

AMAZING NEW CHAPTERS

Siripakorn Cheawsamoot
Deputy Governor for Marketing Communications
Tourism Authority of Thailand

Thailand Tourism Overview 2019

GDP Share

2019

17.79%

2018

17.43%

2017

17.65%

Total Employment in Tourism Sector

4,366,392

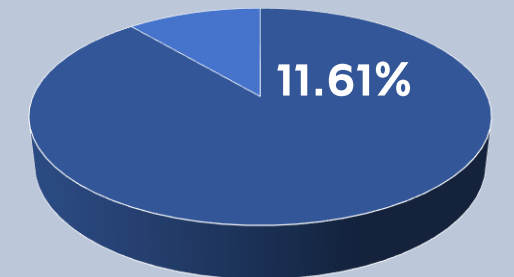
Top 3 Service Sectors

Food Services 2,284,002

Accommodation 566,051

Ground Transportation 566,026

Total Employment
(37,613,438)



Tourism Employment

Thailand Tourism Overview 2019

Total Tourism Receipt

3.01

trillion Baht

(+2.37%)

Inbound Tourism Receipt

1.93 trillion Baht (+3.05%)

Domestic Tourism Receipt

1.08 trillion Baht (+1.18%)

Top 5 Spenders

-  1. China
-  2. Malaysia
-  3. Russia
-  4. Japan
-  5. India

Total Tourist Arrivals **39.79** million (+4.24%)

Top 10

- | | |
|-------------|---------------|
| 1. China | 6. Japan |
| 2. Malaysia | 7. Russia |
| 3. India | 8. Singapore |
| 4. Korea | 9. USA |
| 5. Laos | 10. Hong Kong |

Timeline

Strategic Directives 3R to Quality and Sustainable Tourism



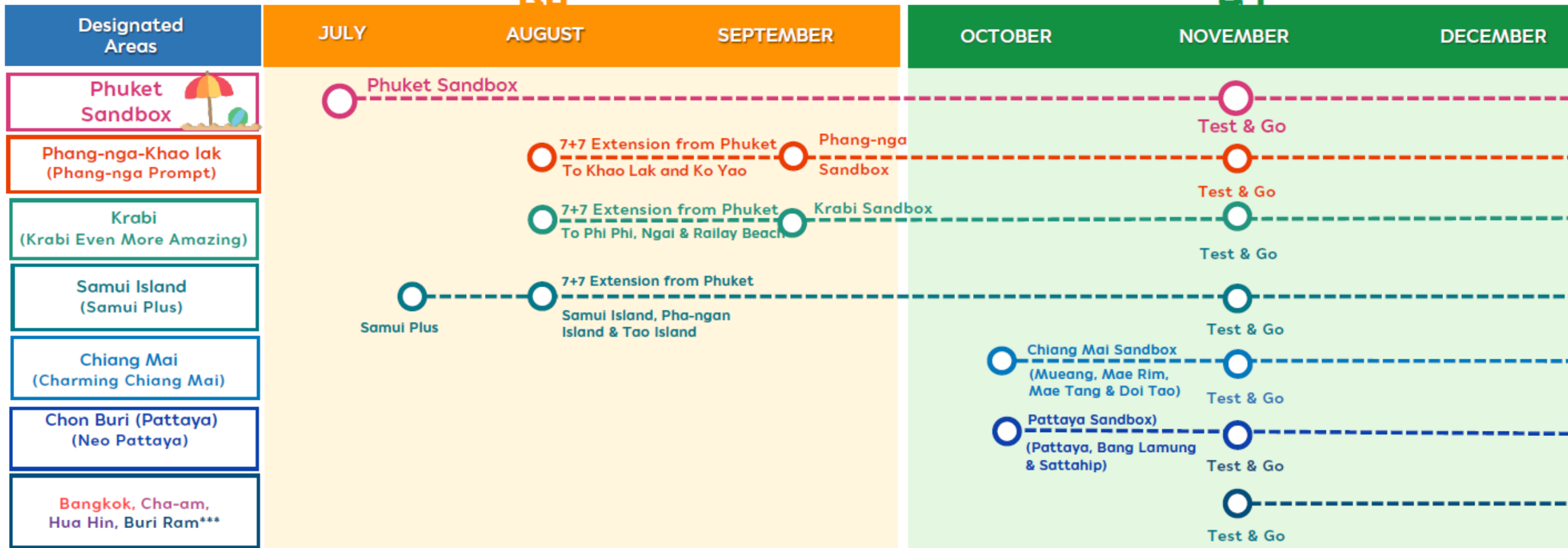
2021

Roadmap to Reopen Cities to Vaccinated Travellers





The Centre for Economic Situation Administration (CESA), chaired by the Prime Minister approved the roadmap proposed by the Tourism Authority of Thailand on **26 March, 2021**.

