THE NEXT BIG THING

THAILAND Outbound Travel Report 2018

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Ministry of Tourism & Sports
กระทรวงการท่องเที่ยวและกีฬา

MESSAGE FROM MINISTER OF TOURISM AND SPORTS

WEERASAK KOWSURAT

Although Thailand is well-recognised as one of the world's leading inbound travel & tourism destinations, it is also rapidly emerging as a strong source of outbound travel. However, there is a big imbalance between the number of foreign visitors to Thailand and Thais travelling abroad.

This report is designed to narrow that imbalance, and the Ministry of Tourism and Sports supports this effort. Thais who travel abroad become Ambassadors for Thailand. They gain knowledge and experiences, learn about new cultures and meet people. These are all great benefits. In a globalised world, two-way travel contributes to peace, friendship and good people-to-people relations.

I hope that foreign diplomatic missions in Thailand, chambers of commerce, national tourism organisations, airlines and other marketing representatives use this report as a source of valuable research to better understand the dynamics and opportunities of Thai outbound travel trends. As their marketing efforts bear fruit, I hope to see more airlines flying to Thailand, and more foreign NTOs opening full-time offices in Bangkok, especially from countries in Latin America and Africa.

Once business grows, airline accessibility and visa facilitation will follow. That, in turn, will be good for inbound travel to Thailand.

Weerasak Kowsurat
Minister of Tourism and Sports

MESSAGE FROM TOURISM AUTHORITY OF THAILAND GOVERNOR

YUTHASAK SUPASORN

The Tourism Authority of Thailand (TAT) is primarily responsible for promoting inbound tourism. By supporting this inaugural report on the surging Thai outbound travel sector, TAT is taking an interest of the new era for tourism marketing by recognising the importance of two-way leisure travel, as this will further create mutual benefits between countries and also pave the way for two-way travel for business, conventions, exhibitions, and vice versa.

Airline access is crucial. In today's intensely competitive market-place, route profitability is a major factor in an airline's decision on which cities to serve. Profitability is enhanced when airlines can tap into the full potential of travel from both ends of each route.

Today, the nearly 120 airlines flying to the two major airports in Bangkok are the lifelines of our 35 million annual visitors. TAT welcomes more airlines to Thailand, especially from new markets; such as, Africa and Latin America. Now, we can also offer them better route profitability due to the outbound potential.

Thailand also has a very liberal visa regime for inbound tourism. We encourage more countries to forge stronger linkages between countries in every dimension apart from free travel in order create win-win partnerships.

Fair and balanced travel and tourism flows are the way of the future, and benefit everyone.

Yuthasak Supasorn,
Governor, Tourism Authority of Thailand

Travel Impact Newswire

MESSAGE FROM EXECUTIVE EDITOR

IMTIAZ MUQBIL

Set to cross the 10 million mark in 2018, Thai outbound travel is expected to be the Next Big Thing in Asia-Pacific travel & tourism.

Thai inbound travel is booming, and outbound travel is coming of age. Similar to other emerging source markets, Thai outbound travel is already shifting from mass-market, flag-following group tours to more specialised, selective niche-customer segments relying less on discounts and seeking higher levels of comfort, facilitation and experience.

This ground-breaking report, the first of its kind in the history of Thai travel & tourism, is designed to help all those interested in tapping the future potential of Thai outbound travel, identify trends and opportunities, focus their marketing strategies, generate ideas and improve the return on investment.

Strong outbound travel can contribute to strong inbound travel. Because Thailand has long been an A-grade inbound-tourism destination, it is served by 118 airlines. As filling up both inbound-outbound sectors is key to route profitability, strong outbound flows will enhance overall route revenues – and attract more airlines to fly to Thailand.

By comparison, Bangkok is home to only 11 foreign national tourism organisations. Over the next few years, I expect several more NTOs to set up shop in Bangkok. Regardless of their budgets, this report will help them save time and money in doing their homework and tapping what is likely to be a great new source of business.

Full credit and thanks are due to Minister of Tourism & Sports Weerasak Kowsurat, Tourism Authority of Thailand Governor Yuthasak Supasorn and TAT Deputy Governor for Marketing Tanes Petsuwan for their instant understanding of the broader policy, economic and business benefits of promoting two-way travel, and supporting the publication of this landmark report.

Imtiaz Muqbil, Executive Editor, Travel Impact Newswire

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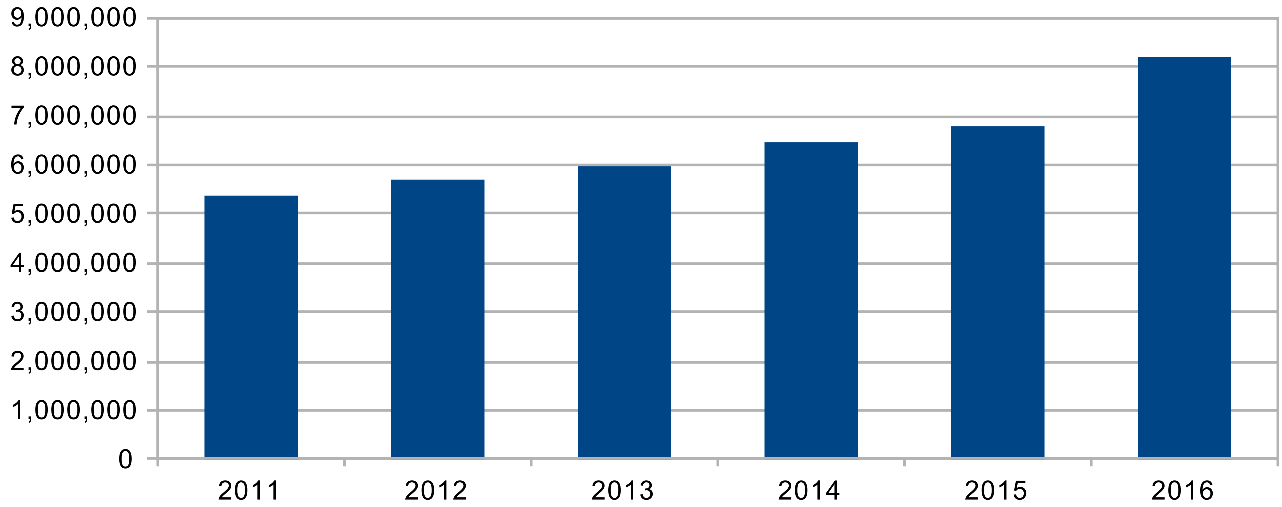
20 Reasons why Thailand will be the Next Big Asian Outbound Travel Market

Given the rates of growth since 2011, the number of outbound travellers from Thailand is projected to cross nine million in 2017 and 10 million in 2018. A country widely known to be one of the world's most popular inbound travel destinations is now set to become a major source of outbound travel too.

Outgoing Thai Travellers 2011-2016

2011	2012	2013	2014	2015	2016
5,397,248	5,721,485	5,969,913	6,443,736	6,794,327	8,203,521

Source: Ministry of Tourism and Sports, Thailand



Here are 20 reasons why this is set to happen.

1. The economy is stable. A new Thailand 4.0 National Development policy is in place designed to capitalise on the country's geographical advantage at the crossroads of the Greater Mekong Subregion and ASEAN. The baht is relatively strong against major global currencies, thanks to robust exports and a booming inbound tourism sector.

2. The population is young and growing. Three most promising demographic segments are the millennials, ageing baby-boomers and the female market. A vibrant Middle Class is emerging, thanks to the strong economy, low unemployment and improved quality of life

3. Travel is a major revenue spinner for banks, credit card companies, telecom companies, insurance companies and the media. These companies are prominent supporters and sponsors of travel trade shows and events

4. Both Thai and multinational conglomerates are major sources of outbound corporate travel, MICE and human resources development travel.

