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An Analysis of International Tourism Development in Thailand: 1994–2007

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Tourism serves as a means for Thailand to receive foreign currency, increase international reserves, stimulate production and maximize the use of resources from other related sectors, which in turn enhance the country's economic status. The importance of tourism is inspiring Thailand to strive to become a major international tourist destination in Southeast Asia and the world. The continued success of international tourism and the future direction of tourism development in Thailand can be enhanced through a historical analysis of the tourism industry and a critical and thorough SWOT (strengths, weaknesses, opportunities and threats) analysis. This paper provides a historical overview of international tourism development in Thailand from 1994 to 2007, assesses the performance of the Thai tourism industry in this period, provides a SWOT analysis of the Thai tourism industry, and offers recommendations for the future success of Thailand as a competitive tourist destination.

Key words: Thailand, international tourism, SWOT analysis, tourism marketing

Introduction

Tourism serves as a means for Thailand to receive foreign currency, increase international reserves, stimulate production and maximize the use of resources from other related sectors, which in turn enhance the country's economic status (Thailand Board of Investment, 2001). International tourism is one of the fastest growing sectors in the Southeast Asian region (Tourism Authority

of Thailand [TAT] News Room, 2007a). Although Thailand is a small country, it is one of the world's leading tourist destinations. In 2004, Thailand's international tourist arrivals increased 16% and revenue increased 24%. Southeast Asia tourist arrivals increased by only 5% in 2005, whereas Thai tourist arrivals decreased by 1%, as a result of the tsunami of 2004. However, Thailand soon regained its leading tourism growth status. In 2006, Thailand ranked 13th in international

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tourism receipts (US\$12.4 billion) and 18th in international tourist arrivals, with 12.9 million visitors (World Tourism Organization [WTO], 2007).

The success of Thailand's international tourism can be contributed to natural resources, good location, easy accessibility and marketing strategies adopted to promote the country to the international market. The continued success of international tourism and the future direction of tourism development in Thailand can be enhanced through a historical analysis of the tourism industry and a critical and thorough SWOT (strengths, weaknesses, opportunities and threats) analysis. This research focused on Thai tourism performance in 1994–2007. This period was selected to continue the Thai tourism performance research last conducted by Chon, Singh, and Mikula (1993) and Chon and Singh (1994) prior to 1994. The year 2007 was chosen as the end date because it provided the most current information available for this research project. The purpose of this paper is as follows.

1. To provide a historical overview of Thai international tourism and assess its performance from 1994 to 2007.
2. To examine the marketing strategies adopted by TAT to promote the country's tourism.
3. To analyze the strengths, weaknesses, opportunities and threats in relation to international tourism development in Thailand.
4. To provide recommendations for future Thai tourism development.

History of Thai Tourism

The Tourism Authority of Thailand was established in 1960 and became an official organization to promote the country's

tourism. The importance of tourism in Thailand started with the Vietnam War, when Thailand became a popular destination for the US military for rest and recreation (Nimmonratana, 2000). Revenues from the US military during the Vietnam War, combined with the increase of tourists, led the Thai government to become more aware of the importance of tourism. In 1981, Thailand's tourism industry replaced rice as the country's major source of foreign exchange and leading export commodity (Horey, 1991). Chon and Singh (1994) stated that the importance of tourism to Thailand's economy was more evident when the country shifted from an agricultural-based to a more industrialized and service-based economy.

The National Economic and Social Development Plan (NESDP) serves as a master plan for providing direction to the economic and social development of Thailand. The promotion of the international tourism industry and service businesses was first identified under the "commerce and services" sector in Thailand's Third NESDP (1972–1976). However, there was no clear direction as to how to implement this plan. Promotion of international tourism was identified for the second time in the Fourth NESDP (1977–1980), and tourism was considered as a means of increasing foreign exchange earnings to decrease deficits in the balance of trade and payments. The Fourth NESDP plan discussed the target number of international tourists, strategies to promote tourism, and formal training to provide a qualified workforce for tourist businesses. Since then, international tourism has been discussed in all the NESDPs.

With the strong support of the government, the success of Thai international tourism has accelerated. Table 1 shows a 10% increase in international tourist arrival to Thailand in 1990 from the previous year. During the

Table 1 Number of International Tourists and Revenues from 1990 to 2007

Year	No. of Tourists (Million)	% Change of No. of Tourists	Revenues (Billion Thai Baht)	% Change of Revenues	Major Events
1990	5.3	+10.19			
1991	5.09	-2.02	100	-9.56	Gulf War
1992	5.14	+0.05	123	+23.13	
1993	5.76	+6.95	128	+5.2	
1994	6.17	+4.39	145	+19.26	
1995	6.95	+3.46	191	+31.37	
1996	7.19	+3.46	219	+14.99	
1997	7.22	+0.41	220.75	+0.63	Asian Economic Crisis
1998	7.76	+7.53	242.19	+9.70	
1999	8.58	+10.50	253.02	+4.48	
2000	9.51	+10.82	285.27	+12.75	
2001	10.06	+5.82	299.05	+4.83	September 11 and Afghanistan War
2002	10.80	+7.33	323.48	+8.17	
2003	10.00	-7.36	309.27	-4.39	SARS and Iraq War
2004	11.65	+16.46	384.36	+24.28	Bird Flu and Tsunami
2005	11.52	-1.51	367.38	-4.42	Impacts of Tsunami and daily protests against the PM Thaksin Shinawat
2006	13.82	+17	482.30	+31.29	The commemoration of the 60th Anniversary of His Majesty the King's accession to the throne; <i>coup d'état</i> (September 19, 2006)
2007	14.46	+4.65	547.78	+13.57	Celebration of His Majesty the King's 80th Birthday; military government
2008 (estimated)	15.7				Oil price crisis, political instability

Source: Tourism Authority of Thailand.