Q3

Q4



Requirements :	Arrival :	Stay :	Departure :
<ul style="list-style-type: none"> Fully vaccinated travellers from low-medium risk countries (according to the list of the new COVID-19 variant detected countries by the Ministry of Public Health). Children under 12 travelling with vaccinated parents and guardians. Children aged between 12-18 must be subjected to a test on arrival. 	<ul style="list-style-type: none"> PCR test negative result (less than 72 hours before departure). Vaccine certificate. Alert application. 	<ul style="list-style-type: none"> Stay at SHA+ accommodation. 1 RT-PCR test on Day 4-5. Health report on application. Stay within the designated areas (cities or areas) for at least, 14 consecutive days.* 	<ul style="list-style-type: none"> To next destinations in Thailand : COVID-19 test result or vaccine certificate. To next international destinations : Depending on the respective country's policy.

GOALS  **Achieve Targets**  **No Lost Opportunities**  **Build Trust**  **Extend to Other Areas**

International Tourist Arrivals

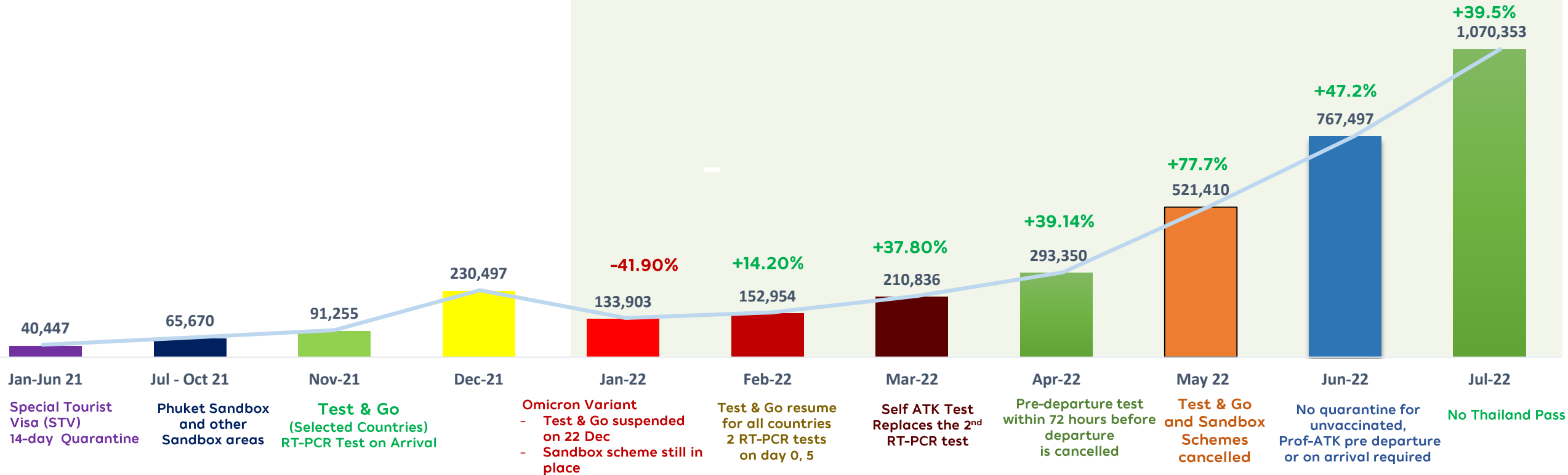


**Total International Tourists
Jan – Dec 2021
427,869 persons**

**Total International Tourists
Jan – Jul 2022
3,150,303 persons**

**Total Tourism Income
Jan – Jul 2022
1.57 Billion Baht**

*In estimation



PHUKET SANDBOX

Socio-Economic Benefits

International Tourism Revenue

JULY – OCT 2021

4.26 billion Baht



Accommodation: 1.76 billion Baht



Tourism Products and Services: 536 mil. Baht



Food & Beverages: 906 million Baht



Medical & Healthcare Services: 781 mil. Baht



Others: 277 million Baht



Economic Impacts of the Money Flow in the Tourism Industry

10.1 billion Baht

Direct and indirect contributions
of tourist's expenses to tourism businesses.



