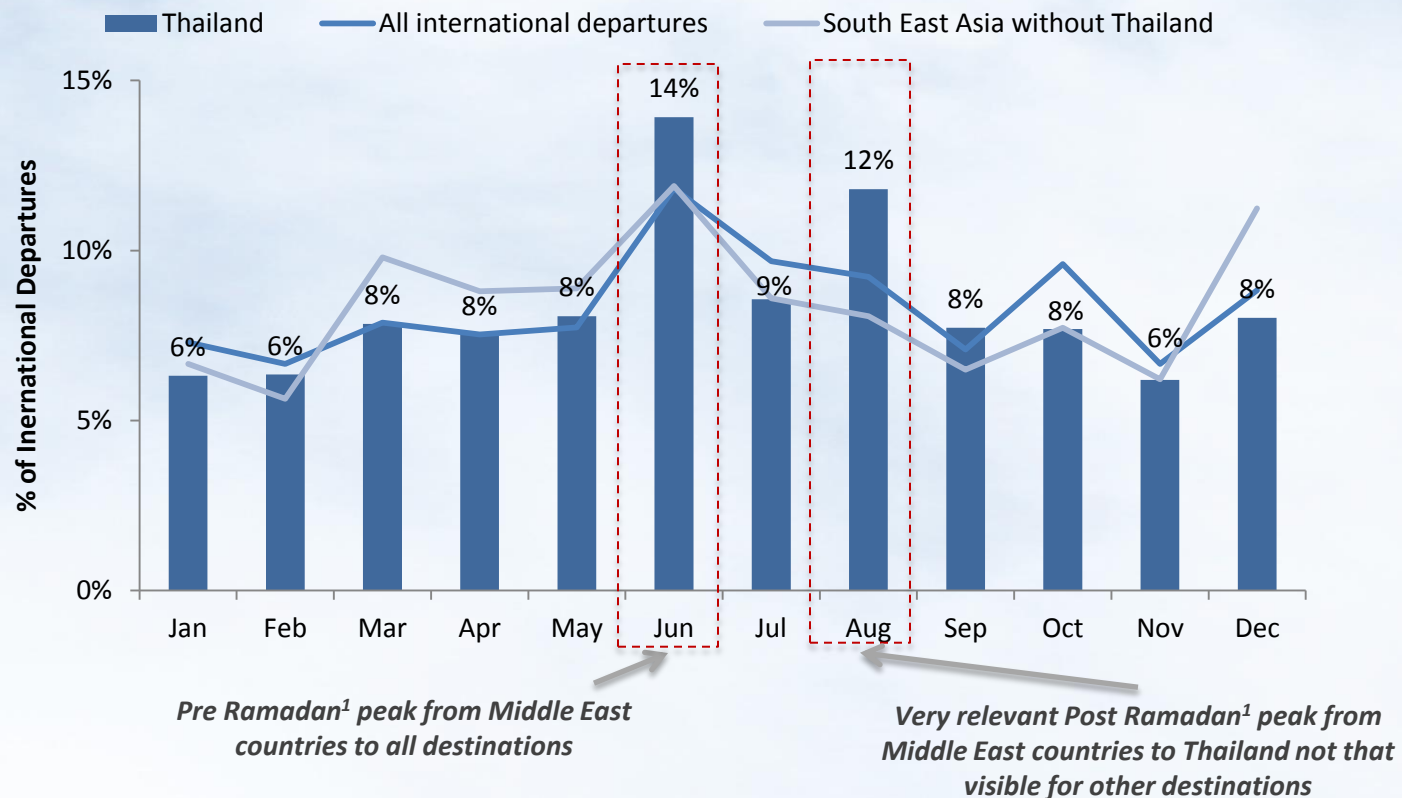
Medical
tourism
suffers from
poor (data) BI

Outbound Middle East trends to South East Asia

Destination: All international destinations with detail of South East Asia and Thailand