1990s, tourism was a major economic force, job creator and foreign exchange earner. While other export industries fluctuated with global conditions (e.g. the Gulf War in 1991), Thailand enjoyed economic growth in tourism. During the Gulf War, the number of international tourists who visited Thailand decreased only 2% compared with 1990. However, the country regained international tourists in 1992 with a slight increase of less than 1% of the number of tourists but with a 23% increase in tourism revenue. Between 1993 and 1995, the number of international tourists and revenue continued to increase. In 1996, the country welcomed 7 million international tourists with a 15% increase in revenue over 1995 (TAT News Room, 2007a).

During the 1990s, Thailand hosted many international tourists and gained significant revenue from tourism. However, Thailand also suffered from the negative impacts of tourism, such as pollution, traffic congestion, AIDS, competition in hotel room rates in urban destinations (Chon & Singh, 1994), political unrest (Chon et al., 1993), degradation of the environment (Jansen-Verberke & Ko, 1995; Li & Zhang, 1997), crowding, commercialization of culture, increasing prostitution (Jansen-Verberke & Ko, 1995), inadequate infrastructure, safety issues, and the negative image of sex tourism (Li & Zhang, 1997). These negative impacts severely affected the image of the country. As a result, the country has shifted the focus from mass tourism into quality, sustainability and ecotourism.

Thailand experienced growth in the economy and in tourism in the early 1990s until July 2, 1997, when the country faced the Asian economic crisis. This downturn was due to the imbalance of trade, unfeasible international currency policy and inflow of capital to the unproductive business sector (Bank of Thailand, 1998). During that time,

Thailand faced a dramatic increase in unemployment as well as bankruptcies in the commercial and banking sectors, which led people to reduce consumption, which in turn affected tourism. This crisis affected the value of the Thai currency (baht). The exchange rate of Thai currency fell from 27 baht to 35 baht per US dollar and the revenue from tourism decreased by 31%. Although revenue from tourism has increased gradually since 1990, this growth was represented in the Thai currency, not US dollars or other major convertible foreign currencies. During the economic crisis, the Thai government encouraged Thais to take trips within the country (domestic tourism) to assist the Thai economy. After the crisis, Thai tourism regained its leading status as one of the top three revenue generators in Thailand.

From 1990 to 2000, the number of international tourists to Thailand increased from 5.3 million in 1990 to 9.5 million in 2000, a 79% increase in a decade. This growth occurred despite the Gulf War in 1991 and the 1997 Asian economic crisis. Although Thailand experienced a negative economic impact from September 11, 2001 and the subsequent war in Afghanistan, the number of international tourists reached a record of 10 million in 2001. In 2001, tourism revenue increased by 5% from 2000. Thai tourism experienced a continued increase in the number of tourists and revenue in 2002. However, the outbreak of Severe Acute Respiratory Syndrome (SARS) and the war in Iraq caused a 7% decline in the number of tourists and a 4% decrease in revenue in 2003. Thai tourism had a slow start in 2004 because of the avian influenza (bird flu) at the beginning of the year, but by the end of the year the number of international tourists had increased 16% and revenue increased 24% compared with 2003.

Everything looked promising until December 26, 2004 when the tsunami hit the southern part of the country. The consequences of the tsunami, political unrest in the south, and demonstrations to protest against Prime Minister Thaksin Shinawatt affected Thai tourism negatively in 2005. As a result, the number of international tourists declined by 1.5%, and there was a 4% corresponding decline in tourism revenue. Thailand regained trust from tourists in 2006, when there was a 17% increase in the number of international tourists, with a 31% increase in revenue. In 2007, the number of international tourist increased by 5% and revenue increased by 14% from 2006 (TAT News Room, 2007a). TAT set a target of 15.7 million international tourists for 2008.

Marketing Strategies

After the founding of TAT, a variety of strategies and marketing campaigns to promote Thai Tourism were utilized. The first successful marketing campaign, "Visit Thailand Year 1987", brought in over 5 million international tourists in 1990. Table 2 illustrates the themes of marketing campaigns from 1994 to 2007. From 1995 to 1996, the "Golden Jubilee" campaign celebrated the 50th anniversary of His Majesty King Bhumibol Adulyadej's accession to the throne. This campaign brought 7 million international tourists to the country (TAT News Room, 2000a). On July 2, 1997, Thailand experienced an economic crisis. The exchange rate fell from 25 baht per US dollar to 35 baht per US dollar, and revenue from tourism slipped to second place, behind computer parts. Although the number of international tourists visiting Thailand in 1997 did not decrease (+0.4%) and tourism revenue in

baht increased, revenue in US dollars decreased owing to the falling rate of exchange. During the economic crisis, Thailand was in need of foreign currency, especially US dollars, to pay for imports and to use as foreign currency reserves to back up the Thai currency so the value of Thai money would stabilize and be accepted in the market. Tourism played an important role in fulfilling this goal.