TAX INCOME

435 million Baht

EMPLOYMENT INCOME

1.082 billion Baht

Total economic value of income, wages, and
salaries to employment.

JOB CREATION

13,759

Total economic value in tourism and
recreation employment in the full-time
equivalent.

An Inspiration to Other Destinations in the Asia-Pacific Region

UNLOCKING THE WORLD

Why Phuket's 'Sandbox' pilot project matters to other islands in Asia

Kate Springer, CNN • Updated 6th August 2021



Bloomberg

Pursuits | Prognosis

Malaysia Uses Phuket 'Sandbox' to Re-Open Langkawi Islands

- Langkawi to re-open to locals from Sept. 16: Prime Minister
- Other destinations to follow when vaccination rate hits 80%



Navigating Covid-19 Travel Rules for Your Next Holiday

By Ravil Shirodkar +Follow
2 September 2021, 17:08 GMT+7
Updated on 2 September 2021, 18:26 GMT+7

Malaysia plans to reopen the tourist haven of Langkawi islands as it renews efforts to rebuild parts of the economy worst hit by the pandemic.

THAILAND

Phuket Sandbox shines the way for Thai tourism revival

Quarantine island experiment set to be replicated as kingdom takes a daring punt on reopening its decimated tourism industry

By PETER JANSSEN
OCTOBER 27, 2021



This Week in Asia / Health & Environment

Phuket's sandbox to Singapore's travel corridors: as Asia wakes up to travel, destinations weigh risks and rewards

- Thailand and Singapore are at the vanguard of Asia's tourism reawakening and their moves will be eagerly watched by other destinations seeking an insight into what works and what doesn't
- Early data looks encouraging, but experts say such schemes are small steps. Increased costs, the risk of new variants emerging, and a lack of

Asia Responsible Enterprise Awards (AREA) 2022

"Leader in Opening the Phuket Sandbox for Foreign Tourist"



This award is a prize for everyone from every sections in the tourism industry who have involved and coordinated during the COVID-19 to help the tourism industry revive from the pandemic, especially **Phuket**.

