



The Ministry of Tourism and Sports
Thailand

The Second National Tourism Development Plan

(2017 - 2021)





Acknowledgements

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All Thai people play a role in creating a memorable tourism experience, either as a welcoming host or as a provider of tourism products and services. More than 50 industry experts have been engaged throughout the plan's development, each representing a unique element of Thailand tourism: from the luxury segment to community-based tourism segments, both from public and private sector. Sincere recognition to all the experts, who have contributed their time and opinions in shaping the development direction of Thailand's tourism for the next 5 years. Also, sincere appreciations to public and private stakeholders who have graciously participated in 5 focus groups throughout the nation to voice their concerns, put forward their ideas, and collectively formulate initiatives that can resolve and add competitiveness to Thailand's tourism. Moreover, special thanks to all the participants in NTDP public hearings. Only through consensus can Thailand grow with harmony, into a true world-class high-quality tourism destination.

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Executive Summary

Tourism is one of the most prominent and fastest growing industries in the world. In 2015, the tourism industry generated more than USD 7.8 billion in value, which accounted for 9.8% of global GDP. Global international tourism receipts have been increasing at a rate of 5% over the past 5 years, reaching USD 1,260 billion in 2015 and becoming the third largest global export after fuels and chemicals. Among these, 33% was generated from Asia Pacific region and with 8% from Southeast Asia.

In Thailand, the tourism industry is of great economic significance when compared to most countries in the region. It accounted for 16.6% of Thailand's GDP in 2015, which surpassed most of the countries in the region and was higher than global average of 9.8%. The tourism receipts have as well been experiencing strong growth since 2011 at 15.6% p.a. In addition to its GDP contribution and receipts, the tourism industry was responsible for more than 4.2 million jobs or 11% of total national employment, exemplifying its strong contribution to the social economy. Thailand tourism industry consists of 2 sub-groups, which are international tourism and domestic tourism.

In addition, Thailand is among the top tourism destinations in the world with its unique culture and natural offerings, its hospitality, and its location at the center of Southeast Asia. According to the assessment of Travel and Tourism Competitiveness Index (TTCI) by World Economic Forum, Thailand was ranked #35 from 141 countries assessed and was particularly strong on Natural Resources (#16), Air Transport Infrastructure (#17), and Tourist Service Infrastructure (#21). With intensifying competition, changing tourists' preferences and increasing expectations, it is critical for Thailand to prepare and enhance its supply capacities and quality to match global demand. At the same time, it has to enhance its tourism assets, which are needed for sustainable growth. The tourism ecosystem is made up of several industries, such as attractions, hotels, restaurants and transportation. All of which are critical in improving the competitiveness of Thailand, supporting the growth in the number of tourists, and enhancing tourists' travelling experiences. Therefore, The second NTDP devised the Tourist Lifecycle framework to analyze each tourist touch-point to find the gaps and opportunities for improvement.

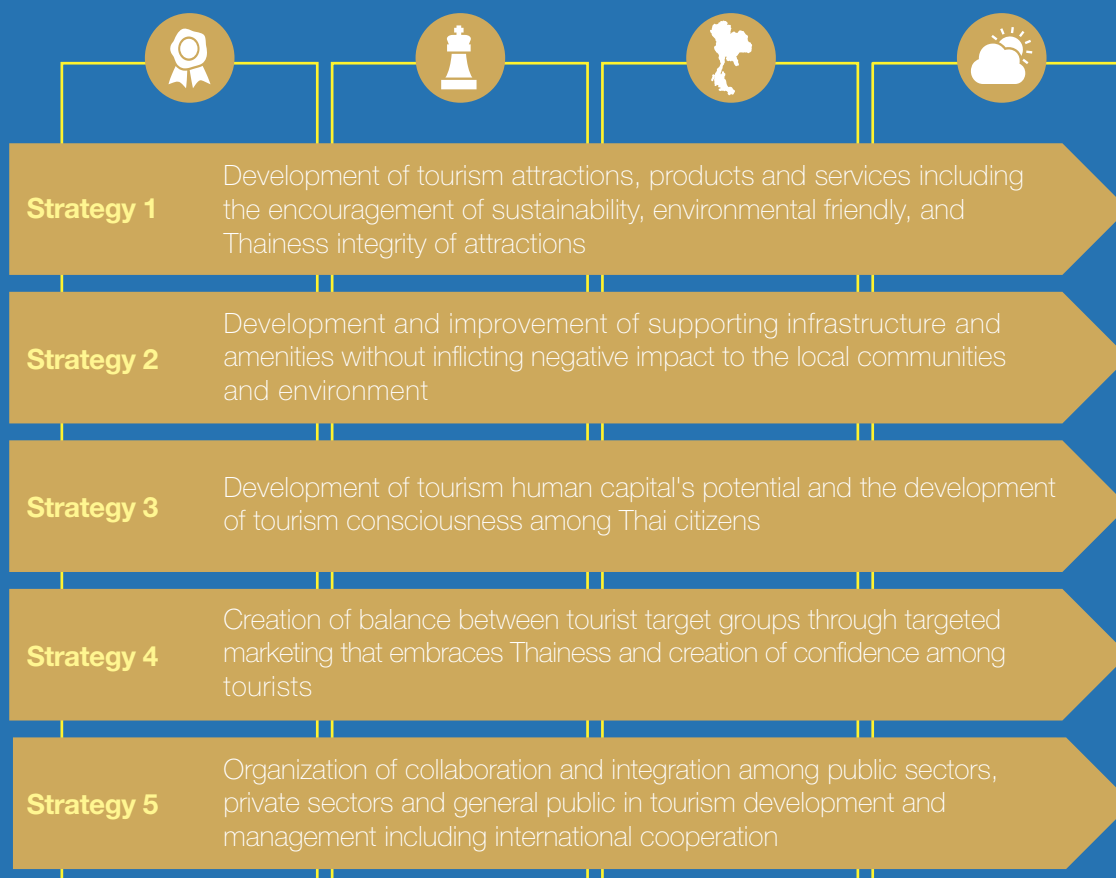
Tourism industry is an ever-changing, yet fast growing sector. Thailand tourism needs to enhance the competitiveness of its offerings along the Tourist Lifecycle while taking into account the major trends governing the dynamic of global tourism landscape. To effectively drive the growth of Thailand's tourism industry, everyone needs to have the same picture of where Thailand wants to be. Thailand's tourism vision towards 2036 depicts the ideal Thailand as a tourism destination. The vision set an inspiring, yet achievable target for all the stakeholders to align on the development direction, which will best realize the potential of Thailand tourism. By 2036, **Thailand will be a World's leading quality destination, through balanced development while leveraging Thainess to contribute significantly to the country's socio-economic development and wealth distribution inclusively and sustainably.**

To realize the vision of Thailand's tourism 2036, the nation needs to devise stepping stones to lay out the development path to reach the ambitious goal. 5-year objectives and targets have been set to portray what Thailand could realistically achieve in the next 5 years. The overarching strategic objectives and targets focus on improving the overall quality and capabilities of Thailand's tourism industry and support the sustainable growth to closely adhere to the great value of Thainess. Thailand's tourism has seen great increases in number of tourists as well as the tourism receipts over the past few years. The challenges now lie in the ability to derive greater economic benefits from tourism industry while ensuring the sustainability of the nation's tourism assets. A set of KPIs is defined, each targeting a different aspect of the 5-year tourism development objectives.

In achieving the vision of Thailand tourism in 2036, each party has the responsibility to take part in the cooperative development of Thailand's tourism industry. Five strategies have been defined to guide development actions to accomplish the four objectives. In the process of analyzing and defining these strategies, several stakeholders and tourism-related parties were closely involved to brainstorm and synthesize the key actions needed to take Thailand tourism to the next level. In addition, the strategies were deduced from extensive analysis of the global tourism landscape and trends that could affect Thailand tourism performance. They also take into account the capabilities and room for improvement of Thailand's tourism along the Tourist Lifecycle analysis. The insights and learnings from the study of best-in-class countries and regional peers have been incorporated into the process, to enhance the effectiveness of strategy with proven cases.

In addition to the layout strategic axes, the process resulted in more than 100 ideas being generated. These ideas were drilled down to a portfolio of 55 detailed initiatives, across 5 strategic axes.

Figure 1: Thailand's tourism's 5-year strategic axes





chapter 01

Introduction

The country renowned for its unique heritage and culture, flavorful cuisine, serene seas and sands and welcoming hospitality, Thailand has been the top-of-mind destination for many travelers. Over the past 5 years, Thailand has seen phenomenal growth in its tourism industry, both on the number of tourists on the income generated. It has become the world's 11th destination in terms of international arrivals, welcoming almost 30 million international tourists in 2015. In addition, the tourism sector has generated income that accounted for 17% of national GDP in 2015 or USD 69 billion in tourism revenue, which also placed Thailand as the world's 6th destination in terms of income from international tourism receipts. This large and fast-growing sector has become one of the main gears propelling the growth of the nation.

In 2012, National Tourism Development Plan 2012–2016 (NTDP 2012-2016) was developed to be the National Master Plan for tourism development. It focused on building quality tourism offerings, while keeping the balance of demand and supply. Upon the conclusion, NTDP 2012-2016 had successfully developed the tourism market, resulting in tourism receipt growth of more than 15%, a beyond-target development of tourism competitiveness. There were also 8 tourism clusters established. The second NTDP will continue this growth, by better preparing Thailand for the ever-changing global tourism market and further embrace sustainable developments of Thailand's tourism sector.

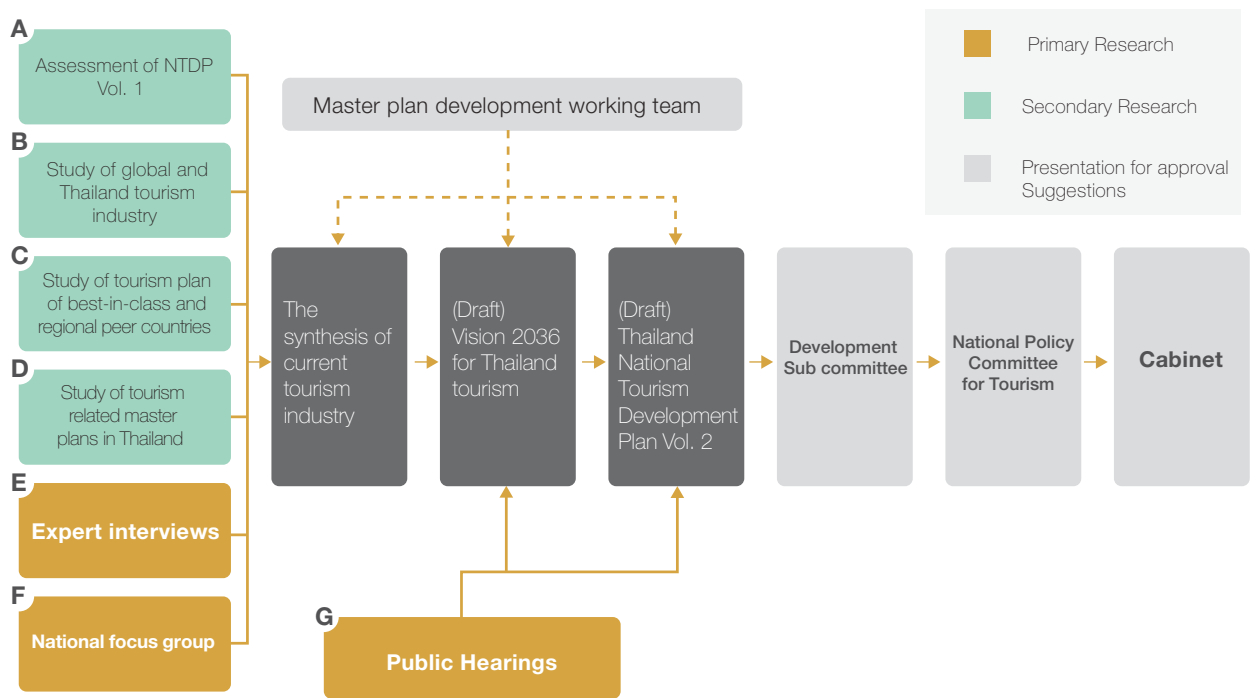
A forward-looking and long-term development is at the core of national development agenda. Thailand is moving towards a better nation with “Prosperity, Stability and Sustainability”, as guiding principles under a 20-year national development vision. Human capital development and inclusiveness of the whole population are at the forefront of national agenda. Therefore, The second NTDP places high emphasis on taking a long-term view and laying down the 20-year national tourism development vision towards 2036. This Master Plan encompasses strategic development plans and detailed initiatives for the first 5 years (2017-2021) that will reinforce Thailand's tourism competitiveness to support the achievement of a more prosper, stable, and sustainable Thailand.

The Master Plan consists of 5 strategic axes, each aims to enhance the quality and the capabilities of the critical factors in tourism development. Each axis focuses on developing the necessary infrastructure, the quality tourism offerings, the quality of tourism human capital and participation of local community, the authentic Thai image through effective marketing, and the integrative developments and effective governance. A 5-year development roadmap and detailed initiatives are developed as common guidelines. This will align the directions and resources with all implementation entities for the most efficient and effective tourism development.

To ensure that the second NTDP takes the swift changes and opportunities of tourism industry into account, while reflecting suggestions from all involving parties, the plan has been developed with regards to 5 key inputs, consisting both global and local perspectives.

- 1. Assessment of the first NTDP in 2012–2016 through focus groups, surveys, interviews, and review of the half-plan assessment of the first NTDP
- 2. Study of global and Thailand’s tourism industry, including analysis of current situation and expected future evolution of global tourism industry, analysis of current situation and expected future evolution of Thailand’s tourism industry, analysis of key global trends and implications for Thailand including trends for each tourism segment, and assessment of Thailand’s tourism industry across various dimensions of the tourist lifecycle
- 3. Study of tourism development Master Plans and strategies of both regional competitors and best-in-class countries through the study of tourism vision and strategic axis, as well as studying the international best-practices of each dimension across the Tourist Lifecycle
- 4. Study of point of views and plans of stakeholders in Thailand tourism industry, including reviews of Master Plans of organizations in Thailand involved with tourism development, interviews with experts and stakeholders in the tourism industry, and focus groups in the 5 regions of Thailand
- 5. Validation and integration of inputs of stakeholders from the public sector, the private sector and the general public

Figure 2: National Tourism Development Plan Vol. 2 development framework



This framework ensures that the development procedure is built upon the basis of consensus from all involving parties, a crucial point that leads to integrative implementation and successful tourism development.

chapter 02

Diagnosis

2.1 Overview of global tourism

Tourism is one of the most prominent and fast growing industries in the world. In 2015, tourism industry created more than USD 7.8 billion in value which accounted for 9.8% of the global GDP. Global international tourism receipts have been increasing at a rate of 5% over the past 5 years, reaching USD 1,260 billion in 2015, becoming the third largest global export after fuels and chemicals. Among this, 33% were generated in Asia Pacific region, specifically 8% from Southeast Asia. The increase in tourism receipts is driven by 2 factors: the number of tourist and the average spending per tourist per trip.

There were almost 1.2 billion international tourist arrivals in 2015. It has been growing at 6% p.a. over 2010-2015. Among which, 279 million international arrivals were in Asia Pacific, which accounted for 24% of global international arrivals – the second largest after Europe at 51%. The World Tourism Organization (UNWTO) expects the number of global international tourist arrivals to grow at a humble rate of 3.3% p.a. over the next 15 years, reaching 1.8 billion arrivals by 2030. Emerging economy destinations are expected to see the highest growth of international tourist arrivals, with some expecting double digit growth throughout the next 15 years. By 2030, 57% of global international tourist arrivals are expected to be in emerging economy destinations. Asia Pacific is expected to enjoy higher-than-global arrivals growth at 4.9% p.a. through 2030.

In addition, the average spending per trip reached USD 1,120 per tourist per trip in 2015, which has been growing at a slow rate of 1.9% p.a. China, the United States and Germany are in the global top 3 in tourism expenditure, as a result of their strong economies and currencies. On the receiver side, Europe has the largest total tourism receipts, yet the highest receipts per arrival are in the Americas and Asia-Pacific.

Despite its strong growth in the past, the global tourism industry is on a continuous change, depending on tourist preferences, global economy, major trends, regulations, international stability, etc. Thus, the constant attention to monitor the changing trend and the flexibility to adapt the national tourism development plan are essential to sustain and improve nation's tourism competitiveness given the global landscape.

2.2 Overview of Thailand tourism

The tourism industry is of great economic significance for Thailand when compared to most countries in the region. It accounted for 16.6% of Thailand's GDP in 2015, which surpassed most of the countries in the region and is higher than global average of 9.8%. The industry generated more than USD 69 billion in total tourism receipts. Tourism receipts have been experiencing strong growth since 2011 at 15.6% p.a. In addition to its GDP contribution and receipts, the industry responsible for more than 4.2 million employments or 11% of total national employment, showing its strong contributions to the social economy. Thailand's tourism industry consists of 2 sub-groups which are international tourism and domestic tourism.

2.2.1 International tourism in Thailand

Thailand international tourism receipts reached almost USD 45 billion in 2015 and have grown robustly at 16.8% p.a. over the past 5 years, despite the decline in 2014 due to political turmoil. This growth is well above the global average of 5% over the same period. This significant growth is a result of 3 main factors: the number of international tourist, the length of stay and the spending per day per international tourist.

1. Number of international tourists has been growing at 12% p.a. over the last 5 years, surpassing the global average at 4.4% p.a. and placed Thailand as the global top 11th in international tourist arrivals in 2015. Noticeably, more than 50% of total arrivals are concentrated within the top 5 countries with the Chinese being the most prominent contributor at 27% of total international tourist arrivals. Chinese tourists are one of the most important factors contributing to the strong growth of international tourism in Thailand, as they are the fastest growing group over the past 5 years at a rate of 47% p.a. Although the top tourist origins of Thailand largely resemble those top global contributors, there are still lucrative markets Thailand can attract, such as Italy, France, and Canada.
2. Length of stay of international tourist is at an average of 9.55 days in 2015, compared to the global average of 7.3 days. Yet when compare to the global leaders, such as Australia at 26 days, the USA at 18 days and Philippines at 16.7 days, Thailand still have the potential to improve tourists' length of stay. The increase of short-haul tourists, such as Chinese and Malaysians, is one of the reasons contributing to the short average length of stay. Another reason is the limitation of intra-country travelling. Currently, most of the international tourists only visit the South and Bangkok. In 2015, Southern region of Thailand received more than 23 million international tourist arrivals or 77% of national total. On the other hand, northern region of Thailand welcomed only 1.4 million international tourists, or 5% of the total. Undoubtedly, this is a result of tourist preference to visit "Sea, Sun, Sand" tourism in the Southern region. However, Thailand has the potential to attract tourists to stay longer and travel to the other parts of Thailand.
3. Spending per day per international tourists stood at THB 5,072.7 (USD 157) in 2015. The figure has been growing with strong fundamentals, at a rate of 4.1% over 2011 to 2015. Accommodation and shopping have the top share of tourist daily spend at 30% and 24% respectively. The analysis of spending per trip by origin of international tourist has revealed that the spending by UK, Russian and US tourists are still below total average, signifying the possibility to further induce higher spending.

2.2.2 Domestic tourism in Thailand

Thailand has been aiming to grow domestic tourism simultaneously with international tourism in order to reinforce the balance for the industry. Domestic tourism receipts have been growing at 13.6% p.a. over the past 5 years. The number of domestic tourist, measured with number of trip per population per year, stands at 138.8 million trips per person per year in 2015, which has been increasing rapidly over the last 5 years at an average of 9% p.a. In other words, a Thai tourist has 1.57 trips per year on average, which is slightly over the global average of 1.5 yet still significantly lower than regional peers, such as China at 2.45 trips per year, Japan at 2.33 trips per year, Malaysia at 2.22 trips per year and South Korea at 2.02 trips per year.

Thailand has been aiming to grow domestic tourism simultaneously with international tourism in order to reinforce the balance for the industry. Domestic tourism receipts have been growing at 13.6% p.a. over the past 5 years. The number of domestic tourist, measured with number of trip per population per year, stands at 138.8 million trips per person per year in 2015, which has been increasing rapidly over the last 5 years at an average of 9% p.a. In other words, a Thai tourist has 1.57 trips per year on average, which is slightly over the global average of 1.5 yet still significantly lower than regional peers, such as China at 2.45 trips per year, Japan at 2.33 trips per year, Malaysia at 2.22 trips per year and South Korea at 2.02 trips per year.

Most of the domestic trips are short period – over the weekend – trips, resulting in the average length of stay for domestic tourism at 2.61 days. This number has also been declining at an average of 1% p.a. over the past 5 years. However, the spending per day per domestic tourist has been increasing at 5.3% p.a. and stands at THB 2,404 (USD 74.4) in 2015. The distribution of domestic tourists is more spread out across different regions when compared to that of international tourists. This is due to the type of the trip, such as relative and family visit, and the availability of information of tourist attraction across Thailand in Thai language.

2.3 Assessment of Thailand's tourism industry along the Tourist Lifecycle

Thailand is among the top tourism destination in the world with its unique culture and natural offerings, its hospitality, and its location at the center of Southeast Asia. According to the assessment of Travel and Tourism Competitiveness Index (TTCI) by World Economic Forum, Thailand was ranked #35 from 141 country assessed and was particularly strong on Natural Resources (#16), Air Transport Infrastructure (#17), and Tourist Service Infrastructure (#21).

With the intensifying competition, changing tourists' preferences and increasing expectation, it is critical for Thailand to prepare and enhance its supply capacities and quality to match the global demand. At the same time, it has to enhance its tourism assets needed for sustainable growth. The tourism ecosystem is made up of several industries, such as tourist attractions, hotels, restaurants and transports. All of which is critical in improving the competitiveness of Thailand, supporting the growth in the number of tourists, and enhancing tourists' travelling experience. To assess the potential of Thailand tourism industry, it is critical to evaluate the industry along the entire Tourist Lifecycle, from the stage of deciding to visit Thailand to the impression left after the trip concluded.

Figure 3: Tourist Lifecycle Analysis



Step 1: Deciding to go and planning

Thailand tourism marketing efforts have been among the industry's leaders. According to WEF's TICI 2015, the effectiveness of marketing campaign in Thailand is ranked #23 out of 141 countries. Besides the effectiveness of marketing campaigns, Thailand's visa requirements are also one of the most relaxed in the region at #25 out of 141 countries assessed on TICI, yet still behind Hong Kong (#3) and Singapore (#20). Relaxed visa requirement is one of the supporting factors for traveling in Thailand. The ease of trip planning is also relatively high, thanks to the presence of several online travel sites. However, low ICT adoption among Thai businesses is preventing local tourism businesses from having an effective online presence. An attractive and informative online presence can enhance the tendency of tourist visit to the attraction, especially at the height of traveler's preference for online information.

Step 2: Getting to Thailand

Air transport infrastructure is among the strengths of Thailand tourism. The nation is at the central of the region and is servicing as a transit hub for many air transport routes, which make it easy and attractive to visit Thailand. However, the international airport capacity and quality are still behind regional leaders, such as Hong Kong and Singapore. Land border is another important point of entry, yet the convenience at land border is still far behind that of airport. Among the hindrances at land border are limitation of opening hours and less generous visa exemptions. This could bring down Thailand tourism competitiveness, especially at the rise of short-haul tourism from neighboring countries.

Step 3: Staying in Thailand

There are great variety of accommodation in Thailand, ranging from a small boutique hotel to a large international chained hotel. The availability is more than adequate and the affordability is among the best in the region. In 2015, TripAdvisor rated the quality of hotels in Thailand at 4.8 from a total of 5. Despite the great availability and quality, Thailand is still facing a large number of illegal hotels, which compromise the standard and quality of overall hotel sector in long run.

Step 4: Getting around Thailand

Although there are several routes and services connecting parts of Thailand, transportation is still among the key challenges for tourists. Domestic flights are relatively expensive comparing to average tourist's budget. Public transportations, such as railway, are not covering all the major cities and are mostly low in quality. Bus and van are the alternatives, yet some do not offer pre-booking services or comprehensive English information.

Step 5: Enjoying the attractions

Thailand is renowned for its cultural and natural attractions. However, this very popularity has drawn in large number of visitors to these fragile attractions, resulting in deterioration of environment and cultural assets. Tourist flow and attraction capacity management are critical to ensure the sustainability of these attractions. In addition, many attractions are presented as-is with limited information and amenities. Thailand has the opportunity to better leverage its unique story and history to create greater impression for its tourists. Thai people are famous for their service-mindedness, which is another important factor in creating memorable traveling experience. However, ASEAN collaboration has opened the opportunities for free flow of labor, which might pose threat to Thai workforce who are relatively weaker in language proficiency.

Step 6: Convenience and Safety

Despite high availability and quality of tourist services and communication services, Thailand has critically low safety and security ranking from TICI at #132 from 141 countries assessed. The lack of standards and poor law enforcements has resulted in several crimes, accidents, and scams targeting foreign tourists. Health and hygiene are also issues for Thailand; this is clear, given that it ranked #89 from 141 countries assessed. This emphasizes the importance to enhance safety and security for tourists, as well as ensure a hygienic environment throughout tourists' touch-points.