From 1998 to 2004, the "Amazing Thailand" campaign was reintroduced. The main focus of the 1998/1999 campaign was the royal celebration of His Majesty the King's 6th cycle Birthday Anniversary. The country experienced a 10% increase in international tourists in 1999. The "Amazing Thailand 2000: Enchantment for the Next Thousand Years" campaign was presented in 2000 to highlight the country's heritage, culinary delights, shopping and recreational facilities and position Thailand as a place to escape from a stressful, fast-moving world. An appropriate target market tactic and aggressive marketing plans along with increased flights from airlines helped boost Thai tourism (TAT News Room, 2000b). As a result, the number of international tourist arrivals increased 11% and revenue increased 13% in 2000.

The September 11, 2001 terrorist attacks raised concerns about safety and security for people around the world. It appeared that this had little effect on Thai tourism, as the number of international tourists and tourism revenue still increased. Thailand launched the "Amazing Thailand" campaign in 2001 to promote the country's unique culture and way of life and niche tourism products and services, including health spas, golf, ecotourism, and the meetings, incentives, conventions and exhibitions business (MICE). The campaign also emphasized coordination with ASEAN

Table 2 Theme of Marketing Campaigns

Year	Marketing Theme	Main Concepts
1994 1995–1996	Thai Culture Promotion The Golden Jubilee	Promote Thai culture to gain tourist attention Celebrate 50th anniversary (Golden Jubilee) of His Majesty's accession to the throne
1997		Asian economic crisis
1998–1999	Amazing Thailand	Celebrate His Majesty the King's 6th cycle birthday anniversary on December 5, 1999
2000	Amazing Thailand 2000: Enchantment for the Next Thousand Years	Highlight the country's heritage, culinary delights, shopping and recreational facilities. Position Thailand as a place to escape from a stressful, fast-moving world
2001	Amazing Thailand	Show the country's unique culture and way of life as well as promote a series of new niche tourism products and services (health, golf, ecotourism and MICE)
2002	"Amazing Thailand 2002 Amazes the World", "Be My Guest" and "Celebrating Asia's Fascinating World of MICE"	Position Thailand as a peaceful, hospitable country and a wonderful year-round destination with high-value products and services. Feature specific products, such as shopping opportunities, health and spa services
2003	Amazing Thailand – Unseen Thailand (domestic market) Amazing Thailand – Unseen Treasures (international market)	Promote Thailand as a truly quality destination. Target the country as "Tourism Capital of the World"; Emphasize the preservation and restoration of the cultural and natural heritage of each destination

2004	Amazing Thailand – Unseen Thailand	Highlight the most extraordinary parts of the country. Emphasize recovery and restore trust from SARS. Focus on niche markets, such as the MICE business, golf, wellness and spa, family, diving, youth and honeymooners. Other target groups are senior citizens, women, eco and soft adventure, medical tourism, long-stay visitors and film-makers
2005	Thailand – Happiness on Earth	Emphasize the traditional hospitality of Thai residents and the kingdom's unique cultural, historical and natural heritage
2006	Thailand Grand Invitation 2006	Celebrate the King's 60th anniversary accession to the throne. Focus on delivering a memorable experience to visitors through beauty, luxury, culture and adventure. Continue to position Thailand as a "Tourism Capital City of Asia"
2007–2011	Sufficiency economy tourism	Focus on quality tourists, balance economic growth with sustainable development, and reduce negative impact on natural and cultural attractions

countries (Brunei Darussalam, Cambodia, Indonesia, Lao People's Democratic Republic, Malaysia, Myanmar, the Philippines, Singapore, Thailand and Vietnam) and the Greater Mekong Subregion (GMS) countries (Cambodia, Lao PDR, Myanmar, Thailand, Vietnam and the Yunnan Province of the People's Republic of China) to promote regional tourism destinations (TAT News Room, 2001a). In 2001, a record 10 million international tourists visited Thailand. Since then, the country has hosted over 10 million international tourists annually.

In 2002, "Amazing Thailand 2002 Amazes the World", "Be My Guest" and "Celebrating Asia's Fascinating World of MICE" were introduced. The objectives of the campaigns were to position Thailand as a peaceful, hospitable country and a wonderful year-round destination with high-value products and services. TAT has recognized the potential of the MICE sector in attracting visitors with increased spending habits by supporting this lucrative market (TAT News Room, 2001b). The marketing campaign was very successful and generated a 7% increase in the number of tourists and an 8% increase in revenue in Thai currency.

In February 2003, SARS broke out in China and spread to the Hong Kong Special Administrative Region (SAR), Vietnam, and several other Asian countries, including Thailand. SARS was a health threat that gained worldwide attention. Trips were cancelled because of people's fear of the disease. Thailand suffered economically from SARS, as the number of international tourists dropped by 7% and the revenue decreased by 4%. TAT implemented a variety of tactical marketing campaigns in 2003 (Thailand Smiles Plus, Big Smile Card and Thailand Grand Sale) as a short-term recovery strategy to boost the tourism decline. The "Unseen Thailand"

campaign was geared towards domestic tourists and the "Amazing Thailand – Unseen Treasures" was targeted for international tourists. Thailand established a long-term goal in 2003 to become the "Tourism Capital of the World" by 2006. The goal was to develop the country to become a center of tourism and a center of fashion, food, health and spa, meetings and conventions, automobile production, information technology, and many other industry sectors (TAT News Room, 2003).

In 2004, the "Amazing Thailand – Unseen Thailand" campaign was continued to market the most extraordinary areas of the country. Another focus of the campaign was to restore people's faith that Thailand was a safe and healthy place to visit after SARS in 2003. Tourism awards were given to several organizations for their promotion of parks, performances, museums, ecotourism, agrotourism, city hotels, resort hotels and other tour programs. Avian influenza or bird flu spread to Thailand at the beginning of 2004. However, with good marketing tactics and an effective response to incidents, the number of international tourists increased 17% and revenue increased 24% (TAT News Room, 2004a).