International Tourist Arrivals

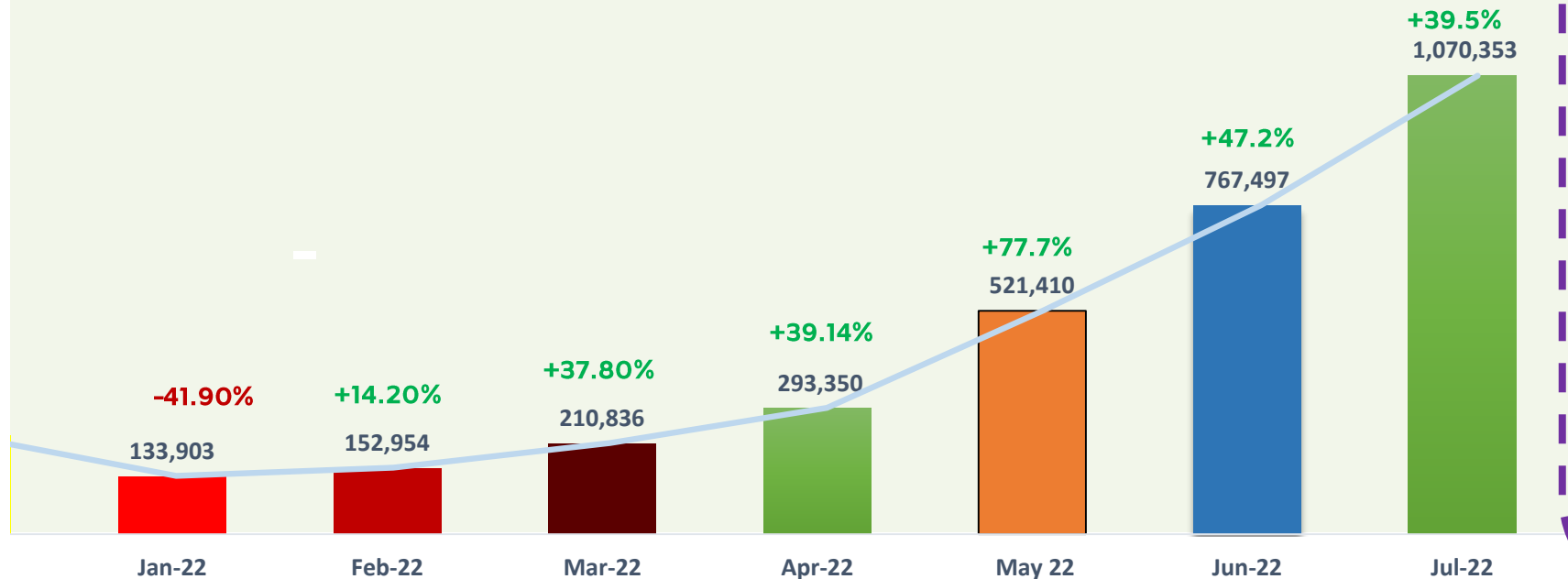


**Total International Tourists
Jan – Jul 2022
3,150,303 persons**

**Total Tourism Income
Jan – Jul 2022
1.57 Billion Baht**

*In estimation

**Total International Tourists
1 - 20 Aug 2022
860,611 persons**



**Trend
1M+**

- **Omicron Variant**
- Test & Go suspended on 22 Dec
- Sandbox scheme still in place
- Test & Go resume for all countries for 2 RT-PCR tests on day 0, 5
- Self ATK Test Replaces the 2nd RT-PCR test
- Pre-departure test within 72 hours before departure is cancelled
- Test & Go and Sandbox Schemes cancelled
- No quarantine for unvaccinated, Prof-ATK pre departure or on arrival required
- No Thailand Pass

Key Figures by NESDC

2nd Quarter GDP

2.5%

GDP Forecast

2.7 – 3.2%

Accommodation and
Food Service Activities
Sector

44.9%

(1st quarter : 33.5%)

Average
Occupancy Rate

42.09%

(1st quarter : 36.15%)

Total International
Arrivals Forecast

9.5 million

(previous forecast : 7 million)

Total Tourism Receipt
Forecast

0.66 trillion Baht

(previous forecast : 0.57 trillion)

As of July 2022



Target in 2022-2024



Total Revenue
(50% of 2019)

**International
Market**

Domestic Market

In 2022

1.5 trillion Baht =

882 billion Baht
(7-10 million tourists)

+

625 billion Baht
(160 million travel trips)

June - Sep 2022



500,000 international arrivals/month

Oct - Dec 2022



1 million international arrivals/month

In 2023

20 million
international visitors
Revenue: **2.4 trillion Baht**



In 2024



Revenue :
3 trillion Baht
From Thais (36%) + foreigners (64%)

MARKETING & COMMUNICATION DIRECTION



- **Create Demand**

Stimulating qualitative demand by prioritizing safety in order to create consumer reputation and confidence, with an emphasis on high-income and high-quality consumers.



- **Shape Supply**

Enhancing tourism ecosystems by focusing on quality and sustainability. The TAT will focus on responsible tourism and digital tourism, which will result in long-term income distribution.



- **Drive Collaboration**

Stakeholder collaboration to create sustainable and responsible tourism

VISIT
THAILAND
YEAR 2022-2023

AMAZING
NEW
CHAPTERS

WRITE YOUR
NEW CHAPTER

The communication concept will continue with the Amazing New Chapters theme for both 2022 – 2023 to ensure consistency

Amazing New Chapters

Featuring Soft Power 5F : 4M



FOOD



FASHION



FIGHT



FESTIVAL



FILM



MUSIC



MUSEUM



MASTER



META

“From **a-z**

Amazing Thailand has it all”

A	Authentic Artisan
B	Bleisure
C	Community-based Tourism
D	Defining your Thainess
E	Eco-tourism
F	Forest Bathing
G	Glamping
H	Healing Holidays
I	Ice Cream & Sweet Treats
J	Just the two of us
K	Kid-friendly Destination