5. Diplomatic missions are seeking to narrow the inbound-outbound gap. Countries such as Indonesia, Russia, Bangladesh and India are seeking to rectify the huge imbalance between the number of their citizens coming to Thailand vis a vis the number of Thais visiting their countries.

6. Government travel is rising. The Royal Thai government is the largest single purchaser of travel covering official business, fam trips, study trips, training programmes, and more. Some of the biggest travel budgets are by the Ministries of Foreign Affairs, Defence, Transport and Communications, and Tourism & Sports.

7. Thais are striving for higher levels of education in pursuit of better jobs with multinational companies and opportunities to work abroad or acquire new skills to grow their companies within Thailand and the ASEAN region. Student travel is surging as more Thais head abroad for all forms of education, especially English-studies and short-courses. Many schools and universities are offering exchange programmes.

8. Costs are dropping. Rising competition means more deals, especially at the Thailand International Travel Fair, the biannual outbound travel fair organised by the Thai Travel Agents Association (TTAA), the country's largest outbound travel trade body.

9. Thailand is served by 118 scheduled and charter airlines (as of January 2018). Low-cost airlines are expanding their presence across Thailand. New airlines bringing tourists into Bangkok as a popular inbound tourist destination are keen to fill up the return sectors and take local people out.

10. Easier entry-exit formalities. The Thai government has made it extremely easy for Thais to get passports and/or renew them. Moreover, Thais face less hassles at their own border checkpoints. No more immigration form filling and automatic machines has reduced the stress of travel.

11. New urban centres are emerging. Chiang Mai, Phuket and Haad Yai are just three of the emerging new cities, driven mainly by inbound tourism. Their populations are growing significantly, with good purchasing power.

12. Infrastructure is coming up, especially to neighbouring countries. Thailand lies at the geographical hub of Asia with extensive land, air and sea connections with all the countries, especially its immediate overland neighbours Myanmar, Cambodia, Laos and Malaysia. It also shares marine borders with Indonesia. Thais will be travel overland beyond the immediate neighbouring countries to Vietnam, India, China and Singapore.

13. More countries are giving visa free facilities: As of January 2018, Thailand had visa-free or visa on arrival agreements with 34 countries. This number will grow in future.

14. Thailand is a prominent member of many international associations and organisations, especially in the medical field. Thais sit on the boards and committees of these international organisations and regularly lead large Thai delegations to their global conventions, usually in order to attract them to Thailand.

15. Thailand has nearly two million expatriates of diverse nationalities living in Bangkok and all around the country. They are a high-spending, middle-class market eager to seek new, off the beaten track destinations in the region.

16. Thai hotel companies such as Centara, Anantara and Dusit Thani are expanding their international footprint, stepping up marketing and promotion efforts. They have large databases on travel trends, seasonality and customer demographics.

17. Thai restaurants all over the world means that Thai tourists never have to worry about missing their favourite fare when abroad.

18. Foreign NTOs, airlines and OTAs are stepping up their marketing campaigns.

19. Cruise companies are stepping up distribution networks and expanding their ports of call in Thailand. A perfect product for Thailand's ageing populations, cruising is set to enjoy exponential growth in the years ahead.

20. Buddhist travel is on the rise. The main Buddhist circuit spots in India and Nepal are high on the list, with other countries such as Laos, Myanmar, Sri Lanka, Indonesia, Bangladesh and even Pakistan seeking a piece of the action.

The Thai Economy

Thailand Key Economic Indicators

	1990	2000	2010	2016
Population, total (millions)	56.58	62.96	67.21	68.86
Population growth (annual %)	1.4	1	0.5	0.3
Life expectancy at birth, total (years)	70	71	74	75
GDP (current US$) (billions)	85.34	126.39	341.11	407.03
GDP growth (annual %)	11.2	4.5	7.5	3.2
Inflation, GDP deflator (annual %)	5.8	1.3	4.1	1.8
Agriculture, value added (% of GDP)	12	9	11	8
Industry, value added (% of GDP)	37	37	40	36
Services, etc., value added (% of GDP)	50	55	49	56
Exports of goods and services (% of GDP)	34	65	66	69
Imports of goods and services (% of GDP)	42	56	61	54
Time required to start a business (days)	..	35	34	28

Source: World Development Indicators, World Bank
Figures in blue refer to periods other than those specified. Last Updated: 01/25/2018

The following analysis is extracted from the 12th National Economic and Social Development Plan (2017-21)

Since the First Plan (1961-1966), there has been significant growth in the size of Thai economy, manufacturing base, and services base. Citizens' incomes are higher, poverty has decreased, people's quality of life has improved since the coverage of social services has been increased, basic infrastructure has been more comprehensively developed, and the results of free trade and investment policies and the enlargement of cooperation with allied countries, at both bilateral and multilateral levels, as well as cooperation within the sub-region and ASEAN which have been more intensive since 2015, have expanded Thai's trade and investment opportunities, bringing strength and prominence to many Thai production and service bases.

In the previous 6 decades, the Thai economy has expanded at an average rate of 6.0 percent per year. Since 1987, the Thai economic base has shifted from one concentrated on agriculture to one concentrated on industrial production, and has started to become more modern services-based in the last 10 years. As a result of the expansion of the Thai economy and increasing per-capita income, Thailand shifted its status in the World Bank classification from a low-income economy to a lower-middle income economy in 1988. Thailand's per-capita income in 1988 was 29,307 THB per year, and surpassed the threshold for classification as an upper-middle income country in 2010, before reaching a GNI per capita of 4,121 USD per year in 2014. The production and service bases have become more diversified, the industrial goods export base has impressively enlarged, many production and service sectors - such as the automotive industry, electronics and electric appliances, food industry, agricultural products, tourism and health services - have been internationally competitive, increased global market share, and gained higher foreign currency earnings.

The value of international trade and investment has increased continuously. By the year 2015, the value of trade in both goods and services was 17.2 trillion THB, or 126.9 percent of the size of Thai economy, measured as the value of the country's total production (Gross Domestic Product: GDP). Additionally, Thai society and Thais have become more international, Thai and people have higher English language skill, knowledge about international standards, rules and regulations, as well as the changing global situation. The integration of cultures has been adopted into daily life.

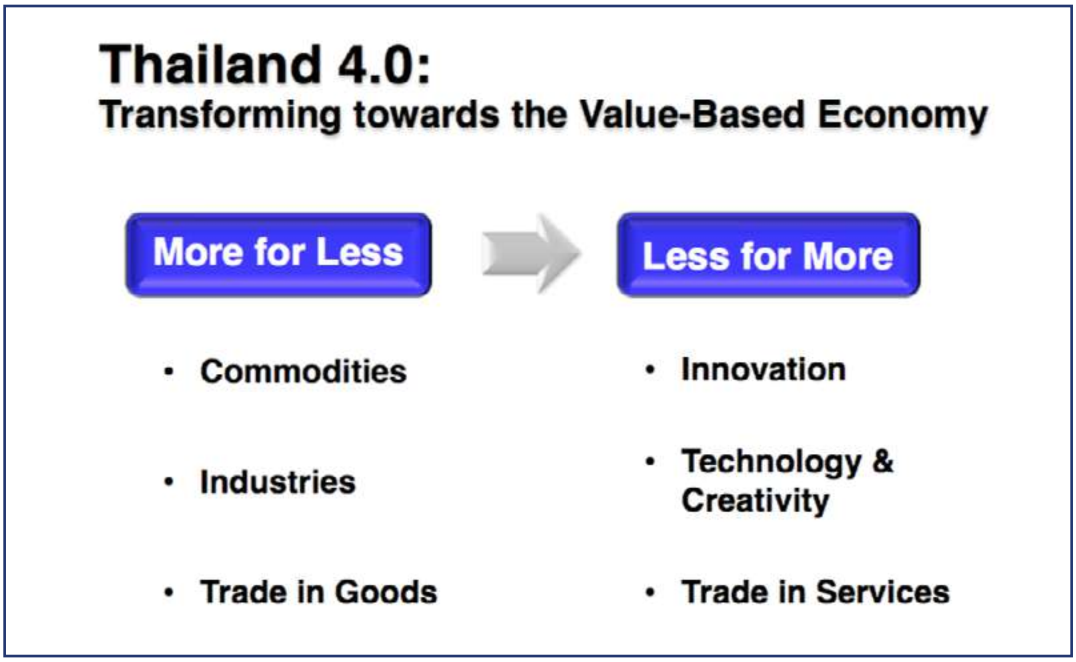
The enlarged economic base has resulted in increasing employment, absorbing up to 38 million out of the 38.5 million workforce. The average unemployment rate was less than 0.9 percent, and poverty has decreased accordingly, both in terms of the number of people under the poverty line and the proportion of people under the poverty line as a proportion of total population. This proportion dropped from 20 percent in 2007 to 10.5 percent in 2014, while the population below the poverty line fell from 12.7 million in 2007 to 7.1 million in 2014.