TAT launched the "Thailand – Happiness on Earth" campaign in 2005 to emphasize the traditional hospitality of Thai residents and the kingdom's unique cultural, historical and natural heritage. The recent recovery from the tsunami and daily protests against Prime Minister Thaksin Shinawatra made 2005 a challenging year. Despite a decline in the number of international tourists and revenue, TAT continued to promote Thailand as a "Tourism Capital City of Asia" (TAT, 2005).

The "Thailand Grand Invitation 2006" campaign in 2006 focused on delivering a memorable experience to visitors through

beauty, luxury, culture and adventure. It also aimed to increase revenue rather than the number of visitors. A main event was the 60th anniversary celebration of His Majesty the King's accession to the throne (TAT News Room, 2006a). This year the country faced a political *coup d'état* and political unrest in the south. However, there was a 17% increase in international tourists and a 31% increase in revenue (TAT News Room, 2007b).

In 2007, a 5-year tourism marketing and promotion plan (2007–2011) began with the primary goal of balancing economic growth with sustainable development. To achieve this goal, Thai tourism implemented the concept of “sufficiency economy” tourism. This required a shift in focus from marketing the country to attract a large number of tourists to promoting the country to quality tourists who spend more money and are more environmentally conscious. Simultaneously, tourist activities that would negatively impact natural and cultural attractions would be reduced (TAT News Room, 2007b). In 2008 and 2009, to align with the Thai government Cabinet's Visit Thailand Year and the Investment Year, there is a repositioning of existing and potential tourism products and a renewed emphasis on quality tourism (TAT News Room, 2008a).

From 1990 to 2000, international tourist arrivals to Thailand increased at an average annual growth rate of 8.17%, with the only annual decline being experienced in 1991 due to the Gulf War (TAT News Room, 2005a). These annual increases occurred despite numerous obstacles, such as the 1997 Asian economic crisis, pollution, traffic congestion, environmental problems, insufficient infrastructure, safety issues, AIDS, prostitution and sex tourism. Beginning in 2007, the Thai government began seriously

to counteract the negative effects of tourism on the natural and environmental resources. Hopefully, the government enforcement will continue to encourage TAT to implement effectively more marketing and promotion campaigns that emphasize quality tourism and sustainable economic growth.

A SWOT Analysis of Thai Tourism

A SWOT analysis was conducted to evaluate Thailand's tourism situation. The SWOT analysis is widely accepted as a tool to assess an organization's strengths, weaknesses, opportunities and threats. This analysis provides helpful information in identifying a country's resources and capabilities. A summary of the SWOT analysis of Thai tourism is presented in Table 3.

Strengths

Seven factors were identified as the strengths for international tourism development in Thailand: (1) geographical location and accessibility; (2) ample natural resources and scenic environments; (3) ingrained culture of hospitality of local residents; (4) a stable economy; (5) supportive government; (6) increasing infrastructure development in Thailand and neighboring countries; and (7) joint regional marketing. Each of these strengths is discussed in the following paragraphs.

1. Geographical location and accessibility. Thailand is located in the heart of Southeast Asia. This geographical location enables the country to be a natural gateway to Indochina and Southern China (TAT, 2001). Thailand's geographical advantage as a major hub for Asian air traffic makes the country easily accessible by tourists and it has become a

Table 3 A SWOT Analysis of Thai Tourism

<i>Strengths</i>	<i>Weaknesses</i>
<ul style="list-style-type: none"> • Geographical location and accessibility • Ample natural resources and scenic environments • Ingrained culture of hospitality of local resident • Stable economy • Supportive government • Increasing infrastructure development in Thailand and neighboring countries • Joint regional marketing 	<ul style="list-style-type: none"> • Shortage of qualified workers in the tourism industry • Negative image • Environmental degradations • Political instability • Safety and security of tourists in outlying areas
<i>Opportunities</i>	<i>Threats</i>
<ul style="list-style-type: none"> • Increasing interest in Asia and the Pacific • Emerging markets of India and China • Growth of Asia Pacific economy • Internet as a powerful distribution channel • Changing demographics • Growth of cultural tourism • Low-cost airlines • Visa and immigration policies 	<ul style="list-style-type: none"> • Intensified competition among other nations • Political instability and religious in neighboring countries • Disease and natural disaster • Oil prices • Safety and security • Exchange rates

natural center for air traffic. The access to coaches, buses, trains, taxis and airplanes that have flexible schedules makes traveling in the country convenient.

2. *Ample natural resources and scenic environments.* The mountains in the north provide cool temperatures for tourists to enjoy mountain views, tour orchards, and taste a variety of fresh fruits and vegetables. The north is also home to various tribes, which gives tourists the opportunity to explore the northern tribal culture. The north-east is well known for its archeological and anthropological mysteries. The Central Plain is rich with rice fields and fruit-producing

areas as well as the beautiful beaches of the East Coast and the city life of Bangkok. The Andaman Sea and the Indian Ocean lie on each side of the southern peninsula, enabling tourists to enjoy mountains, beaches, sun and the sea all year round (TAT, 2001).