Arrival period: Jan-Dec 2012

Source Markets considered: Middle East countries



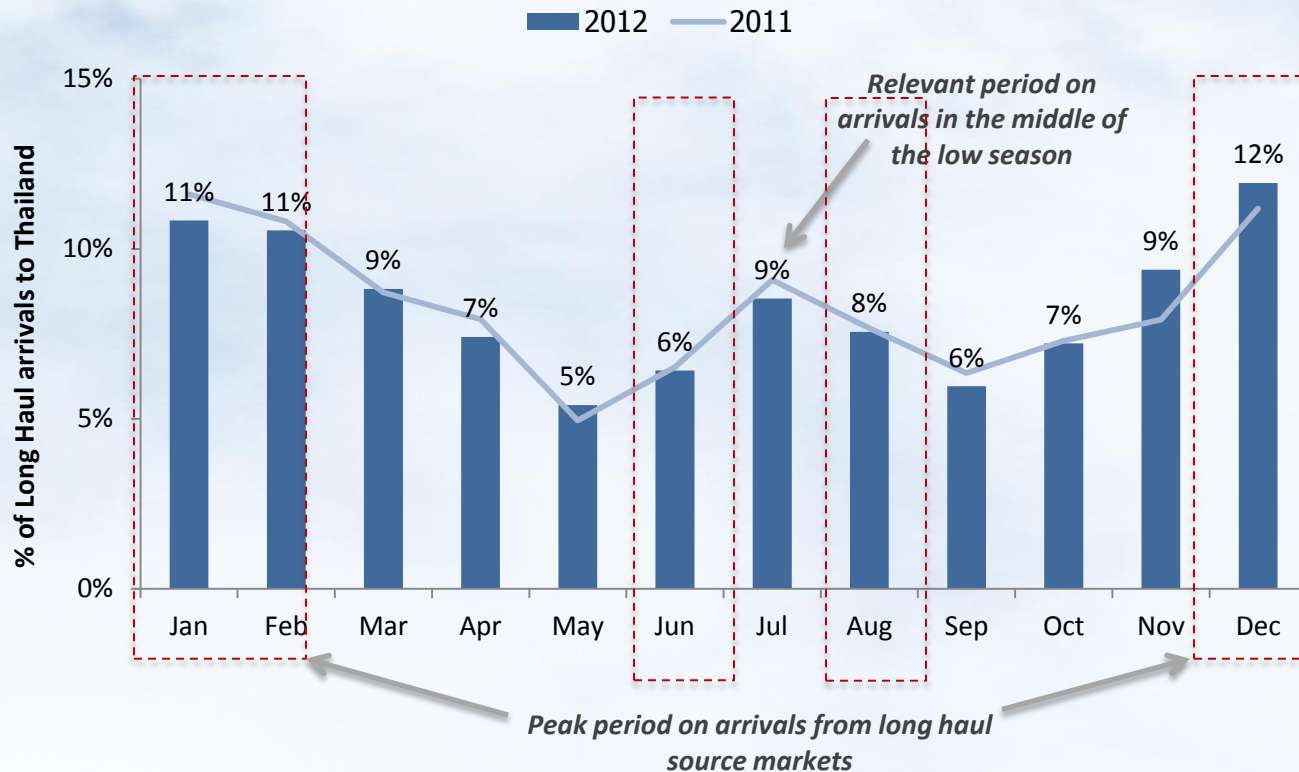
Notes: (1) In 2012 Ramadan begun on 20th July and ended on 18th August

Thailand arrivals seasonality

Destination: Thailand

Arrival period: 2011, 2012

Source Markets considered: Long haul¹ source countries



Notes: (1) Long Haul including The Americas, Europe and Middle East as source regions

Tourism is not equal to Leisure

- Medical Tourism needs to be addressed a part of the « Tourism portfolio »
 - Fantastic (potentially manageable) drivers to our industry - (as well as trade tourism - shoppers).
 - A (key) facet of tourism that could be optimized to the benefit of destination economy – the benefit of all!