Step 7: Reviewing post-trip

Many online platforms are available for tourists to leave a review about places they have visited. These tourist reviews can influence decisions of other potential travelers whether to visit Thailand. On TripAdvisor, Thailand's key attractions receive similar high ratings as key attractions in other countries. However, the number of online reviews is low compared to number of tourist arrivals in Thailand and to the result observed in regional peers.

Step 8: Deciding to stay long-term

It is becoming more popular among foreigners, especially from the West, to have a tropical destination as a second home for retirement and for winter getaways. Singapore and Malaysia have especially been active at attracting this tourist segment through relaxation of various policies. However, Thailand's policies are still less conducive to attract long-term visitors compared with regional peers.

Step 9: Support from the government

Overall public investment in tourism as % of GDP is high comparing to most countries in the region. However, there is room to improve the integration and collaboration of development to better ensure success and impact to the nation.

2.4 Key global trends in the tourism industry

Analysis of global tourism market reveals key megatrends driving the tourism industry, all of which are relevant to Thailand's tourism development. These megatrends can be separated into 2 main forces: growth drivers and behavioral changes.

2.4.1 Growth drivers

1. **Growing middle class and rising disposable incomes** – The middle class population is projected to grow by 5% p.a. and per capita disposable income is to grow by 2% p.a. through 2030. This will lead to an increase in tourist arrivals and travel spending going forward. Growth is mainly concentrated in APAC countries especially in China and India, which account for 30% of total inbound tourists in Thailand today.
2. **Low-cost carriers on the rise** – Air travel demand has been growing by CAGR of 5%, while average fare per passenger has been decreasing at the same rate. Low cost carriers will continue to play a pivotal role in developing the tourism industry, as they can cater to the middle class needs and provide access to domestic locations.
3. **Ageing population with high willingness to spend** – The global population is ageing with more than 17% of the population in 2030 aged over 60 as compared to 12% in 2015. The silver segment budget increase up to approximately 3 times of the younger generation per year and spend up to approximately 1.5 times more per trip. New silver generation tourists have longer life expectancy and are more adventurous than the past.

2.4.2 Behavioral changes

1. **Adoption of travel technology during travel journey** – Online channel has become a key platform across the travel journey, with global online travel sales expected to grow at CAGR of 10% towards 2019. Currently, 75% of international travelers are using online information as part of the trip planning, compared to about one-third using travel agencies and one-fourth using information from friends.
2. **Experiential travelers with more sophisticated expectations** – Travelers are demanding a deeper connection with the destination they visit and the local people they meet. Sharing economy is one example which shows how traveling is not only about relaxing and sightseeing, but it has been turning into an opportunity to become a part of a new culture at a personalized level. Globally, tour operators are reacting to this trend by offering more customized itineraries and personal guides to cater to different aspiration of individual tourist.

Tourism is an ever-changing, yet fast growing sector. Thailand's tourism needs to enhance the competitiveness of its offerings along the Tourist Lifecycle, while taking into account the major trends governing the dynamic of global tourism landscape. With this in mind, the development of Thailand tourism should focus on improving the quality and quantity of tourism offerings and infrastructure, while ensuring the sustainability of development ready for the growth in demand. Human capital should be at the center of development, to ensure inclusiveness of tourism benefits and to best showcase the value of Thailand through its welcoming hosts. Thailand should also commit to create balance in tourism industry, in terms of tourist origins, region of visit, time of visit, and domestic and international tourism. This balance will result in a resilient tourism industry that can weather changes, while continuing to propel the growth of the nation. The most important factor for the success is the integrative effort from all related parties, public or private, in driving Thailand tourism towards the same goal. These are the pivotal factor to the growth of Thailand tourism sector and are at the core of The Second National Tourism Development Plan.



chapter 03

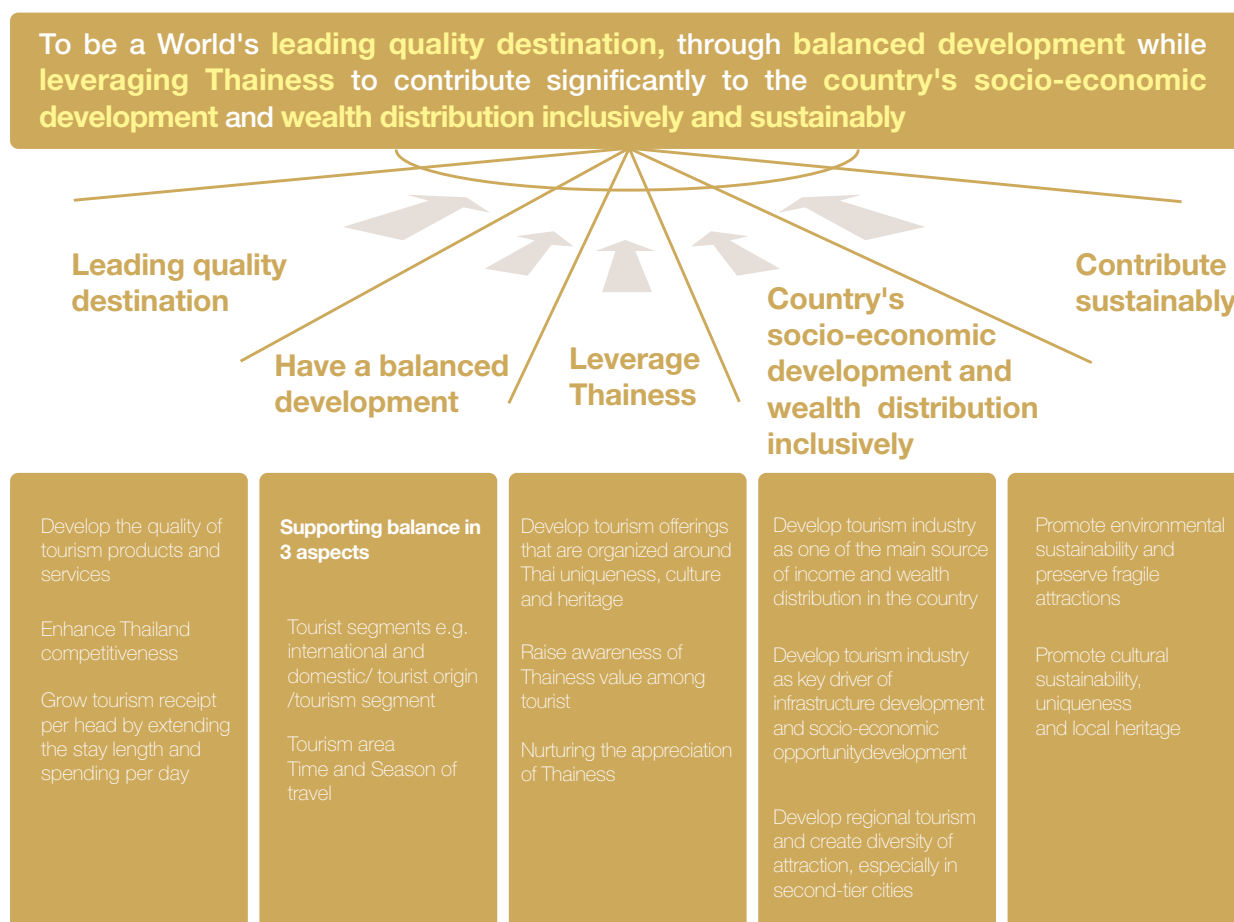
Thailand Tourism Vision towards 2036

To effectively drive the growth of Thailand's tourism industry, everyone needs to have the same picture of where Thailand wants to be. Thailand's tourism vision towards 2036 depicts the ideal Thailand as a tourism destination. The vision set an inspiring yet achievable target for all the stakeholders to align the development direction, which will best realize the potential of Thailand tourism.

Thailand's Tourism Vision

By 2036, Thailand will be a **World's leading quality destination**, through **balanced development** while **leveraging Thainess** to contribute significantly to the country's socio-economic development and wealth distribution **inclusively and sustainably**.

Figure 4: The 5 essences of Thailand tourism vision towards 2036



Thailand tourism vision towards 2036 consists of 5 key essences, which set a clear goal of Thailand's tourism for the next 20 years.

The essences of Thailand's tourism vision towards 2036

1. **Leading quality destination**

Develop the quality and diversity of tourism products and services

Enhance Thailand tourism competitiveness

Grow tourism receipts through increases in spending per trip and extend the length of stay

2. **Have a balanced development**

Balance development between tourist segments, i.e. among domestic/international tourists, among countries of origin, and among mass/niche segments

Balance development among tourism area by focusing on improving tourism in second-tier locations and local areas

Balance development among the time and season of tourism

3. **Leveraging Thainess**

Develop tourism offerings that are organized around Thai uniqueness, culture and heritage

Raise awareness and understanding of Thainess among tourists and Thai citizens

Nurture appreciation of Thainess and the value of a good host

4. **Contribute to the country's socioeconomic development and wealth distribution inclusively**

Develop tourism industry as one of the nation's main sources of income generation and wealth distribution

Develop tourism as one of the key drivers in developing infrastructure and creating opportunity for socioeconomic development for Thailand

Develop regional tourism and create diversity of attractions, especially in second-tier cities and local community areas

Generate benefits to businesses in tourism industry and other related industries

5. **Contribute sustainably**

Promote environmental sustainability and preserve fragile attractions

Promote cultural sustainability, uniqueness and local heritage



chapter 04

Thailand tourism strategy towards 2021

This strategic framework serves to translate Thailand's tourism vision towards 2036 into an actionable development plan and roadmap over the next 5 years. A calibrated set of initiatives will put in place the necessary developments in each of the key tourism segments, as well as uplifting the quality and the capacity of all the essential enabling factors surrounding the growth of Thailand tourism industry.

The designing and development of Thailand 5-year tourism development strategic framework evolved around extensive engagement, collaboration and the desire to harness the interest and expertise of all tourism industry stakeholders, to shape the future of Thailand as an outstanding tourist destination. Five industry engagement workshops, two public hearings, and over 50 expert interviews were conducted to contribute to the strategy formulation. These ensure that the framework effectively addresses current industry challenges and is implementable for all the parties to collaborate the efforts in creating Thailand as a world class tourism destination.

Thailand tourism 5-year strategic objectives and targets

In realizing the vision of Thailand tourism 2036, the nation needs to devise stepping stones to lay out the development path to reach the ambitious goal. 5-year objectives and targets have been set to portray what Thailand could realistically achieve in the next 5 years. The overarching strategic objectives and targets over the next 5 years focus on improving the overall quality and capabilities of Thailand's tourism industry and to support sustainable growth that leverages the great value of Thainess. Thailand tourism has seen a great increase in number of tourists as well as the tourism receipts over the past few years. The challenges now lie in the ability to create greater economic benefits from the industry, while ensuring the sustainability of the nation's tourism assets. A set of KPIs is defined, each targeting a different aspect of 5-year tourism development objectives.

The first objective is for Thailand tourism to become a quality tourism destination and, as a result, increase the tourism competitiveness. Quality tourism destination encompasses a destination with high standard and value-added tourism offerings. Currently, there are several quality marks in Thailand, yet none have been able to become the quality assurance trusted by international tourists. The targets over the next 5 years are to encourage more standardization of tourist attractions, tourism business, products and services, which in turn, reinforce higher tourism competitiveness.

The second objective is for Thailand tourism to be able to increase economic value with balance and sustainability. It aims to create balance between international and domestic tourism, as well as a balance of tourist origins. A balanced growth will ensure resilience of Thailand's tourism industry, which is essential to sustain the growth throughout dynamic global landscape. The target over the next 5 years is to sustain reasonable international tourism receipts growth, while encouraging more domestic tourism.

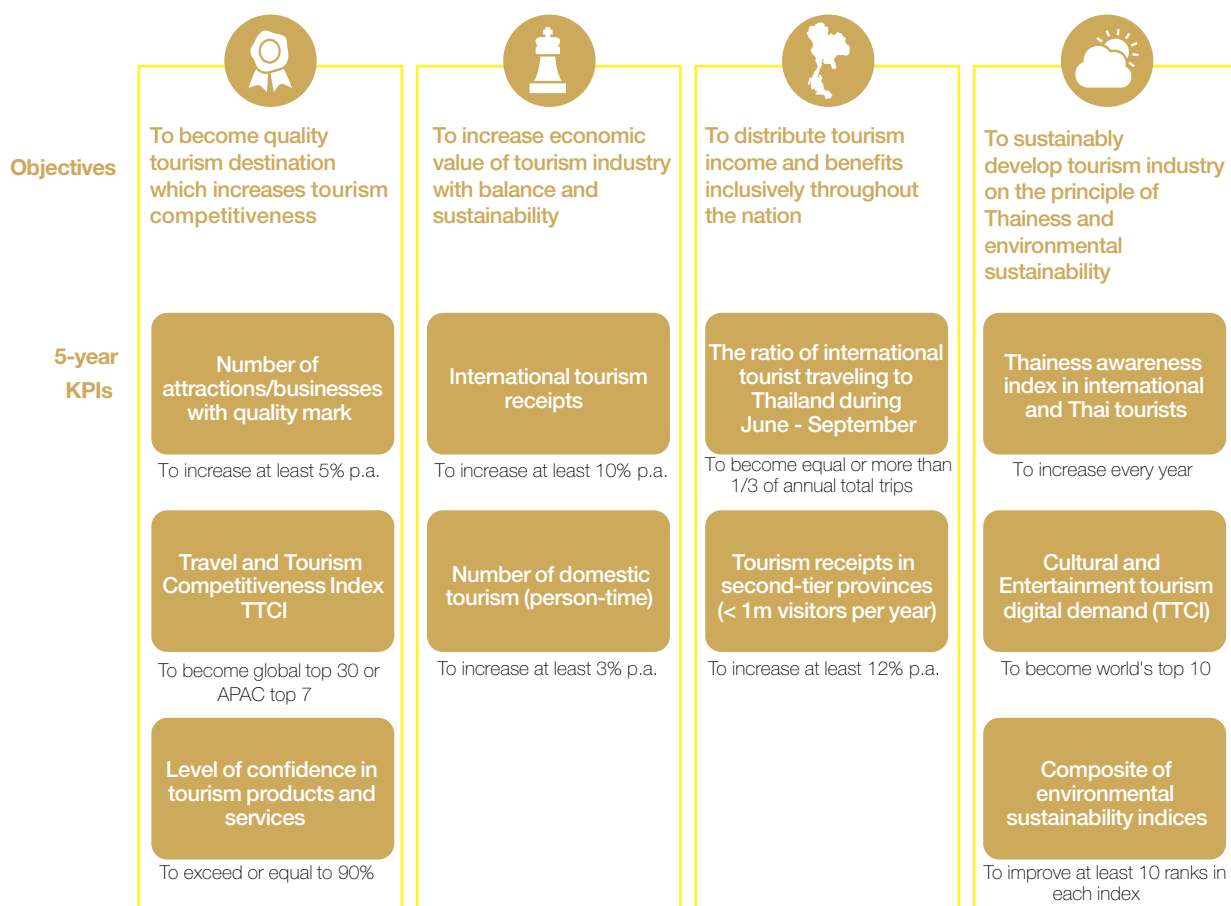
The third objective is for Thailand tourism to be able to distribute incomes and benefits inclusively throughout the nation. The aim is to spread out the tourists in terms of visiting destinations and visiting time in order to smooth out the deviation and better support tourism income generation in second-tier provinces.

The last objective is for Thailand tourism to be able to sustainably develop on the principle of Thainess and environmental sustainability. This objective aims to foster the sustainable growth, in terms of cultural sustainability and environmental sustainability. It leverages Thainess to add value to the existing tourism offerings. At the same time, it reinforces tourism growth that does not compromise sustainability of the nature. Therefore, the targets set a quantitative goal to effectively measure the increase in awareness of Thainess and the level of environmental sustainability.



These four objectives lay out the ambitious, yet achievable, targets for Thailand in the next 5 years. Strategic axes are later defined as guidelines for development direction for all parties, to align and integrate their development efforts.

Figure 5: Thailand's tourism's 5-year strategic objectives and targets

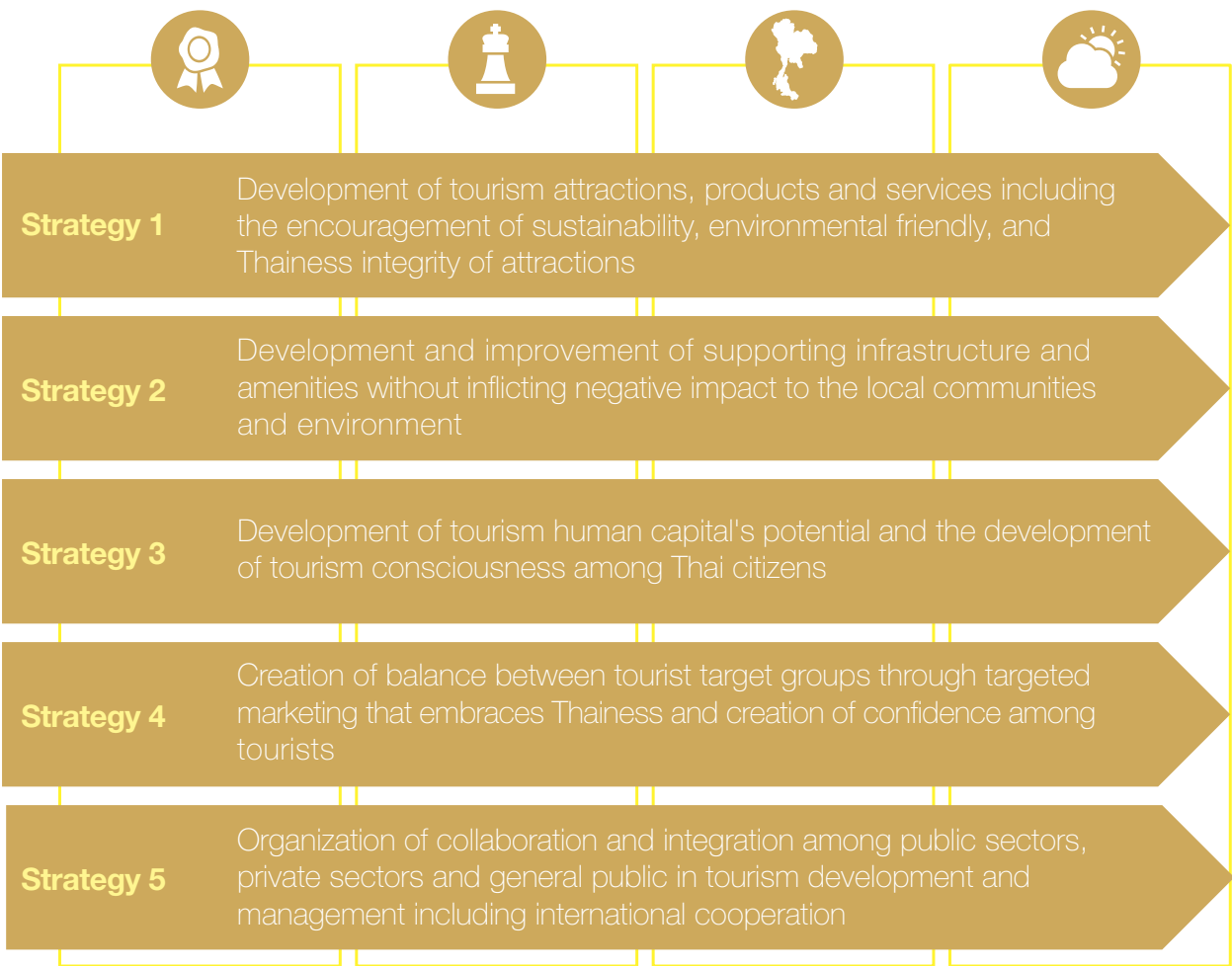


Thailand tourism 5-year strategic axes

In achieving the vision of Thailand tourism in 2036, all parties have the responsibility to take part in cooperative development of Thailand tourism industry. Five strategies have been defined to guide development actions in accomplishing the four objectives. In the process to analyze and define these strategies, several stakeholders and tourism related parties are closely involved to brainstorm and synthesize the key actions needed to take Thailand tourism to the next level. In addition, the strategies were deduced from extensive analysis of global tourism landscape and trends that could affect Thailand's tourism performance. They also take into account the capabilities and room for improvement of Thailand's tourism along the Tourist Lifecycle analysis. The insights and learnings from the study of best-in-class countries and regional peers have been incorporated into the analysis process to enhance the effectiveness of strategy with proven cases.

In addition to the layout strategic axes, the process also resulted in more than 100 ideas being generated. These ideas were drilled down to a portfolio of 55 detailed initiatives, across 5 strategic axes.

Figure 6: Thailand's tourism's 5-year strategic axes



Strategy 1

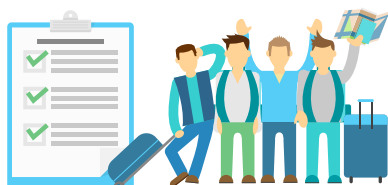
Development of tourist attractions, products and services, including the encouragement of sustainability, environmental friendly, and Thainess integrity of attractions

This strategy focuses on improving the core components of tourism which are the attractions and tourism products and services. Tourism offerings should achieve internationally accepted standards and possess the unique values that distinguish them from other tourism destinations. The development of tourism offerings should be carried out in the manner that is environmental friendly and is balanced in terms of location, time, and tourism segments. These elements serve to ensure that the development will result in a spread of opportunities, incomes and wealth throughout the nation.

Measures

Initiatives

1.1 Improve qualities of tourism offerings for all tourist segments



1.1.1 Maintain Thailand as leading travel destination in Cultural Tourism, Sea Sun Sand tourism, and Medical tourism

1.1.2 Support the development of tourism that targets quality tourist segments such as Wellness Tourism

1.1.3 Promote Thailand as leading regional travel destination that targets high potential segments such as MICE, Gastronomy Tourism, Shopping Tourism, Sports Tourism

1.1.4 Support the development of potential travel segments that is yet to be popular such as Cruise Tourism, Yacht Tourism, Man-made attraction

1.2 Develop tourism offerings that adhere to cultural and environmental sustainability



1.2.1 Promote sustainability of Thai culture and local heritage through collaboration with all stakeholders such as embedding the sense of preservation as well as defining the standard and protocols that uphold the uniqueness of architecture and local way of life

1.2.2 Promote environmental sustainability through collaboration with all stakeholders, such as promoting understanding and raising awareness on the importance of preservation as well as establishing central standard and law on environment, and employ technology in operation, such as real-time tourist volume measuring system and dynamic pricing scheme

1.3 Create balanced development in tourism offerings in both regions and time dimension



1.3.1 Promote balanced tourism areas, such as establishment of Tourism sub-clusters to develop tourism in provinces and areas that are not yet popular, while developing the offerings that are uniquely local and reflect local identities

1.3.2 Promote balanced time and seasonal tourism, such as tourism campaigns across various seasons and annual festivals





Initiative 1.1.1 (1/3)

Maintain Thailand as leading travel destination in Cultural Tourism

Objective

This initiative aims to encourage longer stays at old towns and more visits to cultural attractions through offering improvements and better differentiation across attractions.

Rationale

Thailand is most prominent in cultural, sea-sun-sand and medical tourism; therefore this initiative is aiming to further reinforce the growth of high potential tourism segments. The cultural segment is the largest segment in Thailand. Yet, tourists often visit the site during day time and rarely stay overnight, resulting in low income generated from the segment. In addition, the value of cultural attraction can be increased through engaging presentations of unique background story of the attractions. However, most of the information is not available due to the lack of systematic record keeping, and if available, are often in Thai.

Recommended Actions

Therefore, the first action is to **induce more day spend at the cultural provinces, alongside the improvement of night experiences through lighting, shows and living museums**, such as in Ayutthaya, Lumpoon and Sukhothai.

Cultural tourism is also a great way to showcase the uniqueness of Thai originality. Thus, **good maintenance and concurring renovation are needed**. Some of the sites can as well **apply for UNESCO World Heritage status**, which will boost the awareness of the attractions and gain necessary resources to improve the site. Environments surrounding old towns should be carefully maintained to ensure the authentic experience for tourists.

To further increase the value of the attraction, more **information and background stories of each attraction should be developed in international languages** and presented in a more interactive manner through the use of technologies. This will not only increase the value of the experiences, but will also help communicate the great authenticity of Thailand. In addition, **each region should strive to develop cultural routes that showcase distinctive culture of each region**. These include: 5 Chiangs route in the North to showcase Lanna culture, connecting with Myanmar and Laos; and Southern Isan route focusing on ancient ruins connecting with Cambodia, routes surrounding ethnic minorities. Visitor flow management should be developed, especially in fragile attractions, for greater tourist convenience as well as ensuring the sustainability of fragile cultural attractions.

