

# THAILAND'S TRAVEL & TOURISM SECTOR 2012 AND DIRECTION FOR THE FUTURE

FEBRUARY 2013

## INTRODUCTION

This briefing note is designed to introduce key factors related to understanding travel and tourism in Thailand in 2012 along with providing some insight into future directions. It forms part of a series of initiatives of the department tourism to provide information to stakeholders within the tourism industry.



## A LONG TERM PERSPECTIVE

Calendar year 2012 was a record year for international tourist arrival worldwide, reaching the one billion mark in December. The Kingdom of Thailand also marked a record year, welcoming 22.3 million foreign arrivals, an increase of 16% year-on-year.

Given the number of natural disasters as well as other problems over the preceding years such a significant increase in international arrivals was not expected. International tourism to Thailand has a long history with just over 81,000 foreign arrivals being recorded at the end of the 1950s. In 1973 the million arrivals mark was exceeded for the first time and eight years later that volume had doubled (2.052 million arrivals in 1981). Exhibit 1 demonstrates the nature of this growth.

Less than a decade later however, that figure had more than doubled to 5.3 million arrivals in 1990, and by the end of 2001, it had doubled again, to reach in excess of 10 million. Fast forward another 11 years and even that volume of foreign arrivals had doubled to reach an inbound volume of 22.3 million (2012).

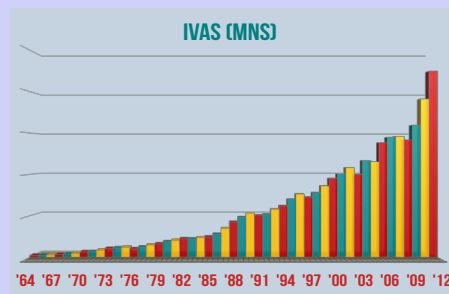


Exhibit 1: International arrivals into Thailand 1972-2012  
Source: MoTS

The impacts of various incidents over the recent past are apparent – the SARS outbreak in 2003 and the 2008 Global Financial crisis being the most evident in recent years. However, since 2010 the increase in foreign arrivals has increased at a remarkable rate.

While the volume of foreign arrivals is trending upwards at an exponential rate, there are social, environmental and capacity factors that need consideration including:

- The real value of those arrivals in terms of length-of-stay, dispersion and spend;
- The ability of Thailand to adequately absorb that increasing value without compromising the lifestyle of its citizens;
- The capacity of the airports and roads;



- The ability of Thailand to adequately deal with those arrivals without any loss of service quality; and
- The ability to provide adequately trained staff to manage the demands of these tourists and of course the domestic sector as well.

## AN ASEAN PERSPECTIVE

It is useful to put growth in tourism in Thailand within the perspective of the ASEAN region. The ASEAN region has seen substantial growth in foreign arrivals over the last four years, expanding by an average of 8.4% per annum (CAGR) between 2008 and 2012 as evidenced in Exhibit 2.

### FOREIGN ARRIVALS

ECONOMY	2008	2009	2010	2011	2012	CAGR (%)
BRUNEI	225,757	157,474	214,290	242,061	269,898	4.6
CAMBODIA	2,001,434	2,161,577	2,508,289	2,881,862	3,548,307	15.4
INDONESIA	6,234,497	6,323,730	7,002,944	7,649,731	8,000,000	6.4
LAO PDR	1,736,787	2,008,363	2,513,028	2,723,564	3,330,072	17.7
MALAYSIA	22,052,488	23,646,191	24,577,196	24,714,324	24,883,801	3.1
MYANMAR	193,319	762,547	791,505	816,369	1,058,995	53.0
PHILIPPINES	3,139,422	3,017,099	3,520,471	3,917,454	4,272,811	8.0
SINGAPORE	10,115,638	9,681,259	11,638,663	13,171,303	14,677,120	9.8
THAILAND	14,584,220	14,149,841	15,936,400	19,230,470	22,303,065	11.2
VIET NAM	4,253,741	3,772,559	5,049,855	5,988,425	6,847,678	12.6
<b>ASEAN</b>	<b>64,537,303</b>	<b>65,680,640</b>	<b>73,752,641</b>	<b>81,335,563</b>	<b>89,191,747</b>	<b>8.4</b>

Exhibit 2: Foreign Arrivals Into Individual ASEAN Economies, 2008-2012  
Source: MoTS

Exhibit 3 demonstrates how receipts from tourism have grown even more strongly, averaging 18.0% per annum over the same period.

### TOURISM RECEIPTS US\$ MILLIONS

ECONOMY	2008	2009	2010	2011E	2012E	CAGR (%)
BRUNEI	\$131.60	\$91.90	\$187.50	\$141.20	\$157.44	4.6
CAMBODIA	\$1,595.00	\$1,561.00	\$1,786.00	\$1,912.00	\$2,354.16	10.2
INDONESIA	\$7,347.60	\$6,400.00	\$7,600.00	\$8,554.39	\$8,946.08	5.0
LAO PDR	\$275.51	\$267.70	\$381.60	\$406.18	\$496.63	15.9
MALAYSIA	\$7,193.91	\$12,141.45	\$17,908.50	\$18,008.42	\$18,131.91	26.0
MYANMAR	\$126.00	\$196.00	\$254.00	\$319.00	\$534.00	43.5
PHILIPPINES	\$2,428.68	\$2,235.92	\$2,490.23	\$2,771.04	\$3,022.40	5.6
SINGAPORE	\$10,735.00	\$12,800.00	\$14,500.00	\$22,300.00	\$24,849.46	23.3
THAILAND	\$17,247.69	\$14,880.58	\$18,706.03	\$25,458.09	\$32,977.00	17.6
VIET NAM	\$3,580.00	\$4,227.00	\$4,800.00	\$5,620.00	\$6,426.39	15.8
<b>ASEAN</b>	<b>\$50,516.14</b>	<b>\$53,687.15</b>	<b>\$62,642.06</b>	<b>\$85,490.32</b>	<b>\$97,895.48</b>	<b>18.0</b>

Exhibit 3: Receipts From Tourism In Individual ASEAN Economies, 2008-2012  
Source: MoTS



While Thailand has outperformed the ASEAN average growth rate in terms of foreign arrivals (11.2% vs 8.4%), it would appear that it has lagged marginally behind the average in terms of receipts from tourism (17.6% vs 18.0%) during the period 2008 to 2012.