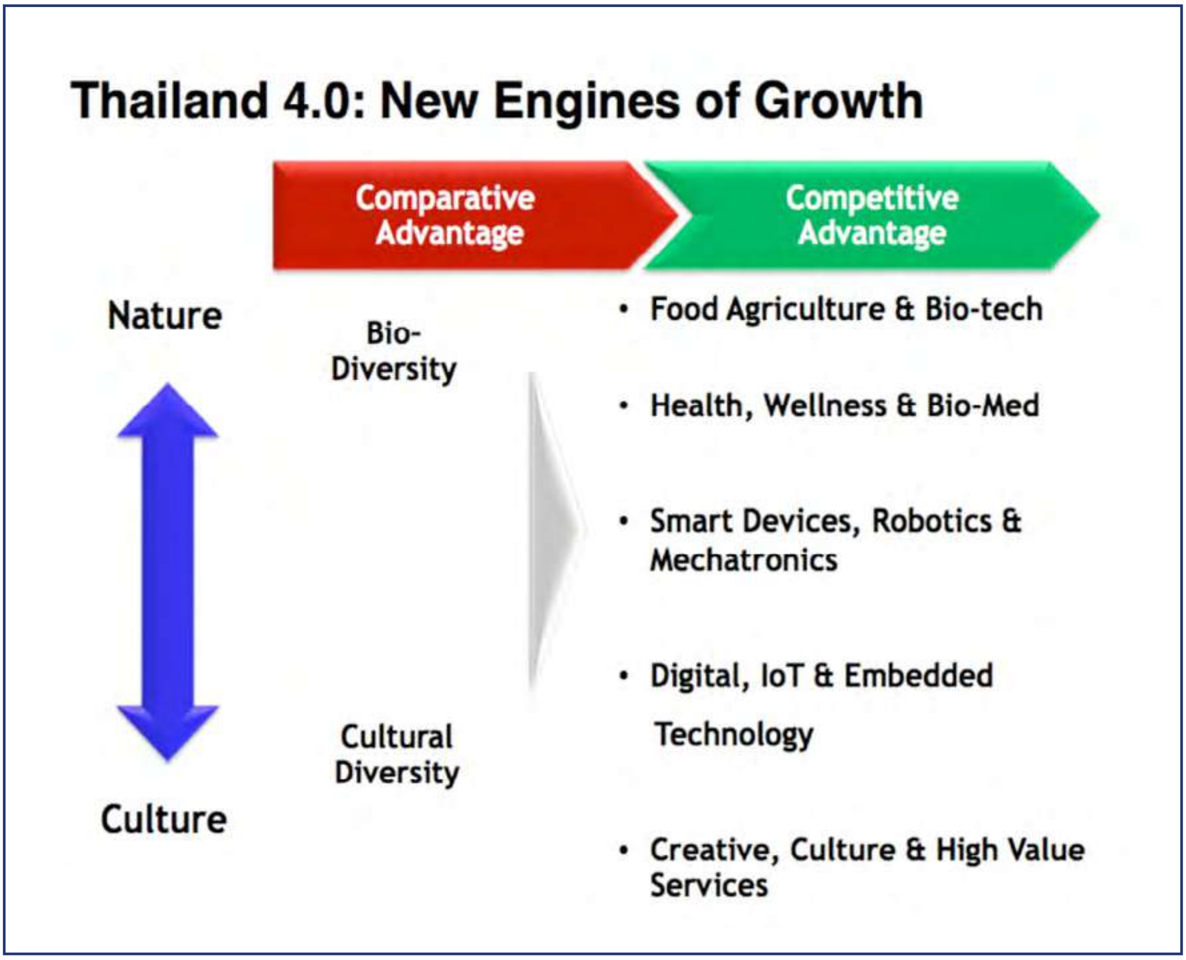
The quality of life of the average Thai has improved in all regards. Access to education, public health services, public services, basic infrastructure, social protection and other resources has improved in coverage and quality. For instance, in 2015 universal health care covered 99.9 percent of Thai people, while there was income security for disadvantage people, the coverage of which improved. Life expectancy has continuously increased: a male's life expectancy at birth was 71.6, whereas a female's was 78.4. The average number of years education of Thais aged between 15-59 years has increased to 10.1 years.

10 Development Strategies

1. Strengthening and Realizing the Potential of Human Capital
2. Creating a Just Society and Reducing Inequality
3. Strengthening the Economy, and Underpinning Sustainable Competitiveness
4. Environmentally-Friendly Growth for Sustainable Development
5. Reinforcing National Security for the Country's Progress towards Prosperity and Sustainability
6. Public Administration, Corruption Prevention, and Good Governance in Thai Society
7. Advancing Infrastructure and Logistics
8. Development of Science, Technology, Research, and Innovation
9. Regional, Urban, and Economic Zone Development
10. International Cooperation for Development

The future agenda is driven by the Thailand 4.0. The following images show the key points of this socio-economic development policy which will drive the national agenda for the next five years and beyond:





New Technology	New Industry	Enterprise
• Bio-tech	• Food & Agriculture	• Agritech • Foodtech
• Bio-Med	• Health & Wellness	• Healthtech
• Mechatronics	• Smart Devices & Robotics	• Robotech
• Embedded Technology	• Digital & IOT	• Fintech • Edtech • E-Marketplace • E-Commerce • Service Enhancing
• Service Design & Technology	• Creative, Culture & High Value Services	• Designtech • Lifestyle Business • Traveltech

Demographics: Females outnumber Males

As of July 2015, the total population of Thailand was approximately 67.2 million, according to the National Statistical Office.

The gender breakdown was 32.8 million male (48.8 percent) and 34.4 million female (51.2 percent), making Thailand one of the few countries in the world which has more females than males. Women are also prominently represented in the work force. The country also has a large number of single-parent women-headed households. This makes women very important decision makers in the travel decision-making process.

As a percentage of population by age, between 2010-2015, children (aged 0-14 years) decreased from 19.2 to 17.8 percent, the working-age population (aged 15-59 years) decreased from 67.9 to 66.7 percent, while the elderly population (aged 60 years and over) increased from 12.9 to 15.5 percent.

Thailand is currently facing two population trends: a rapidly ageing population and urbanization. Urbanization is mostly concentrated around Bangkok and its surrounding areas, and many educated Thais are moving abroad while less educated migrants from neighboring countries like Myanmar and Cambodia move into the country.