Ownership

Initiative champion(s) – MoTS and DOT

Stakeholder(s) – TAT / Ministry of Culture /Ministry of Digital Economy and Society / National Identity office / NESDB / Ministry of Interior / Local district authorities / Private sector

Initiative 1.1.1 (2/3)

Maintain Thailand as the leading travel destination in “Sea, Sun, Sand” tourism



Objective

This initiative aims to ensure sustainability of “Sea, Sun, Sand” tourism segment in Thailand and raise average spending per head in the segment.



Rationale

“Sea, Sun, Sand” is one of the most famous attractions in Thailand, claiming the regional leader position in this segment. However, because of its popularity, Thai beach destinations have seen excessively large numbers of tourists, who caused damage to the destination. This resulted in an unsustainable environment and reduced the appeal to other tourists.



Recommended Actions

It is the **most urgent to protect and restore the fragile beaches and environmental attractions** using both **strict limitation on the number of tourist allowed** and the education of preservative behavior to tourist. At the same time, new destinations should be developed to service large number of tourists and reduce the pressure on those popular ones, such as the beaches in Ranong, Satun, Trang, and Nakorn Sri Thammarat.

In addition, Thailand should focus on **improving the quality of the destination by clearly defining the position of existing popular destinations**. It should closely monitor or control the development of businesses surrounding the attraction to align the positioning of all products, services and architectures. Sustainable tourism should be promoted with a touch of Thai culture and authenticity, such as beach for quiet getaway, beach for water sports, and beach for entertainment and bars. The development of high-end, exclusive beaches with premium products and services are also encouraged.

Ownership

Initiative champion(s) – MoTS and DOT

Stakeholder(s) – TAT / Ministry of Natural Resources and Environment /

Local district authorities / Ministry of Interior / Private sector / Tourist Police Department





Initiative 1.1.1 (3/3)

Maintain Thailand as leading travel destination in medical tourism



Objective

This initiative aims to increase the size of medical tourism segment in Thailand, benefiting larger portions of the healthcare industry in Thailand.



Rationale

Bangkok is one of the global leaders in medical tourism thanks to its quality and affordability of medical services. Chiang Mai and Phuket are also emerging as famous destinations for medical tourism as well. Most of the renowned services are in large international hospital and are concentrated in large cities with little trickle-down to the smaller hospitals.



Recommended Actions

This shows the opportunity to better promote this segment through **the development of capability in smaller-sized hospital, both in cities and private hospitals in the border areas**, starting from Bangkok, Chiang Mai and Phuket. The first step is to enhance the quality and the confidence of consumers, by supporting small-sized hospital for the registration of JCI and the development of necessary services to best serve tourists, such as international language capabilities, one-stop services, on-site visa extension, etc. Enhanced capabilities of hospital in border areas will enable better services for patients from neighboring countries, which are one of the main foreign patient groups in Thailand.

In addition, the **government is in the best position to collaborate the knowledge and expertise** among hospitals, hospitals and private sectors, and hospital and university or research institutes, to **further develop specialist capability and innovation**. The aim of this collaboration is to strengthen the R&D aspects of Thai medical tourism, in order to increase its value and lift the experience with a touch of Thainess.

Ownership

Initiative champion(s) – MoTS/ DOT/ Ministry of Public Health
Stakeholder(s) – TAT / The Medical Council of Thailand/ Department of Immigration/ Ministry of Foreign Affairs/ Thailand Tourism Council



Initiative 1.1.2 (1/2)

Support the development of tourism that targets quality tourist segments such as wellness tourism

Objective

This initiative aims to support the development of Thailand into a high-quality destination by attracting wellness tourists, who have higher average spending and longer lengths of stay.

Rationale

Thai massage is one of the famous “must-try” when coming to visit Thailand. However, the size of Thailand wellness tourism is significantly smaller than that of medical tourism. While on the global scale, wellness tourism is worth approximately 9 times of medical tourism industry. This is because wellness tourist tends to stay longer and spend more per trip, in comparison to the average of other tourism sectors. In addition, they are seeking authentic, place-based offerings that Thailand has much to offer. Yet, Thai wellness providers are often unregistered services with varying quality and some lacking professionalism.

Recommended Actions

The most prominent action is to lift the quality of wellness tourism in Thailand. A **national database of wellness tourism providers should be developed** to keep track and maintain the quality of providers. With this database, **national quality standards with ratings and accreditations could be developed**. Quality products and services should be supported and encouraged the use, to create incentives for getting qualifications. Therefore, quality wellness offerings in each region should be used to add a touch of true Thainess in other tourism offerings in the same region, such as hotels, resorts and spas.

To further boost the attractiveness of wellness tourism, selected **high potential hotspot in Thailand should be further developed into wellness heaven**, such as Trat, Ranong, Chiang Mai, Chiang Rai, Lampang, Hua-Hin, and other high potential locations. Thai food is another highly recognized symbol of Thailand. Thai food has the potential to be developed into a part of wellness tourism, as “**food-centric wellness tourism**”, **through the support of clean and healthy food** from the local cuisine made with organic produce. Once the infrastructure of wellness tourism is strengthened, Thailand should take the initiative to promote awareness and the understanding of wellness tourism to build the correct perception of this segment and further develop Thailand into high quality wellness destination.

Ownership

Initiative champion(s) – MoTS/ DOT/ Ministry of Public Health

Stakeholder(s) – TAT / Ministry of Commerce/ Local district authorities/ Private sector



Initiative 1.1.2 (2/2)

Support the development of tourism that targets quality tourist segments such as ecotourism



Objective

This initiative aims to support the development of Thailand into high-quality eco-centric destination, attracting tourists with love for the environment and the willingness to help conserve the environment.



Rationale

The rise of volunteering trips and CSR travelling are significant in the global tourism landscape. More travelers are not looking to only admire the beauty of the nature and culture, but they are interested to take part in preserving this beauty. Consumers are willing to pay a premium for eco-friendly offerings. In Thailand, there are more than 150 protected national parks. However, Thailand has not been active in offering eco-friendly alternatives to the tourists, such as botanic and wildlife conservation trips. Some initiatives to offer conservatories visits are often not promoted or not financially sustainable.



Recommended Actions

The first action is to **promote the existing ecotourism offerings** such as wildlife, botanic, and marine ecosystem conservation travelling, especially in the underexplored provinces. One way is to design ecotourism routes in each region that take tourists to different national parks and conservatories in the region. In addition, **more conservatories should be developed and effectively turned into tourist attractions**, such as sea grass/manatees in Trang, crane birds in Korat-Buriram area, elephants in Surin. Conservatories as tourism attractions will generate income in order to be financially sustainable.

With more variety of ecotourism offerings, there should **be more development of tourism packages that specifically cater for CSR and volunteer tourists** to participate in environmental conservation focusing on underexplored locations, both for international and domestic tourists. **Other tourism touch-points should also be made eco-friendly, especially accommodations.** Green criteria/standards should be designed to monitor the level of eco-friendliness in hotels and other accommodations. In underexplored provinces, eco-lodging should be encouraged to better support the ecotourism position in the destination.

Lastly, **some of the ecotourism provinces can be further developed into ecotourism hotspots or clusters**; such as Nan – Lampang – Phayao; Chanthaburi – Trat; Krabi – Trang – Satun – Nakorn Sri Thammarat – Phattalung – Chumphon. These clusters can be made into special ecotourism zones through the use of financial incentives to promote development of high-quality offerings.

Ownership

Initiative champion(s) – MoTS/ DOT/ Ministry of Natural Resources and Environment
Stakeholder(s) – TAT / Ministry of Commerce/ Local district authorities/ Private sector/ DASTA/ Communities



Volunteering
in Thai forest



Initiative 1.1.3 (1/4)

Promote Thailand as leading regional travel destination that targets high potential segments such as MICE



Objective

This initiative aims to increase revenues from MICE by enhancing regional leadership through differentiated and high-quality products, and through the growth of domestic MICE segment.



Rationale

Thailand is facing strong competition in the region in MICE, especially from India, China, Singapore and Malaysia. Currently, the majority of Thailand's MICE revenue is still concentrated in Bangkok despite facilities being available across various MICE cities.



Recommended Actions

To strengthen Thailand as a preferred MICE destination, firstly, The first step is to develop better one-stop services for companies looking to host events in Thailand. In addition, Thai organization should be supported to have more prominent position in global stage to better attract more international events to Thailand. such as ISO, especially in high potential MICE cities outside of Bangkok. Technologies should also be incorporated into MICE services to enhance the quality and enrich tourists' experiences. In addition, **Thailand should use the opportunity to differentiate its MICE offerings**

Local products, services, and activities should be integrated into MICE package in the region, such as Lanna cultural show in Chiang Mai, afternoon beach activity in Phuket, Isan food for lunch in Khon Kaen. Domestic MICE markets should also be encouraged and expanded through the use of effective marketing and suitable offerings.

Last is to reinforce market intelligence efforts and support innovation for MICE sector. A complete database of national MICE offerings should be established with the capabilities to produce data analysis for private sector to devise strategies. Research and development efforts should also be encouraged to stem innovation that enhance the capabilities and uniqueness of Thailand's MICE sector. Moreover, regulations should be made conducive to logistic and movement of goods for MICE purposes.

Ownership

Initiative champion(s) – TCEB

Stakeholder(s) – MoTS/ DOT/ TAT/ BOI/ Tourism Council of Thailand/ Private sector

Initiative 1.1.3 (2/4)

Promote Thailand as leading regional travel destination that targets high potential segments such as gastronomy tourism



Objective

This initiative aims to increase average spending per tourist and improve incomes for communities selling local foods and agricultural products.



Rationale

Food has moved from the necessity during the trip to become the main reason for starting the trip itself. Thai food has gained its fame on global landscape, yet only the mainstream ones are on tourists' agendas. Many foreigners are still unaware of the variety of regional Thai food. In addition, Bangkok hosts several fine dining restaurants including several 5-star Thai cuisines. Several chefs/owners of these restaurants have received Michelin stars for their restaurants overseas. However, Thailand has yet to be regarded as a destination of fine dining food.



Recommended Actions

Thailand should first focus on developing food tourism segments by better showcasing regional food. Food tourism routes should be developed to bring tourists to try several authentic local Thai food, such as Lanna food in the North and Isan food in the Northeast. Local restaurants should be encouraged to improve their products and services to be more tourist-friendly, such as menu and service in English and better hygiene. This will facilitate tourists in exploring the local cuisine and reinforce satisfactions.

To better promote Thai locality in food tourism, the ingredients should be sourced from the local producers. A “Locally sourced” label could be established to guarantee the locality of the cuisine. In addition, these farms can be developed into tourist attractions to better showcase the Thai way of life and the beauty of homemade produce, on fine dine dishes. Tourist can witness the exotic production of tropical fruits and vegetables. This will bring out the charm of Thai food, while supporting the distribution of income to local communities.

Lastly, there should be a solid support in developing Bangkok into fine dining regional hub with more fine dining offers in other key tourist cities. International visibility of Bangkok restaurants should be supported, as a part of the attempts to attract the establishment of Michelin stars in Bangkok. More fine dining restaurants should be developed, especially those that integrate local ingredients and flavors to the dish to better promote Thai local produce. These restaurants should be established in high-end tourist areas to enhance its premium position.

Ownership

Initiative champion(s) – MoTS/ DOT

Stakeholder(s) – Ministry of Commerce/ Ministry of Agriculture/ Ministry of Public Health/ Tourism Council of Thailand/ Private sector/ Thai Chef Association



Initiative 1.1.3 (3/4)

Promote Thailand as leading regional travel destination that targets high potential segments such as shopping tourism



Objective

This initiative aims to increase average spend per tourist and create incomes for communities from selling souvenir products and overall shopping spend.



Rationale

As the world economy grows, people are becoming capable of indulging themselves in shopping. Luxury shopping, in particular, has grown rapidly in the past few years, especially among East Asian and Southeast Asian upper and middle classes. Thailand has the largest offerings of luxury products among the neighboring countries, thus, becoming the center of shopping within CLMVT. In addition, Thailand has been able to showcase its unique culture and local intellects in its products. However, given the intense competition to be the shopping hub of ASEAN, Thailand should continue to strengthen this tourism segment to secure the leading position as the most desired shopping destination.



Recommended Actions

Thailand should first diversify and improve its current locally-developed souvenir products that are unique to Thailand and each region. Market insights and tourist preferences should be made available to local producers and businesses to adjust their products according to the market desires, while adhering to Thainess as unique selling point. **Quality marks should be developed** to universally ensure the quality and authenticity of local products for tourists. Competitive landscape analyses should be rolled out continually to identify value-for-money products unique to Thailand, compared with regional peers. In addition, **support should be made for local communities to ease go-to-market routes for high quality locally produced souvenirs.** Retail space near tourist attractions and large shopping malls should be developed to add convenience in shopping for local products.

Given the interest for luxurious preferences, Thailand should take this opportunity to **develop Bangkok into regional hub of luxury shopping.** The quick-wins are to **better inform tourists of VAT refund procedures and ease the process** for refunds. Easier tax refund procedures will be one of the factors encouraging the purchase of big-ticket products. Logistic regulations should be revisited to ensure **facilitation for tourists in moving their purchases** to other countries. Moreover, the entire tax structure of luxury goods should also be reanalyzed in order to make luxury goods more price competitive to other leading luxury shopping tourism countries. **Better tour packages focused on luxury shopping.**

Ownership

Initiative champion(s) – MoTS/ DOT
Stakeholder(s) – TAT/ Ministry of Commerce/ Department of Custom/
Department of International Trade Promotion (Thailand Trust Mark)/
Private sector/ Community





Initiative 1.1.3 (4/4)

Promote Thailand as leading regional travel destination that targets high potential segments such as sports tourism

Objective

This initiative aims to raise more income from existing sports infrastructure, and use sports tourism to help promote awareness and interest in sports and exercise among Thai population.

Rationale

Sports tourism is one of the fastest growing tourism segments in the world. Thailand is one of the regional leaders in golf and water sports. However, the nation is still lacking behind in terms of infrastructure and facilities to support the growth of sports tourism, both for tourist as a player or tourist as a spectator. End-to-end sport offerings are lacking, including accommodation, transport, and potentially additional visits to other attractions. The lack of infrastructure and end-to-end sports tourism offerings have resulted in Thailand hosting far less international sports events comparing to regional peers like Singapore and Malaysia.

Recommended Actions

The first recommendation looks into **developing more variety and availability of end-to-end sports packages, especially in already popular sports**, such as Thai Boxing, to attract the increasing number of sports tourists. Golf and extreme sports also show great potential for development in the Northern Thailand. To better control the quality and ensure safety of tourists, a set of standards and compulsory business licensing are needed to ensure well-being of the tourist participating in sports activities.

Moreover, Thailand should establish Sport Cities as the official status for selected cities with proper financial incentives to attract investments from the private sector. **Sport Cities should encompass international standard sport facilities both for professionals and recreation players.** Multi-sport training facilities should be established in Sport Cities to serve as a destination not only for the professionals but also for the sports tourists. In addition, Thailand should thrive to partner with international sport academies to exchange knowledge and capabilities in supporting each type of sport such as Thai boxing and football.

With high standard infrastructure in place, **Thailand should further move to become the host for international sports events, especially in Sport Cities.** Province-level and national-level initiatives to host domestic and international sports events, such as Asian Games or SEA Games, can generate higher traffic, attract additional income, and foster fan loyalties.

Ownership

Initiative champion(s) – MoTS/ SAT/ DPE Stakeholder(s) – TAT/ Ministry of Commerce/ DOT/ Local district authorities/ Private sector



Initiative 1.1.4 (1/4)

Support the development of potential travel segments that are yet to be popular such as cruise tourism



Objective

This initiative aims to leverage beautiful coastlines of Thailand in enhancing the competitiveness of cruise tourism, which has recently gained popularity in Asia Pacific.



Rationale

Asia is the fastest growing regions for cruise tourism, where the number of passengers have grown at a CAGR of 34% over the past 5 years, with Chinese tourists being the main driver of this growth. There are also more cruise visits to Asia with a 34% increase in port calls to Thailand from 2014 to 2015. However, inadequacies in cruise terminal in Thailand have resulted in limited stops from regional cruises through Thailand.



Recommended Actions

Although there are limited deep water ports in Thailand, the nation should **focus on further enhancing the existing deep water port to support increases in demand for cruise tourism**, such as in Chonburi, Koh Samui and Phuket, as well as the development of supporting facilities such as shuttle boat services. Thailand cruise tourism offerings should also be developed to be part of international and regional cruise tours. A variety of international and regional sea routes should be developed, with a touch of Thainess by encouraging stops or visits to local community attractions along the coastal lines, such as fisherman villages and marine conservatories. In addition, the collaboration between Thai and international businesses in the cruise tourism segment should be encouraged to foster co-developments and co-promotions of cruise tourism offerings.

Cruise tourism has not gained as much popularity among Thai tourists, comparing to that of international tourists. Therefore, **more marketing campaigns to build awareness and promote the attractiveness of cruise tourism should be implemented**, such as through TV series or movies featuring scenes on cruises.

Ownership

Initiative champion(s) – MoTS/ DOT
Stakeholder(s) – TAT/ Ministry of Transport/ Ministry of Commerce/ BOI/
Department of Immigration/ Private sector

Initiative 1.1.4 (2/4)

Support the development of potential travel segments that are yet to be popular such as yacht tourism



Objective

This initiative aims to support the development of Thailand into a high-quality destination by attracting international tourists with higher spending power, through the development of yacht tourism.



Rationale

Yacht holidays are becoming more popular with the super-premium tourist segment, who travel between countries while enjoying the beautiful sea view on their yacht. This niche market attracts high-spending tourists both in terms of tourism and commercial aspect. Tourists can rent a yacht for short-term vacations or can use the yacht port in Thailand as a maintenance port, which create jobs for the locals and income for the nation. However, the availability and the quality of yacht marinas in Thailand are still low. Laws and regulations conducive to the segment are not clear, diverging development.



Recommended Actions

Yacht tourism is a high value niche market, where Thailand has the potential to become the regional leader. Therefore, the **first development step is to develop the infrastructure and services that support yacht tourism** sector. More yacht marinas and yacht repairing facilities establishment are to be encouraged, especially in the Southern of Thailand. The development should also adhere strictly to the international standards for high quality assurance.

Secondly, **regulations related to yacht tourism should be revisited to provide more clarity and more up-to-date content**. Conducive regulations is a key factor supporting the growth of yacht tourism, such as regulation related to the purchase of yachts, facilitation of visas for entry via sea, regulation related to yacht parking in Thailand, regulation related to boat and crew, etc.

The products and services should also be developed to target wider range of tourists, such as improving the availability of locally developed super-premium products, for yacht and super yacht owners. The product range should also be extended to serve wider markets, such as mass premium segment, who rent yachts for short-term vacations. To further promote Thailand's yacht tourism segment, **national routes for yacht tourism should be designated**, especially along the Eastern coastline, the Prachuab Khiri Khan coast, and the Andaman Coast with the potential to link with Southern Myanmar, Malaysia, and Singapore. This could call for **Thai and international business alliances** to best co-develop and co-promote yacht offerings.

Similar to cruise tourism, the yacht tourism market has not gain much popularity among Thai tourists. This calls for more **proactive marketing strategies to showcase the attractiveness of yacht tourism for domestic tourists**.

Ownership

Initiative champion(s) – MoTS/ DOT

Stakeholder(s) – TAT/ Ministry of Transport/ Ministry of Commerce/ BOI/ Department of Immigration/ Private sector



Initiative 1.1.4 (3/4)

Support the development of potential travel segments that are yet to be popular such as river tourism



Objective

This initiative aims to spread tourism income to more areas by turning natural waterways into tourism corridors, leveraging Thailand's large and connected river network and abundant attractions near the rivers.



Rationale

Rivers have been the center of Thai way of life. Thailand has abundant waterways connected to each other to form a unique network of transportation, especially in the provinces. Thai people have always lived near rivers, resulting in several attractions and cultural heritage along both sides of the river. However, sightseeing along the river is common only in certain areas, such as Bangkok, and there are limited offers in terms of longer river tours covering more areas. In addition, the quality of boats and infrastructure are not yet up to the safety standards and are not the most convenient for tourists.



Recommended Actions

Thailand is blessed with several waterways throughout the nation. This network has served as a mode of transportation and the lifeline for the people. With this in mind, **Thailand has the opportunity to best showcase its riverside Thai lifestyle by designing various river tourism routes**, especially along the Chaopraya River in the Central region and Mekong River in the upper Northeast region. Along the route is the showcase of traditional Thai way of life, attractions, cultural attractions and other activities that embrace Thainess. Other rivers with tourism potential should be identified and developed into tourism routes, such as Pa Sak, Mae Klong, Bangpakong, Ta Jeen, Mun, Chee. These routes can be further linked to the neighboring countries for interregional traveling.

Secondly, **boat services and supporting infrastructure should be improved** to service the increasing demands of river tourism and to enhance the quality of the sector. **Investment in piers, tourist shuttle boats, and boat variety should be supported**. This will ensure that the quantity, the quality, and the variety of river tourism offerings meet the expectation of wide range of tourists.

Lastly, **the development and renovation of attractions alongside the river routes should be implemented**. This implementation can be in a form of private business alliances for riverside man-made attractions, or a public-led development of cultural attractions. Local riverside communities should be offered the opportunity to be involved in the development of riverside attractions to reinforce community collaboration that further add the touch of true locality to the tourist experience. In addition, **man-made attractions could be further developed at certain stops of the route**, especially the stops in or near Bangkok. This will enhance the diversity of river tourism and reduce the pressure to community and cultural attraction, in case of large flows of tourists.

Ownership

Initiative champion(s) – MoTS/ DOT

Stakeholder(s) – TAT/ Ministry of Transport/ Ministry of Commerce/
Ministry of Culture/ BOI/ Private sector





Initiative 1.1.4 (4/4)

Support the development of potential travel segments that are yet to be popular such as long-stay tourism



Objective

This initiative aims to build consistent stream of tourism income, through increases in number of long-stay tourists, including retirees, regular seasonal visitors, focusing on high-income.



Rationale

High-income tourists from Europe, North America, and East Asia increasingly look to retire or to spend winters in tropical countries. Thailand is considered one of the migration hubs in Southeast Asia; however, only 3% of these immigrants are the professional and skilled workers with high ability to spend. This is because of the strict visa restrictions, high restriction on foreign property ownership, and high restriction on employment opportunities. On the other hands, Malaysia and Singapore have launched campaigns to target these long-stay foreigners through regulatory eases.



Recommended Actions

To address these challenges, the first recommendation is to **improve national regulations to facilitate long-term stays, subject to national security**. Specifically, the government should design clear plans and directions for this segment, considering both tourism income and national security. The eligibility and requirements to obtain long-stay and multi-entry visa should be revisited in such a way that better facilitates the incoming of retirees in Thailand, while does not compromise national security. Adjusting regulation to facilitate time-sharing of accommodation to support seasonal getaway segments and to allow long-stay foreigners to work part-time (or full-time) in more industries could elevate the attractiveness of Thailand for these targeted groups. Further relaxing regulations on capital and asset transfers across borders, such as car import duties, should also be considered.

Secondly, they should look into **developing products and packages that cater for long-term tourists**. National one-stop service centers should be created, to facilitate foreigners looking to retire in Thailand, as well as those looking for winter getaways, which provide assistance in all related matters, such as visas and accommodation. Moreover, the government should support the development of accommodation that targets foreign retirees and seasonal long-term tourists, focusing on Chiang Mai, Hua Hin, Phuket and Pattaya. The development of supporting infrastructure and conducive requirements for expatriates can advance Thailand as the preferred location for long-term stays and for retirement, leading to an increase in recurring sustainable incomes for the tourism industry.

Ownership

Initiative champion(s) – MoTS/ DOT/ Ministry of Foreign Affair

Stakeholder(s) – TAT / Department of Immigration / Ministry of Commerce / Ministry of Interior/ Private sector



Initiative 1.2.1

Promote the sustainability of Thai culture and local heritage through collaboration with all stakeholders, as well as define standards and protocols that uphold the uniqueness of architecture and local ways of life



Objective

This initiative aims to maintain authenticity and uniqueness of Thailand's tourism offerings in each region, to truly reflect genuine culture and experiences.



Rationale

Each region and province in Thailand has a unique heritage. However, not all aspects of Thai and local cultures are fully leveraged in the development of tourism products, leading to ununiformed offerings across different regions, such as similar looking buildings, restaurants, hotels, city centers, or even local products.



Recommended Actions

To develop tourism offerings that truly reflect the diverse identity of each region, it is recommended to **first use public awareness campaigns to encourage preservation of local identities**. Precisely, the government should foster collaboration between local authorities and community leaders to help raise awareness in each region/province. The media should be leveraged to showcase the identity and the uniqueness of each region to foster the pride of local cultures and heritage. This awareness campaign should also highlight the importance of appreciation and preservation of Thainess, to encourage the use of Thainess as unique value in all tourism offerings.