It must be recognised however that the estimates of receipts from tourism for much of 2011 and all of 2012 are preliminary and in many cases estimated based on the previous year's results. In the case of Thailand, while the 2011 figures are published, the 2012 figures are estimated from the first quarter figures for 2012 and the full year figure may in fact differ from the estimates used here.

Nevertheless, the issue worth considering is that of how the rapid rise in arrivals relates to the revenues derived from international tourism.

Reducing the number of arrivals and the receipts data into their respective indices (Exhibit 4) clearly shows that based on the data as stipulated above, Thailand is precisely in the position it should be, with receipts growing at a faster rate than arrivals.

Bear in mind however that the receipts data have not been standardised and relate to expenditures in the year they were made.

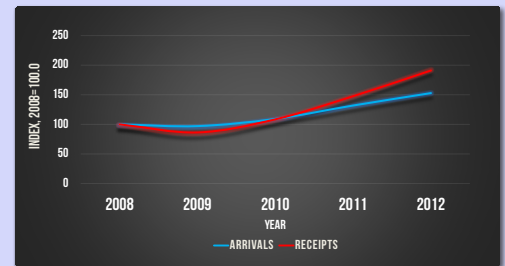


Exhibit 4: Index of Foreign Arrivals And Receipts From Tourism For Thailand, 2008-2012  
Source: MoTS

## MODE OF ARRIVAL

Although data for 2012 is not yet available for Mode of Arrival, it is still interesting to note an emerging trend in land entry as can be seen in Exhibit 5, which by the end of 2011 accounted for just short of one-fifth of all foreign arrivals.

YEAR	AIR (%)	LAND (%)	SEA (%)
1998	85.0	12.7	2.3
1999	83.8	13.4	2.7
2000	84.2	13.2	2.6
2001	83.4	14.2	2.5
2002	82.2	15.7	2.1
2003	80.8	17.4	1.8
2004	82.9	15.0	2.1
2005	82.4	15.5	2.1
2006	83.5	14.2	2.3
2007	82.8	15.3	1.9
2010	77.7	19.3	3.0
2011	77.6	19.5	2.9

Exhibit 5: Foreign Arrivals Into Thailand By Mode of Entry, 1998-2011  
Source: MoTS

As the numbers in Exhibit 5 illustrate, arrivals by land have increased every year, which is a function of the land borders that Thailand shares with its Asian neighbours.

## SEASONALITY

With minor exceptions in 2010 and 2011, the overall seasonality pattern appears to be reasonably stable so that an average profile over the last four years sees the major peaks in traffic occurring during the first and fourth quarters of the year (Exhibit 6 and 7).

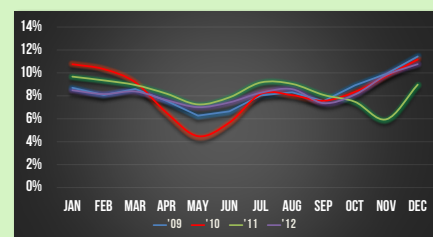


Exhibit 6: Foreign Arrivals by Month, 2009-2012, %  
Source: MoTS

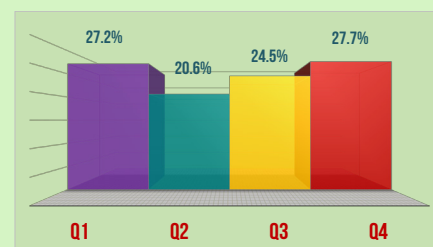


Exhibit 7: Average of Foreign Arrivals by Quarter (2009-2012), %  
Source: MoTS

## CHANGES IN THE INBOUND MIX

Nothing remains the same however, and in the case of Thailand possibly the most significant factor in the Kingdom's evolution of international tourism has been the change in the mix of arrivals by nationality, with Asian source markets gaining dominance in 1983 (69%) and then oscillating between 60% and 70% thereafter (Exhibit 8).

*Note: In this context, the definition of Asia follows the United Nations Country Classification system so that West Asia (also referred to as the Middle East) is included in the broader definition of Asia.*

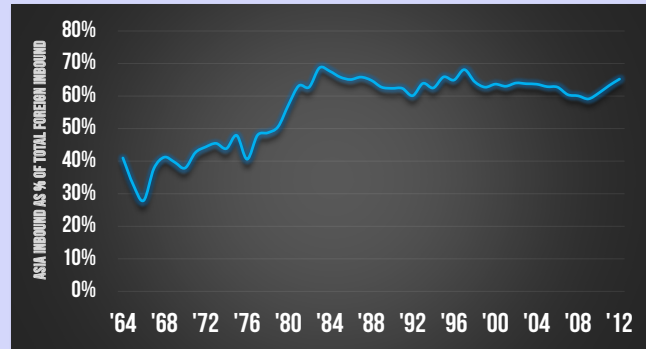


Exhibit 8: Arrivals from Asia Source Markets into Thailand as % of Total Foreign Arrivals, 1964 to 2012  
Source: MoTS, PATA

Since 2009, the relative dominance of Asian source markets has been progressively on the rise reaching a moderately recent high of 65% in 2012 and that has been driven largely by volume traffic from the neighbouring source markets of Northeast and Southeast Asia. (Exhibit 9)

Interestingly, the long view shows that in relative terms, the ASEAN source markets diminished in importance up until the early 1990s when they once again began an upward climb. The source markets of Northeast Asia by contrast were quite erratic until the mid 1980s when they began to gain in relative importance as a major supplier of foreign arrivals from Asia, driven in part by the opening up of China with a massive increase in outbound travel from that one source market.