Population by characteristics, 2010 and 2015

Population Characteristics by age-group (%)	2010	2015
Children age: 0-14 years		
Male	20.1	18.6
Female	18.4	17.0
Total	**19.2**	**17.8**
Working age: 15-19 years		
Male	68.0	67.1
Female	67.8	66.3
Total	**67.9**	**66.7**
Old age: 60 years and over		
Male	11.9	14.3
Female	13.9	16.7
Total	**12.9**	**15.5**
Dependency ratio (%)		
Children age: 0-14 years	28.3	26.7
Old age: 60 years and over	19.0	23.3
Total	**47.3**	**50.0**

The 2010 Population and Housing Census, National Statistical Office

Sex Ratio

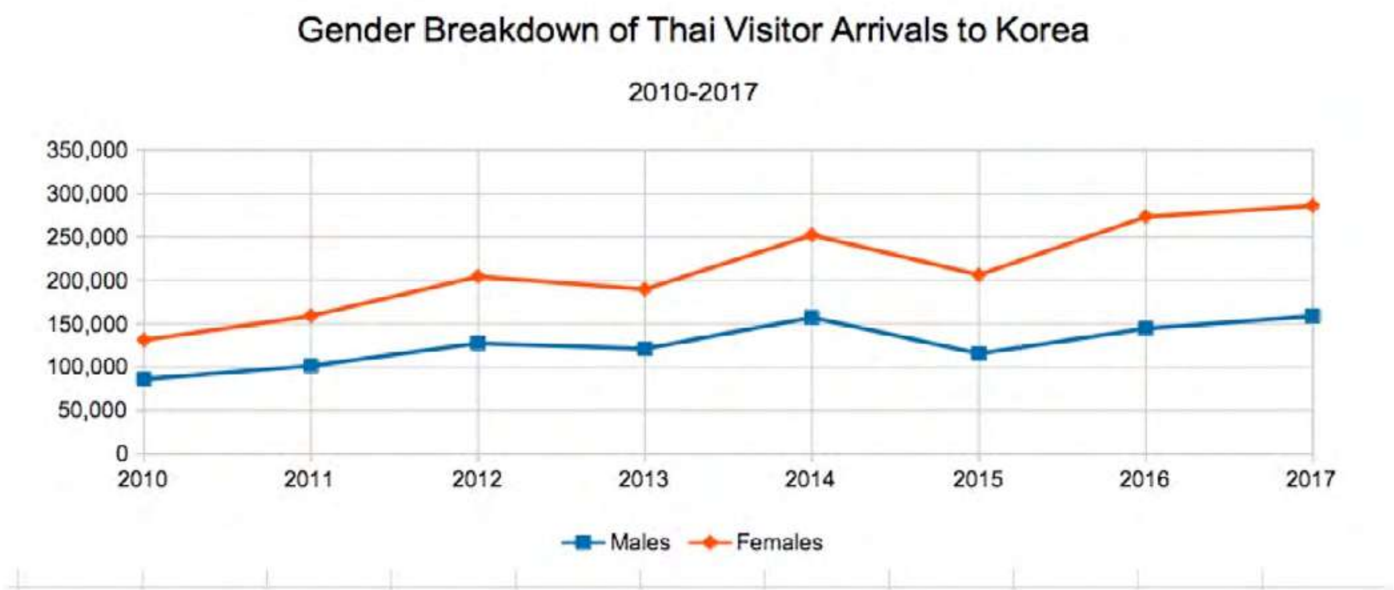
In 2015, every region had more females than males. The sex ratio (the number of males per 100 females), was roughly 95.5, a slight drop over 96.2 in 2010 . The sex ratio in the rural areas was higher than urban areas (97.1 and 93.4 respectively).

The elderly female population has also increased significantly between 2010 and 2015.

Population and sex ratio by area and region

Region and area	Population			Sex ratio (%)
	Male	Female	Total	
Whole Kingdom	32,832.7	34,395.8	67,228.5	95.5
Municipal area	14,470.0	15,485.9	29,955.9	93.4
Non-municipal area	18,362.7	18,909.9	37,272.6	97.1
Bangkok	4,182.7	4,442.5	8,625.2	94.2
Central	9,417.2	9,822.2	19,239.4	95.9
Nothern	5,595.5	5,881.4	11,476.9	95.1
Northeastern	9,125.6	9,604.4	18,730.0	95.0
Southern	4,511.6	4,645.3	9,156.9	97.1

One destination that has tapped the female market segment very well is Korea. The number of Thai female visitors to Korea has outpaced male visitors for many years, thanks to the popularity of Korea soap operas and K-Pop music. The stats show a clear trend.



Ageing population

Thailand's ageing population offers enormous opportunities for marketers. Many are retirees, with spare time and money. Although many travel in similar-age groups, a growing trend is towards family travel during school holidays.

One destination enjoying steady growth in silver-market visitors from Thailand is New Zealand, as the following chart shows.

Key characteristics of visitors from Thailand
Year ended December 2012–16

Key characteristic	Year ended December					Change 2015–16	
	2012	2013	2014	2015	2016	Number	Percent
Total visitor arrivals	**16,944**	**20,704**	**21,696**	**21,696**	**27,104**	**5,408**	**24.9**
Travel purpose							
Holiday	7,968	10,016	11,312	11,296	15,552	4,256	37.7
Visiting friends & relatives	3,088	3,328	2,928	3,328	3,952	624	18.8
Business	1,440	1,616	1,360	1,440	1,600	160	11.1
Education	2,320	3,008	3,344	3,056	3,424	368	12.0
Conferences & conventions	432	352	512	272	480	208	76.5
Age group (years)							
Under 15	1,808	2,496	2,560	3,040	2,992	-48	-1.6
15–24	1,984	2,832	3,072	2,688	3,296	608	22.6
25–34	3,344	3,264	3,600	3,424	4,192	768	22.4
35–44	3,424	4,272	4,704	4,352	5,584	1,232	28.3
45–54	3,392	4,048	3,936	4,096	5,120	1,024	25.0
55–64	2,240	2,736	2,816	2,736	3,696	960	35.1
65+	752	1,056	1,008	1,360	2,224	864	63.5
Length of stay (days)							
1–3	1,168	1,408	1,296	1,168	1,488	320	27.4
4–7	5,840	6,896	7,120	7,024	9,360	2,336	33.3
8–14	4,528	5,680	5,824	5,904	8,016	2,112	35.8
15–21	1,696	1,776	1,616	2,240	2,448	208	9.3
22 and over	3,712	4,944	5,840	5,360	5,792	432	8.1
Median	9.0	9.3	9.5	9.7	9.1	...	...

Spending Habits: Key Indicators

These population figures are from the National Statistical Office Survey Report 2015. Most noticeable is the growing number of female-headed households nationwide. The ratio is more dominant in the municipal (urban) areas.

Households characteristics, 2015 and 2010

Households characteristics	2015	2010
Number of private household	21,326.0	20,364.3
Average household size	3.1	3.1
Female-head households (%)	37.7	34.7

National Statistical Office Household Survey Report 2015

This shows the relatively high status of the Thai middle-class population. It is growing rapidly as the country advances economically.

Percentage of private households by total monthly income of household area

Total monthly income (Baht)	Area		Total
	Municipal area	Non-municipal area	
Less than 5,000	6.5	14.1	10.5
5,001-10,000	17.4	30.4	24.2
10,001-15,000	17.5	21.4	19.6
15,001-30,000	31.1	23.2	26.9
30,001-50,000	17.6	8.5	12.8
50,001-70,000	5.7	1.6	3.6
70,001-100,000	2.6	0.6	1.5
More than 100,000	1.6	0.2	0.9
Total	100.0	100.0	100.0

National Statistical Office Household Survey Report 2015

Most Thais already have important household equipment and appliances such as TVs, DVD players, refrigerators, washing machines and motorcycles. Hence, travel is becoming a more important component of discretionary travel expenditure.