3. *Ingrained culture of hospitality of local residents.* Thais are relaxed, friendly and slow to take offense, which are attractive personal qualities to tourists (Elliott, 1983). In addition, the majority of Thais are Buddhist, which emphasizes “kindness, openness, and passivity” (Elliott, 1983, p. 380). Thailand is known as a “Land of Smiles”, which makes tourists feel welcome. The ingrained

hospitality of the Thai culture, coupled with the attitude of Thai employees who want to make guests happy, make Thailand an attractive travel destination. Thai culture is influenced by two major Asian cultures: India and China. Thailand was never colonized by western countries, which allowed the country to retain its culture and character. All of these aspects make tourists feel welcome wherever they travel in Thailand. This evidence is supported by the study of Henkel, Henkel, Agrusa, Agrusa, and Tanner (2006), which revealed that culture and beaches were the top two images that both international tourists and Thai residents had in mind when thinking of Thailand as a tourist destination. The friendliness of Thai residents was another factor that international tourists perceived to be important in choosing Thailand as a travel destination.

4. *A stable economy.* According to the Thailand Board of Investment (2005), the Thai economy has experienced steady growth. From 1981 to 2003, Thailand's average GDP grew by 6%. In 2003, the Thai economy reached an impressive GDP of 6.6%, second only to China. The country's form of government, a constitutional monarchy, allows steady change to take place. The country's economic stability has made the country free of those conflicts that have negatively affected other parts of Asia. This stable economy provides Thailand with a favorable competitive position in attracting international tourists.

5. *Supportive government.* The government established TAT to promote and market Thai tourism. Additionally, the Thai government incorporated the promotion of tourism into Thailand's National Economic and Social Development Plans. With strong support from the government, Thai tourism will become more integrated into a Thai society that emphasizes quality of life, honesty and

integrity. The development will focus on improvement and protection of natural resources and scenic environments for the long-term benefits of the Thai people as stated in the Ninth NESDP and the Thai government Cabinet (TAT News Room, 2008a).

6. *Infrastructure development in Thailand and neighboring countries.* The first Thai-Laos Bridge across the Mekong River in Northeast Thailand was built in 1994 to connect the Thai province of Nong Khai to Vientiane, the capital of Laos. It has become the most significant source of visitors to Laos. The second bridge across the Mekong River was completed in 2006 to link the northeastern Thai province (Mukdaharn) and the western Laotian province of Suvannakhet. This bridge is a part of the East-West economic corridor that connects Myanmar, Thailand, Laos and Vietnam. The governments of Thailand, India and Myanmar agreed to develop the Asian Highway to connect these three countries. This will promote tourism, trade and investment among them (TAT, 2005). In the south, a ferry service operating between the Thai province of Trang and the Malaysian resort of Langkawi opens additional access for Trang (TAT News Room, 2004b). These infrastructure improvements will strengthen the transportation links among the countries in the GMS, which includes Cambodia, the People's Republic of China, Lao PDR, Myanmar, Thailand and Vietnam. This also will provide the GMS countries with collective opportunities to market their products and services better.

7. *Joint regional marketing.* Thailand has taken a leading role in facilitating travel and tourism to the neighboring countries of Indochina (Cambodia, Lao PDR and Vietnam) and ASEAN (Brunei Darussalam, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand

and Vietnam). To stay competitive with other tourist destinations, TAT also has promoted Thai tourism by joint marketing with ASEAN and GMS countries to draw tourists to the region (TAT, 1999).

Weaknesses

Five major factors were identified as the weaknesses for international tourism development in Thailand: (1) shortage of qualified workers in the tourism industry; (2) negative image of aspects of Thai tourism; (3) environmental degradation; (4) political instability; and (5) safety and security of tourists in outlying areas. Each of the weaknesses is discussed in the following paragraphs.

1. *Shortage of qualified workers in the tourism industry.* Although Thai is the official language of Thailand, the Thai educational system offers English as a second language. In Thailand, English is an important language to both professionals (administrators and educators) and Thai residents. English is present in advertising, labels, signs, manuals, services and places catering to international guests.

Moreover, the development of Thailand in terms of international commerce and investment, tourism, cultural exchange and technology, reinforces the significance of English as a means of communication. However, Thailand is still in need of English-speaking employees (Srijunyachon, 2006). As international tourists in Thailand speak many different languages, hotels and other tourist-related businesses need employees who can communicate in other languages, such as French, German, Japanese, Korean and Mandarin.

2. *Negative image of certain aspects of Thai tourism.* In the 1990s, the negative effects of tourism in Thailand were a recurring theme in many studies (e.g. Chon & Singh, 1994;

Chon et al., 1993; Jansen-Verberke & Ko, 1995; Li & Zhang, 1997). The study of Esichaikul and Baum (1998) identified the negative image of sex tourism as one of the major problems of tourism development in Thailand. To counteract this problem, the Thai government and TAT, along with tourism businesses, have tried to emphasize the country's cultural and natural attractions and shopping paradise, instead of sexual attractions (Chon et al., 1993). As a result, Henkel et al. (2006) reported that both international tourists and Thai residents felt sex and erotic tourism were not important when they thought of Thailand as a tourist destination.

3. *Environmental degradation.* Natural beauty and resources and scenic environments are one of the major attractions to Thailand. However, the rapid growth of tourism, swift economic expansion and the lack of long-term planning contribute to the country's environmental problems (Chon et al., 1993; Esichaikul & Baum, 1998; Kontogeorgopoulos, 1998), which include a high level of carbon monoxide, particle elements and high lead levels in Bangkok, high deforestation rates, waste products, water pollution, destruction of coral reefs due to boat anchors, and the development of golf courses that have caused environmental deterioration. The study of Kontogeorgopoulos (1998) illustrated that economic gains from tourism can inspire residents to protect the natural beauty, as in the case of Phuket, where residents of the island burned the potentially hazardous tantalum plant because they were afraid that poisonous chemicals used to produce tantalum would pollute the air and water and destroy the image of the city. Environmental concerns have led the Thai government and TAT to shift the focus from mass tourism to rural tourism and ecotourism. This trend emphasizes the preservation and protection of environments

and natural resources for tourists and for Thai citizens. It avoids exploiting natural resources, makes the most out of natural resources and environments, and increases the benefits to local communities and host countries (Carter, 1993; Chalker, 1994; Dowling, 2000; Wight, 1997).