Europe is the other broad source region that has maintained a relatively strong presence in the Thailand inbound mix, still accounting for between 20% and 30% of the total foreign arrivals count. (Exhibit 10)

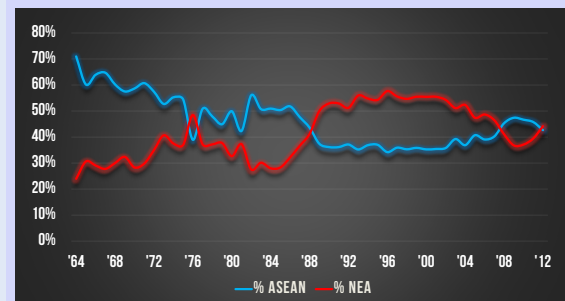


Exhibit 9: Foreign Arrivals from ASEAN and Northeast Asia Source Markets into Thailand as a Percentage of Total Arrivals from Asia, 1964-2012  
Source: MoTS, PATA

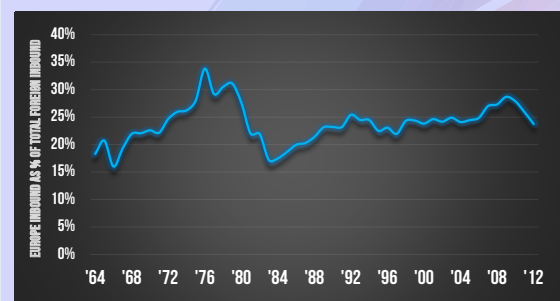
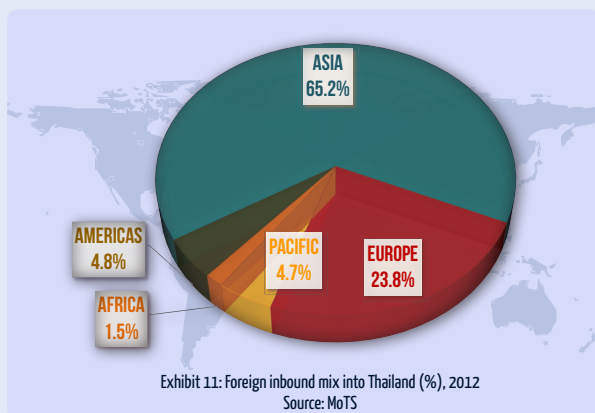


Exhibit 10: Foreign Arrivals from Europe into Thailand as a Percentage of Total Foreign Arrivals, 1964-2012





The current relative position of Thailand's current foreign inbound mix - as at 2012 - is represented in the following chart (Exhibit 11).



Clearly, Asia and Europe dominate the mix, accounting for almost 90% of foreign arrivals in 2012 (See also exhibit 12).

As we can see from Exhibit 12 seven of the top source markets by volume, are in Asia (Exhibit 12); Europe is still significant of course, driven by Russia and to a lesser extent by the United Kingdom, while Australia is on the way to joining the one-million club.

NATIONALITY	ARRIVALS 2012	% OF TOTAL
CHINA	2,789,345	12.5
MALAYSIA	2,560,963	11.5
JAPAN	1,371,253	6.1
RUSSIA	1,317,387	5.9
KOREA (ROK)	1,169,131	5.2
INDIA	1,015,865	4.6
LAO PDR	951,090	4.3
AUSTRALIA	930,599	4.2
UNITED KINGDOM	870,164	3.9
SINGAPORE	821,056	3.7
TOTAL	13,796,853	61.9

Exhibit 12: Top 10 Source Markets into Thailand, by Volume, 2012

It is essential to consider the volume of arrivals against other metrics including length of stay and receipts generated. By way of example, and using 2011 data as the most recent complete figures available, it can be seen that those markets with the longest stays and those generating the largest tourism receipts (by relative share percentage) differ somewhat from those generating the most arrivals.

Russia and the United Kingdom top the list in terms of days spent in Thailand, as seen below in Exhibit 13.

SOURCE MARKET	% DAYS
RUSSIA	7.54
UNITED KINGDOM	7.22
CHINA	7.00
MALAYSIA	6.43
AUSTRALIA	5.76
GERMANY	5.57
USA	4.87
JAPAN	4.55
FRANCE	4.28
KOREA (ROK)	3.94
TOTAL	57.16