Percentage of private households by ownership of household appliance, technology used and area

Ownership of household appliance and technology used	Area		Total
	Municipal area	Non-municipal area	
Ownership of household	(100.0)	(100.0)	(100.0)
Television	97.6	97.3	97.5
VCD/DVD player	64.4	52.3	58.1
Mobile phone	97.3	94.9	96.0
Computer	39.3	21.1	29.7
Refrigerator/Freezer	88.3	91.8	90.1
Microwave/Oven	32.6	15.1	23.4
Washing machine	67.7	66.5	67.0
Air condition	35.4	14.5	24.4
Car/Pick-up truck/Van	47.8	39.7	43.5
Motorcycle	72.2	86.5	79.7
4-wheel tractor	1.2	4.3	2.8
2-wheel tractor	6.1	20.4	13.6

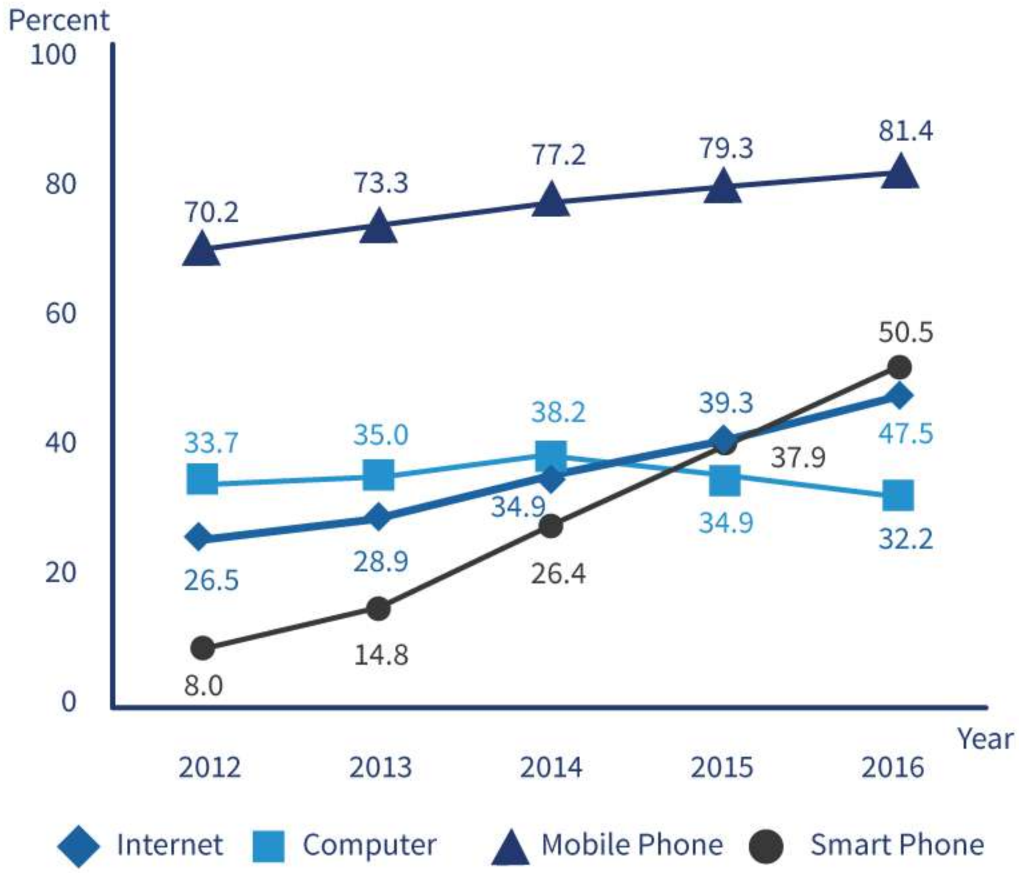
National Statistical Office Household Survey Report 2015

Ownership of household appliance and technology used	Area		Total
	Municipal area	Non-municipal area	
Technology used	(100.0)	(100.0)	(100.0)
Cable TV	22.4	3.6	12.5
Satellite dish	55.3	71.9	64.0
Internet	43.5	21.8	32.1

National Statistical Office Household Survey Report 2015

Like everywhere else in the world, the use of mobile phones is rising rapidly.

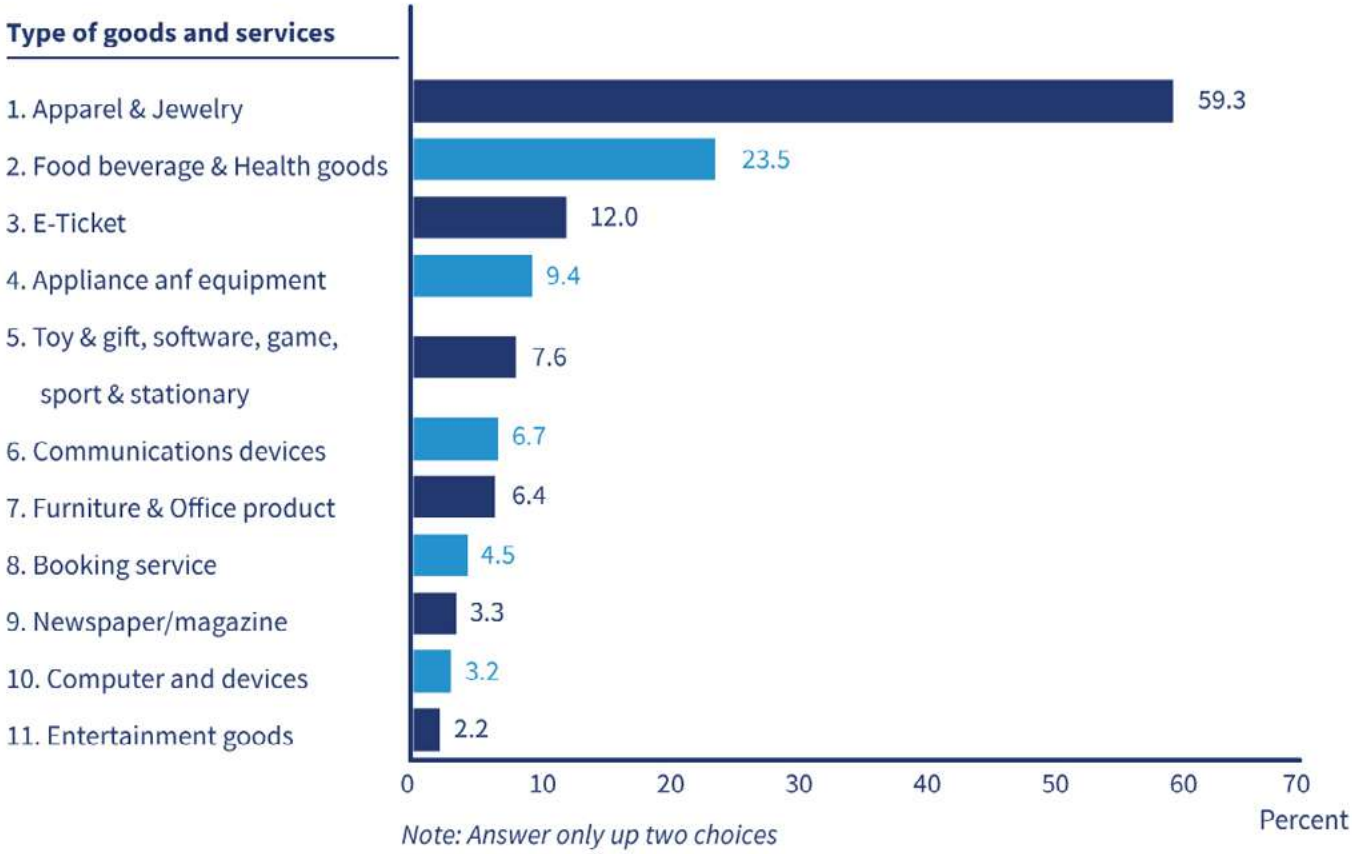
Percentage of population aged 6 years and over who used information and communication technology in 2012-2016



Note: Mobile Phone, it includes feature phone and smart phone

Source: 2016 Household survey on the use of Information and Communications Technology, National Statistical Office.