4. Political instability. The transformation of the Thai government from an absolute to a constitutional monarchy occurred in 1923. Since then, Thailand has been intermittently ruled by a series of military governments. In 1992, the Thai people rose against the military leadership, which, in turn, severely damaged the Thai economy, including the tourism industry (Chon et al., 1993; Wikipedia, 2007). A democratic system was established and tourism flourished again after that year (Wikipedia, 2007). However, the 2006 political protests by people dissatisfied with the leadership of Prime Minister Thaksin Shinawatt led to a *coup d'état* on September 19, 2006 (TAT News Room, 2006b). The military again took control of the country and many international tourists were concerned about the impact of a non-elected government on the country's major decisions and their own safety. Although Thailand is now ruled by a democratically elected government, political protests still occur, which adds to a feeling of instability and concerns about the possibility of another *coup d'état*.

5. Safety and security of tourists in outlying areas. According to the Thailand Board of Investment (2005), Buddhism is the major religion (94%) in Thailand, followed by Muslim (4%), Christian (1%) and other religions (1%). The majority of Muslims live in the four southern provinces, near the border of Malaysia, a country with a predominantly Muslim religion. Thai Muslims in the south want to separate from Thailand and become a part of Malaysia. There have been frequent

bombings and bomb threats in the south, which cause people to be concerned about safety and discourage tourists from visiting Thailand. According to Mydans (2007), the situation in the south is getting worse and many are referring to it as a war.

Opportunities

There are many favorable conditions Thailand can take advantage of for its international tourism development. These opportunities include: (1) increasing interest in Asia and the Pacific; (2) the emerging markets of India and China; (3) the growth of the Asia Pacific economy; (4) the Internet as a powerful distribution channel; (5) changing demographics; (6) the growth of cultural tourism; (7) low-cost airlines; and (8) visa and immigration policies. Each of these opportunities is discussed in the following paragraphs.

1. Increasing interest in Asia and the Pacific. Since 1990, the Asia and Pacific region has experienced growth in international tourism. In 2006, the region's international tourist arrivals increased by 7.8% compared with the world's growth of 4.9%, and accounted for 20% of the world's tourist arrivals. Southeast Asia's tourism growth rate in 2006 was 9%, and the region reported a 9.4% increase in tourism receipts, compared with the world's 4.5% increase (WTO, 2007). Many Asian destinations, such as China and Hong Kong, have become the world's top 10 tourist destinations. Within the Southeast Asian region, the number of international tourist arrivals in Thailand is second only to Malaysia (WTO, 2005). This trend signifies that an interest in Asia is increasing, and Thai tourism is in a position to benefit from this trend.

2. The emerging markets of India and China. India has become one of the world's

fastest growing economies, reporting an average growth rate of 8% per year from 2004 to 2007. India is the world's fourth largest economy in terms of purchasing power and now has a sizable wealthy middle class (World Bank, 2007). This new middle-class segment travels to other countries, such as Thailand, to visit other destinations (Wehrfritz, 2004). In 2007, Thailand had over 500,000 Indian tourists. Thailand also has become the preferred location for the movie and entertainment industry of India (TAT News Room, 2007b, c, 2008b). This has made Thailand an even more popular destination for Indian tourists.

China contributed one-third of the global economy in 2004, and represented 14% of the world economy's purchasing power in 2005 (second only to the USA). In 2007, China had an economic growth rate of 11.4%, the fifth year in a row of double-digit growth (World Bank, 2007). China's strong economy has provided the Chinese with financial resources, and the reduced travel restrictions placed on the Chinese citizens by their government allow them to travel to destinations not previously permitted. It is predicted that China will be the number one inbound and fourth outbound destination in the world for tourists, with 100 million international tourists projected by 2020. In 2007, Chinese tourists spent about US\$30 billion during their trips abroad (WTO, 2008). In 1987, Thailand was the first country to receive Approved Destination Status (ADS) from the Chinese government to allow Chinese citizens to visit (TAT News Room, 2008c). This privileged status, close geographic proximity, Thailand's cultural and natural resources, and low-cost airlines should help Thailand attract more Chinese tourists.

3. *The growth of Asia Pacific economy.* In 2004, Asia and the Pacific region had a 29%

growth in the number of tourists. In 2005, the growth rate slowed to 8%, due to the tsunami, terrorism, increased oil prices, exchange rate fluctuations, and economic and political instability. However, the region was second only to Europe as the most visited region in the world in 2006 (WTO, 2007). Furthermore, 78% of outbound Asian tourism is represented by the region, which is referred to as intraregional tourism (WTO, 2006a). The China-EU Authorized Destination Status (ADS) Agreement, which allows citizens of agreed countries to visit one another, has stimulated growth of Asian intraregional tourism. As Asia and the Pacific travelers account for over 60% of Thailand's international tourists, the country has continued to emphasize the intraregional market as one of the major target markets for Thai tourism (WTO, 2006a, b).