Secondly, **best-practices in the preservation of Thainess and local culture and heritage should be rewarded to encourage a mass movement to preserve Thainess**. An annual competition ("Authentic Awards") between provinces and between communities in each province can provide the incentives and motivation among community members to promote the preservation of local authenticity.

Next development step is to focus on the **use of standards and regulations to embed local unique cultures and heritage into the architecture and design of buildings, to reinforce the theme of 77 provinces, 77 experiences**. Zoning laws can be an effective tool to control the types of developments permitted in these special Thainess zones, to preserve the uniqueness. Any restoration of old architecture or architecture in cultural zone should adhere to its originality and the surrounding environments.

As a final point, the government **should support the commercialization of comprehensive aspects of Thainess into tourism products under the concept of "cultural economy"**. Support to the local communities, such as funding and mentoring support, should also be considered to improve the effectiveness in developing tourism products and services, based on the cultural economy concept.

Ownership

Initiative champion(s) – MoTS, DOT and Ministry of Culture
Stakeholder(s) – TAT / Ministry of Commerce /
DASTA / Local district authorities / National Identity Office

Initiative 1.2.2

Promote environmental sustainability through collaboration with all stakeholders as well as establishing central standards and laws on environment with employment technologies in operation



Objective

The aim of this initiative is to enhance the sustainability of the tourism industry by protecting and restoring the environment.



Rationale

The fast-growing tourism industry has a responsibility in the damage of environment and natural attractions. Thailand is one of the lowest-scoring countries in terms of environmental sustainability based on the World Economic Forum Index. The regulations are found to be too lenient with lack of effective enforcement. Therefore, it is crucial to develop a systematic protocol to preserve and improve the sustainability of environmental attractions.



Recommended Actions

The first recommended action is to build awareness and understanding of environmental sustainability. This can be implemented through the use of public campaigns that promote awareness of sustainability and importance of conservation. Tourism businesses should be informed on the techniques they can use, to minimize the adverse environmental impact, such as better waste management. The educated tourism businesses are then encouraged to subsequently educate their tourists on the do's and don'ts to support environmental sustainability. Local government authorities should also develop an effective measure to manage fragile attractions and prevent damage to popular attractions. An informative and attention-grabbing booklet should also be developed to distribute to tourists in different languages on environmental sustainability and what to do (and not to do) to protect the environment.

Secondly, the government and related parties should **encourage participation of all parties in tackling this issue.** Local communities should be involved, especially students and elderlies in monitoring tourists' behavior, educating tourists and reporting threatening activities. Moreover, a network of companies and communities should band together to preserve shared attractions in the region. The government should also develop a program that encourages tourists to participate in conservation initiatives, while working alongside other institutions to improve the efforts to sustain fragile tourist attractions.

Furthermore, **a proper set of rewards and incentives should be given to outstanding sustainability practices.** Ranking and scoring system for tourism areas, especially beach areas, based on quality of environment (green awards) can encourage collaboration within the communities and inspire competition among different communities to preserve the environment. Incentives to attract private investment in environmentally friendly tourism, such as green hotels, should also be created in parallel.

Finally, the government should **invest in related infrastructures that promote sustainability, such as bike lanes and pedestrian walks. Revising regulation to reinforce sustainability is also highly recommended.** Some of the areas to explore are sustainability requirement clauses in public contracts, building permits, or green standards for building designs and operations. In addition, revising zoning law to also cover water areas and beach areas is highly recommended.

Ownership

Initiative champion(s) – MoTS, DOT and Ministry of Natural Resources and Environment
Stakeholder(s) – TAT / Ministry of Commerce / Local district authorities / Tourist Police



Initiative 1.3.1

Promote balanced tourism areas by developing tourism in the areas that are not yet popular or far away, with unique offerings that reflect local identity



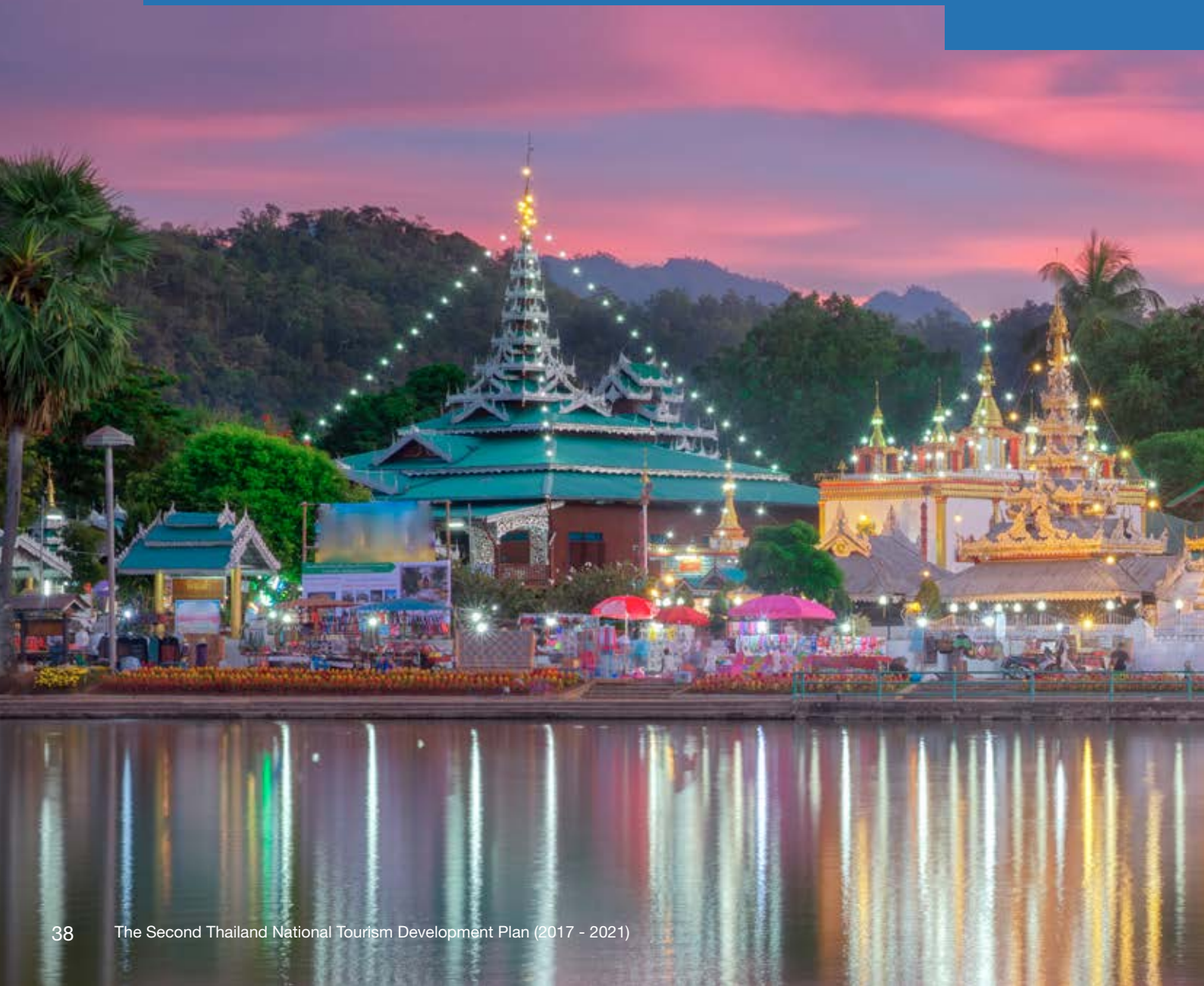
Objective

This initiative aims to improve geographical balance of tourism by spreading income to more regions and to rural, less developed areas of each region to further support income and wealth distribution.



Rationale

Despite the striking growth of Thailand's tourism, most of the income and wealth is concentrated in a few areas, especially in Bangkok and the South. Within each region, tourists visit few destinations with limited extensions to secondary cities and rural areas. Recently, the government has created 8 strategic clusters throughout the country as priority areas for tourism development. In addition, the 12 hidden gems and hidden gems plus provinces are another marketing campaign, aiming to attract domestic tourists to visit second-tier provinces. However, the issue of tourist concentration still prolongs.





Recommended Actions

To begin with, **Thailand should continue to employ and adhere to the cluster strategy in tourism development.** Concerted efforts should be put in place to develop the 8 strategic clusters according to the plan initiated by the government, to spread tourism development to less popular cities and leverage the popularity of main tourism cities in the clusters to attract tourists. In parallel, Thailand should **also identify other potential areas that could be developed as second generation of strategic clusters** by focusing on the linkage with existing strategic clusters to develop nationwide tourism corridors, for instance, The Gulf of Thailand coastline and Central Isan area.

In addition, **Thailand should better develop tourism infrastructure in selected 12 high-potential hidden gems and hidden gem plus,** at the same time, identify more provinces, such as Phrae, Mae Hong Son, Prachinburi, Lopburi, that could be the second generation of hidden gems to offer new experiences and fresh perspectives of tourism in Thailand.

Ownership

Initiative champion(s) – MoTS and DOT

Stakeholder(s) – TAT / Ministry of Social development and Human security / Local district authorities / DASTA



Initiative 1.3.2

Promote balanced time and season in tourism, through initiatives such as tourism campaigns across various seasons and annual festivals



Objective

This initiative aims to address the seasonal imbalances of tourism offerings and tourism demands.



Rationale

Thailand's tourism development exhibits fairly strong seasonality due to large dependence on natural attractions, in which their appeal varies with the weather. The high and low seasons vary across different regions of Thailand and across different GMS/Southeast Asia countries. This seasonality creates difficulties in resource management, as well as the frustration for tourists who visit in the crowded season.



Recommended Actions

To attract tourist visits outside of high season, Thailand needs to create attractive reasons to lure tourist visits during off-season. **Thailand should look to organize more regular annual events and festivals across different regions with emphasis on more events during the low season of each region**, such as annual music festival, annual amazing grand sales in June-August, "Tastes of Thailand" in September. Moreover, occasionally organizing special events in areas facing extremely high seasonality during low season can further depolarize demand in some destinations.

Another attraction that does not depend on the weather forecast is manmade attractions. Thus, it is recommended to **identify and build new manmade attractions that do not depend on weather or seasons and can bring in a stable number of tourists year-round**. The area should be officially designated as "manmade attractions zone"; such as amusement park area. In each location, the suitable types of man-made attractions, the availability of other attractions in the area and the feasibility to support new attractions should be well-considered.

Ownership

Initiative champion(s) – MoTS and DOT

Stakeholder(s) – TAT / Ministry of Culture/ Local district authorities/ Private sector/ BOI

Strategy 2

Development and improvement of supporting infrastructure and amenities, without inflicting negative impact to the local communities and environment

This strategy focuses on developing the infrastructure and the facilities necessary to support the growth of tourism sector. The emphasis is on the conveniences of transportation, facilities and amenities for tourists, safety and security for tourists, and hygiene.

Measures

Initiatives

2.1 Support larger volume of tourist arrivals through improvements in logistics network



2.1.1 Develop air transportation networks for incoming tourists such as improvements of international airports and additions of direct international flights to key cities in Thailand

2.1.2 Support and enhance efficiencies and conveniences in traveling to Thailand via land and water transport such as improvement of border travels and effectiveness of checkpoints

2.2 Facilitate domestic travel through improvement in logistics



2.2.1 Optimize domestic air transport such as improvement and construction of airport across key provinces, opening of new routes and connectivity improvements between primary and secondary cities

2.2.2 Improve domestic land transport such as extensions and improvements of motorway to promote safety in traveling for tourists as well as establish shuttle bus systems that cover key tourist attractions

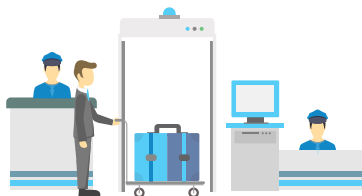
2.2.3 Improve train transportation networks to cover destinations across Thailand and connect with neighboring countries and standard level of travel supports facility such as convenience of booking and speed of services

2.2.4 Promote intra-city transportation such as extensions and improvements of quality of transportation services as well as widening the choices in travel

2.2.5 Promote development of transportation networks to support the accessibility to tourist attractions for all

Measures

2.3 Develop and improve amenities, safety and hygiene for Thai tourism



Initiatives

2.3.1 Develop and improve amenities in planning and navigation such as improvement of signs to meet international standardization, development of navigation maps that encompass all modes of transportation, installment of Wi-Fi hotspots, and creation of a single card system for all modes of regional transportations

2.3.2 Develop and improve an application that facilitates tourists such as Tourism Gateway and Application, to provide comprehensive information across all modes of transportation nationwide

2.3.3 Improve tourism safety, such as ensuring the readiness of equipment, personnel and safety services such as Tourist Centers, CCTV, translators, sufficient lighting at attractions as well as risk and disaster management systems

2.3.4 Promote hygiene at tourist attractions such as improvement of public restrooms, waste and water management systems and establishment of standards and rankings of tourist attraction hygiene



Initiative 2.1.1

Develop air transportation networks for incoming tourists such as improvements at international airports and additions of direct international flights to key cities in Thailand



Objective

This initiative aims to reduce travel time and improve convenience for tourists arriving to or within Thailand by air, including in the cities outside of Bangkok



Rationale

Bangkok is very well-connected with the rest of the world, with one of the highest scheduled seat-KMs in the region. However, limitations at air transport facilities such as international airports, have resulted in inconveniences for tourists during immigration. There are increasing direct routes connecting other cities to the world: such as Chiang Mai and Phuket. Despite the existence of direct flights, Thailand still has the opportunity to improve the number of destinations and the frequency of the direct flights. To become a gateway for ASEAN, Thailand still needs to improve the quantity and the quality of its airport infrastructure.



Recommended Actions

Firstly, the government should **promote more direct international flights to secondary cities** by encouraging airlines to offer more flights between major cities in ASEAN and Southern China. The routes should focus on connecting CLMV countries to other key cities in Thailand, for instance, Chiang Mai, Chiang Rai, Phuket, Krabi, Hat Yai, Khon Kaen and Udon Thani. Moreover, domestic flights should increase code-shares with international airlines to allow check-throughs or direct transfers to the provinces currently without enough volume to establish direct international flights. There should be promotion of more direct medium-haul and long-haul flights to Chiang Mai and Phuket from key origin countries, subject to market demand. To better support the increasing number of incoming tourists, capacity expansion at secondary airports should be considered to service the excess demand and reduce the pressure on the main airports.

Secondly, the government and stakeholders should look into **improving the efficiency of international arrival at leading international airports** by implementing these four following actions. First action is to execute the quick-win measures that reduce immigration queues, for instance, improve staff availability and better leverage advanced passenger processing system. Second is to invest and promote the use of more self-service facilities such as e-check-in and automated immigration to reduce immigration queues. Third is to invest in technologies and other measures that reduce waiting time for luggage. Lastly, it is recommended to develop U-Tapao airport as the third international commercial airport serving Bangkok.

Thailand should also look into developing **Bangkok as a regional and international hub with stopover facilities to promote transit tourism**. The government should promote more flights from more cities especially from ASEAN region to increase intra-ASEAN travel and reinforce Bangkok as a stopover for long and medium-haul to the ASEAN destinations. The airlines should look into improving the availability, the variety, and the quality of the stopover packages in order to compete with other regional hubs. Moreover, the government should look into developing Suvarnabhumi, and potentially U-Tapao, into standard aircraft Maintenance, Repair and Overhaul (MRO) hub for ASEAN as well as establishing free zone areas for cargos.

Ownership

Initiative champion(s) – MoT and AOT

Stakeholder(s) – Department of Immigration / MoTS / Ministry of Interior / Ministry of Foreign Affairs / Ministry of Digital Economy and Society / Ministry of Defense / NESDB / Private airline businesses



Initiative 2.1.2

Support and enhance efficiencies and conveniences in traveling to Thailand via land and water transport



Objective

The aim of this initiative is to support the growth of border tourism and multi-country tourism corridors to reinforce Thailand as a hub for CLMV travel.



Rationale

Thailand has several land and water border crossing points with neighboring countries. Currently, the convenience of land border crossings are not great with several issues reported, such as limited and misaligned opening hours, less generous visa rules than by air arrival, occasional bribery and fraud, and long queues. Improvements are critical in supporting tourism at border areas and in the development of multi-country tourism corridors.



Recommended Actions

First and foremost, efforts to **improve efficiencies and conveniences at border crossings should be supported**. It can start by aligning the opening hours of borders with neighboring countries and extending opening hours at selected borders. Clear information regarding visa rules for border crossing should be made available at ease. Investment in technologies, such as automated passport control kiosks, can significantly improve efficiencies. Having more information signs at borders, preferably in multiple languages, to clarify the documents required, visa fees and the related rules, can help reduce confusion and potential fraudulent behavior.

Secondly, the government should consider revising regulations for more conducive border crossings. Visa rules for land arrival should also be in-line with those of air arrival. To support tourism by car, the government should also encourage car rental companies to ease out inter-regional car crossing permits. These regulation adjustments should consider national security and the safety of tourists as priorities.

The last recommended action is **to improve the accessibility of borders**. Road quality to key border check-points should be improved with pavements and lighting installed. More reliable and higher quality public transport services are encouraged as a means to facilitate land border crossing.

Ownership

Initiative champion(s) – Department of Immigration
Stakeholder(s) – MoT / MoTS / Ministry of Interior / Ministry of Foreign Affairs / Ministry of Commerce / Ministry of Digital Economy and Society / Local district authorities

Initiative 2.2.1

Optimize domestic air transport to improve connectivity between primary and secondary cities



Objective

The aim is to improve domestic air connectivity to support the growth of tourism outside of Bangkok, especially in cities that are not popular.



Rationale

Thailand's domestic flight schedule to smaller cities is catered to people coming into Bangkok than for tourists to visit the new destinations. Many smaller airports are operating beyond full capacity, placing Thailand's domestic flight capacity utilization as one of the highest in the region. Some attractions do not have airport in 1-2 hour drive proximity. The limitation of airport access is one of the hindrances to develop the secondary areas into key tourism attractions.



Recommended Actions

The first recommendation looks into **expanding capacities and improving facilities of the existing airports**. The air transportation capacity expansion should be focused on high potential tourist cities, such as Chiang Mai, Chiang Rai, Phuket, Krabi, Buriram, Korat, Ubon Ratchathani, Mae Sot, and Hat Yai. In addition to the improvement in capacities, Thailand can further look into improving tourist experiences through the development of air transport facilities such as air bridges, more effective baggage claim belts, self-check-in counters, as well as in-airport services and amenities, such as restaurants and shops.

Feasibility studies on establishment of a new airport to support the growth of tourism should be implemented, with the focus on high potential provinces such as Pang-nga, Prachuap Khiri Khan, Satun, and Yala. The government should also look into collaborating with airlines to optimizing domestic flight routes, improving affordability, and initiating more direct flights between cities that are not subjected to connections in Bangkok. The frequency and timings of domestic flight should be conducive for tourists.

Ownership

Initiative champion(s) – MoT/ AOT

Stakeholder(s) – MoTS / NESDB / Local district authorities / Private sector (especially airlines)



Initiative 2.2.2 (1/2)

Improve domestic land transport such as extensions and improvements of motorways, to promote safety in traveling for tourists as well as establish shuttle bus systems that cover key tourist attractions



Objective

This initiative aims to support the development of tourism corridors, encouraging visits to more destinations and longer overall stays, through increased ease of intra-country transportation.



Rationale

Due to poor domestic connectivity, tourists visiting Thailand are concentrated in few destinations near the airports. Based on the 8 strategic cluster plans by the government, tourism corridors will be developed to showcase attractions in each region, including community-based tourism surrounding local communities. Currently, options to travel between cities are limited by inadequate bus services, expensive taxis, and limitations of railway networks. In addition, the quality of motorways in many regions is still poor. Thus, an initiative to improve the overall intra-country transportation experience is important to support the distribution of tourism benefits and induce longer stays in Thailand.



Recommended Actions

First and foremost is to tackle the most common mode of transportation in Thailand, car. The **improvement in motorways to and within the strategic cluster will enhance the experience of road transportation**. Motorways out of Bangkok to different key regions should be widened to 4 lanes to improve accessibility by road in and out of the capital. Motorways connecting primary cities and secondary cities in each region, for instance, Doi Saket-Mae Saruay, Korat-Ubonratchathani, Phuket-Satun, and roads to key border checkpoints should also be expanded according to the traffic demand forecasts.

The government should further take the steps **to enhance services that facilitate tourists' travelling by road**, by developing high-quality tourist-oriented shuttle buses between cities, providing clear route maps and information on scheduling. Technologies should also be leveraged to deliver more convenient experiences for tourists, such as the offer of user-friendly online booking platforms and information portals in various languages. The quality of overall land transportation modes in Thailand should be further improved to meet international standards, such as the capability of drivers and the availability of seatbelts. The provision of tax incentives or a setup of joint ventures with the private sectors can be a good collaboration model that drives efficiencies and quality of transportation services in Thailand. Other supporting tourist-oriented services along the roads, such as service stations, scenic photography points, should also be properly maintained and made in tourist-friendly manner.

The most important is to emphasize on enhancing road safety. Laws and regulations with regard to quality of bus services and quality of car rental companies, should comply with the international standards. Lighting along major motorways and rural roads as well as speed limits and time restrictions for heavy goods vehicles should also be benchmarked with international peers.



Ownership

Initiative champion(s) – MoT
Stakeholder(s) – MoTS / NESDB



Initiative 2.2.2 (2/2)

Improve domestic land transport, such as extensions and improvements of motorways, to promote safety in traveling for tourists as well as establish shuttle bus systems that cover key tourist attractions



Objective

This initiative aims to promote overall improvements in quality of transport infrastructure and services, by developing clear standards and quality in infrastructure (bus terminal, train stations, etc.) and service providers (bus companies etc.)



Rationale

There are currently several standards for transportation infrastructure and services, yet most are often scattered across many public entities. This creates the confusion for service providers and leading to variation of service quality. In addition, there is no centralized national standard for transportation services in Thailand. This issue will not only result in inconvenience but also discourage tourists from using public transportations.



Recommended Actions

One potential solution for this issue is to **establish public-private syllabus board to be in charge of designing courses.**

The first quick-win action is to **consolidate all existing standards and certifications and develop clear single set of standards in which all transport infrastructure and services must meet.** This consolidation should also ensure that the standards are in adherence to the international standards, such as safety. These standards should be strictly enforced, reviewed regularly, and communicated as clearly as possible to all stakeholders and the public. Parties that fail to comply must be shutdown to ensure overall high safety standards and the service quality for every users.

To further ensure universal quality in nationwide transportation infrastructure and services, national quality rating systems should be put into place. This will encourage operators and providers to continuously improve quality. Well-designed criteria and scoring systems for transport infrastructure and services should be established, to rate different types of providers and cover various quality dimensions: efficiency, cleanliness, ease of accessibility to elderlies and disabled tourists; this will support tourism for all. The rating criteria should also be communicated as clearly as possible to all stakeholders and the public. The result of ratings must be visible onsite or on vehicles for tourists' reference.

Ownership

Initiative champion(s) – MoT

Stakeholder(s) – MoTS / Ministry of Commerce / Royal Thai Police / Ministry of Public Health



Initiative 2.2.3

Improve train transportation network through development of network covering destinations across Thailand and connects with neighboring countries as well as the standard level of travel supporting facilities



Objective

The aim of this initiative is to reduce travel time and improve passengers' experiences in order to elevate railway as common mode of tourist transportation and not only for the budget tourists.



Rationale

Thailand's railway infrastructure is currently one of the lowest-rated globally. The network coverage is poor with many key tourist cities missing. The fleets are often unclean and archaic (60% of fleet is >30 years old) with outdated communication and signaling systems. Old systems and infrastructure have resulted in occasional accidents with derailling and collisions. Limited availability of train, lack of online information and inefficient online booking platforms are among the challenges tourists have to face, while traveling with train.



Recommended Actions

The quick-win action to elevate the quality of Thai railway transportation is to invest in improving the passenger experience. The quality of the trains and the stations should be improved to meet international standards, especially in terms of safety and hygiene. Train stations should be made more equipped with amenities such as automated ticket booth, useful information and real time train schedule. Booking and purchasing platform should be refurbished, leveraging technologies to provide greater accuracy and ease of access to both domestic and foreign users. In addition, tourism-oriented trains can be an option to promote tourism along scenic route, for instance Orient Express along the Royal coast.

The rail network should also be extended to cover more destinations and link with neighboring countries. Domestic network should be extended to cover more provinces, such as Chiang Rai, Roi Et, and Phuket, aligning with Ministry of Transport's Master Plan. Moreover, the government should consider the feasibility of connecting rail networks with neighboring countries and Southern China.

To enhance the efficiency of train travel, **investments should be made to reduce train travel time.** Specifically, the development of dual-track to support high-speed rail services on priority routes should be made in alignment with Ministry of Transport's Master Plan. The development should first focus on priority routes: such as Bangkok - Hua Hin - Chumphon; Bangkok - Ayutthaya - Chiang Mai; Bangkok - Ayutthaya - Sara Buri - Korat; Bangkok - Chonburi - Korat; Khon Kaen - Jira, Korat-Mab Kamao. Moreover, procurement of new rolling stock with better speed capability is highly recommended.