Percentage of population aged 6 years and over who have made online purchases of goods and services by category



Source: 2016 Household survey on the use of Information and Communications Technology, National Statistical Office.

A very important statistic here: Even in 2016, e-tickets was the third highest item purchased online. The ranking may remain the same in the next survey but the volume of purchases will grow exponentially as Internet penetration grows amongst Gen Y consumers.

Booming credit cards and personal loans

The Thai outbound travel boom is directly related to the boom in the number of credit card holders, the volume of credit card usage and personal loans, which are often used to finance travel. This growth has been significant and sustained, and will gain further momentum in the years ahead.

Krungthai Card Public Company Ltd (KTC), is one of the major sponsors of the biannual Thai International Travel Fair. The stock market-listed company provides unsecured financial products to Thai consumers, credit card products and services as well as personal loans and various other e-payment services.

The following information, extracted from the KTC's 2016 Annual Report, offers unique insights on how the highly competitive Thai credit card sector is performing and positioning itself to take advantage of the travel boom.

Thailand Credit Card Industry

Thailand Credit Card Industry		2014			2015			2016		
		Amount	Market Share	Growth Rate	Amount	Market Share	Growth Rate	Amount	Market Share	Growth Rate
Total Spending Amount through Credit Card (Million Baht)	Industry	1,307,152	100.00%	9.4%	1,393,121	100.00%	6.6%	1,488,408	100.00%	6.8%
	Commercial Bank	874,175	66.9%	10.3%	923,940	66.3%	5.7%	984,294	66.1%	6.5%
	Non-Bank Financial Institution	432,977	33.1%	7.5%	469,181	33.7%	8.4%	504,113	33.9%	7.4%
	KTC	129,828	9.9%	7.4%	145,800	10.5%	12.3%	164,991	11.1%	13.2%
Credit Card Account Receivable (Million Baht)	Industry	318,141	100.00%	9.5%	336,641	100.00%	5.8%	358,413	100.00%	6.5%
	Commercial Bank	193,394	60.8%	10.2%	204,980	60.9%	6.0%	218,220	60.9%	6.5%
	Non-Bank Financial Institution	124,748	39.2%	8.5%	131,662	39.1%	5.5%	140,193	39.1%	6.5%
	KTC	37,621	11.8%	6.6%	41,412	12.3%	10.1%	46,195	12.9%	11.5%
Number of Credit Card	Industry	20,303,751	100.00%	9.5%	21,762,273	100.00%	7.2%	23,151,164	100.00%	6.4%
	Commercial Bank	9,744,241	48.0%	7.9%	10,119,844	46.5%	3.9%	10,313,291	44.5%	1.9%
	Non-Bank Financial Institution	10,559,510	52.0%	10.9%	11,642,429	53.5%	10.3%	12,837,873	55.5%	10.3%
	KTC	1,807,755	8.9%	15.3%	1,887,015	8.7%	4.4%	2,095,563	9.1%	11.1%

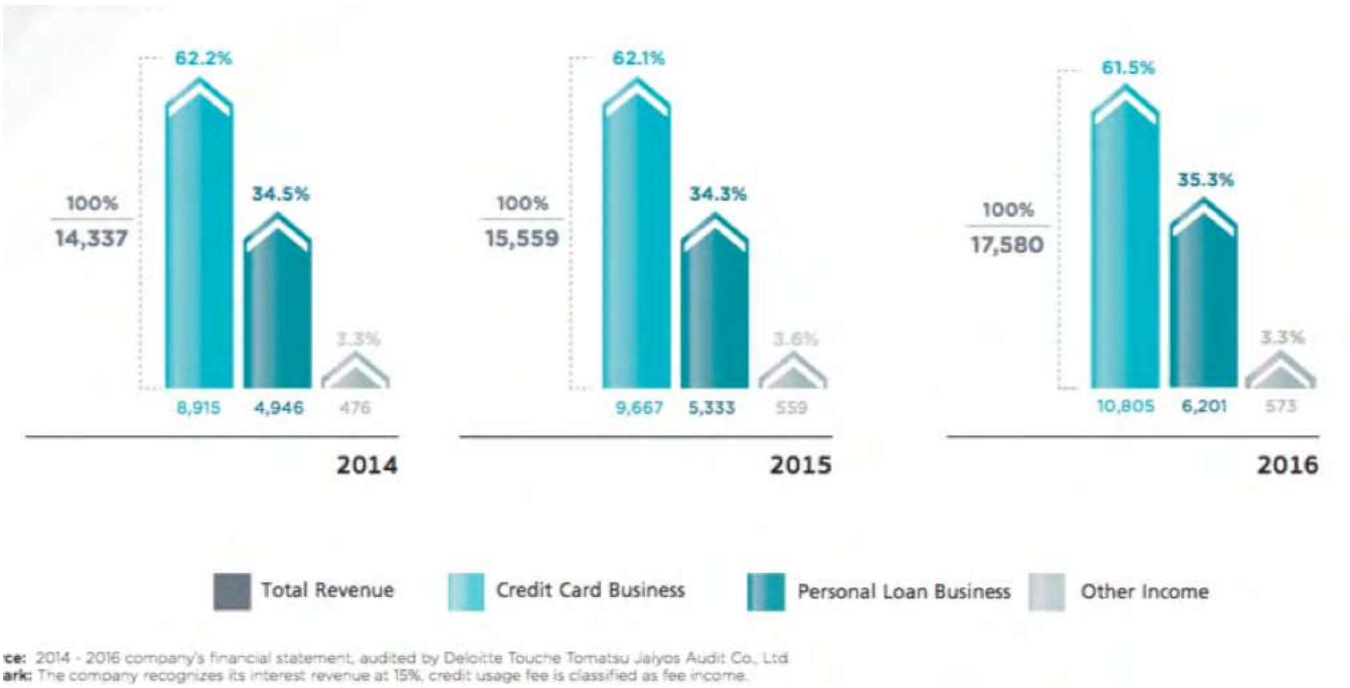
Source: Bank of Thailand / KTC

- In 2016, the overall growth in the Thai consumer finance industry continued to grow from 2015. Industry credit card receivable as of December 2016 was 358,413 MB or a 6.5% growth, which was similar to that of 2015 which was 336,641 MB or 5.8%. The consumer finance industry potential remains strong, especially for the high income and Gen Y customers. The industry's credit card spending in 2016 was 1,488,408 MB or a 6.8% growth, which was similar to the 6.6% growth in 2015.

- As of 31 December 2016 the market share of KTC's credit card and personal loan is 12.9% and 6.5%; up over 31 December 2015 by 12.3% and 5.7% respectively.

- KTC had a total member of 2.9 million accounts by the end of December 2016, a 10.6% increase from the same period of the previous year. Current credit card members were 2,095,563 (11.1% growth), and current personal loan accounts were 818,068 (9.5% growth).

KTC's 3-year revenue structure



- Portfolio of total credit card and personal loan increased 12% and 18% respectively, as a result interest income (including credit usage fee) growth of both credit card and personal loan was 9% and 17% respectively. This was achieved by targetting new members in the Premium segment, while maintaining member base in the mass segment. Customer Relationship Management (CRM) system was utilized to enhance customer experience. Online medias were used to helped stimulate credit card spending and also respond to specific needs, as well as cultivating long term brand loyalty.

- In term of new product launching, KTC, with the collaboration of MasterCard, has issued the premium credit card "KTC World Rewards MasterCard", aimed at customers with metropolitan lifestyle and the fondness to travel abroad. KTC also co-operated with JCB to issue its first "JCB Platinum" card in Thailand, focusing on the high end customer group. KTC & Visa jointly issued "KTC Visa payWave" card. KTC also issued "KTC MasterCard Contactless" card. They're both designed to perform new form of payment base on the no-touch concept in order to increase speed and convenience.