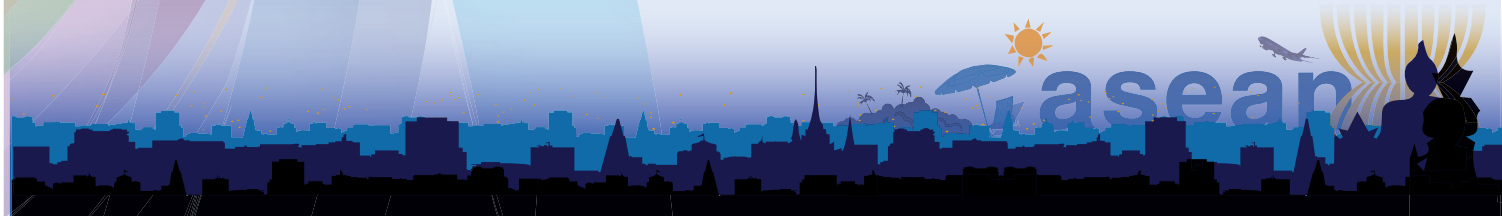
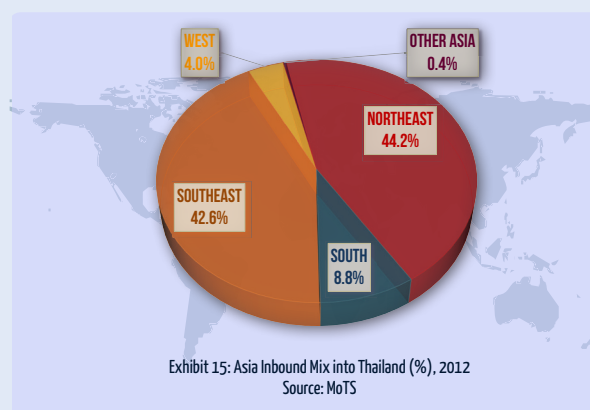
Exhibit 13: Top Ten Source Markets by Days in Thailand (%), 2011  
Source: MoTS

Similarly, while Russian visitors generate the most in terms of tourism receipts (7.74%), China (7.47%) follows closely behind as Exhibit 14 illustrates.

SOURCE MARKET	% RECEIPTS (\$)
RUSSIA	7.74
CHINA	7.47
AUSTRALIA	6.68
MALAYSIA	6.42
UNITED KINGDOM	6.41
USA	5.19
JAPAN	4.86
GERMANY	4.68
KOREA (ROK)	4.40
INDIA	3.91
TOTAL	57.75

Exhibit 14: Top Ten Source Markets by Tourism Receipts Generated in Thailand (%), 2011  
Source: MoTS

As seen in Exhibit 15, Northeast and Southeast Asia captured almost 87% of the total Asia inbound volume into Thailand in 2012.



By individual source market, the top ten Asian markets account for more than half of the total foreign arrivals into Thailand during 2012 and almost 90% of those are from a combination of markets comprising of North, South and Southeast Asia (refer to Exhibit 16).

NATIONALITY	ARRIVALS 2012	% OF ASIA	% OF TOTAL
CHINA	2,789,345	20.2	12.5
MALAYSIA	2,560,963	18.6	11.5
JAPAN	1,371,253	9.9	6.1
KOREA (ROK)	1,169,131	8.5	5.2
INDIA	1,015,865	7.4	4.6
LAO PDR	951,090	6.9	4.3
SINGAPORE	821,056	6.0	3.7
VIETNAM	617,804	4.5	2.8
HONG KONG SAR	472,699	3.4	2.1
INDONESIA	448,748	3.3	2.0
TOTAL	12,217,954	88.6	54.8

Exhibit 16: Top 10 Asia Source Markets into Thailand, by Volume, 2012  
Source: MoTS

The other significant source region for Thailand, Europe, sees most of that volume coming from Western and Northern Europe (34.5% and 32.7% respectively) with Eastern Europe now accounting for close to one-quarter of the arrivals from Europe in 2012 (refer to Exhibit 17).

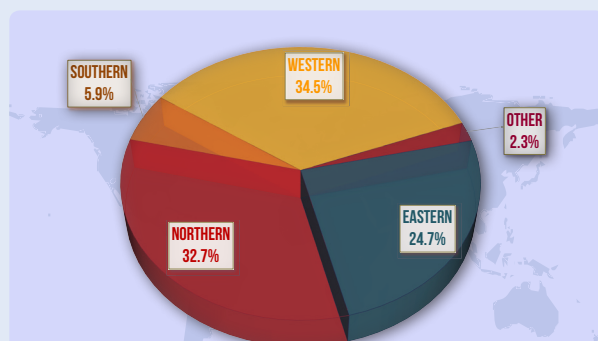


Exhibit 17: Europe Inbound Mix into Thailand (%), 2012  
Source: MoTS

While Eastern Europe as a whole may only deliver 25% of the total arrivals from Europe, it is nevertheless Russia that generates the most arrivals from a single European source market, as exhibit 18 clearly shows.

NATIONALITY	ARRIVALS 2012	% OF TOTAL
RUSSIA	1,317,387	5.9
UNITED KINGDOM	870,164	3.9
GERMANY	681,566	3.1
FRANCE	572,996	2.6
SWEDEN	350,565	1.6
NETHERLANDS	207,499	0.9
ITALY	199,089	0.9
SWITZERLAND	190,784	0.9
DENMARK	167,118	0.7
FINLAND	148,649	0.7
TOTAL	4,706,817	21.1

Exhibit 18: Top 10 European Source Markets into Thailand, by Volume, 2012  
Source: MoTS

## REGIONAL DISPERSION

Exhibit 19 illustrates the usage of commercial accommodation in regional Thailand, the most detailed and up-to-date data are for Bangkok, Pattaya, Chiang Mai and Chiang Rai, which are Thailand's most popular destinations.

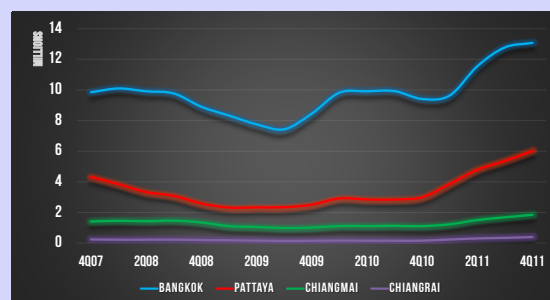


Exhibit 19: Moving Annual volume of Foreign Arrivals (annual) into Commercial Accommodation in Regional Areas of Thailand 4Q07-4Q12  
Source: MoTS

Even with the substantial difference in arrival numbers it is clear that each of the regions shown above is realising increasing numbers of foreigners. Recalculating these as a series of indices, allows for a better comparative display of growth rates independent of the volumes into each region (refer to exhibit 20).