Ownership

Initiative champion(s) – MoT
Stakeholder(s) – SRT / MoTS / NESDB

Initiative 2.2.4

Promote intra-city transportation such as extension and improvement of quality of transportation services, as well as the widening of choices in travel



Objective

This initiative aims to make travelling around and sightseeing in cities more convenient, especially in Bangkok and other key tourist cities.



Rationale

Bangkok is the most connected city in Thailand, however, tourists travelling to or within Bangkok still faces many problems with the public transportation. Buses are the most prominent mode of public transportation in Bangkok, which connect to the old town. However, the bus system is mostly archaic and inconvenient with no comprehensive English route maps published at the bus stops or online. Taxis are known to be used with caution, given the possibility of tourist scamming. All of the transportation services in Thailand only accept cash and do not offer single ticketing alternatives to cover major mode of transportation around the city.



Recommended Actions

To address these problems and improve the tourists' experience, it is proposed to first **improve the quality of existing transport options in Bangkok**. This can be achieved by extending Bangkok mass transit networks, as per the Ministry of Transport's plan and improve capacities and quality of public boat services. The government should also continue to impose and tighten measures to reduce taxi scams and look into enhancing convergence among all the public transportation systems through the offering of single ticket for all the transportation modes.

Secondly, the range of transportation options to key tourist cities should be developed. Light transportation options are recommended especially for key tourist cities that lack public transportation infrastructure, such as Phuket monorail or Tram in Lampang, Lampoon, Payao, and Sukhothai. To better support the tourism industry, tourist-oriented sightseeing buses within or around the cities should be established, similar to hop-on hop-off bus in the European cities.

Furthermore, it is recommended to **improve the infrastructure for bike in areas with lots of tourist attractions**. Investment in more proper bike lanes and bike stands in old town Bangkok and old town of other provinces with lots of tourist attractions in the city center e.g. Chiang Mai, Lumphun, Payao, Lampang, Phuket, Pangnga will provide a healthy alternatives to enjoy the beautiful sceneries of each city.

Lastly, **improving the walkability of streets to promote sightseeing on foot in key cities including in old town Bangkok will create greater convenience and satisfaction for both tourists and local citizens**. The government should enhance regulations to regulate street vendors, add more pedestrianized zones, public bins, walking maps, as well as improve waste collection and management.

Ownership

Initiative champion(s) – MoT and Local district authorities

Stakeholder(s) – MoTS / Ministry of Interior/ MRTA / BEM / BTS / SRT / Private Sector





Initiative 2.2.5

Promote the development of transportation networks to support accessibility to tourist attractions for all



Objective

This initiative aims to improve accessibility of tourist attractions by increasing the popularity of underexplored destinations including tourism surrounding the local communities.



Rationale

There are several factors that determine the popularity of an attraction, among which are ease of access, transportation convenience, the infrastructure and services, ready to serve tourists. Thus, the ability to easily and conveniently access attractions should be improved to better develop the popularity of second-tier attractions.



Recommended Actions

To address these problems, the **improvement of accessibility to attractions including villages and farms are to be implemented** through improving accessibility of the roads to national parks and to villages and farms. Moreover, Thailand should look into constructing more supporting infrastructure that can improve the convenience of getting to attractions: such as lifts in Phu Pa Petch Cave, cable cars in Doi Luang and shuttle bus services from the city centers to tourist attractions. The enhanced accessibility will ensure that every tourist group will have the opportunity to explore the attractions, especially with the rise of ageing societies and elderly travelers who might seek assistance.

Furthermore, **Thailand should enhance transport options within attractions** by providing more sightseeing vehicles, promoting sightseeing by bike, and improving walkways at large tourist attractions to help facilitate tourists who do not have cars. The improvement in public transportation will also benefit the overall environments at attractions, with less pollution and less congestions.

Ownership

Initiative champion(s) – MoT/ Local district authorities

Stakeholder(s) – MoTS / Ministry of Natural Resources and Environment





Initiative 2.3.1

Develop and improve amenities in planning and navigation such as improvement of signs to meet international standards, development of navigation maps that encompass all modes of transportation, installment of Wi-Fi hotspots, and creation of single card system for all modes of regional transportation



Objective

This initiative aims to make trip bookings, journey planning and navigating around Thailand easier for free independent travelers (FITs) through the use of smartphone apps and other technologies.



Rationale

Tourists are traveling more often, yet stay for shorter lengths of time at each destination. This short-haul trend means that each travel needs to be planned to fit a tight schedule. Tourists are demanding and expecting the availability of services that could ease up the planning process. Therefore, Thailand should embrace shifts in the tourism landscape and further improve the level of convenience through every step of the Tourist Lifecycle.



Recommended Actions

The first, and the quick-win action, is to improve road signs to tourist attractions. The sign should be made in more languages, such as Chinese, Russian, or Bahasa, depending on key nationalities of tourists at each tourist attraction area. Road sign platform should be established as a method to continuously improve the road sign and navigation effectiveness. They should be provided such that they are adequate for tourist to navigate to attractions purely based on these signs.

Secondly, Thailand should consider offering a single transportation ticket that can be used for all modes of transportation among the provinces in 8 strategic clusters, including the installation of card readers on vehicles. Moreover, it should identify and produce maps that show all modes of public transports in each of the 8 strategic clusters including train, ferries, shuttle buses, public bus, and public vans.

Finally, it should also **improve attractions and transport infrastructures to be friendly for the elderlies and disabled tourists.** Universal accessibility is essential to service all group of tourist, especially given the rise of elderly tourists. In addition, tourists should be supported with connection to the internet throughout the journey. Collaboration with local telecom providers should be established to promote the use of tourist SIM card and study the possibility to offer free data to access certain necessary apps through the SIM. In addition, expected services such as free Wi-Fi should be made widely available throughout tourists' touch-points.

Ownership

Initiative champion(s) – MoTS and DOT
Stakeholder(s) – Ministry of Digital Economies and Society / Ministry of Transport / Ministry of Commerce / National Innovation Agency



Initiative 2.3.2

Develop and improve apps that facilitate and apps that provide comprehensive information across all modes of transportation nationwide



Objective

This initiative aims to make trip bookings, journey planning and navigating around Thailand easier for free, independent travelers through the use of smartphone apps and other technologies.



Rationale

More and more tourists are opting to travel independently, creating a new segment call “Free Independent Traveler” or FIT. The FIT segment is growing rapidly globally. FIT tourists enjoy planning and booking their own trips and self-navigate their own way around Thailand. Therefore, the ease to which they can do this, can affect decisions whether to visit Thailand. Moreover, tourists are opting for online channels to search and plan for their trips, as reflected in strong growth of online tourism providers globally. In the light of shifting tourist preferences towards online alternatives, Thailand should focus on improving its tourism presence in online channels and providing the online services that are expected.



Recommended Actions

Thailand should first **continue to build and launch integrated information databases and booking platforms**, for instance, Tourism Gateway with comprehensive database of tourism offerings in the nation such as hotels, transportation, activities and bundled offerings to facilitate trip booking and planning for these independent travelers. It should also develop and launch apps to provide the ease of navigating around Thailand, potentially developing a Virtual Reality App that provides maps and directions in 3D, which makes navigation easier for tourists. The App should be able to suggest and navigate tourists to attractions at ease.

Another option to consider is to develop a Journey Planning App, which displays all travel options from the searched routes including schedule, price, and recommended transportation routes. This one-stop app can facilitate tourist in navigating around Thailand. Lastly, Thailand should **gradually integrate various apps into single app to promote ease of use.**

Ownership

Initiative champion(s) – MoTS and DOT

Stakeholder(s) – Ministry of Digital Economy and Society / Ministry of Transport / Ministry of Commerce / National Innovation Agency/ Ministry of Science and Technology/ Private sector

Initiative 2.4.1

Improve tourism safety such as ensuring the readiness of equipment, personnel and safety services, such as Tourist Centers, CCTV, translators, sufficient lighting at attractions as well as risk and disaster management systems



Objective

This initiative aims to improve safety for tourists and enhance confidence in visiting Thailand.



Rationale

Thailand is currently one of the lowest ranked countries in the world in terms of safety and security (#132 from 141 countries assessed in WEF's TCI in 2015). The doubt in safety and security in Thailand has prohibited potential tourists from visiting. Among the major causes of insecurity are crime, scams, accidents (especially road accidents), terrorism, and natural disasters. It is crucial for Thailand to quickly revamp its safety and security infrastructure and effectively communicate safety tips and protocols to tourists.



Recommended Actions

Safety and security issues have been a challenge, not only for the tourism industry but for the national security as well. To tackle the safety and security challenges, **Thailand should first improve the availability and the capacity of safety services at tourist destinations**. Specifically, Thailand should build more tourist information and assistance centers at tourist destinations and set up more check-points and hot desks in specific areas during high-season and big events.

Limitation of security personnel is another challenge for Thailand, especially with rapid increases in incoming tourists. Thailand should further recruit more Tourist Police personnel to grow in line with the growth in the number of tourists and fill current shortages through locally recruited watchdogs, who help monitor suspicious activities and report to the Tourist Police. It should look into building more police stations in key tourist destinations, currently without police stations. Greater presence of the tourist courts in tourist destinations can accelerate criminal cases and re-affirm tourists' confidence in Thailand.

In addition to the quick-win improvements, Thailand should look at investing in safety and security infrastructure and deploy more technologies to increase effectiveness. Thailand should further **reinforce safety and security infrastructure in tourist destinations by installing more CCTVs and improve the lighting** to reduce blind and quiet spots at tourism areas. Improved CCTV coverage and reduced dark areas will reduce the chances of crime and accidents.

Technologies can play a key role in improving the safety and security for public and for tourists' safety. Most of the tourists are using more mobile apps during the travel. Therefore, it would be beneficial for Thailand to invest in an app that enhances tourists' safety, such as location-based safety tips app, emergency hotlines app, emergency services chat app, real-time translation for emergency app. In addition, emergency and security personnel should be equipped with online translation tools to assist in communication with tourists. An upgrade and continuous maintenance to surveillance and IT infrastructure at the Royal Thai Police and Tourist Police are highly recommended.

Ownership

Initiative champion(s) – MoTS / Tourist Police

Stakeholder(s) – Royal Thai Police / TAT / Ministry of ICT / Ministry of interior / Local district authorities





กระป๋อง
ขวดแก้ว
Cans & Bottles

ขวดพลาสติก
PET Bottles

ขยะทั่วไป
Others

Initiative 2.4.2

Promote hygiene at tourist attractions such as improvement of public restrooms, waste and water management systems and establishment of standards and rankings of hygiene at tourist attractions



Objective

This initiative aims to improve tourists' experiences, encourage repeat visits and visits to more destinations especially in underexplored areas through the improvement of hygiene and cleanliness.



Rationale

Thailand is currently ranked low at #89 in the world in terms of health and hygiene by WEF. Many tourists have reported issues of insufficient toilets and toilet amenities that are not aligned with international standards. Furthermore, waste management and water supply are problematic at some tourist destinations especially on islands.



Recommended Actions

The first quick-win action is to **improve toilet hygiene at tourist attractions and the existing toilets facilities at attractions to be aligned with international hygiene standards**. New toilet facilities should also be constructed to ensure sufficient availability, and these facilities should be encouraged to be self-reliant, by raising own funds or fees to support toilet maintenance. Information signs in various languages as well as instructions and restriction on appropriate etiquette to maintain proper toilet hygiene should be visible onsite. Fines should be enforced for failure to adhere.

Secondly, **proper waste management at tourist destinations is highly encouraged**. Waste sorting trash containers should be provided with visibility and abundance at tourist destinations. Improvement of waste collection capacities and frequencies at tourist destinations, for instance, boats collecting rubbish from islands such as Koh Phi Phi, is advised. Responsible parties should also construct more shared waste treatment facilities, including private sector and communities, especially where the environment is fragile.

Lastly, Thailand as a whole should develop **hygiene standards and ranking systems to encourage nationwide collaboration to improve the basic hygiene**. The government should established ranking and scoring systems to rate different attractions and service providers based on level of hygiene and proper set of incentives should be awarded to top performers. The standard should be communicated clearly and comprehensively to all stakeholders and the public, and should be reviewed annually. Enforcement and fines should be both significant and credible enough to encourage appropriate behavior by all parties.

Ownership

Initiative champion(s) – MoTS and DOT

Stakeholder(s) – Ministry of Public Health / Ministry of Natural Resources and Environment/ Local district authorities/ Private sector

Strategy 3

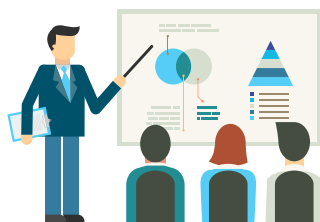
Development of tourism human capital's potential and the development of tourism consciousness among Thai citizens

This strategy focuses on developing tourism human capital through systematic training and quality enhancements to meet international standards. The attempts to develop human capital should be under close collaboration of public and private stakeholders to ensure the quality and the skill attained are in line with market demand. This strategy also encourages the enrichment of Thai hospitality through awareness creation for all Thai citizens and proactive collaboration with the local communities.

Measures

Initiatives

3.1 Enhance capabilities of those employed in the tourism industry to gain competitiveness and adhere to international standards



3.1.1 Improve national education curriculums such as promoting collaboration between public and private sectors in the development of comprehensive tourism curriculum that suits industry needs

3.1.2 Promote basic training in general skills for workforce in tourism industry that includes languages, communication, IT and hospitality through widening training channels as well as creating incentives for businesses to standardize their workforce

3.1.3 Promote specialized skills training to support the development of multi-tourism segments, such as establishing specialized training center through joint public and private efforts

3.1.4 Establish training in management through defining practical development curriculums for all executive levels, as well as creating incentives for receiving such training to standardize the quality

3.1.5 Improve the standard quality of professionals in tourism business to match with the needs of the industry while adhering to ASEAN Mutual Recognition Arrangement (MRA) on tourism professionals, through collaboration between public and private sectors

3.2 Develop human resources in tourism industry that tailors to market needs



3.2.1 Increase manpower in tourism industry, such as improving the perception and encouraging personnel to take pride in hospitality services in the tourism industry, as well as promoting the cooperation with business owners to improve job attractiveness through individualized career paths

3.2.2 Resolve the shortage of workforce in tourism business through local employment such as promoting careers in the tourism industry for local people and recruiting local patrolling units to assist tourist police

Measures

Initiatives

3.3 Equip local communities with capabilities to support, participate and benefit from tourism



3.3.1 Raise awareness of values and benefits of local heritage among the Thais such as promoting the benefits of tourism industry, training in communication skills, and educating the stories behind their local attractions and cultures

3.3.2 Develop business skills among local communities to commercialize tourism offerings that leverage local and cultural heritage to generate wealth, which include the training curriculums for business fundamentals through collaboration with schools and local businesses

3.3.3 Promote businesses in tourism industry that include existing businesses namely tour guides, startups, and related businesses that have high socioeconomic impact such as Community-Based Tourism (CBT) by providing local consulting services in establishing and running business



Initiatives 3.1.1

Improve national education curriculums such as promoting collaboration between public and private sectors in the development of comprehensive tourism curriculum that tailors to industry needs.



Objective

This initiative aims to improve quality of fresh graduates from tourism-related faculties to meet the industry requirements in terms of hospitality skills and general core skills.



Rationale

Among Thailand's many beauties are its people and of Thailand's many beauties are its people and their hospitality. However, it has been stated by many tourism businesses that the quality and the skill of graduates are not aligned with industry expectations, especially in the practical skills. Due to the limitation of skills, Thai human resources often have difficulties progressing in the organization and a few reach the management level. In the light of ASEAN collaboration, some Thai tourism businesses are opting for ASEAN workers, due to lower pay requirements for the same set of skills and often better language proficiencies.



Recommended Actions

One potential solution for this issue is to **establish public-private syllabus board to be in charge of designing courses**. The board should further **collaborate with the private sector to improve quality of education syllabus to align with industry's current and future needs**. This includes adding more courses to enhance digital capabilities, foreign languages and communication skills, as well as basic management and business skills. The course should also build appreciation and awareness of the attractions and offerings in Thailand, including locally-tailored courses for local attractions covering newly developed segments.

Ownership

Initiative champion(s) – Ministry of Education and MoTS
Stakeholder(s) – DOT / Ministry of Commerce / Private sector

Initiatives 3.1.2

Promote basic training in general skills for workforce in the tourism industry that includes languages, communication, IT and hospitality through widened training channels, as well as creating incentives for businesses to standardize their workforce.



Objective

This initiative aims to improve quality of workers already working in the tourism industry.



Rationale

There is a big discrepancy of knowledge in ICT, language, communication skills, and safety procedures within tourism industry workforce, as well as safety personnel. This discrepancy has resulted in large variation of workforce skills and quality. One of the causes of this discrepancy is the inadequate channels and opportunities to obtain proper training.



Recommended Actions

To tackle the problem of skill discrepancies, it is recommended to **develop and reinforce various platforms for training** by providing more training courses arranged by local universities and establishing “train the trainer” campaigns, to train employers so they can train their staff. Moreover, self-learning platforms, such as e-learning tools and booklets, should be provided for those interested or as a platform for SMEs to improve the skillset of their employees.

In addition, **the training syllabus should be redesigned to match the current tourism market**. The core skills of communications, language, and ICT should be embedded in every course. The tourism workforce as well as tourism-related workforce such as safety personnel should be encouraged to enroll in the course. In addition, more tailored courses for specific professions in the industry should be developed to best match the skills of graduates with the unique needs of the segment. The tailored training paths will provide guidance as to which courses or modules to take for different businesses, geographies, levels, and functions.

Moreover, **the government should reinforce training regulations for worker** by defining minimum number of required training programs, provided by employers and enforce them accordingly. Lastly, **training programs on sustainable tourism management and other-related topics should be a fundamental training for government officials**.

Ownership

Initiative champion(s) – MoTS
Stakeholder(s) – DOT / Ministry of Education
/Ministry of Commerce/ Ministry of Labor /Ministry of
Digital Economy and Society / Private sector





Initiatives 3.1.3

Promote specialized skills training to support the development of multi tourism segments such as establishing specialized training centers through joint public and private efforts



Objective

This initiative aims to ensure that there is sufficient number of high-quality workers with specialist skills available, for all tourism segments that will be developed.



Rationale

There are several tourism segments in Thailand, among which are the new, high growth segments. Currently, there are no standardized courses or specialist training programs for workers to equip them with the skills required to serve in newly developed segments, such as marine, wellness, and MICE. Thailand has the potential to establish a strong position in these newly developed segments by improving facilities and courses to train workers with these specialized skills.



Recommended Actions

In order to develop Thailand as a preferred destination for these new segments, it is recommended to establish **more specialist public-private academies as training centers for segment-specific skills**. The public sector should look for partnership opportunities with the private sector in each of the specific tourism segment, such as marine businesses, luxury accommodations, spa and massage providers, and MICE providers. The collaboration should also expand to the regional level to establish regional training institutes and position Thailand as the dedicated leader in these segments, such as ASEAN MICE institute.

Secondly, **the government should consider designing training programs for specialist skills** such as boat crew for yacht tourism and therapists for wellness tourism. This can be accomplished by defining priorities of the specialist skills needed to boost the tourism industry. Those workers already in the field should be supported with training programs that enhance their skills in the respective segment and improve professionalism for greater quality in overall services. Another syllabus for those wishing to join the respective segments should also be developed in parallel, to create more qualified candidates to support the growing tourism segments. The syllabus should meet international standards and align with the industry's needs and future development.

Ownership

Initiative champion(s) – MoTS
Stakeholder(s) – DOT / MoE / Ministry of Commerce /
Ministry of Labor / NESDB / Private sector

Initiatives 3.1.4

Establish training in management by defining practical development curriculums for all executive levels as well as creating incentives for receiving such training to standardize the quality



Objective

This initiative aims for Thai citizens in the workforce advance to higher positions in tourism businesses, which helps improve attractiveness of career in tourism and address the local supply shortage.



Rationale

Although Thai people are one of the jewels of Thai tourism, only a few of Thai professionals have made great career advancements in the field of tourism. Currently, most of the management at large hotels and other tourism businesses are foreigners. Those who are Thais are often from Bangkok, even in hotels outside of Bangkok. Local talents often lack opportunities to access high quality training programs to obtain the required skills and accreditations to advance in their careers. Not only does the national syllabus insufficiently equip graduates with management skills but also there are limited opportunities for workers in the tourism industry to gain management skills required to take part at the management levels.



Recommended Actions

This initiative calls for a **redesign of the tourism management curriculum**. The public should work closely with universities to develop up-to-date and practical courses for people in tourism sector. This can be further developed **into an international collaboration and study abroad opportunity** for Thai students to expand their knowledge and skill in world-class business schools. However, there is nothing more tangible than learning from those in the field. Therefore, it is also recommended to invite people from the management level to share their experiences and participate in new generations training programs. To further facilitate learning, e-learning and self-learning tools should be encouraged and distributed.

Secondly, Thailand should promote **the flexibility in working schedules to allow the intellectual curious employees to join appropriate training programs**. The government can contribute to this by improving regulations regarding flexible working schedules and collaborating with private businesses to inspire the importance of training for organizational development and sustainable competitive advantages.

Ownership

Initiative champion(s) – MoTS
Stakeholder(s) – DOT / Ministry of Education
/ Ministry of Commerce / Ministry of Labor /
Private sector



Initiatives 3.1.5

Improve the quality of professionals in the tourism business to match with the needs of the industry while adhering to ASEAN Mutual Recognition Arrangement (MRA) on tourism professionals through collaboration between public and private sectors



Objective

This initiative aims to set clear standards for employers, current staff and new staff on the skills required for each level of all tourism-related professions.



Rationale

Currently, there are no clear requirements of what skills are expected at each level in the tourism businesses, leading to huge discrepancies in skills of workers and, hence, service quality across the industry. The lack of standardized skill measurements also resulted in wrong level hiring, in other words, ineffective recruitment of substandard workers, due to “over-hiring” and the loss of talent due to “under-hiring”.



Recommended Actions

To create uniformity of workforce standards, **Thailand should deploy standard skill system for workers in the tourism industry**. This standard will outline the set of skills required for the tourism business, including safety personnel, across all levels of staff in all dimensions. The standard should as well align with international standards, while adhering to the value of Thainess, and should be developed under close collaboration with the relevant private sector. All relevant businesses within the sector should be educated on these standards and potentially required to have their worker trained accordingly.

Furthermore, the government should look into **developing formal licensing system for tourism staff by adhering to ASEAN** Mutual Recognition Arrangement (MRA) as a standardized measurement of skills in key professions including tourism and tourism-related professions. The government should support the accreditation of MRA among Thai tourism workers in order to attain internationally accepted standard qualification and open up the opportunity for the accredited workers in other ASEAN countries. The attainment of MRA will also elevate the competitiveness of Thai tourism worker and Thai tourism industry. In addition, Thailand should look into developing laws and regulations that support the attainment of tourism license and create the opportunity for the entire workforce to receive MRA accreditation. Thailand also has the potential to develop national tourism workforce standard on top of MRA accreditation, to embed the value of Thainess into Thai tourism workforce.

Ownership

Initiative champion(s) – MoTS
Stakeholder(s) – DOT/
Ministry of Education/
Ministry of Labor/ Ministry
of Commerce/ Private sector





Initiatives 3.2.1

Increase manpower in tourism industry such as improving the perception and encouraging personnel to take pride in hospitality service industry as well as promoting the cooperation with business owners to improve job attractiveness



Objective

This initiative aims to ensure that the shortage within the tourism industry is fulfilled with high quality workforce by improving attractiveness and perception of service and hospitality career



Rationale

Thai people often associate hospitality and service career as less attractive with limited advancement opportunity. In addition, several employers are more reluctant to invest in regular training for their employees, which eventually resulted in limited career progression for Thai workforce. Tourism businesses would rather hire foreign workers who are more equipped for the position. However, this substitution for foreign workers has reflected in the loss of Thainess and the feeling of authentic Thai experience in the services. Thai workforces are often staffed in unskilled positions such as maids and security guards. Should this prolongs, Thailand will lose the balance of local talents in tourism sector, which can prevent Thailand from growing sustainably as world-class destination.



Recommended Actions

This inevitable fact has to change and Thailand can start by **improving the attractiveness of careers in hospitality sector**. First, a close collaboration between public sector and tourism businesses should be established to drive a joint-attempt in making hospitality career more attractive. Tourism businesses should be encouraged to offer more internship opportunities to better showcase the real-life experience in hospitality business to the new generations. Employer presences at job fair and clearer career progression in hospitality field should be promoted.

Secondly, the **improvement of the perception and creation of pride in hospitality and service jobs** are recommended. The government can collaborate with production houses to develop or endorse reality TVs, TV series, or other media about hospitality industry that can boost the awareness and attractiveness of the industry. The media can also be leased from other trend-leading countries such as Korea to further promote the awareness and encourage interest among new generations. In addition, a nationwide hospitality award should be deployed to incentivize hospitality workforce and to showcase the value of hospitality services.