Suggestion...

Let's apply tourism management receipes to Medical and Yield it!

Better BI and solid Middlemen

Drivers	Facilitators
<ul style="list-style-type: none"> • Costs • Time • Quality • Law 	<ul style="list-style-type: none"> • Ease and cost of transportation • Quality is available • A real business opportunity

- Drivers (driving demand) are volatile in a permanently changing and very diverse market. Demand is changing but there!
- Facilitators will only get better – Offer is growing



Key importance of facilitators between offer and demand - How to « ease » the link between offer and demand?

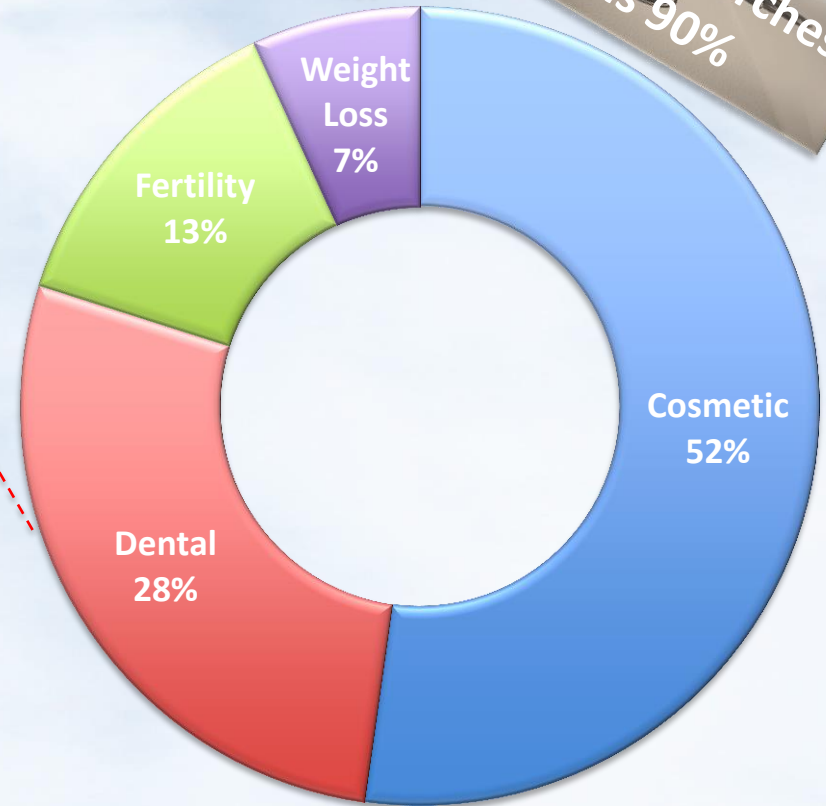
Conclusions

- The nature of medical tourism business makes it difficult to apprehend – let's build a better Business Intelligence!
- Let's yield Medical Tourism as a facet of tourism, to best contribute to destination economy.
- Young and heterogeneous industry - link between demand and offer needs to be allowed to mature.