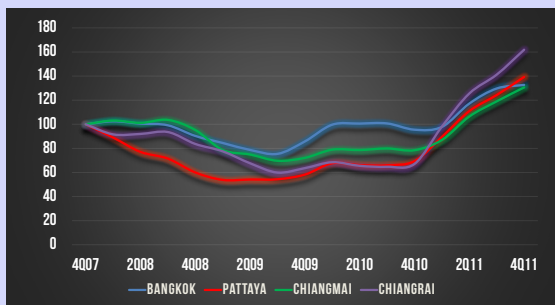


Exhibit 20: Index of Foreign Arrivals into Commercial Accommodation, Moving Annual Total by Quarter, 4Q07-4Q11  
Source: MoTS

A similar picture emerges for domestic arrivals, which in general are all tracking upwards, albeit at different rates (refer to Exhibit 21).

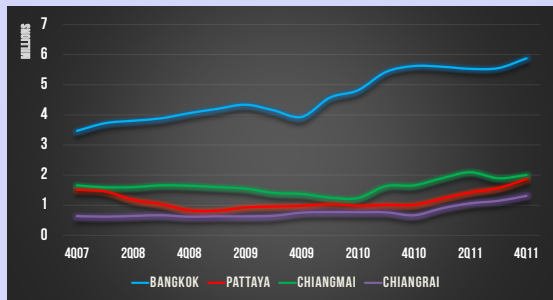


Exhibit 21: Domestic Arrivals into Commercial Accommodation, Moving Annual Total by Quarter, 4Q07-4Q11  
Source: MoTS

Once again however, there is a substantial difference in arrival numbers so the recalculation to indices, which can be seen below in Exhibit 22, shows these rates of growth more clearly.

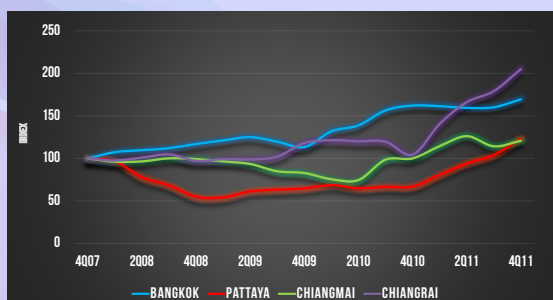


Exhibit 22: Index of Domestic Arrivals into Commercial Accommodation, Moving Annual Total by Quarter, 4Q07-4Q11  
Source: MoTS

As a final review of regional dispersion, indices of arrivals, both foreign and domestic have been charted for each of the four regions covered here (seen below in Exhibits 23-26).

Commercial accommodation in Bangkok is seeing a faster rate of growth in demand from domestic arrivals, but off a much smaller numeric base (refer to Exhibit 23). At the end of 2011, domestic demand equated to less than half of that from foreign visitors.

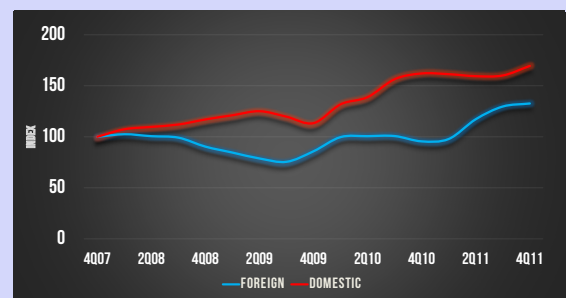


Exhibit 23: Index of Domestic and Foreign Arrivals into Commercial Accommodation in Bangkok, Moving Annual Total by Quarter, 4Q07-4Q11  
Source: MoTS

Pattaya is experiencing roughly the same pattern for demand from both foreigners and domestic travellers alike, as can be seen in Exhibit 24, with the former edging up a little faster in recent periods. Domestic demand in Pattaya was about one-third that of foreign demand at the end of 2011.

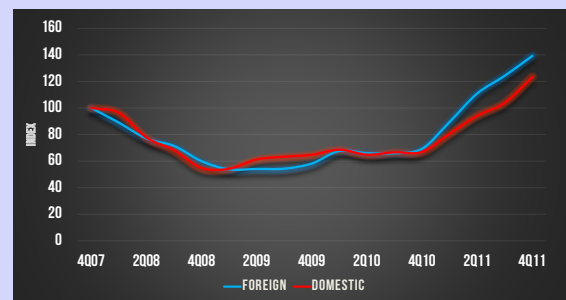


Exhibit 24: Index of domestic and foreign arrivals into commercial accommodation in Pattaya, moving annual total by quarter, 4Q07-4Q11  
Source: MoTS



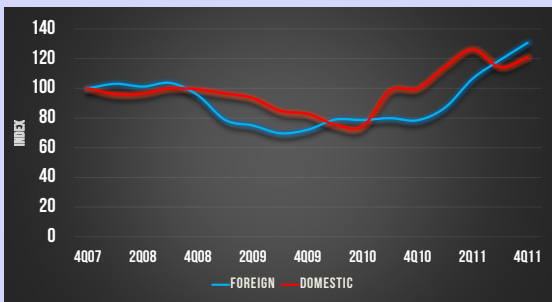


Exhibit 25: Index of Domestic and Foreign Arrivals into Commercial Accommodation in Chiang Mai, Moving Annual Total by Quarter, 4Q07-4Q11  
Source: MoTS

Chiang Mai saw a slight dip in the rate of growth of domestic demand for commercial accommodation during the early part of 2011, allowing foreign demand to outpace it for the first time in almost 12 months (see Exhibit 25). Domestic demand is only a little larger than foreign demand.