Ownership

Initiative champion(s) – MoTS

Stakeholder(s) – DOT / Ministry of Education / Ministry of Commerce / BOI / Ministry of Social Development / Ministry of Labor / Private sector



Initiatives 3.2.2

Resolve the shortage of workforce in tourism business through local employment such as promoting careers in tourism industry for local people and recruiting local patrolling unit to assist tourist police



Objective

This initiative aims to ensure that the shortage in emergency and security service personnel within the tourism industry are fulfilled by recruiting locals with proper trainings, and also by adopting technologies to reduce the needs of manpower.



Rationale

Thailand has been welcoming almost 30 million international tourist arrivals in 2015. The challenge for Thailand is the insufficiency of resource and personnel to service such large incoming tourists. Currently, there are only about 900 tourist police officers nationally. This limitation has forced reallocation of officers such that some areas are less secured than others. In addition, there is a shortage of interpreters supporting the emergency services. Thailand needs to ensure that there are sufficient security and emergency capacity to ensure safe and sound experience for all tourists.



Recommended Actions

The quick-win is to recruit and train the locals as **watchdog to patrol and monitor suspicious activities and report to the Tourist Police**. This can alleviate the shortage problem in tourist police and help ensure safety for the tourists. In addition, more interpreters, both professional and local, should be recruited to support the work of emergency units and the Royal Thai Police in assisting tourist and foreign visitors in several languages.

Technology can be adopted to increase automation in supporting tasks and better facilitate the work of security and emergency unit. Technology will be the key to free up more manpower to work on field and reduce the issue of personnel shortage. Language barrier can be alleviated with the installation of translation device at police and emergency call center. The translation technology can also be used in police stations and medical provider unit to assist in emergency response and treatment. In addition, tourists can be assisted in reporting emergency or receive alerts with the Application that dedicated to communication of emergency message through embedded real-time translation feature.

Ownership

Initiative champion(s) – MoTS
Stakeholder(s) – DOT / Tourist Police / Royal Thai Police /
Ministry of Education / Ministry of Digital Economy and Society

Initiatives 3.3.1

Raise awareness of value and benefits of local heritage among the Thais such as promoting the benefits of tourism industry, training in communication skills, and educating the stories behind their local attractions and cultures



Objective

This initiative aims to develop locals into local ambassadors for their areas who can support the tourism industry by being a good host or local guides.



Rationale

Travelling is not just about seeing the architecture, but it has become the unique experience to deep dive into the story behind each attractions. However, there are limited capacity of tour guide, especially in the rural areas and under-explored attractions. The great story and history of the attraction are often within the locals, yet knowledge pass-down is limited. The locals also lack language proficiency to portray the story for tourists.



Recommended Actions

To bring out the authentic experience for tourist, it is recommended to develop **local ambassadors by training local people in communication skills and knowledge of local attractions, helping them to be more qualified and accessible by tourist**. The communication skill training for local should be designed under collaboration with academic and businesses. Training programs should be devised to cover the story and history of local attractions, the uniqueness of the community, understanding of local culture and heritage. Furthermore, **the government should also look into adjusting regulation to support local ambassadors**. Travel guideline and map of local attractions should be developed as tools to facilitate and assist the local guides. Standard operating procedure should be established to align the quality level of service in local guides and to deliver the level of quality expected by tourists. Ease of accessibility to these local guides should be supported by listing them on Thailand Tourism Gateway or other common information channels that will be easy for tourist to search and find local guides in the area.

In addition to local ambassador, Thailand should also look into **creating good local host through education about cultural differences between tourists and locals**. The locals should be educated and informed of the benefits that tourism can bring, such as additional incomes and development of infrastructure. A good host has to understand its guest. Therefore, the local should be educated of the differences in culture with the support of the public sector in establishing international cultural center as the main education center of foreign culture. E-learning platform about foreign culture should also be encouraged to increase the level of understanding among the locals. Beside direct method to educate the local of foreign culture, it is also recommended to familiarize the local with foreign culture through the use of foreign media, such as TV programs. This media will help create the understanding of cultural differences and reinforce the ability to properly welcome foreign tourists.

Ownership

Initiative champion(s) – MoTS
Stakeholder(s) – DOT / Tourist Police / Royal Thai Police / Ministry of Education / Ministry of Digital Economy and Society





Initiatives 3.3.2

Develop business skills among the local community to commercialize tourism offerings that leverage local and cultural heritage to generate wealth



Objective

This initiative aims to enhance the capabilities of the locals to be able to participate in tourism and leverage local assets, culture and heritage.



Rationale

Local assets, culture and heritage are the charm of Thainess. However, these elements can better enhance the value of Thailand tourism with a proper commercialization that closely adheres to their true value. Currently, there are limited affordable and accessible platforms for locals to acquire business and commercial knowledge and skills. This limits the opportunity for the locals to create economic value from the great cultural assets they have. Moreover, the locals sometimes lack Appreciation and knowledge about local attractions and culture. Instead, many attempt to imitate and copy tourism offerings from other areas resulting in lack of unique offerings, which do not appeal or attract tourists.



Recommended Actions

The locals should be offered the opportunity to equip themselves with essential business and commercial skills. **The training courses on business and commercial skills should be developed and offered to the locals at convenient.** Local training center should be established to accommodate the training. E-learning platforms should also be developed to assist the learning. A “Student tourism development” program that brings students with business and commercial background to implement their knowledge for the development of local tourism industry should be supported by public and private sectors.

Additionally, it is recommended to enhance local capabilities to commercialize local assets to develop unique tourism offerings and raise income locally. Pride and Appreciation in local uniqueness should be further instilled to the locals and the new generations. This pride will be the key driver of more Application of local assets in commercial manner. Community forum should be established to assist in clearly defining the uniqueness of the village and set the direction of collaboration for tourism development in the community. Local universities and training centers should provide training on how to commercialize local offerings, through examples of success cases. To best support the growth of unique tourism offerings, necessary equipment and technologies should be provided to the locals to market their offerings on national and international scale.

Ownership

Initiative champion(s) – MoTS

Stakeholder(s) - DOT / Ministry of Education / Ministry of Commerce / Ministry of Digital Economy and Society/ DASTA/ Local district authorities/ Private Sector

Initiatives 3.3.3

Promote businesses in tourism industry that include existing businesses namely tour guides, startups, and related businesses that have high socio-economic impact such as Community-Based Tourism (CBT) by providing local consulting services in establishing and running business



Objective

This initiative aims to support innovation of new products and services in the tourism industry by enriching tourists' experience through supporting the operation of tourism businesses



Rationale

Tourism business is the driving factor of economic growth of tourism industry. Currently, there are limited fundings that help promote the establishment and the growth of tourism businesses. Starting a tourism-related business can be risky, especially under such a dynamic industry. The locals, who are often in the lower income populations, are facing higher risk in establishing tourism business. In addition, formal technical assistance and mentoring in doing business in tourism are limited.



Recommended Actions

To foster the growth of local new businesses, **private sector should be encouraged to participate in funding the local tourism entrepreneurs, especially those in growing sector or important geography.** Regulations and procedure that ease out funding activity in a new business should be simplified. In addition, private sector should be encouraged and supported to establish incubator program to foster the growth of startups and SMEs in tourism sector. Beside private participation, there should be the effort to establish public funding scheme that focus on businesses benefiting the communities.

The subsequent step is to **provide and arrange mentorship support for tourism entrepreneurs.** The involving parties should work closely with the local business schools to devise a course that trains tourism entrepreneurs on how to effectively do business in tourism. The mentorship program should be made available in the key tourism sectors;] [such as CBT, MICE, wellness, and in the key tourism areas such as 8 strategic clusters and 12 hidden gems. A best practices and knowledge sharing platform for startups and SMEs will provide new entrepreneurs with real-life insights. This new entrepreneur community will also reinforce cooperation among new tourism businesses.

Lastly, **the government should encourage locals to develop an innovative and creative new tourism business through the provision of both financial and non-financial incentives.** Annual business competition is also encouraged to create friendly-competition atmosphere that will spice up the innovation and creativity in the industry.

Ownership

Initiative champion(s) – MoTS

Stakeholder(s) - DOT / Ministry of Education / Ministry of Commerce / Private sector / BOI / Tourism Council of Thailand / Thai Chamber of Commerce



Strategy 4

Creation of balance between tourist target groups through targeted marketing that embraces Thainess and creation of confidence among tourists

This strategy focuses on improving the branding of Thailand as quality destination. It involves helping Thailand tourism to grow with balance and affirmative quality through the use of effective and targeted marketing alongside the establishment and communication of national quality mark on the basis of Thainess. The targeted marketing campaign under this strategy will also be devised as a method to encourage more spending in international tourists and attract more domestic tourism. Technology will be integrated to enhance the capability of marketing efforts and create greater impression for potential tourists.

Measures

Initiatives

4.1 Reinforce Thailand as quality and safe destination



4.1.1 Improve perception and confidence in quality through value communication to tourists as well as the system that monitors and rates the quality of tourism offerings (Quality Marks) to elevate Thailand as quality destination

4.1.2 Educate tourists through different channels on safety and prevention protocols of Thailand including rules to follow for safety as well as things to do during emergency

4.2 Employ targeted marketing to attract and encourage visits from specific segments



4.2.1 Launch targeted marketing for core tourist segments (core geographical tourists from ASEAN, China and Europe) such as targeted advertising and packages to each core segment including loyalty program

4.2.2 Employ targeted marketing to niche tourism segments such as targeted advertising and packages tailored to each niche segment – wellness tourism, ecotourism

4.3 Promote and emphasize uniqueness of Thailand and individual destination



4.3.1 Communicate Thainess on the global stage that includes creating and communicating value and Thainess in tourism offerings internationally

4.3.2 Promote the uniqueness of each region, province and attraction through storytelling to develop and communicate different branding of different region and province

4.4 Encourage domestic tourism to create location and time balance



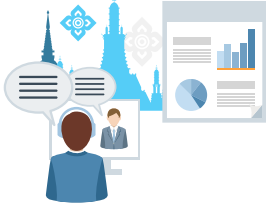
4.3.1 Create popularity for off-season tourism offerings such as festival calendar

4.3.2 Raise awareness on tourist attractions that are not yet popular through advertising, branding as high-quality attraction as well as providing one-stop tourist package

4.4.3 Promote a culture of domestic tourism “Thais travel in Thailand” through increasing attractiveness of domestic tourism and tailored sales mechanism such as tax-reduction scheme

Measures

4.5 Empower marketing campaigns through stakeholder collaboration and technology

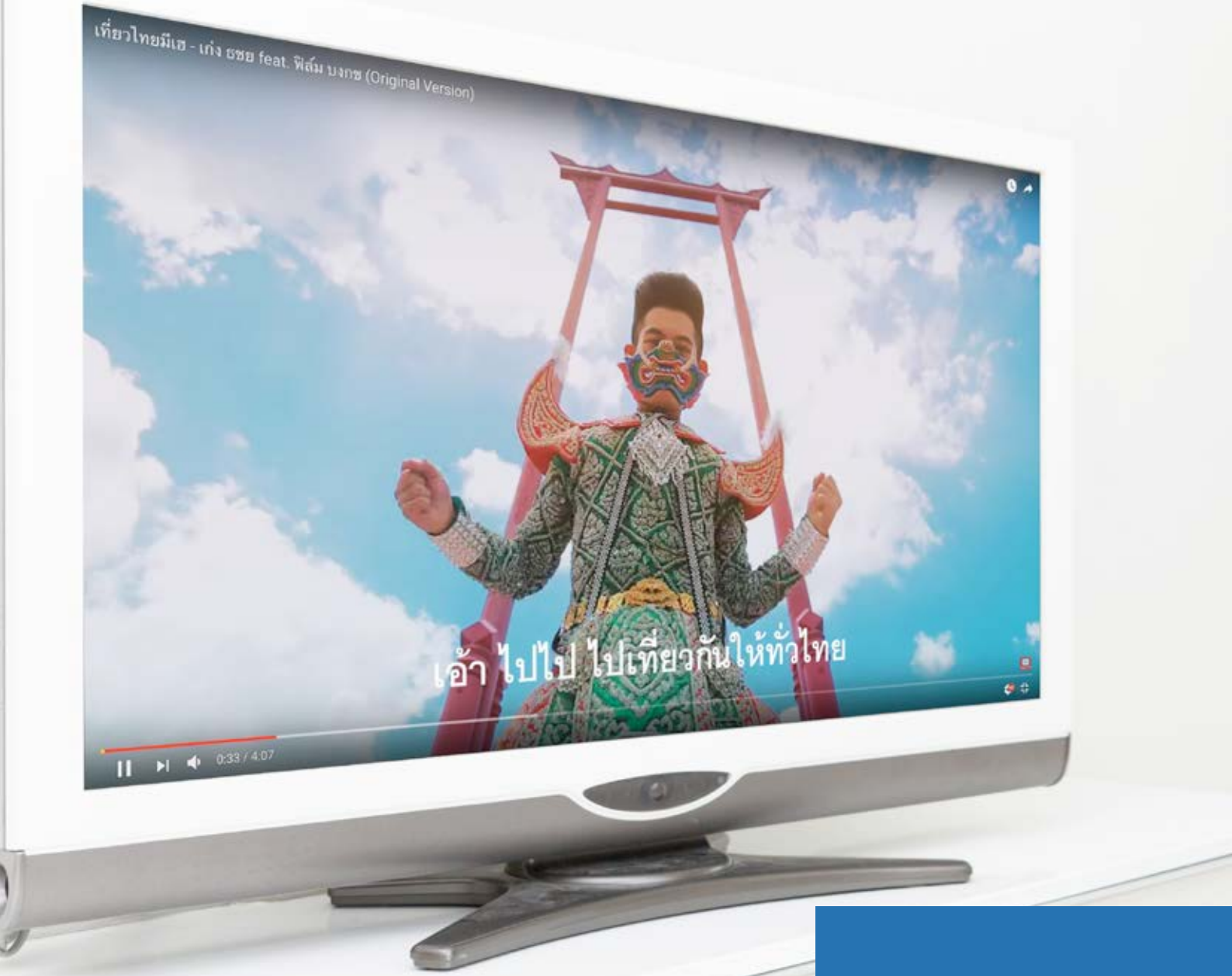


Initiatives

4.5.1 Promote collaboration in joint marketing across stakeholders such as public and private partnership

4.5.2 Employ technology in marketing tactics such as devising applications for marketing promotion as well as monitoring and analyzing post-travel reviews and feedbacks on online media





Initiative 4.1.1

Improve perception and confidence in quality through value communication to tourists and establishment of system that monitors and rates the quality of tourism offerings (Quality Marks)



Objective

This initiative aims to boost Thailand's appeal as a high-quality tourist destination via rebranding campaigns and development of quality certifications for local attractions.



Rationale

Despite the beauty of cultural and natural assets in Thailand, the unpleasant issues, such as scamming, have tinted Thailand with negative image and a perception as mass tourism destination. This image has created skepticism to support local merchandizes and services. In addition, there is no official quality certification program for tourism offerings in Thailand that are well-known to the tourists and can create trust in Thai tourism offerings.



Recommended Actions

In order to turnaround the negative perception, **Thailand should first focus on branding it as self a high quality and preferred destination.** The first quick-win is to conduct aggressive marketing campaign to promote and reinforce the perception of Thailand as high-quality destination. This campaign can be accompanied by the promotion of high-quality tourist attractions, as developed in the first strategy. Furthermore, targeted marketing aligned with high-quality brand for high-quality tourism segments, such as wellness, ecotourism, and yacht should be initiated. Targeted marketing can also be devised to attract the high-income tourist groups, such as elderlies, honeymooners, higher-end tourists from Russia/ China/ ASEAN. The government can also leverage high-quality events to attract high-quality tourists, such as fashion weeks, art festivals, or royal regatta.

Secondly, **Thailand should conduct rebranding exercise on specific areas with negative image through collaboration with local authorities and communities.** The government should start by identifying areas that are particularly associated with negative image. A place-specific communication campaigns towards tourists and locals should then be devised to counter negative image of the area. In the rise of internet and experience sharing site, tourists often seek and trust in first hand review from previous tourists' more than devised information from the authorities. Therefore, Thailand should encourage tourists to leave positive review, such as in social media, about their trip to Thailand through marketing campaign, especially in the area with currently negative image.

Lastly, the government should **develop Quality Certification program for Thai tourism offerings as a signal of quality assurance.** Quality Mark standard, criteria, and mechanism should be clearly defined to align with customer preferences by related-parties. The government should also build awareness of Quality Mark and encourage adoption among businesses. In parallel, the government should support marketing campaigns that promotes these certified quality offerings.

Ownership

Initiative champion(s) – MoTS and DOT

Stakeholder(s) – TAT / Ministry of Social development and Human security / Local district authorities / DASTA



Initiative 4.1.2

Educate tourists through different channels on safety and prevention protocols of Thailand including rules to follow for safety as well as things to do during emergency



Objective

This initiative aims to make Thailand a safer place and improve safety perception of Thailand.



Rationale

One bad incident is enough to create a mark of distrust in tourists. Thailand is perceived by some foreigner as unsafe with widespread tourist scams, especially involving transportation services. Crime is another cause of the distrust, with several cases of tourists being a victim during their trip to Thailand. Regulations and enforcement against tourist's related scam are considered weak with much room for improvement. In addition, tourists are not well-aware of the measures and protocols to ensure safety during traveling in Thailand, which further creates doubt and reduces the confidence in visiting Thailand. Furthermore, tourists in Thailand often lack the knowledge of how remain safe and what to do in the case of emergency.



Recommended Actions

To address these fundamental problems that hinder the development of tourism, **Thailand needs to promote itself as safe destination to build confidence and encourage visits**. Some of the recommended actions to consider include launching memorable advertising campaign to re-brand Thailand as safe destination, through common-used media channel such as YouTube, social media, and travelling magazine. Clearer safety information should be made available for tourist at ease, especially on online channels, such as TAT website, airlines' website, embassies' website, as well as at high exposure physical site, such as brochure at tourism roadshows and at Thai embassies abroad.

Secondly, Thailand should work on educating the tourists on safety tips and protocol necessary to help them avoid dangerous situation and be ready to assist tourist in case of emergency. The knowledge tourist attained will further boost the confidence in safety while traveling in Thailand. A comprehensive brochure detailing this essential information should be made available at key tourist touch-points, such as attractions and transport points. Place-specific safety tips pop up on phones should be activated when tourists move around and get connected to different Wi-Fi hotspots throughout the nation. The enhancement of existing hotline 1155 ready to provide tourists with more safety tips as well as assistant in case of emergency is also recommended. One of the most effective modes of communication is through the local themselves. Therefore, personnel in tourism industry as well as general public should be educated to be well-aware of the safety tips and effectively advices to the tourists.

Lastly, the related parties should strengthen enforcement and education of scam law. The locals should be educated and informed of the long-term negative impact of scamming. On the other hand, incentive should be provided to reinforce straight business transaction. Great case should be made public as example for the others. Tourists should be given an easy channel to report scamming incident. In addition, the law enforcement and penalty for scamming should be made more significant to discourage the attempt of scamming.

Ownership

Initiative champion(s) – TAT and Tourist Police
Stakeholder(s) - MoTS / Royal Thai Police / Ministry of Transport / Ministry of Interior / Ministry of Foreign Affairs / Local district authorities

Initiative 4.2.1

Launch targeted marketing for major tourist origins (i.e. ASEAN, China and Europe) such as targeted advertising and packages suitable for each origin including loyalty program



Objective

This initiative aims to increase marketing effectiveness by launching campaigns catered to the profile and interest of tourists from key origin countries.



Rationale

The current tourism marketing campaigns are often generic for mass audience. However, each tourist origins are fond of different aspect of Thailand. Thailand has the opportunity to selectively present the right value of Thailand to the right group of tourist. Moreover, there are minimal programs available to entice and reward frequent visitors, leaving opportunities to increase their retention.



Recommended Actions

Thailand should **use targeted campaigns to create awareness and promote Thailand to tourists in key origin countries**. Targeted marketing is a tool to showcase the part of Thailand that will most appeal to each group of tourist. First is to start gaining the understanding in the profile of tourists from each origin, for instance, ASEAN, China, and Western Europe, then match the preference with the right offerings. This method should also be used to assess new growing group of tourists to better prepare suitable offerings to attract the new group. Marketing partners from the origin countries should as well be identified to further boost the marketing effort in those key origin countries. Thailand should also leverage this partnership to develop an effective marketing campaign and tailored the offerings for each key origin. In the light of online traveler, Thailand should look to develop country-specific websites, YouTube channels, and social media pages with customized languages for each country. Another method of promotion is movie. Many famous movies featuring scenery from a foreign country have been effective in boosting tourism in that nation. Therefore, Thailand should encourage and attract movie productions, especially from key origin countries, to feature scenes in Thailand to promote tourism.

Moreover, **Thailand should develop segment-specific promotional packages** by designing the packages suitable for each nationality through the use of country-specific marketing channel. The marketing message should go where the target tourist groups are, either mass media, online, or mobile. **Loyalty program for frequent visitors should also be established** to encourage re-visiting and create greater loyalty to the country.



Ownership

Initiative champion(s) – TAT
Stakeholder(s) - MoTS / Ministry of Foreign Affairs / Private sector



Initiative 4.2.2

Employ targeted marketing to niche tourism segments such as wellness tourism and ecotourism



Objective

This initiative aims to improve marketing effectiveness by targeting promotion of specific destinations, experiences and offerings that Thailand can offer to niche segments.



Rationale

Over the past 10 years, more tourism segments have established and gained popularity. Tourists interested in these niche segments often need to search for the destination with such unique offerings. Thailand has the potential to offer several niche tourism, such as wellness tourism, ecotourism, yacht tourism, and long-stay tourism. However, these segments are currently not receiving much marketing attention and are not effectively promote to the prospective tourists. There are also minimal events targeting these niches - yet fast growing - segments.



Recommended Actions

Thailand should promote its niche offerings more effectively through the use of **targeted campaigns to create awareness and promote specific offerings in niche segments**. In order to effectively promote the niche segment, Thailand needs to first identify the niche segments that are ready to support incoming of tourists. Later, these niche offerings will be matched with the prospected tourist groups. Segment-specified advertisements through relevant marketing channels are encouraged to effectively attract tourists of niche segments. Segment specific webpages on Tourism Thailand website to promote awareness and the Appeal of offerings for each niche segment should be developed, including wellness, cruise, ecotourism, and long-stay tourism. Online marketing channels, such as blogs, YouTube channel, and social media pages can be leveraged as supplement to the traditional media.

Furthermore, **segment-specific promotions should be developed**. Thailand should aim to host segment specific events, such as 'ASEAN connectivity' targeting luxury or high-end and expats, as well as specific niches, such as 'Amazing Thailand Golf Paradise'. Segment specific royalty program should be devised through collaboration with service provider in the segment, such as wellness cards, golf course cards. Promotional packages specific to each segment should be developed and promoted in relevant marketing channels such as advertisements, content marketing, social media, etc.

Ownership

Initiative champion(s) – TAT
Stakeholder(s) – MoTS / Private sector / Ministry of Foreign Affairs / Sector specific entities such as TCEB for MICE segment

Initiative 4.3.1

Communicate Thainess on the global stage that includes creating and communicating value and Thainess in tourism offerings internationally



Objective

This initiative aims to define a clear value proposition of Thainess to the world and communicate the uniqueness of such value through the creation of products with Thainess value and immersion of tourists within the local community.



Rationale

Thainess is everything that represents Thailand, involving both the modern Thai way of life and the local traditional Thai way of life. Currently, most tourists are easily exposed to the modern Thai way of life and lack the awareness of the locality of Thailand, especially in the community level. In addition, Thailand has not utilized this unique value to support the growth of tourism effectively, especially into the development of local products.



Recommended Actions

To reach the full potential for Thailand tourism on the value of Thainess, it is recommended to **define the unique value propositions of each community and extract them to create distinct and desired products**. First, the understanding of the value of Thainess should be emphasized. These values should be communicated to the locals. These locals should also be encouraged to incorporate such values into developing or upgrading their products and services. The government should also develop “Thainess” labels and support marketing of Thai products with “Thainess” labels through relevant marketing channels.

In addition, the local Thainess experience should be effectively marketed. Thailand should **promote its community-based tourism to boost local Thainess internationally and to offer wider range of tourism experience**. First is to raise awareness and clear understanding of community-based tourism in Thailand’s context. CBT has always been associated with budget travel and backpacker. However, CBT has wide range of offerings that includes more premium experience. Each of the regions in Thailand has different way of life and its own unique culture. Therefore, Thailand should look to exhibit of CBT offerings in each region of Thailand by including more information on marketing materials and by encouraging communities to participate in roadshows locally and abroad to promote their own destinations.