L	Luxe & Local	18
M	Medical Tourism	
N	Night Sky Obsessed	
O	Organic Lifestyle	
P	Pursuit of Mindfulness	
Q	Quest for Dining	
R	Reconnect with Nature (Responsible Tourism)	
S	Surf Sea Sand Sun	
T	Trail & Hike	
U	Urban Discovery	
V	Vegan Thai Recipes	
W	Workcation	
X	X-treme	
Y	Yesterday Once More	
Z	Zero Waste	

2022 AWARDS & ACHIEVEMENTS



Travel and Leisure Asia "Asia's Best Awards"

#1 BANGKOK
Best City in Southeast Asia

#6 CHIANGMAI
Best City in Southeast Asia

#1 PHUKET
Best Island in Southeast Asia

#2 SAMUI
Best Island in Southeast Asia

#9 PHI PHI
Best Island in Southeast Asia

Lifestyle Asia "Best Digital Nomad Cities Globally"

#2 BANGKOK
Best City for Digital Nomads

International Festivals and Events Association ASIA (IFEA Asia)

#1 PATTAYA
Top 3 Ocean Cities



2022 AWARDS & ACHIEVEMENTS

Reisgraag.nl
"Travel Destination Awards"

#1 THAILAND
Golden Travel Destination Awards

DestinAsian Magazine
"2022 Readers' Choice"

#1 BANGKOK
Best City

TripAdvisor 2022 Awards

#5 BANGKOK
Most Popular Destinations in Asia

#6 PHUKET
Most Popular Destinations in Asia

Capital Magazine
"2022 Annual Global Retirement Index"

#5 THAILAND
Best Places For Retirees



Potential Target Segments

Family



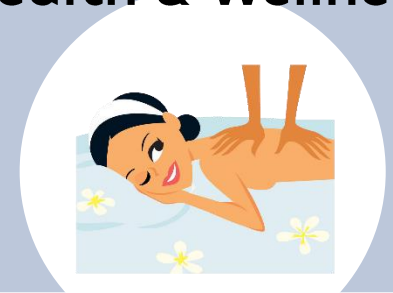
- Often travel during off-peak season
- Book in advance

Digital Nomads



- Long stay travelers
- Flexible in time

Health & Wellness



- Being a major trend
- High spending travelers



Millennials

- Open to new experiences
- Frequent travelers
- Share experiences on social media
- Travel in green season



Active Senior

- Able to travel all year round

LONG-HAUL MARKETS

"Time is the New Currency"

- Promoting Thailand as a year-round destination for **health and wellness, families with kids, active seniors, and remote workers/teleworkers**
- Launching marketing activities in **new source markets**, including **Saudi Arabia and the USA's large secondary cities**



SHORT-HAUL MARKETS

"The Great Resumption"