4. *The Internet as a powerful distribution channel.* An increased number of tourists use the Internet as the number one source of information to plan their vacations. The Internet provides travelers with the chance to connect directly with local tourism suppliers for product and service information and to investigate a wide range of tourism choices (Beith, 2004). This gives them the ability to create their own individual vacations (Underhill, 2004). Thai tourism can take advantage of this opportunity by adopting and integrating information technology to market, promote and sell their tourism products directly to consumers. The emergence of social media such as online travel community and blogs has provided another opportunity and platform for Thai tourism to take advantage of.

5. *Changing demographics.* Baby-boomers are beginning to retire and are healthier and more active than their predecessors, while seniors are spending more time traveling. Additionally, many affluent younger couples

without children are using their disposable income for vacations. Young couples with children are combining work and leisure by using Internet access while on vacation (Underhill, 2004). These different traveler profiles can assist TAT in organizing unique travel information or packages for visitors with different travel motivations. In return, if these visitors are satisfied with their travel experiences, they will recommend Thailand to other people and/or return to visit Thailand themselves.

6. *The growth of cultural tourism.* The WTO (2001) stated that cultural tourism had become the fastest growing segment of tourism and increased at a faster rate than tourism growth worldwide. Cultural tourism immerses visitors in the local lifestyle, allowing them the opportunity to enjoy the people and area. Cultural tourism activities do not need to be limited to specific locations in Thailand, but can also relate to the history of the area through museums and activities that reenact past events. Areas in Thailand that have suffered economic hardship may take advantage of cultural tourism and offer unique experiences to visitors. Cultural tourists tend to have higher income and education, are between 45 and 60 years of age, are relatively well traveled, and are looking for new experiences and destinations. Museums, universities and wildlife organizations in Thailand can offer programs to meet this demand. Many countries are following this trend by expanding the emphasis from beaches to include monuments, historical sites and heritage (Butler, 2004). This trend will enhance the attractiveness of Thailand, because the country is well known for its history, culture and heritage.

7. *The low-cost airlines.* Rising disposable income, economic growth of countries in Asia and the Pacific region, a desire to travel, and low-cost airlines provide opportunities

for less affluent and young tourists to explore the world (WTO, 2005). Low-cost airlines provide more flights to more destinations at attractive prices that allow more people to travel (WTO, 2007). In the last few years, airlines have offered reduced fares to attract more travelers. However, an increase in oil prices in 2008 has led to higher airfares and additional fees. These airfare increases may encourage Thai tourism to be more creative in the development of more interesting attractions and activities to make tourists' visits more enjoyable and memorable.

8. *Visa and immigration policies.* Many countries in Southeast Asia have implemented a visa-free zone for member countries' residents, allowing more tourists from each member country to visit other member countries. Some countries also have reduced visa requirement restrictions, encouraging more people to travel. Thailand issues visa-free entry for citizens of certain countries to visit Thailand during certain times. The country also offers visa-on-arrival at the point of entry for tourists' convenience (TAT News Room, 2001c). This flexibility may provide the country with a competitive advantage in attracting tourists.

Threats

From an external perspective, threats exist as unfavorable conditions for Thai international tourism development. The followings six factors are considered major threats to Thai international tourism: (1) intensified competition among other nations; (2) political instability and religious unrest in neighboring countries; (3) disease and natural disaster; (4) oil prices; (5) safety and security; and (6) exchange rates. Each of these threats is discussed in the following paragraphs.

1. *Intensified competition among other nations.* The WTO (2001) forecast that first-time Asian travelers will contribute to an increase in intraregional tourism, particularly in East Asia and the Pacific, from 79% in 1995 to 81% in 2020. As many countries in Asia regard tourism as a means of contributing to economic development and generating foreign capital, they promote their countries as tourist destinations. Countries in these regions, including Thailand, now market aggressively to compete for tourists. The close geographic proximity and climates make many tourists perceive these countries to be similar. Thailand must market itself as a unique travel destination.

2. *Political instability and religious unrest in neighboring countries.* Many Asian countries do not have democratic and/or stable governments, which makes tourists from more politically stable countries more reluctant to visit. The majority of the population in Indonesia and Malaysia is Muslim. The strong political and religious movements in Muslim countries and the explosion at a famous tourist destination in Bali, Indonesia, have caused many tourists to avoid travel to Asia. The current political unrest in the Philippines also might cause some tourists to be concerned about their safety during a visit to Asia. All of these situations negatively affect Thai tourism owing to geographic proximity and tourist perceptions.

3. *Disease and natural disaster.* Southeast Asia experienced a 14% decline in international tourism in 2003, due to the SARS outbreak. In 2003, international tourists to Thailand decreased by 7% and international tourist receipts declined by 4% (WTO, 2004). Thailand was affected by the December 2004 tsunami. As a result, the number of international tourists visiting Thailand decreased in 2005. After the tsunami, Thailand established

the National Disaster Warning Center (NDWC) to collect data when there are any indications that severe conditions may occur. This should assist the NDWC committee in deciding about the time to issue warnings (TAT, 2005b), which might mitigate some of the fear tourists may have in selecting certain travel destinations.

4. *Oil prices.* In 2004 and 2005, there was a steady increase in world oil prices. However, tourists were not significantly swayed from traveling as the airline industry absorbed most of these increased costs rather than raising ticket prices. Furthermore, evidence suggested that increased oil prices were merely catching up with inflation (WTO, 2006b). However, the continued rise of oil prices in 2008 has resulted in the bankruptcy for some airlines, while other airlines have passed these additional costs on to the consumers. These rate increases will negatively impact the tourism industry, because airfare costs are a major portion of travel expenses.