Data - The Web perspective

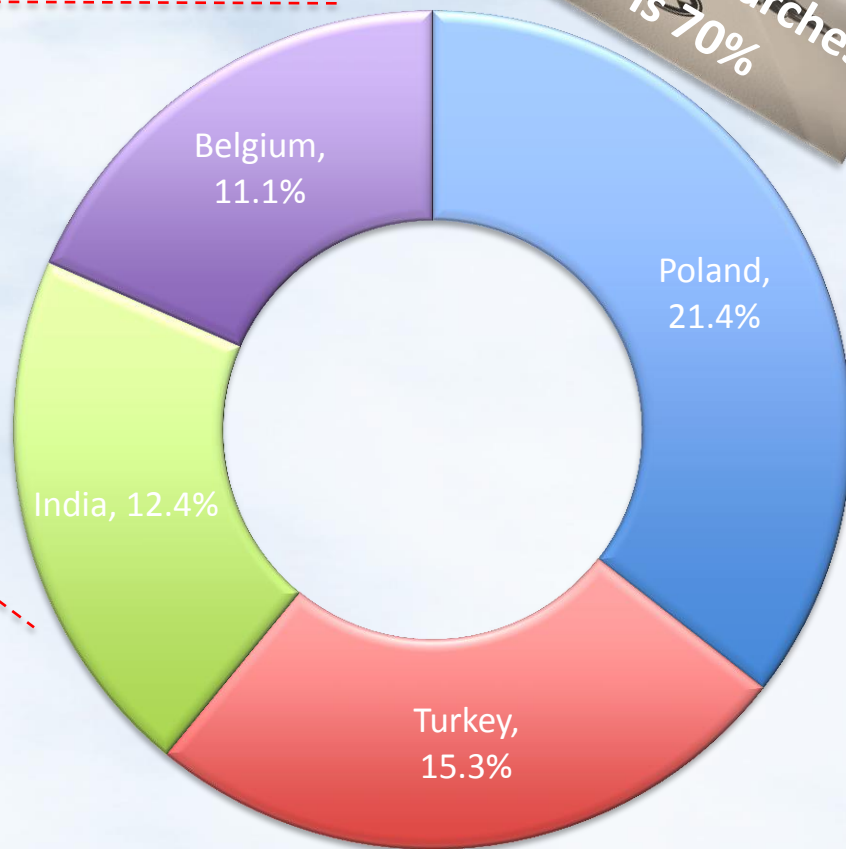
What patients search for?

PROCEDURES	PERCENTAGE
Cosmetic	46,8%
Dental	24,8%
Fertility	11,9%
Weight Loss	6,1%
Orthopedic	3,5%
Surgery	2,5%
Eye Surgery	1,6%
Spine and Neurology	0,8%
Cancer Treatment	0,6%
Stem Cell Therapies	0,6%
Heart Surgery and Cardiology	0,6%
Other	0,2%
Wellness & Spa	0,1%
TOTAL	100,0%



Medical destinations searched by British patients

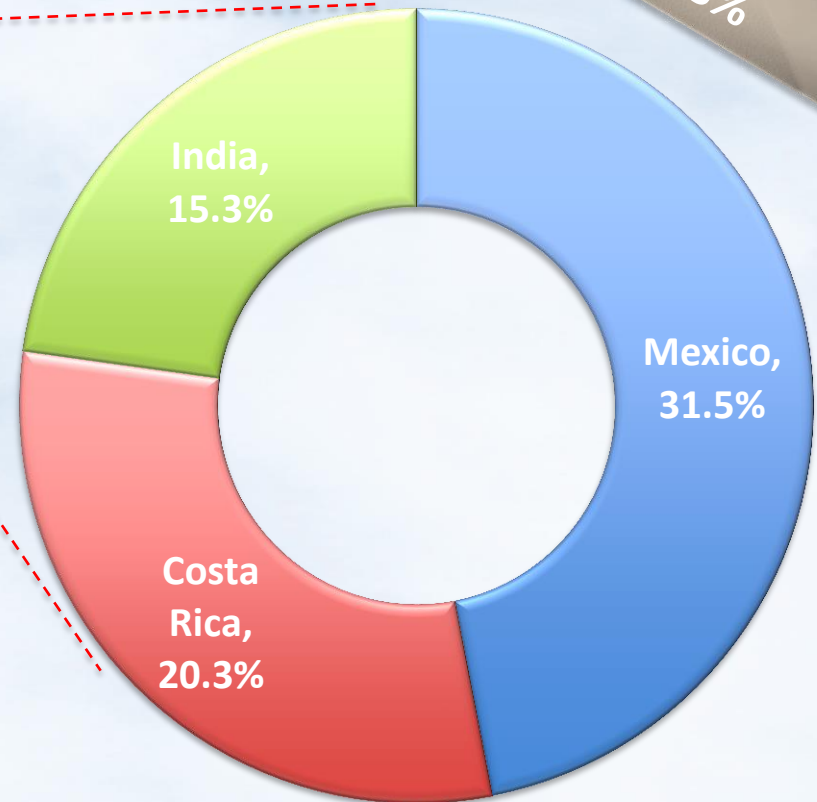
DESTINATION	PERCENTAGE
Poland	21,4%
Turkey	15,3%
India	12,4%
Belgium	11,1%
Spain	9,9%
Czech republic	7,6%
UK	6,6%
Thailand	5,7%
Croatia	5,7%
Other	4,3%
TOTAL	100%