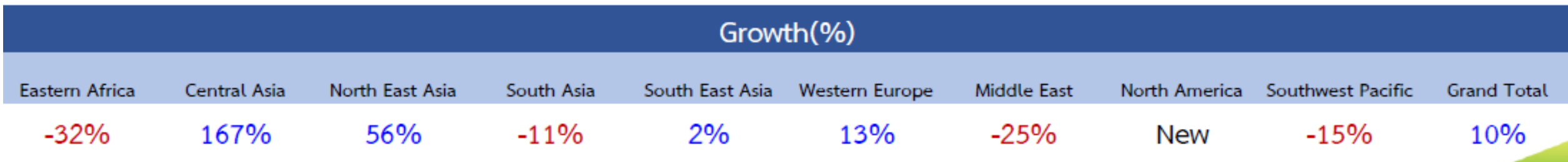
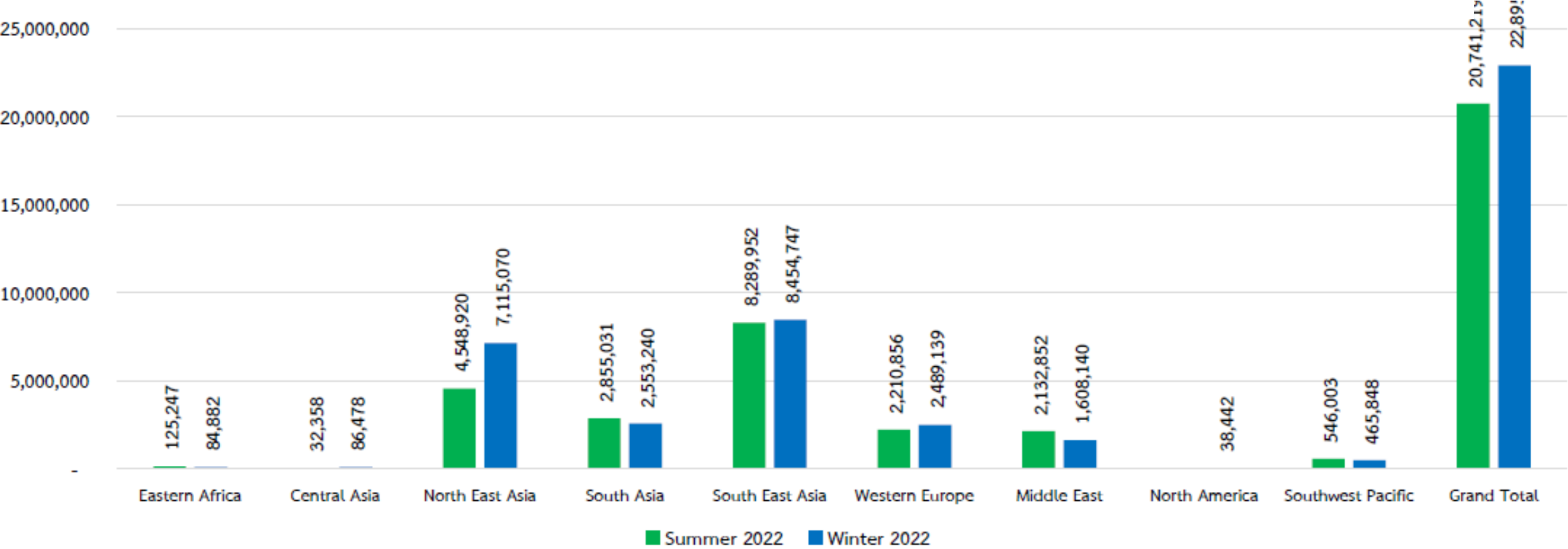
'5News' include

- **New Segments** with growth potential
- **New Areas** for source tourist markets
- **New Partners** in existing markets
- **New Infrastructure** relating to travel and tourism
- **New Way** of travel experiences focusing on responsible tourism

Flight SLOT Allocation for Main Airports in Thailand

Airports	Summer 2022 1 May – 29 October 2022			Winter 2022 30 October 2022 – 25 March 2023		
	Capacity	Allocated slots	Availability	Capacity	Allocated slots	Availability
	(Avg. Movements/Day)	(Avg. Movements/Day)	(Avg. Movements/Day)	(Avg. Movements/Day)	(Avg. Movements/Day)	(Avg. Movements/Day)
Suvarnabhumi	1,632	621	1,011	1,632	1,091	541
Don Mueang	766	467	299	766	708	58
Phuket	360	200	160	320	330	-10
Chiang Mai	432	150	282	432	232	200
Samui	100	45	55	100	80	20
U-tapao	360	4	356	360	29	331

Passenger Seats for International Flights Between Summer and Winter 2022 by Regions



Source : The Civil Aviation Authority of Thailand/ OAG 15 July 2022

RISING IN AIRFARE PRICES



Estimated from economy class airfares

	Pre Covid-19		At Present
RUSSIA	25,000-30,000 baht	➔	Transit 100,000-120,000 baht
UK	25,000-30,000 baht	➔	Direct 35,000-55,000 baht
FRANCE	30,000-40,000 baht	➔	Direct 40,000-50,000 baht
GERMANY	25,000-40,000 baht	➔	Direct 95,000-110,000 baht
MIDDLE EAST	15,000-20,000 baht	➔	Direct 25,000-30,000 baht
SCANDINAVIA	30,000-45,000 baht	➔	Direct 120,000-130,000 baht

Source : The Civil Aviation Authority of Thailand/ As of July 2022



VISA EXTENSION PLAN



As approved by the Centre for Covid-19 Situation Administration (CCSA) on 19 Aug 2022

1. Extension of stay for the arrivals with the **Free Visa (Visa Exemption)**
maximum of 30 days → **maximum of 45 days**
2. Extension of stay for the arrivals with the **Visa on Arrival**
maximum of 15 days → **maximum of 30 days**

The extension will be effective on **1st, October 2022 until 31st, March 2023**

Note: The extension shall be enforceable upon its publication in the Government Gazette.

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