5. *Safety and security.* Tarlow (2002) suggested that the tourism industry is influenced by a country's level of safety and security. Correspondingly, safety has a strong influence on people's choice of destination. This topic has received considerable attention since the terrorist attacks of September 11, 2001. Security concerns have led to intensified security checks at airports and more restrictions on travel. The installation of security measures at airports can cause delays for arriving and departing passengers at travel destinations. This added inconvenience may negatively impact a person's decision to travel.

6. *Exchange rates.* The weak US dollar and the strong euro and the British pound exchange rates in 2004 spurred the growth of tourism in many destinations (WTO, 2006b). The depreciation of US dollars in 2005 relative to some Asia Pacific currencies (i.e. Australian

dollar, Korean won and Chinese yuan) led to a decline in outbound American tourists to many tourist destinations, especially Thailand. The continued weakness of the US dollar will negatively impact the health of international tourism in Thailand. However, Thai tourism also might gain tourists, owing to more favorable currency exchange rates in European and Middle Eastern countries. Therefore, TAT needs to monitor target markets and adjust its marketing strategies to have the right mix of the market.

In summary, the SWOT analysis applied in this study provides a foundation for the development and marketing of international tourism in Thailand. Based on this analysis, actions can be taken to minimize or avoid threats, and weaknesses may be evaluated to determine how to convert them into strengths. Likewise, some of the threats should be converted into opportunities, and strengths and opportunities should be aligned to optimize Thailand's potential as a tourism destination.

Conclusion and Recommendations

Thailand needs to establish strategies to upgrade and protect its natural resources and scenic environments for the long-term benefit of its citizens and tourists. Thailand has emphasized the importance of a "sufficiency economy", which was suggested by the country's King to balance the development of human, social, economic and environmental resources. With the information generated from the current study's SWOT analysis, TAT should develop marketing strategies to take advantage of Thailand's strengths and opportunities, convert weaknesses into strengths and mitigate the negative impacts of threats. The following eight recommendations

are provided to assist future international tourism development in Thailand.

First, increase joint marketing efforts. The joint marketing efforts of TAT, the Greater Mekong Subregion and ASEAN countries have been successful. The Indonesia–Malaysia–Thailand Growth Triangle (IMT-GT), a new international economic project that was formed in 2007, also should lead further joint marketing efforts and bring in more tourists and revenue to each of the countries involved (TAT News Room, 2008d). TAT should continue to investigate potential joint marketing activities with other organizations to reduce marketing costs, increase tourists to the region and strengthen Thai tourism. To be an attractive destination, Thailand also needs to differentiate itself further from other countries by marketing the hospitality and service orientation of Thai employees, along with the country's rich culture and heritage.

Second, increase training and education. A study by Esichaikul and Baum (1998) revealed that the private sector needs the assistance of the public sector in the training and education of a qualified workforce in the tourism industry. To establish this necessary training and education, strong support and guidance are needed from the Thai government. Without qualified employees, tourists will not receive quality service. This can create a negative impact on the tourists' experiences, which would be detrimental to TAT's efforts to promote Thailand as a quality travel destination.

Third, capture the trend of Internet. Since the Internet has become the number one information source for potential visitors in planning their vacations, TAT should develop attractive and informative Internet links in various vacation planning sites on its website (www.tourismthailand.org). Specific vacation packages for visitors to select can also be developed and promoted on this

website. The website needs to be maintained and updated regularly.

Fourth, provide a clearer direction for quality and sustainable tourism. The shifted focus from quantity to quality and sustainable tourism has been discussed for many years, but there needs to be specific standards and the establishment of a system of measurement and feedback. Long-term strategic planning should be developed to ensure the proper implementation of these standards. The annual achievement of Thai tourism is still reported by the number of tourists, which is a quantity measurement. TAT should also use the average spending of tourists, which might be a better representation of quality.

Fifth, establish specific guidelines to preserve the country's natural and cultural resources. This can be achieved by conducting an inventory of natural and cultural resources and responsible organizations within each region. TAT needs to work cooperatively with these organizations and the local communities to preserve natural and cultural resources.

Sixth, develop value-added tourism products. Average spending of tourists to Thailand is relatively low compared with other competitive nations in the region. TAT needs to develop value-added tourism products to increase average spending among tourists (Chaisawat, 2006). This will also support a new direction of Thai tourism that emphasizes quality, not quantity.

Seventh, support the MICE industry. As Thailand focuses more on quality tourism, delegates from the MICE industry can assist TAT in fulfilling this goal because the spending of the average MICE delegate is higher than that of the average tourist. The Thailand Convention and Exhibition Bureau (TCEB) was established in 2002 to market and promote Thailand as the host destination for the MICE industry. The Thai MICE industry

has had a 20% annual growth rate since 2002, and this trend is expected to continue (TAT News Room, 2008e). TAT should work cooperatively with TCEB to promote the MICE industry.

Eighth, strengthen efforts to attract Chinese and Indian tourists. As discussed in the Opportunity section, China and India are important sources of tourists to Thailand. Therefore, TAT should work diligently with the Chinese and Indian governments and private organizations to strengthen relationships between the countries and to develop marketing programs designed to attract more tourists from both countries. Owing to the limited resources that Thailand has for international tourism development, tourism-related projects and activities should be prioritized and specific goals and objectives should be developed for a sustainable and robust international tourism industry from both environmental and economic perspectives.

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