Medical destinations searched by US patients

Top 3 searches
is 68%

DESTINATION	PERCENTAGE
Mexico	31,5%
Costa Rica	20,3%
India	15,3%
USA	7,8%
Argentina	5,6%
Thailand	5,3%
Turkey	5,3%
Other	8,9%
TOTAL	100%

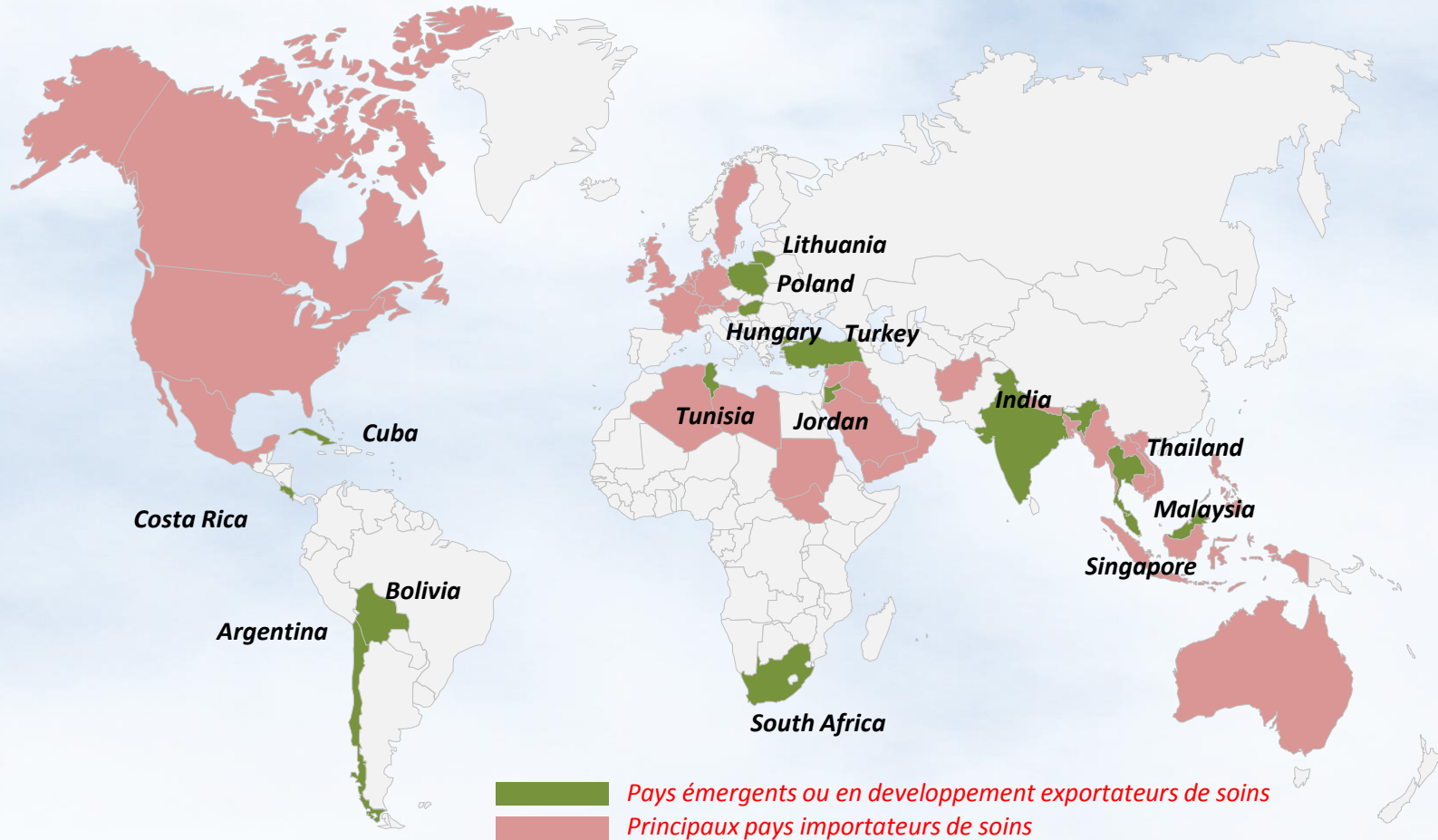


Conclusions

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Thank you!

International flows related to medical Tourism



□ 1.500.000

Notes: (1) The size of the square is not strictly linked to the number of patients
Source: Atlas Mondial de la Santé

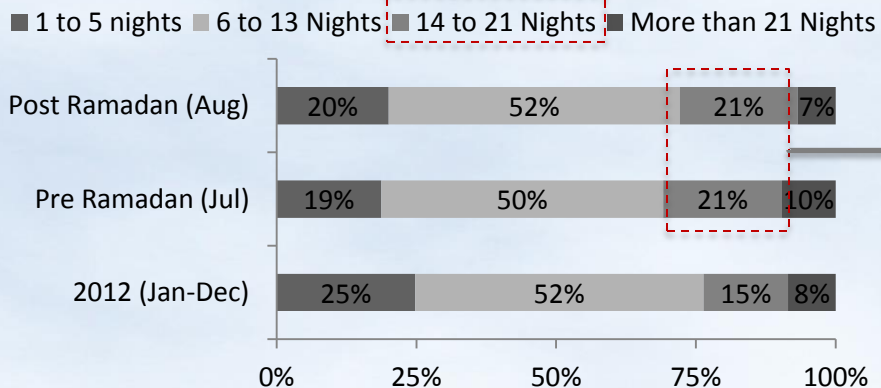
Middle East traveller inbound Thailand - patterns