- The Company continued to expand in both businesses. The ratio of KTC credit card receivables to industry was 12.9%, up from 12.3% in the previous year; the ratio of KTC credit card spending to industry grew from 10.5% in 2015 to 11.1% in 2016; and the ratio of KTC personal loan receivables to industry also increased to 6.5% from 5.7% over the past year.

- The Company reported a net income of 2,495 MB in 2016, increased by 20% from 2,073 MB in 2015.

- The Company's total credit card spending in 2016 was 164,991 MB or a 13.2% growth, which was higher than the industry's growth of 6.8%. The growth was driven by 11.1% member base expansion, continuous creative marketing campaigns, accessible and user-friendly online campaigns, and added benefits through discounts, cash-backs, and reward points.

- Merchant acquiring business grew 22.2% to 61,340 MB up from 50,180 MB, and merchant outlets grew 29.2% to 29,764 outlets up from 23,041 outlets; as a result of the joint projects with KTB to acquire more stores, install more EDC devices, expand online merchants, virtual terminal payment system, and expand Alipay merchants.

2017 strategy plans

- Credit card business to focus on member base expansion and to be more digitally responsive to customers' demands. This is a marketing strategy to continuously increase new members in potential segments-upper and young generation with explicit lifestyles - by focusing on online application, through merchants and business partners. This strategy also help develop products and services to meet the needs of customers by improving existing digital services and creating a variety of new services that are more approachable. The mobile application optimized, be more convenient, support all operational platforms, and are highly secured. The website is to be more user-friendly, modern, and provide seamless user experience and satisfaction.

- Focus on variety and coverage credit card benefits. KTC will collaborate with business partners, merchants, and various organizations to create marketing programs and benefits that uphold KTC's identities (creativity, and diversity). Online benefits will also be improved as well as providing activities and events that enhance good customer experience.

- Add value from Forever Rewards points and focus segmentation marketing. Manage existing portfolio for maximum effectiveness coupled with campaigning the benefits of using Forever Rewards points in both dimensions: earn and burn. Online points redemption and frequency of credit card spending will be promoted so that KTC credit card becomes the default card. Most importantly, targeted marketing will be applied in provincial areas and members of older generation.

- Elevate KTC PROUD products, enhance online experiences, expand customer base, and create long-term loyalty. As consumers are inevitably involved in the digital world, KTC PROUD focuses on elevating its products to enhance online experiences such as 24-hour online cash advance service with no restrictions on withdrawals, which is beneficial in terms of convenient and safety. Moreover, the company aims to expand to new quality target groups to maintain market share; and also, satisfy members to promote brand loyalty in the long-term.

- KTC plans to explore new businesses and build a lasting Total Business Relationship (TBR). The Company will study the growing business trend, potential business or businesses that meet the lifestyle demands of customers. Other marketing campaigns that promote customer satisfaction and credit card spending such as online promotion, insurance plans, and "U Shop V Deliver" service, will not be overlooked. Relations will be made with every business group that address the needs of members.

Countries Thais can visit without visa hassles

In recent years, a growing number of countries are extending reciprocal visa-free or visa-on-arrival facilities to Thai citizens holding ordinary passports. This listing by the Ministry of Foreign Affairs, Royal Thai Government, shows that 27 countries and territories offer visa-free access and four offer visa on arrivals. See more detailed analysis below.

List of Countries and Territories where Thai Nationals may enter without a visa/visa exemption (by Bilateral Agreement)

Diplomatic/Official Passport									Ordinary Passport		
1.	Albania	(90)	26.	Israel	(90)	50.	Romania	(90)	1.	Argentina	(90)
2.	Argentina	(90)	27.	Italy	(90)	51.	Russia	(90)	2.	Bahrain *	(14)
3.	Austria	(90)	28.	Japan	(90)	52.	Seychelles *	(30)	3.	Brazil	(90)
4.	Bahrain *	(14)	29.	Korea (ROK)	(90)	53.	Singapore	(30)	4.	Brunei *	(14)
5.	Belgium	(90)	30.	Laos	(30)	54.	Slovakia	(90)	5.	Cambodia	(14)
6.	Bhutan	(90)	31.	Liechtenstein	(90)	55.	Slovenia *	(90)	6.	Chile	(90)
7.	Brazil	(90)	32.	Luxembourg	(90)	56.	South Africa	(90)	7.	Ecuador *	(90)
8.	Brunei *	(14)	33.	Macau	(30)	57.	Spain (Diplomatic pp only)	(90)	8.	Georgia *	(90)
9.	Cambodia	(30)	34.	Malaysia	(90)	58.	Sri Lanka	(90)	9.	Hong Kong	(30)
10.	Chile	(90)	35.	Maldives *	(30)	59.	Sweden *	(90)	10.	Indonesia *	(30)
11.	Colombia	(90)	36.	Malta *	(90)	60.	Switzerland	(90)	11.	Japan *	(15)
12.	Costa Rica	(90)	37.	Mauritius * (Diplomatic pp only)	(15)	61.	Tajikistan	(90)	12.	Korea (ROK)	(90)
13.	China	(30)	38.	Mexico	(90)	62.	Timor-Leste *	(30)	13.	Laos	(30)
14.	Croatia	(90)	39.	Mongolia	(30)	63.	Tunisia	(90)	14.	Macau	(30)
15.	Czech Republic	(90)	40.	Myanmar	(30)	64.	Turkey	(90)	15.	Mongolia	(30)
16.	Denmark *	(90)	41.	The Netherlands	(90)	65.	Ukraine	(90)	16.	Malaysia *	(30)
17.	Ecuador	(30)	42.	Nepal	(90)	66.	Uruguay	(90)	17.	Maldives *	(30)
18.	Estonia	(90)	43.	Norway *	(90)	67.	Vanuatu *	(90)	18.	Panama*	(180)
19.	France (Diplomatic pp only)	(90)	44.	Oman	(30)	68.	Vietnam	(30)	19.	Peru	(90)
20.	Finland *	(90)	45.	Panama	(90) (180*)				20.	The Philippines*	(30)
21.	Germany	(90)	46.	Pakistan (Diplomatic pp only)	(30)				21.	Russia	(30)
22.	Hong Kong	(30)							22.	Seychelles *	(30)
23.	Hungary	(90)	47.	Peru	(90)				23.	Singapore *	(30)
24.	India	(90)	48.	The Philippines	(90)				24.	South Africa *	(30)
25.	Indonesia	(30)	49.	Poland	(90)				25.	Turkey *	(30)
									26.	Vanuatu *	(90)
									27.	Vietnam	(30)

Summary of Countries and Territories entitled for Visa on Arrival (VOA)			
Countries /Territories	**Type of Passport**	**Period of stay**	**Fee**
1. Fiji	Diplomatic/ Official/ Ordinary	4 months	No Fee
2. Kyrgyzstan	Diplomatic/ Official/ Ordinary	15 days / 1 month	50 USD / 60 USD (For Ordinary Passports)
3. Solomon islands	Diplomatic/ Official/ Ordinary	3 months	No Fee
4. Timor-Leste	Ordinary	30 days	30 USD

Source: Ministry of Foreign Affairs, Thailand, as of May 2017/10/31

Remarks

1. * Refers to countries/territories which grant unilaterally a visa exemption for Thai Nationals.

2. Number shown in ( ) refers to a maximum length of stay permit without visa.

3. Thai Nationals obtaining a permanent residence of / or a multiple entry visa for USA, Canada, United Kingdom, EU, Japan, Australia and New Zealand are visa exempted for Taiwan. Prove of which may be requested upon boarding and /or arrival at the immigration checkpoints. More information can be searched from the following website https://nas.immigration.gov.tw/nase/ .

4. Visa Exemption of Russia is for tourism purpose only. Thai Nationals visiting Russia with other purposes are required to apply for an appropriate visa in order to avoid refusal of entry into Russia.