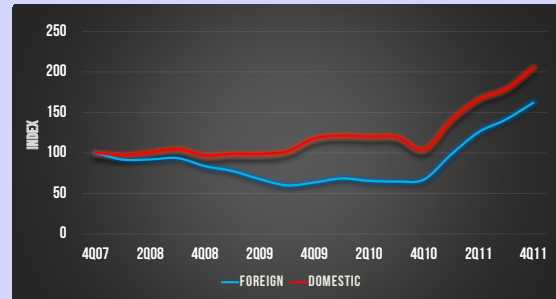


Exhibit 26: Index of Domestic and Foreign Arrivals into Commercial Accommodation in Chiang Rai, Moving Annual Total by Quarter, 4Q07-4Q11  
Source: MoTS

## OVERALL HOTEL PERFORMANCE 2012 – RELATIVE POSITION

According to data presented by STR Global at the Thailand Tourism Forum (Feb 2013), Thailand was the regional leader in 2012 with respect to gains in Revenue Per Available Room (RevPAR), ending the year with an increase of more than 15% year-on-year.

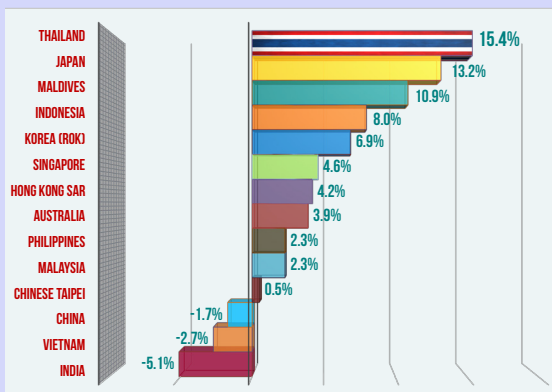


Exhibit 27: Growth (%) in RevPAR Across Asia, 2012  
Source: STR Global (2013)

When it comes to the value of RevPAR however, a completely different picture emerges, where Bangkok is positioned very much differently, as is demonstrated from the data in Exhibit 28 below.

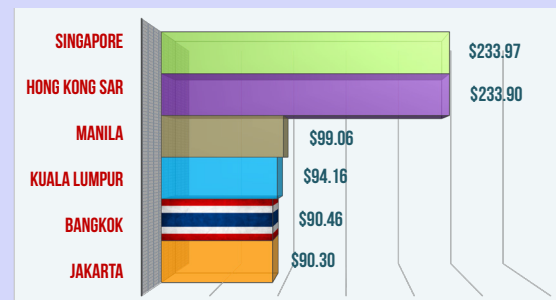


Exhibit 28: Average RevPAR in Asia, 2012 (US\$)  
Source: STR Global (2013)

This certainly reinforces the view as routinely stated in the Various Country Brand Index reports, including the 2012-13 edition, that Thailand is number one for 'Value for Money' within the tourism industry. Surprisingly however, across the tourism metrics, Thailand failed to rank ('did not rank', dnr) in two of the seven such measures covered in the 2012-13 report.





METRIC	RANK
VALUE FOR MONEY	1
NIGHTLIFE	9
FOOD	10
BEACH	10
SHOPPING	11
ATTRACTIONS	DNR
RESORT & LODGING OPTIONS	DNR

Exhibit 29: Rank of Thailand in the 2012-13 Country Brand Index (Tourism)  
Source: FutureBrand

While the overall rank of Thailand, across all dimensions, is 26th in 2012-13, it should be noted that this overall position is predicted by the authors of the report to be as high as 11th over the coming years.

This positive outlook is also reinforced by the hotel investment pipeline for Thailand, which is still extremely active. According to STR Global, Thailand's hotel pipeline has the following characteristics:

- The 5th largest active pipeline in Asia Pacific by rooms (4th by hotels);
- Accounts for 13,968 rooms (Philippines has 10 more at 13,978);
- Supply growth over the next four years is 8.75%, which is lower than the Asia/Pacific average;
- Some 39 hotels (6,172 rooms) are already under construction;
- Another 32 hotels (4,889 rooms) are in the final planning stage;
- Around 27.5% of the pipeline is in the luxury/upper-upscale chain sector;
- Around 42.5% of the active pipeline is in Bangkok, while around 25% is in Phuket.

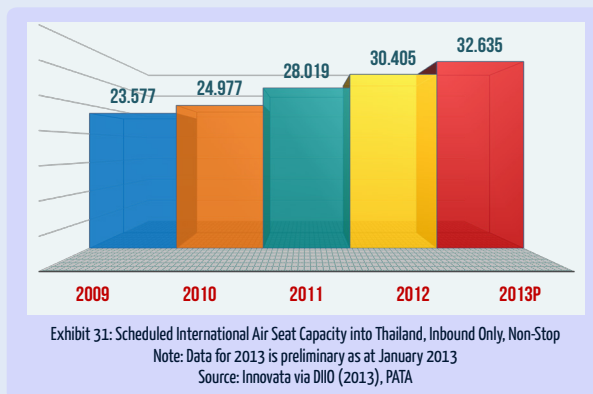
## THE AVIATION COMPONENT

The number of scheduled international flights (non-stop, inbound only) into Thailand increased by 10% in 2012 after several years of already strong capacity increases to reach an inbound volume in 2012 of more than 126,800. This is expected to increase even further in 2013 to reach in excess of 137,400 flights (exhibit 30).



Exhibit 30: Scheduled International Air Flights into Thailand, Inbound Only, Non-Stop  
Note: Data for 2013 is preliminary as at January 2013  
Source: Innovata via DIIO (2013), PATA

Similarly with international inbound air seat capacity (scheduled), which expanded by 8.5% in 2012 and which is expected to increase again in 2013, by a little over seven percent to reach more than 32.6 million seats (Exhibit 31).