Destination: Thailand

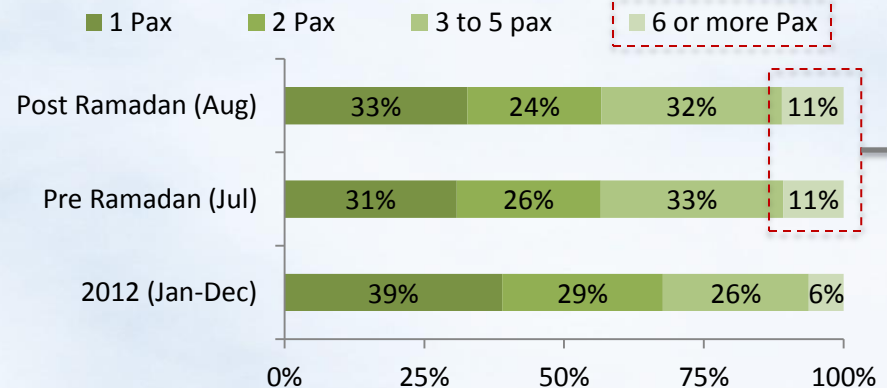
Arrival period: Jan-Dec 2012

Source Markets considered: Middle East countries

Traveller profile by Length of Stay
(% of arrivals by arrival period; 2012)



Traveller profile by Pax per booking
(% of arrivals by arrival period; 2012)



Longer stays in Thailand and higher relevance of large groups than on average were the characteristics of the Pre and Post Ramadan¹ traveller profile in 2012 from Middle East countries

Notes: (1) In 2012 Ramadan begun on 20th July and ended on 18th August