Ownership

Initiative champion(s) – TAT

Stakeholder(s) - MoTS / Ministry of Culture / DASTA / Ministry of Education / Local district authorities



Initiatives 4.3.2

Promote the uniqueness of each region, province and attraction through unique storytelling to develop and communicate different branding of different region and province



Objective

This initiative aims to showcase the uniqueness of tourism assets and offerings in every region and province in Thailand to encourage visits to more destinations and visits to under-explored destinations.



Rationale

Tourism development among region/province is unequal, partially because the concentration of tourists and the lack of awareness in other attractions. Some regions in Thailand have their own association among the locals to support the growth of tourism in the area, while some don't. This limits the opportunity to utilize local expertise in developing unique tourism experience in the area.





Recommended Actions

To draw greater visitors to visit our diverse and unique tourism, first and foremost, Thailand should develop **clear branding and positioning for each region and provinces to reinforce the concept of “77 provinces, 77 experiences”**. TAT and related parties should conduct a study of main tourism assets in each region and province and produce interesting booklets/medias that show all attractions in each region and province. Moreover, branding of each province; for instance, Andaman region is to be associated with high quality, Korat with diversity and nature, Buriram with sports, Surin with elephants, should be made under close collaboration with the locals. These unique provincial brandings should be communicated to all stakeholders, the public, and tourists to build and reinforce consistent branding.

Good story makes consuming and remembering the content generally more Appealing. **Story-telling technique can help enhance interest and Appeal of unknown attractions by differentiating and building the unique branding for individual attractions.**

Collaborations among local communities to cultivate stories for each regions and attractions based on genuine history and uniqueness of the place should be supported. These stories should then be communicated clearly and consistently for tourists and general public. Platforms where tourist can post comments, elaborating their experiences, and add to the stories behind each place should be create as another technique to fascinate new audience and foster involvement among tourists and communities.

Ownership

Initiative champion(s) – TAT

Stakeholder(s) – MoTS / Ministry of Culture /Local district authorities





Initiatives 4.4.1

Create popularity for off-season tourism offerings such as festival calendar



Objective

This initiative aims to boost the number of tourists visiting Thailand during the low season by promoting appeal of low-season travel and launching relevant promotions.



Rationale

Tourism industry revenue varies across seasons and softens significantly during the low season. Currently, marketing efforts and promotions are minimal and can be more aggressive during the low season. The more smooth out tourism revenue will also benefit tourism business in making resource planning and optimizing the value of their investments.



Recommended Actions

Tourists are looking for interesting things to see and to do all year round. Therefore, Thailand should use this opportunity to develop and distribute calendar that shows the best regions in Thailand and ASEAN to visit at each time of the year. The calendar will highlight on the events and attractions that are most beautiful to visit in the, traditionally, low-season. This year-round calendar can help **promote the awareness of low-season offerings**. In addition, this calendar should be developed in such that it aligned with the holidays in each tourist origins; such as summer holidays in Europe during rainy season in Thailand, Chinese New Year in cool season of Thailand. This will further facilitate and attract more tourists visiting during their convenient time.

Secondly, **the development of extensive travel promotion during low season is recommended**. This can be done by reinforcing and expanding partnership with hotels, airlines and tour agencies to reduce the price of accommodation, flights, and tour packages during low seasons. The deployment of tourist travel passes with reduced price during low season can be implemented. Publicizing perks of travelling during low season coupled with discounts and promotions can further provide tourists with the best value-for-money offerings. This will bring in more tourists during traditionally low season and reduce the polarization of the tourism industry.

Ownership

Initiative champion(s) – TAT
Stakeholder(s) - MoTS / Ministry of Culture / Local district authorities

Initiatives 4.4.2

Raise awareness on tourist attractions that are not yet popular through advertising, branding as high-quality attraction as well as providing one-stop tourist package



Objective

This initiative aims to support the development of inclusive tourism by promoting tourism in less addressed regions.



Rationale

Despite the large number of incoming tourists in Thailand, the tourists have been mostly concentrated in few regions – majority visits only Bangkok and the Southern islands. Many have indicated the wish to explore other parts of Thailand, but are not familiar with the attractions and did not know where to visit. In addition, tourists are increasingly seeking for first-hand review about the attractions. This creates the spiral where the attraction with visitors will further draw in more visitors. Those under-explored destinations are then perceived to have “nothing to do” with poor facilities, hygiene, and safety standards. Some of these claims indicate the need to improve physical facilities while some only indicate the need to raise the awareness of the current status of these under-explored destinations.



Recommended Actions

To put more light to these destinations, **it is recommended to put a greater emphasis on advertising the under-explored destinations by building awareness and Appeal of under-explored destinations.** Conducting roadshows and using specific advertising contents will help promote specific regions by focusing on targeted tourists for each region e.g. Northeastern region to Thai and ASEAN tourists. In addition, these destinations should be promoted during tourism fair, nationally and internationally, to raise awareness among tourists and tourism businesses. Aggressive advertising campaigns can be effective in helping to build and reinforce awareness of different attractions, for instance, “one attraction a day” advertising campaign.

After raising awareness, **Thailand should move on to use promotions as a mode to encourage visits to these destinations.** Tourists might be less willing to explore the unbeaten path by themselves, therefore it is advised to first encouraged the travel agencies to develop comprehensive one-stop package to facilitate the tourists wanting to visit under-explored destinations, such as package that includes end-to-end travel, accommodation, and local guides. Discount and special offers could also be effective to attract impulsive and budget tourists to explore these under-explored destinations.

Some under-explored destinations are the hidden gem for a private getaway. **Therefore, Thailand should create high-quality perception in potential under-explored destinations.** Under-explored destinations where local culture and local environment are best retained should be well-advertised to showcase true authenticity of these destinations. Offering and promoting premium packages in under-explored destinations tailoring for high-income tourists could bring in additional economic benefit for the country and turn into a niche segment of itself.

Ownership

Initiative champion(s) – TAT

Stakeholder(s) - MoTS / Local district authorities / DASTA / Private sector



Initiatives 4.4.3

Promote a culture of domestic tourism “Thais travel in Thailand” through increasing attractiveness of domestic tourism and tailored sales mechanism such as tax-reduction scheme



Objective

This initiative aims to encourage locals to travel within Thailand by organizing events of their interest and providing incentives for domestic tourism.



Rationale

Number of domestic trips per capita in Thailand is equal to global average but is still much lower than regional leaders such as China, South Korea, and Japan. Travelling abroad is still viewed as more prestigious option than domestic travelling among middle-class and high-income Thais and low income earners are unable to afford to spend much on leisure travelling. A development of domestic tourism is needed to create balance and increase resilient of Thailand tourism.



Recommended Actions

The quick-win is to **increase the attractiveness and perception of domestic holidays**. One of the ways is to utilize buzz media to create attractiveness for domestic tourism, such as creative campaigns with comparable scenery from local vs. international destination, TV series, reality shows. There are several internationally renowned attractions in Thailand, such as UNESCO world heritage sites, that can be improved to Appeal to domestic holidays. In addition, most of Thai travelers are not aware of the high-end tourism offerings in Thailand. Therefore, the effort to promote high-end offerings that are currently targeting foreigners is recommended. Promotional packages for specific types of domestic tourists, for instance, ‘Elders honeymooners’, ‘Experiential volunteers’, ‘School break family get-together’, and ‘Wonderful weekdays vacations’ should be developed and promoted. Hosting variety of events and festivals in different parts of the country can help create diversity and options for domestic tourists and encourage repeat visits, such as music festivals and marathon events.

Another effective way to induce domestic tourism is through the offering of incentives for domestic travel. The government has recently devised tax incentive to boost domestic tourism and has seen positive result. Tax rebates for spending on domestic tourism products such as flights and accommodation should be continue. Other discounts such as waive of toll fees on expressway, free entry to attractions in certain places or at certain times can also help motivate and encourage domestic tourism. Subsidy for transportation for the lower income travelers are advised to support the growth of domestic tourism. Furthermore, tax incentive should also be given to other tourism segments, such as MICE by granting tax incentives for corporate hosting MICE activity in Thailand.

Lastly, Thailand should allow for more flexible work schedule to create more opportunities for domestic travels. Precisely, the government should encourage paid holidays to be on Mondays and Fridays to increase the number of short trips. Flexible work week will also allow for more weekdays travelling. Finally, the government should be the key to encourage corporates to allow their employees to use the vacation quota.

Ownership

Initiative champion(s) – TAT
Stakeholder(s) - MoTS / Ministry of Culture / Local district authorities / Bangkok City





Initiatives 4.5.1

Promote collaboration in joint marketing across stakeholders such as public and private partnership



Objective

This initiative aims to increase Thailand's tourism marketing effectiveness by collaborating with communities, the private sector, and the public sector.



Rationale

Tourism is an industry with several stakeholders taking care of each aspect of tourism offerings. In order to increase Thailand's tourism marketing effectiveness, these stakeholders have to join force in communicating the position of Thailand as high quality destination. Currently there is no clear collaboration among local communities, the private sector, and the public sector.



Recommended Actions

To establish a joint marketing, **collaboration among the communities is crucial to form collaborative efforts in branding Thailand and each region.** The collaboration can be in form of community forums, which closely involve the local in the development of brand and image of each area. This forum can also be used as the mean to educate the whole communities to be fully understanding of the brand image of their areas. The locals with understanding and Appreciation of their local brands will learn to include the brand image on their products, services, and tourism offerings, as a way to differentiate and add value to the offerings.

On nationwide level, **it is encouraged to form a public-private marketing boards to collaborate tourism marketing attempts.** This board is responsible for creating joint promotional packages e.g. discounted price of public transportation with reduced hotel price. Public and private members are encouraged to work together to get insights on tourism in Thailand from the tourists. This insight will be valuable input in creating effective and targeted marketing campaigns. In addition, the board should look to create joint marketing campaign involving both public and private efforts to ensure effective marketing deliveries that are aligned with tourist consumption preference and the goal of the country.

Ownership

Initiative champion(s) – TAT

Stakeholder(s) - MoTS / DASTA/ Private sector /Local district authorities



Initiatives 4.5.2

Employ technology in marketing tactics such as devising applications for marketing promotion as well as monitoring and analyzing post-travel reviews and feedbacks on online media



Objective

This initiative aims to increase marketing campaign effectiveness by adopting new channels such as digital marketing and deploy more technology.



Rationale

Though reviews of Thai attractions are generally as positive as those from countries in the region, the number of reviews and experience sharing is low compared to number of tourists visiting. This can be a challenge for Thailand especially that tourists are looking for online reviews in making their travel decisions. The existing online tourism portal are not widely used and only offered limited information. Therefore, Thailand should further look into establishing more attractive online presence and marketing to better communicate the unique value of Thailand to the world.



Recommended Actions

Tourism marketing has been one of the strong points of Thailand. However, there are still rooms for improvement to match and exceed tourist expectations. First, Thailand should look **to manage, monitor and analyze online materials and feedback about Thailand**, by setting up entity that will be responsible of all online interactions. This team can work closely or be a part of data intelligence team. The main responsibility of the team is to rectify negative reviews and add positive reviews, provide incentives for tourists to post reviews, such as discount for entrance fees/at souvenir shops, and conduct analysis and recommendations for the marketing team.

In addition, **a partnership with digital advertisers to run and optimize online marketing is recommended**. Digital will be used as one of the main channels for tourism marketing for all the existing tourism campaigns. New partnership such as C2C marketing on social media Apps should also be explored.

Lastly, it is encouraged to **revamp the tourism Apps** by reviewing the existing App features and benchmark Apps from other countries as well as from private companies. Apps upgrade should be supported to enhance the attractiveness and functionality of the platforms.

Ownership

Initiative champion(s) – TAT
Stakeholder(s) - MoTS / Ministry of Digital Economy and Society /
National Innovation Agency / SIPA / Private sector

Strategy 5

Organization of collaboration and integration among public sectors, private sectors and general public in tourism development and management including international cooperation

This strategy focuses on fostering collaboration and integrative development action among all tourism stakeholders. It involves enhancing governance, adjusting relevant law and regulation, and managing tourism information, in order to support more effective analysis and development planning. This strategy also addresses public and private collaborations and international collaborations as another key driver to the success of tourism development.

Measures

5.1 Promote good management and governance to support effective tourism development



5.2 Improve and integrate tourism related laws, regulations, and standards to support tourism development



Initiatives

5.1.1 Improve work integration among central entities by appointing National Policy Committee for Tourism and MoTS as the core in management, follow-up and evaluate the direction and timing of plan development and improve alignment of top-down direction and downward communication among central and local entity with clear responsibility, roles and tracking process

5.1.2 Decentralize implementation by allocating and empowering local authorities across all levels through defining clear roles and responsibilities, improving top-down communication, optimizing approval process from the central entity, and appointing entity with power in tracking implementation progress and coordinating across different entities

5.1.3 Promote synergies and continuous best practice sharing through collaboration between public and private stakeholders across all levels as well as local entities and promote the establishment of business alliances to support joint cooperation

5.1.4 Optimize budget and human resources allocation to accommodate needs of each entity across levels and facilitate tourism development

5.1.5 Promote engagement with local community in development and management of community-based tourism or CBT such as agricultural tourism, horticulture tourism and homestay tourism

5.2.1 Promote understanding of tourism law and regulation through communication across different channels such as website summarizing tourism law, call center, stakeholders seminar on raising awareness

5.2.2 Improve collaboration among public entities relevant to tourism law enforcement through defining clear roles and responsibilities, encouraging law compliance via establishing online registration system to facilitate business owners and widening channels for tourists and public to report crimes

5.2.3 Consolidate and update tourism law and regulations to support development of offerings and enhance overall safety and sustainability

5.2.4 Improve national standards governing all tourism business in quality and safety dimensions such as hotels, adventure business and transportation modes through launching comprehensive licenses and accreditation scheme

Measures

Initiatives

5.3 Encourage private investment and the establishment of Tourism Intelligence Center



5.3.1 Optimize and facilitate tourism investment from private sectors such as, improving tourism development fund to better accommodate private investment, promoting public-private partnership (PPP) in infrastructure and man-made attraction investment

5.3.2 Establish entity to manage and analyze tourism data for the use of relevant entities by creating Tourism Intelligence and supporting data sharing tailored to the needs of users through smart dashboard displaying result of data analysis in simplified and easy-to-use form

5.4 Improve international collaboration for tourism development



5.4.1 Promote regional tourism corridors among peers such as Kong River tourism routes

5.4.2 Promote joint-marketing efforts with regional peers such as co-developing regional tourism strategy and sharing relevant data to boost marketing effectiveness

5.4.3 Enhance connectivity in regional tourism such as in CLMVT sub-region

5.4.4 Enhance convenience in regional traveling through collaboration and joint agreement between countries, such as GMS, IMT-GT, MGC, and IORA on tourism facilitating procedure such as reducing administrative difficulties of entry and creating unified regional visa and regional driving license



Initiatives 5.1.1

Improve work integration among central entities by Appointing National Policy Committee for Tourism and MoTS as the core in management, follow-up and evaluate the direction and timing of plan development and improve alignment of top-down direction and downward communication among central and local entity with clear responsibility, roles and tracking process



Objective

This initiative aims to improve alignment of direction between national level entities and enhance communication from national level to lower level.



Rationale

Currently, tourism development attempts from different entities in Thailand are still poor in integration and alignment, especially in terms of timing of development plan. Timing misalignment results in discontinuity of development action and budgets. There are limited number of meetings and workshops held between related entities to reach mutual agreement on direction and timing of master plans.



Recommended Actions

To support collaboration and integration among development parties, it is recommended to first **improve the horizontal alignment between national level entities in terms of development direction and timing synchronization of plans**. It is a priority to synchronize timeline and horizons of different master plans by holding workshop involving all related entities for a concerted effort to design and agree upon timing for master plans. Regular meetings should be organized between various central planning entities to align direction of development. The government should also encourage all master plans to include global standard KPIs that are comparable across different countries such as World Economic Forums Indices, to keep track of Thailand development in comparison to competitors and peers.

In addition to horizontal alignment, the government should also enhance vertical alignment between national and local level authorities. Clear and on-going communication processes as well as dedicated means of communication should be developed to enhance effective communication between policy level and the implementation level. Development direction, as well as long-term vision and development timeline, should be communicated to local authority with clear role, responsibility, and expectations. Aligned development can be further enhanced through the conduct of regular meeting between central planning entities and local authorities. Furthermore, proper incentives and penalties systems to ensure the authorities abide by the agreed process and alignment with the overarching plan should be designed and implemented.

As a final point, the government should set up one designated central entity to be in charge of developing tourism segments currently without clear leading entity such as CBT. A clear definition of segment and standards should be first defined, along with clear roles and responsibilities of ownership and accountability of different national entities and local entities. Best practices and segment specific information should be collated and kept in central database for effective knowledge management and for sharing among the stakeholders. A network of involving local stakeholders should be established to help promote segment at province level.

Ownership

Initiative champion(s) – National Thailand Tourism Committee and MoTS
Stakeholder(s) - All Ministries and organizations involved with tourism development / Local district authorities



Initiatives 5.1.2

Decentralize implementation by allocating and empowering local authorities across all levels through defining clear roles and responsibilities, improving top-down communication, optimizing Approval process from the central entity, and Appointing entity with power in tracking implementation progress and coordinating across different entities



Objective

This initiative aims to encourage local authorities to be more involved in developing tourism in their area by giving them the authority and ownership to implement projects.



Rationale

Currently, local communities and authorities are not sufficiently involved in developing tourism in their areas, which resulted in insufficient utilization of local culture and inclusiveness of tourism development. Some local authorities are not well aware of their responsibility or available scope of development in tourism related issues. Long and tedious approval layers in Thailand are inefficient and create much confusion to both the implementation entities and the policy making entities. This layer has also resulted in difficulties of reporting mechanism, which hinders development monitoring and assessment.



Recommended Actions

To address these inefficiencies, the policy entity is encouraged to **empower local level authorities to carry out implementation tasks**. This can be done through clear identification of roles and responsibilities of local authorities and clearly define the scope of work and accountability of each entity. Complex and long process of layer approval should be improved through a better allocation of roles from national to local level authorities and a more streamline process of approval for swift development actions.

Clear reporting mechanism should be designed to streamline the communication process between central authorities and the local authorities. This can be achieved by defining reporting lines and monitoring mechanisms including scope and occasion for intervention by national entities and the procedure to address project derailment.

In addition to collaboration among the government entities, it is also recommended to include local communities for inclusiveness of tourism development. **Formal platform for collaboration between local authorities and the local communities is suggested.** Regular meeting between local authorities and the communities to discuss issues related to tourism development can be arranged upon this platform. In addition, online platform for ideas sharing is highly encouraged.

Ownership

Initiative champion(s) – National Thailand Tourism Committee and MoTS

Stakeholder(s) – All Ministries and organizations involved with tourism development / Local district authorities

Initiatives 5.1.3

Promote synergies and continuous best practice sharing through collaborations between public and private stakeholders across all levels as well as local entities and promote the establishment of business alliances to support joint cooperation



Objective

This initiative aims to encourage more collaboration between stakeholders on areas such as sharing of best practices.



Rationale

Most provinces in Thailand have silo organizational structures for tourism development, preventing knowledge sharing among different communities. The supply chain in the tourism industry in Thailand could be better integrated with more co-planning between tourism and other sectors, such as agriculture. More best-practices could also be shared by national and international experts to local communities and lessons from another province could also be Applied in the development of other provinces.



Recommended Actions

Thailand should look to **improve cross-province collaboration**. The government and related parties should encourage provinces to begin collaborating on developing a consistent tourism brand for the whole region. The consistency of brand communication will build a unique proposition for each area and encourage the spreading of tourist visits to the less-discovered areas. The collaboration should look to co-promote tourism offerings and co-invest in shared facilities. Moreover, knowledge-sharing forums and workshops between provinces and regions should be established to foster cohesion among different communities and sharing of best practices.

Moreover, the government should **support the set-up of business alliances to promote collaboration among tourism businesses and between tourism and other businesses**. This can be accomplished by fostering collaboration among businesses in the tourism sector, such as hotel owners and tourism operators, to offer more attractive bundle packages and improving supply chain integration among businesses to promote sustainable tourism, for instance, connecting souvenir products producers and raw material suppliers from periphery provinces with large retailers.

As a final point, **improvement of communication among different entities at regional, provincial, and local levels to cooperate on tourism development is advised**. Regular meetings among entities particularly between national level and local level to share best practices from national and international experts to the local authorities should be established along with an online platform to share ideas and best-practice among different relevant entities.



Ownership

Initiative champion(s) – National Thailand Tourism Committee and MoTS
Stakeholder(s) - All Ministries and organizations involved with tourism development / Local district authorities

Initiatives 5.1.4

Optimize budget and human resources allocation to accommodate needs of each entity across levels and facilitate tourism development



Objective

This initiative aims to align budget and human resources allocation to support tourism development.



Rationale

Workshops with local authorities have revealed complaints regarding budget and human resources allocation, which should be reviewed and changed if deemed necessary. Specifically, insufficient funds are given to local authorities to independently develop and maintain tourism attractions. Suboptimal allocation between provinces also hinders development of tourism in less addressed areas. Moreover, many tourism-supporting organizations currently lack sufficient funding and human resources, such as Tourist Police. Lack of resource has been one of the causes for discontinuity of tourism development.



Recommended Actions

There are several stakeholders responsible for the development of each component that comprise quality tourism destination. Ensuing that these entities have the resource needed to support the development is necessary. **Budget and human resource allocation to district-level authorities to support local implementation should be revisited to make sure they are sufficient.** Analysis of current budget and human capital allocation should be conducted and these allocations should be optimized based on local authorities' needs as a resource to support tourism development.

Furthermore, the central authority should look into **revising budget and human resources allocations across provinces to reflect direction of tourism development.** It should conduct analyses on the current budget and human capital allocation to provinces with less-developed tourism attractions including 8 strategic clusters and 12 hidden gems. Lastly, resource allocation plan for those entities facing **resource constrain should be reviewed to prevent any derailment of tourism development** in these organizations.

Ownership

Initiative champion(s) – National Thailand Tourism Committee and MoTS
Stakeholder(s) - Ministry of Finance / All Ministries and organizations involved with tourism development / Local district authorities



Initiatives 5.1.5

Promote engagement with local community in development and management of community-based tourism or CBT such as agricultural tourism, horticulture tourism and homestay tourism



Objective

This initiative aims to make tourism development inclusive and able to raise income for local communities with positive spillover to other sectors especially agriculture, fishery and crafts.



Rationale

Thailand, at its fundamental, is an agricultural nation with most of its citizen working in agricultural sector and often resides in the rural areas. This has given the rise to Community-based tourism (CBT), which leverages Thai traditional way of life and showcases it in a way that creates uniqueness to Thailand tourism. CBT has been one of the priorities for tourism development in Thailand in the recent years. This tourism segment creates additional revenue stream for the locals and support wealth distribution to the rural parts of Thailand. Tourists are invited to explore the traditional Thai way of life while living with, or like, the locals. However, communities and some officials still lack clear understanding of what CBT actually is. There is also limited formal support for the development of the sector. Interestingly, tourists who are interested in CBT are usually high-income tourists, who are willing to pay for authentic experience. This indicates that more high-quality products could be offered to increase spending per head and/or increase length of stay.



Recommended Actions

To crystalize the understanding among stakeholders and capture the opportunity, Thailand **should formalize the system for supporting development of community-based tourism**. A designated entity in charge of CBT sector should be established and defined its roles and responsibility. Formal definition and the overarching concept of community-based tourism needs to be defined and communicated clearly among communities, local authorities and other relevant stakeholders including the public and tourists. The designated entity should also establish networks involving local stakeholders to help promote CBT at province level and set formal standards to govern CBT segment. Database sharing across communities should be also established to identify best practices for each dimension and foster cohesion and knowledge sharing among communities. This designated entity should also look into designing and promoting tourism routes surrounding CBT offerings in each region to allow tourists to visit various communities along the route, each offer a unique experience based on authentic local uniqueness; for instance, Chiang Mai - Chiang Rai -Phayao route, Trat – Chanthaburi – Rayong – Chonburi route, and Phuket - Satun route.

Secondly, Thailand should **support the development of CBT by creating more premium and value-added product offerings along with more exciting and diverse activities to increase spend per head and length of stay**. The government should inspire more local-led development of communities producing local craft products into tourist attractions; for instance, ceramics in Lampang and silk in the Lower Isan region. In addition, farming, fishing and mining communities and be developed into tourist attractions; such as rice farms in Lower Isan, mining communities in Chanthaburi, fishing communities on islands, and coffee farms in Chumpon. The government should further support local communities throughout the development of go-to-market for high-quality souvenir products leveraging local area's culture and heritage.

Finally, Thailand needs to promote the development of homestay tourism in rural communities by setting standards for homestay offerings, revising regulation to legalize and support homestay segment. Security control protocol should be studied and put in place for both the hosts and the guests. These standards serve to elevate the level of quality in homestay tourism of Thailand. These homestay offerings should retain authenticity of each community, yet meet tourists' expectations in terms of hygiene and cleanliness. Local activities should be made available for tourist to enrich the experience and promote longer stay. In addition, the use of application and technology could help enhance accessibility and strengthen homestay markets in rural areas.