The bulk of the additional air seat capacity in 2013 appears to be slated for DMK in Bangkok, followed by Phuket (HKT); Suvarnabhumi (BKK) and Hat Yai (HDY) appear to face some minor contractions.

AIRPORT	2012	2013P	VOLUME CHANGE
BANGKOK (DMK)	647,898	2,716,812	2,068,914
PHUKET (HKT)	2,622,693	2,836,929	214,236
CHIANG MAI (CNX)	343,567	401,518	57,951
KRABI (KBV)	151,382	204,113	52,731
KOH SAMUI (USM)	243,339	285,608	42,269
CHIANG RAI (CEI)	7,765	18,068	10,303
HUA HIN (HHQ)	1,564	10,676	9,112
SURAT THANI (URT)	25,881	29,332	3,451
HAT YAI (HDY)	145,152	142,632	-2,520
BANGKOK (BKK)	26,215,938	25,989,096	-226,842
<b>TOTAL</b>	<b>30,405,297</b>	<b>32,634,784</b>	<b>2,229,487</b>

Exhibit 32: Scheduled International Air Seat Capacity Changes into Thailand, 2013  
 Note: Data for 2013 is preliminary as at January 2013  
 Source: Innovata via DIIO (2013), PATA

Even so, the vast bulk of the seat capacity remains with BKK, with almost 26 million seats available in 2013. Nevertheless, the growth (as opposed to volume) in additional seats appears to be largely concentrated on DMK, with Thai Air Asia being the major contributor.

ORIGIN	DESTINATION	CARRIER	2013	VOLUME INCREASE
KUALA LUMPUR (KUL)	DMK	AIRASIA	388,080	305,280
SINGAPORE (SIN)	DMK	THAI AIRASIA	306,600	229,320
MACAU SAR (MFM)	DMK	THAI AIRASIA	245,280	187,152
VIETNAM (SGN)	DMK	THAI AIRASIA	183,960	145,320
QATAR (DOH)	BKK	QATAR AIRWAYS	505,335	142,314
KUALA LUMPUR (KUL)	DMK	THAI AIRASIA	183,960	141,288
MYANMAR (RGN)	DMK	THAI AIRASIA	183,960	138,096
CAMBODIA (PNH)	DMK	THAI AIRASIA	115,080	99,624
INDONESIA (CGK)	DMK	INDONESIA AIRASIA	131,400	99,000
HONG KONG SAR (HKG)	DMK	THAI AIRASIA	122,640	91,728

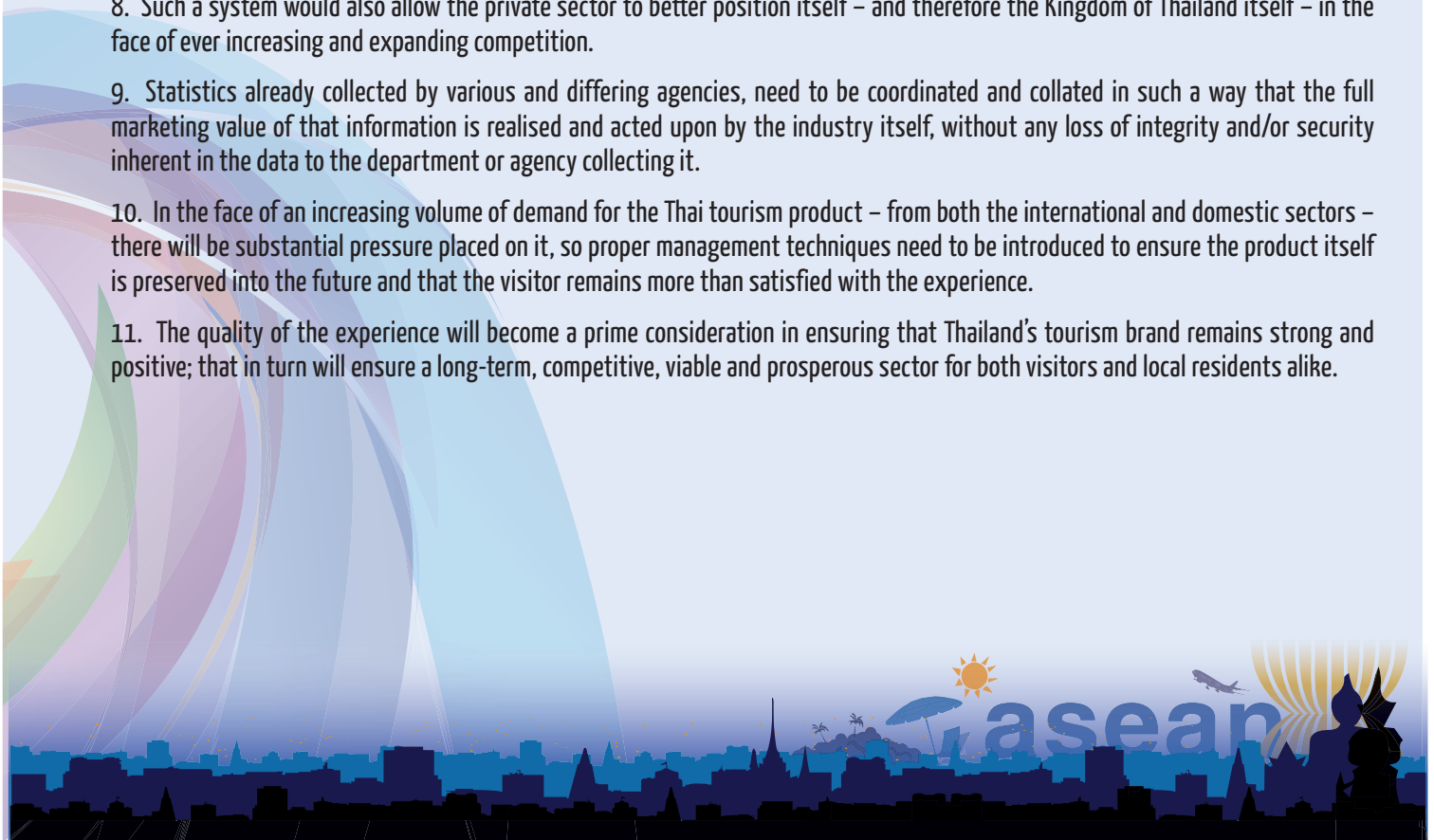
Exhibit 33: Scheduled International Air Seat Capacity Changes into Thailand, 2013 - Top Ten by Origin-Destination  
 Note: Data for 2013 is preliminary as at January 2013  
 Source: Innovata via DIIO (2013), PATA