Ownership

Initiative champion(s) – MoTS and DOT
Stakeholder(s) - TAT / Ministry of Education / Ministry of Commerce / Ministry of Culture / Ministry of Agriculture / CBT-I / Local district authorities / DASTA / Ministry of Social development and Human security/ Communities/ Private sector





Initiatives 5.2.1

Promote understanding of tourism law and regulation through communication across different channels such as website summarizing tourism law, call center, stakeholders seminar to raise awareness



Objective

This initiative aims to increase awareness of existing tourism related law and regulations among local businesses in the tourism industry, before the creation of new consolidated law.



Rationale

Law and regulations regarding tourism are currently scattered across different Acts, with many related entities having Acts that involve clauses related to tourism. Stakeholders in tourism development are often unaware of law and regulations related to tourism, resulting in delay in processes and unintentional breach of law and regulations. Uniform understanding of tourism-related law will help ensure the quality, integrity, and efficiency of tourism development among all involving parties.



Recommended Actions

The quick-win is **to summarize all relevant law and regulations that are related to tourism**. This summary is to be produced and distributed among stakeholders to promote uniform understandings. A website that consolidates clear explanation of all up-to-date regulation is highly suggested. This website will provide ease of access to key information and ensure all relevant parties are well-informed.

Furthermore, the channels to engage tourism-related business in understanding tourism regulations should be developed. This can be done through seminars and information sessions that aim to explain and create understandings in tourism law and regulations. Lastly, contact center with informative staffs should be established as a contact point for businesses and public seeking advice regarding tourism law and regulations, either by email or by call.

Ownership

Initiative champion(s) – MoTS
Stakeholder(s) - Ministry of Interior

Initiatives 5.2.2

Improve collaboration among public entities relevant to tourism law enforcement through defining clear roles and responsibilities, encouraging law compliance via establishing online registration system to facilitate business owners and widening channels for tourists and public to report crimes



Objective

This initiative aims to boost safety and sustainability of Thailand's tourism industry by strengthening enforcement of regulations.



Rationale

Despite numbers of tourism related laws and regulations in Thailand, most of which are not being enforced effectively. This reduces the importance of these laws, resulting in many tourism stakeholders not taking them seriously. Poor monitoring system as well as lack of strict and credible enforcement further worsens the situation. If systematic law enforcement is still absent in Thailand, it will be difficult to ensure quality of tourism development.



Recommended Actions

To solve this issue, **a platform for collaboration between relevant authorities should be created with clear assignment of roles and responsibilities for enforcing each law.** All tourism-related law and regulations should be defined, along with the scope of responsibility for each tourism related entity, both at the central level and at local level. Central entities should organize workshop with stakeholders to identify current gaps in legislation and assign roles and responsibilities to enforce law.

To ensure effective and continuing monitoring, it is suggested to establish **project management office to track report and monitor enforcement progress.** Upon setting up, clear organizational structure, roles and responsibilities and processes involving this office should be clearly defined. This office will be responsible to provide analysis and recommendation for improvements as well as monthly reports on progress of tourism development throughout the nation.

Furthermore, **technology and innovation should be further leverage to better promote compliance to the law and regulations.** Technology can assist in Application process for businesses in licensing and national standard accreditation directly online within one portal. This portal also contains updates of relevant tourism law and regulations. In addition, Tourism Thailand App should be upgraded to incorporate scam and crime reporting functionalities to enhance the accessibility to safety and security for tourists, or separated App should be developed as main portal for tourist to report and alert for crimes and accidents. Lastly, incentives and penalties should be further used to enforce regulation obedience.



Ownership

Initiative champion(s) – MoTS and Tourist Police

Stakeholder(s) - Royal Thai Police / Ministry of Interior Local district authorities

Initiatives 5.2.3

Consolidate and update tourism law and regulations to support development of offerings and enhance overall safety and sustainability



Objective

This initiative aims to boost safety and sustainability of Thailand's tourism industry and ensure Thailand's standard is aligned with industry dynamics.



Rationale

In addition to law enforcement, Thailand still has room to improve the practicality of its tourism-related law and regulations. Scattered law and regulations have made it difficult to holistically update the law to support the change in tourism landscape, without creating confusion. In certain sector, especially those newly developed ones, law and regulations regarding the sector are not practical, up-to-date, or fail to support the growth of the sector.



Recommended Actions

To enhance the overall safety and sustainability for the tourism industry, it is first recommended to **consolidate tourism-related law into one single act for easier understanding** by engaging relevant authorities and hosting workshops to together in writing the consolidated version.

Secondly, **existing law and regulations should be updated to support development of tourism products**. To support high growth niche segments, Thailand should look into developing dedicated zone for certain tourism segment, such as Special Ecotourism Zones and Wellness hotspots, as official status to promote the development of respective tourism segments. These zones should be supported with incentives and restrictions for effective management. In addition, Thailand should look into further establishing Sport Cities, MICE Cities and Green Cities as official legal status to allow special incentives to be given. In some segments, regulations are the challenges for growth. Therefore, Thailand should revisit regulations concerning tourism segments and adjust them such that they support the growth of the segment; such as in Marine tourism (yacht rental, visas parking of yacht, boat crew) and Homestay tourism, and Long-stay tourism (retirement visas, home ownership, time sharing of accommodation).

Further, the government and related parties should **update law and regulation to enhance tourists' safety**. Specifically, they should update the regulation to promote adoption of travel insurance for tourists and making it mandatory for high-risk segments such as extreme sports. The government can further work with insurance companies to sell insurance at key touch points, such as airports, and promote collaboration between insurance firms in Thailand and abroad. Additionally, to enhance tourists' safety and boost their confidence in visiting Thailand, scam laws should be tightening with increasing penalties and more Tourist Courts in tourist cities should be established.

As a final point, the government and legislative bodies should consider updating the law and regulations **to enhance sustainability, to facilitate human capital development, and to support private investment**. Precisely, the government should tighten zoning law to protect environment and cultural authenticity in selected areas, set legal carrying capacity of fragile attractions, and update regulation to promote eco-friendly buildings and infrastructure. The government should also tighten the requirement of tourism business to properly train their employees and requirement to hire qualified Thai workers across all levels in the organization. Adjustment of regulations to facilitate development of local guides, trained by local communities and businesses can help increase availability of guides and create economic benefit to the communities. Finally, leveraging the use of PPP for large infrastructure projects and augmenting funding availability for tourism entrepreneurs, especially in priority segments, can help accelerate the development.

Ownership

Initiative champion(s) – MoTS
Stakeholder(s) - Ministry of Interior / All Ministries and organizations involved with tourism development / Private sector

Initiatives 5.2.4

Improve national standards governing all tourism business in quality and safety dimensions such as hotels, adventure business and transportation modes through launching comprehensive licenses and accreditation scheme



Objective

This initiative aims to boost safety and sustainability of Thailand's tourism industry and ensure Thailand's standard complies with international standards.



Rationale

Currently, there are no national standards that govern the safety or quality of tourism businesses. Standards and certifications do exist for certain industries, although they are scattered across different entities. This results in low awareness of the system throughout the entire tourism industry. The lack of trustworthy national tourism standard also resulted in lack of confidence among tourists, creating a limitation to develop into quality destination.



Recommended Actions

To address these problems, Thailand should set **national safety and quality standards for all businesses related to tourism including hotels, transportation providers, and tourism businesses**. The government should begin by conducting as-is assessments of safety and quality standards of all tourism-related businesses. The as-is assessment should be later compared with international benchmarks and international relevant standards to find rooms for improvement. At that point, the government can look into drafting new national safety and quality standards and share these drafted standards with related businesses and authorities to obtain feedback. The new safety and quality standards should be launched effectively to ensure high awareness among stakeholders and cooperation from all related parties.

Dedicated entity should be established to be in **charge of monitoring adherence to these standards**. Strong organizational structure with clearly defined roles and accessible processes for new entities should be designed, as well as setting up an effective and transparent monitoring and escalation framework. Furthermore, the designated entity should **encourage businesses to register for the national standards accreditation by educating businesses of the benefits and procedures of the new national standards accreditation** and providing attractive financial and non-financial incentives, including marketing and data support.

Finally, the government should look into developing a **licensing system for all tourism-related businesses, including adventure sports**. This can be achieved by enhancing the existing licensing system for all businesses, inspecting existing businesses to ensure that they comply with the license requirements, and developing a database of licensed firms, including a profile and accreditation status.

Ownership

Initiative champion(s) – MoTS

Stakeholder(s) - Ministry of Commerce / All Ministries and organizations involved with tourism development / Private sector





Initiatives 5.3.1

Optimize and facilitate investment in tourism by private sectors through improving tourism development fund, promoting public-private partnership in infrastructure and man-made attraction investment



Objective

This initiative aims to leverage private sector investment by setting up public-private partnership investment schemes aligned with international standards.



Rationale

Thailand's insufficient and archaic physical infrastructure has created a massive bottleneck that hinders tourism development. Improvements to infrastructure require a considerable financial investment with substantial support and commitment from the private sector. However, a solid collaboration among public sector and private sector, especially at the local authority level, are not prominent.



Recommended Actions

To ensure fruitfulness of Thailand's tourism development, Thailand should look to **develop and promote public-private partnership (PPP) investment schemes that align with international standards**. Specifically, the government should conduct feasibility studies and identify areas in need of PPP and draft PPP arrangements for specific sectors, such as transportation and infrastructure development. Existing regulations should be adjusted to be conducive for PPP establishment and development initiatives. Awareness promotion of PPP schemes should also be made to reinforce additional collaboration.

Secondly, the government should **improve agility and flexibility in the use of the Tourism Development Fund**. Constructive feedback from industry stakeholders about the benefit and areas of improvement can help the government gain a better understanding and insight about the fund. These feedbacks can further help the government reassess target segments and criteria of the Tourism Development Fund, including expansion if required. The structure of the fund can also be assessed; whether breaking down the fund into multiple categories, such as a product development fund, an event development fund, or a capability development fund, is required. Moreover, the current Application, evaluation, and disbursement process of the grant should be streamlined to allow for greater efficiency. Lastly, there should be a platform to promote the fund's success stories and to share the best practices of how to utilize the fund to develop Thailand's tourism industry.

Ownership

Initiative champion(s) – MoTS and Ministry of Finance
Stakeholder(s) - Ministry of Transport / BOI / Other Ministries and organizations involved with tourism infrastructure development / Private sector



Initiatives 5.3.2

Establish entity in managing and analyzing tourism data for the use of relevant entities by creating Tourism Intelligence and supporting data sharing that tailors to needs of users through dashboard displaying result of data analysis in simplified and easy-to-use form



Objective

This initiative aims to improve availability, accuracy and consistency of data, as well as data analysis, to support tourism planning by all stakeholders.



Rationale

Tourism industry needs to deal with large set of data, both from the tourist demand side and from the offerings side. There is, however, no centralized entity in charge of collecting all data related to tourism. The data often collected and stored in isolation among all related entities. This results in inconsistency and often inaccuracy of information. Moreover, local businesses and local authorities often do not receive sufficient data and analysis from central authorities to help plan their own development strategy.



Recommended Actions

This initiative, therefore, calls for **a setup of central authority to collect raw data from relevant units**. This central authority should first identify its key vision, mission, and objectives and design an effective organizational structure with clear roles and processes within the unit. It should lead data strategy and launch the relevant data intelligence and research team to support its objective.

Secondly, Thailand should **design and implement data strategy jointly with relevant units, leading by the central authority**. Specifically, the central authority unit should identify an entity which will be responsible for data-related issues, including roles and responsibilities from relevant units. This central authority will also design industry-wide processes to ensure efficient and timely data collection, reporting, and governance from relevant units, even at local levels. Moreover, the data strategy should organize campaigns to educate local entities on the advantages of collecting timely data. The revision of any necessary regulations to require reporting of certain critical data is needed. Data definitions and templates should also be aligned. Supporting IT- related capabilities required to automate and effectively integrate data into a management dashboard should be studied and implemented.

As a final point, this central authority unit should **identify data and data dashboards to share and set up channels to share information with different stakeholders including private and public sector and CLMV partners and develop an in-depth study on international best practices to be utilized for Thailand**. Specifically, the central unit should establish a tourism data intelligence and research team in charge of conducting research and analysis to enhance knowledge on the tourism sector. In addition, the processes for data sharing with relevant parties should be set up through workshops and recurring discussion meetings. The market insights derived from this initiative should be published for the public to use.

Ownership

Initiative champion(s) – MoTS

Stakeholder(s) - DOT / TAT / Ministry of ICT / Ministry of Commerce / Ministry of Foreign Affairs / Local district authorities / Private sector / All Ministries and organizations involved with tourism development

Initiatives 5.4.1

Promote regional tourism corridors among peers such as Kong River tourism routes



Objective

This initiative aims to make Thailand a hub for CLMV tourism and increase intra-CLMV travel



Rationale

Thailand has the geographic advantage at the center of CLMVT. With the raise of tourism in CLMV countries, Thailand is in the position to become the hub of CLMV Tourism. This will create a win-win relationship which generates gains for Thailand from the popularity of neighboring countries, and neighboring countries could also benefit from large volume of tourists, the majority of which return repeatedly, to Thailand.



Recommended Actions

First and foremost, Thailand should **identify potential tourism routes, focusing on CLMVT routes first**. This can be achieved by establishing a special project team with members from CLMVT and ASEAN countries to be in charge. An immediate goal would be to establish an analysis of key tourism sites across CLMVT and ASEAN along with the supporting ecosystem throughout the tourist lifecycle; including connectivity, accommodation, tourist services, etc. Moreover, the responsible party should conduct a study of feasibility of these potential routes and forecast the demand of potential tourism routes. These routes should then be prioritized for development based on a holistic evaluation of potential demand and implementation requirements.

Following the first recommended action, Thailand should look into **establishing these routes as official tourism corridors**. This can be achieved by outlining tourism corridors' offerings from a tourism lifecycle perspective and designing marketing, branding, and promotion strategies. Moreover, Thailand can identify new products, such as tour packages and services, to gain additional economic income.

Furthermore, **gaps in existing infrastructure and tourism services should be identified along with the solutions and investment strategies should be developed where necessary**. Specifically, the government should identify and launch any initiatives required to improve or enable development of tourism corridors and design a framework for governance that defines the collaborative role of relevant CLVMT and ASEAN members in implementing enablers.

Finally, **an effective system to implement, monitor, and evaluate the development should be considered and established**. Specifically, a proper timeline, an implementation plan, and boundaries around ownership should be clearly defined. A transparent and comprehensive stakeholder management plan as well as procedures for monitoring, reporting, and ongoing progress evaluation and feedback from stakeholders should be considered.

Ownership

Initiative champion(s) – MoTS and DOT
Stakeholder(s) - Ministry of Foreign Affairs / Ministry of Transport / ASEAN / ADB (GMS) / Ministry of Commerce / Ministry of Interior / All Ministries and organizations involved with tourism development



Initiatives 5.4.2

Promote joint-marketing efforts with regional peers such as co-developing regional tourism strategy and sharing relevant data to boost marketing effectiveness



Objective

This initiative aims to boost multi-country visits in CLMVT with Thailand as a hub.



Rationale

There are many complementary attractions among countries in the CLMVT region. However, a collaboration to co-create a brand and awareness of complimenting offerings is yet to exist. This collaboration could promote interest in more attractions throughout CLMVT region and encourage longer or repeated visits. Similarly, developing joint packages and promotions could encourage longer or repeated visits to the CLMVT region.



Recommended Actions

The first recommended action calls for **designing a joint marketing strategy to promote multi-country visits** by co-developing clear brand positioning for each country and co-designing campaigns and promotions with other countries. These countries should further identify channels to promote this joint marketing strategy that will best deliver intriguing message to the targeted tourists.

Key players in tourism industry should be made aware of multi-country visit promotions. Joint marketing strategy should be well-communicated to all relevant stakeholders, including travel agents, hotels, airlines, and transport services. These key players should be encouraged to develop products and services that align with “multi-country visits marketing campaigns,” such as multi-country transportation and hotel passes. The CLMVT governments should collaborate to develop and organize working sessions with interested parties in the tourism sector to share and test ideas of new products and services.

Lastly, the effectiveness of the marketing strategy should be evaluated at an Appropriate interval. CLMVT countries should be collaborating to monitor and track results from marketing campaigns and promotions. The results derived from such an evaluation should be objectively assessed to identify areas where the marketing strategy can be modified.

Ownership

Initiative champion(s) – MoTS and TAT
Stakeholder(s) - Ministry of Foreign Affairs /
Ministry of Transport / Ministry of Commerce / Ministry of Interior / ASEAN / ADB /
All Ministries and organizations involved with tourism





Initiatives 5.4.3

Enhance connectivity in regional tourism such as CLMVT sub-region



Objective

This initiative aims to support the development of regional tourism corridors.



Rationale

Connectivity and ease of transportation among CLMVT countries is one of the key supporting the growth of multi-country tourism. Although there are several transportation infrastructures connecting Thailand with the neighboring countries, the alternatives should be made ready to support the incoming tourists. There are many ways to further expand and improve transportation options to promote Thailand as a hub for CLMV tourism and increase tourism between CLMVT nationals.



Recommended Actions

This can be first achieved by **assessing the existing connectivity for regional travel**. In particular, there should be thorough assessment of the availability, quality, and cost of the current transportation network for regional travel to identify gaps in connectivity among countries and cities, as well as other spots that are simply difficult for tourists to navigate to.

Furthermore, **Thailand and neighboring countries should design and improve the efficiency and the availability of the current transportation networks across regions**. A transportation plan for regional tourism corridors should be developed based on as-is assessment. Existing initiatives across countries, such as tourism corridor initiatives and intra-country transportation development plans, should be compared and aligned with the plan. Initiatives, excluding those already planned, should be short-listed and prioritized. In addition, the role and scope of responsibility among key stakeholders and responsible parties should be clearly defined across countries.

Finally, **Thailand should considered expanding existing transportation services and build new infrastructure based on this plan**. Required new services should be clearly mapped, including new bus routes. Necessary investment to maintain and sustain these infrastructure developments should be made. New transportation services and infrastructure development requirements should be well-communicated to tourism businesses and to investors, to create awareness and to promote optimal utilization of the infrastructure in supporting tourism growth. Lastly, these new transportation services should be monitored and tracked based on their usage as well as to determine the system's efficiency.

Ownership

Initiative champion(s) – MoTS and Ministry of Transport

Stakeholder(s) - Ministry of Foreign Affairs / Ministry of Commerce / Ministry of Interior / ASEAN / ADB / All Ministries and organizations involved with tourism development



Innovation
that excites

Initiatives 5.4.4

Enhance convenience in regional traveling through collaboration and joint agreement between countries such as reducing administrative difficulties of entry and creating unified regional visa and driving license



Objective

This initiative aims to make it easier for tourists to travel within CLMVT region.



Rationale

For Thailand to become the hub for CLMVT tourism, the country needs to review its administrative process and adjust it to be more conducive of tourism growth. Easier process will facilitate international tourists to travel around CLMVT. In addition, tourists from CLMVT will find it easier to travel to the neighboring country, further promoting tourism across the region.



Recommended Actions

In order to promote Thailand as a hub for CLMV tourism and increase tourism between CLMVT nationals, the government should look to alleviate an administrative burden by **supporting the development of single visa for the whole region**. Thailand, specifically, should **propose and initiate the establishment of a cross-country special taskforce** to explore the implementation of a single required visa for the region. This entity will work to identify each country's outstanding concerns, reviewing and modifying existing legislation, identifying and implementing IT capabilities required to integrate visa-related data across countries. The single visa scheme with other countries should then be launched, marketed, and promoted to the public across CLMVT countries, as well as to international tourists.

Secondly, **ASEAN should investigate the possibility to allow the use of domestic drivers' licenses regionally**. The implications of accepting the Agreement on the Recognition of Domestic Driving Licenses should be reviewed. The key concerns, including existing regulations, as well as the identification of solutions for a region-wide implementation should be assessed.

Lastly, all **involved governments should ensure that the existing technological and professional infrastructure can support implementation**; for instance drivers' licenses throughout ASEAN countries must be recognized as valid by officials and by any computer-assisted detection systems.

Ownership

Initiative champion(s) – MoTS

Stakeholder(s) - Ministry of Foreign Affairs / Ministry of Transport / Ministry of Commerce / Ministry of Interior / ASEAN / ADB / All Ministries and organizations involved with tourism development

chapter 05

Conclusion

The National Tourism Development Plan Volume 2 (2017 – 2021) is the guideline for all the involving parties to take part in developing the tourism sector of Thailand. In order for Thailand to become world class high quality destination, it has to take the active steps outlined and emphasize on the key success factors, namely cooperation and integration of all stakeholders, inclusiveness of the locals and communities, and adherence to the great value of Thainess.

5 strategic axes and 55 initiatives introduced in this master plan aims to strengthen the tourism sector of the nation through solid development of tourism offerings, layout the necessary infrastructure development for sustainable tourism, enhance the competitiveness of tourism human capital and embrace the value of good host, creating unique value proposition for each of provinces through effective marketing, and enhance the level of collaboration among Thai entities as well as international entities.

The development will be gauged with a set of KPIs, each setting an ambitious yet achievable goal for Thailand. The proposed KPIs can be adapted as organization KPIs to align development direction through the use of shared KPIs. However, the achievement of the plan can only be realized with strong and consistent collaborations among government ministries, public authorities, private entity, local administrations, and other stakeholders.

Tourism is one of the main sectors in Thailand, both in terms of economic contribution and social development contribution. The sector has also been one of the fastest growing in the nation and brought Thailand into the global spotlights. However, strong growth also comes with a challenges. Thailand needs to ensure that high growth will not compromise the sustainability of its tourism assets. The National Tourism Development Plan Volume 2 (2017 – 2021) layouts the stepping stones of development Thailand should attain in order to become the world class high quality destination as portray in the Thailand Tourism Vision 2036.





chapter 06

Collaboration

The Second National Tourism Development Plan summarizes the research and analyses carried out and the recommendations made by Roland Berger Co., Ltd.

As the first National Tourism Development Plan came to an end in 2016, the Ministry of Tourism and Sports has developed the subsequent The Second National Tourism Development Plan, with the objective to provide practical tourism development directions for both public and private sectors for the period of 2017 - 2021

A structural approach was undertaken to formulate the The second NTDP. a Detailed diagnostics were conducted on the Thailand's tourism industry to obtain in-depth understanding of the past and the on-going tourism development. At the same time, several tourism trends were investigated in order to gain insights on the dynamics of regional and global tourism development. a Benchmarking exercise was also carried out with high competitiveness countries and regional competitors to determine best practices for Thailand to adopt.

Opinions from more than 200 stakeholders – consisting of public and private players – were obtained through focus group workshops held in each of 5 regions of Thailand and one-on-one interviews. Issues and challenges were discussed, and new opportunities and ideas were identified to improve Thailand tourism development. This process resulted in more than 100 ideas being generated, drilled down to 55 detailed initiatives across 5 strategic directions. The draft version of this plan was presented and endorsed at a public hearing session assembling more than 400 stakeholders including representatives from key tourism organizations nationwide. Subsequently, the cabinet approved the The second NTDP on October 5th 2016.

With earnest cooperation of public and private stakeholders from central to local level, the second NTDP is expected to propel Thailand towards a high quality world class destination, which brings wealth to its citizen and helps propel the growth of the nation sustainably and profoundly.





Appendix: List of stakeholders

ADB	Asian Development Bank
AEC	ASEAN Economic Community
AOT	Airports of Thailand Public Company Limited
BEM	Bangkok Expressway And Metro Public Company Limited
BOI	The Board of Investment of Thailand
BTS	Bangkok Mass Transit System Public Company Limited
CBT-i	Thailand Community Based Tourism Institute
DASTA	Designated Areas for Sustainable Tourism Administration (Public Organization)
DOT	Department of Tourism
DPE	Department of Physical Education
MDE	Ministry of Digital Economy and Society
MoA	Ministry of Agriculture
MoC	Ministry of Commerce
MCulture	Ministry of Culture
MoF	Ministry of Finance
MFA	Ministry of Foreign Affairs
Mol	Ministry of Interior
MoJ	Ministry of Justice
MoL	Ministry of Labor
MoPH	Ministry of Public Health
MSociety	Ministry of Social Development and Human Society
MoST	Ministry of Science and Technology
MRTA	Mass Rapid Transit Authority of Thailand
MoTS	Ministry of Tourism and Sports
NESDB	The Office of The National Economic and Social Development Board
NIA	National Innovation Agency (Public Organization)
NPT	National Policy Committee for Tourism
SAT	Sports Authority of Thailand
SIPA	Software Industry Promotion Agency (Public Organization)
SRT	State Railway of Thailand
TAT	Tourism Authority of Thailand (Public Organization)
TCEB	Thailand Convention and Exhibition Bureau (Public Organization)
TCC	Thai Chamber of Commerce



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