## OVERALL FORECAST FOR THE FUTURE

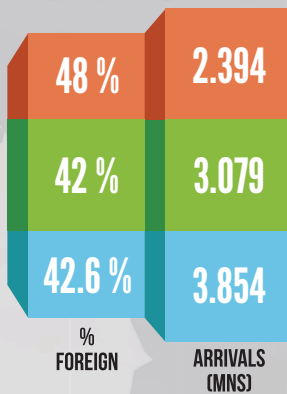
The information provided earlier intended to identify key trends and issues within the tourism landscape in Thailand. What follows is a general overview of factors that will likely be of consideration in planning and developing travel and tourism in the future.

1. Thailand has experienced remarkable growth in foreign arrivals over many decades, but with a particular surge over the most recent times. This is expected to continue, at least in the short-term.
2. Such a view is supported by the aviation and accommodation sectors, both of which are deploying/building additional capacity in 2013, on the back of substantial increases over the last few years.
3. Furthermore, Thailand is seen as being one of the main destinations set to increase its relative Country Brand Image to be placed somewhere in the top 15 global rankings sometime in the near future.
4. The issues facing Thailand seem therefore to be more in the distribution and servicing of this demand, rather than merely stimulating it. There are a number of issues related to this factor alone that need to be considered, including:
  - Ease of visa issuance (without loss of security integrity);
  - Smoother entry/egress through border checkpoints, especially at the international air gateways;
  - More professionally trained service personnel (both in general service and in the public sector e.g. tourist police etc.);
  - Better English proficiency; and
  - A better preparedness for AEC in 2015.
5. In addition, a focus on metrics beyond just visitor numbers needs to be introduced and continually improved, with special emphasis being given to measures of the dispersion of visitors, their length of stay, spend and impacts on Thai society generally.
6. The mix of international visitors therefore plays an especially important role in this regard, as the difference in these metrics varies widely from individual source market to individual source market, as well as between segments within each of those populations.
7. In order to best capitalise on the opportunities offered with the changing dynamics and mix of international visitors, a better combination of related statistics needs to be generated, evaluated and distributed to the industry in a consistent and timely manner.
8. Such a system would also allow the private sector to better position itself – and therefore the Kingdom of Thailand itself – in the face of ever increasing and expanding competition.
9. Statistics already collected by various and differing agencies, need to be coordinated and collated in such a way that the full marketing value of that information is realised and acted upon by the industry itself, without any loss of integrity and/or security inherent in the data to the department or agency collecting it.
10. In the face of an increasing volume of demand for the Thai tourism product – from both the international and domestic sectors – there will be substantial pressure placed on it, so proper management techniques need to be introduced to ensure the product itself is preserved into the future and that the visitor remains more than satisfied with the experience.
11. The quality of the experience will become a prime consideration in ensuring that Thailand's tourism brand remains strong and positive; that in turn will ensure a long-term, competitive, viable and prosperous sector for both visitors and local residents alike.

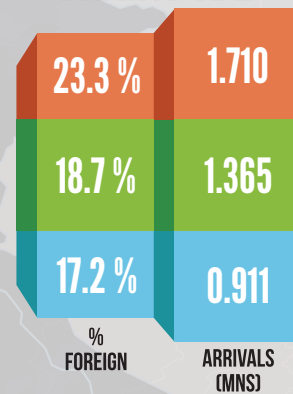


# ARRIVALS AT COMMERCIAL ACCOMMODATION ESTABLISHMENTS-BY REGION

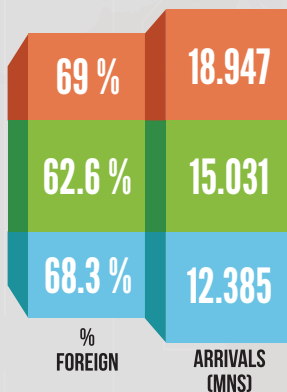
## CHIANG MAI



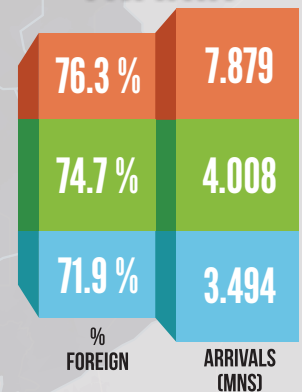
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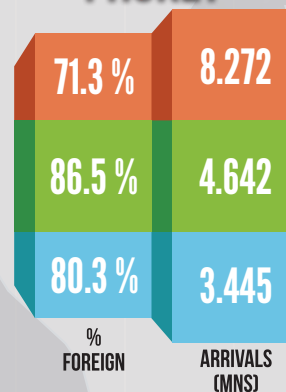
## BANGKOK



## PATTAYA



## PHUKET



Year

2011

2010

2009

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