5. Thai Nationals obtaining tourist, crew member, or business visa to the USA, Canada, Schengen Area, Japan, or South Korea valid for at least three months or a permanent residence in the USA, Canada, or EU valid at least for six months are visa exempted for Costa Rica.

6. Thai nationals obtaining a current USA visa (not type Transit C1) or Schengen visa (only types C and D) with validity of no less than 180 days from the date of arrival in Colombia, including those with permanent residence in the USA and Schengen area, are visa exempted. The duration of the visa exemption depends on the decision of the Colombian Immigration.

More Countries with Easy Visa Access

The countries listed on the website of the Ministry of Foreign Affairs are those with which the Royal Thai Government has bilateral agreements. However, according to the IATA Travel Information Manual and other sources compiled by the Henley Passport Index in January 2018 and listed on the Wikipedia website (https://en.wikipedia.org/wiki/Visa_requirements_for_Thai_citizens), an additional 50 countries and territories grant Thai ordinary passport holders visa-exempt and/or visa on arrival status or free visitor permits with some conditions.

Due to the constantly changing nature of visa requirements, readers should double check the latest status BEFORE committing to any travel arrangement or marketing exercise. Travel Impact Newswire is not responsible for any errors or omissions.

Visa not required

1. Autonomous Republic of Crimea
2. Bermuda
3. Cook Islands
4. Dominica
5. Dominican Republic
6. Fiji
7. Gambia
8. Haiti
9. Iran Kish Island
10. Micronesia
11. Palestine
12. Pitcairn Islands
13. Saint Vincent and the Grenadines
14. Senegal
15. Solomon Islands
16. South Ossetia
17. Transnistria
18. Turkish Republic of Northern Cyprus

Others

1. Belize: Free Visitor's Permit on arrival with valid U.S. visa
2. Colombia: Visa free for holders of valid visa for Schengen area or the US
3. Qatar: Free 30 days, available at Hamad International Airport. eVisa is also available.

Visa on arrival

1. Bolivia
2. Cape Verde
3. China (Hainan island)
4. Comoros
5. Djibouti
6. Ethiopia
7. Guinea-Bissau
8. Iran
9. Jordan
10. Malawi
11. Marshall Islands
12. Mauritania
13. Mauritius
14. Mozambique
15. Nepal
16. Nicaragua
17. Niue
18. Oman
19. Palau
20. Papua New Guinea
21. Saint Lucia
22. Somaliland
23. Tajikistan
24. Tanzania
25. Timor-Leste
26. Togo
27. Tuvalu

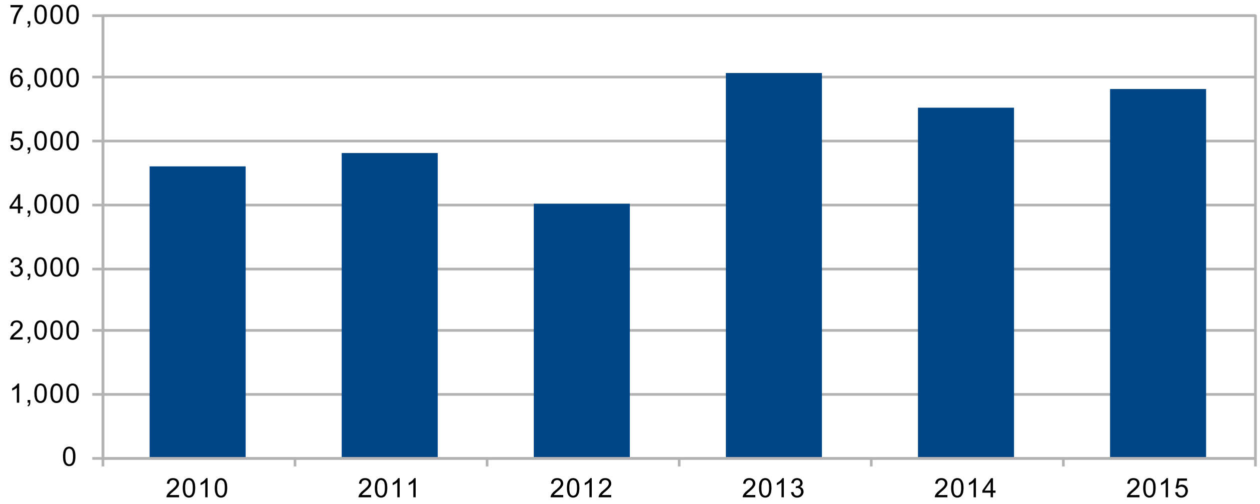
THAI OUTBOUND TRAVEL TRENDS TO SELECTED COUNTRIES

BRUNEI

Thai Visitor Arrivals 2010-2016

By Nationality	2010	2011	2012	2013	2014	2015
Thai Visitors	4,589	4,809	3,997	6,063	5,533	5,831

Source: Brunei Tourism and Development Department
website: http://www.tourism.gov.bn/SitePages/Statistic.aspx



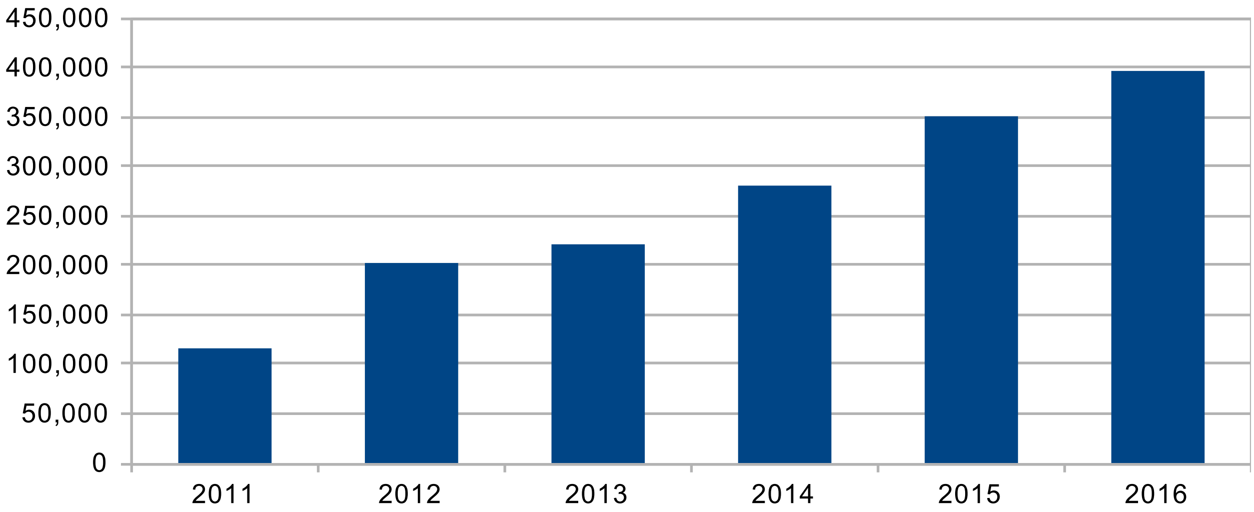
Brunei Darussalaam has a low level of interest in attracting Thai travellers. Tourism promotions are low-grade, confined to a presence by Royal Brunei Airlines at the Thailand International Travel Fair. Creative packaging focussing on the rainforests of Borneo, and including Indonesia and Malaysia would work well, given the growing Thai interest in ecotourism, especially among the young.

CAMBODIA

Thai Visitor Arrivals 2011-2016

By Residence	2011	2012	2013	2014	2015	2016
Thai Visitors	116,758	201,422	221,259	279,457	349,908	398,081

Source: Statistics and Tourism Information Department, Ministry of Tourism, Cambodia
Website: http://www.tourismcambodia.org/mot/index.php?view=statistic_report



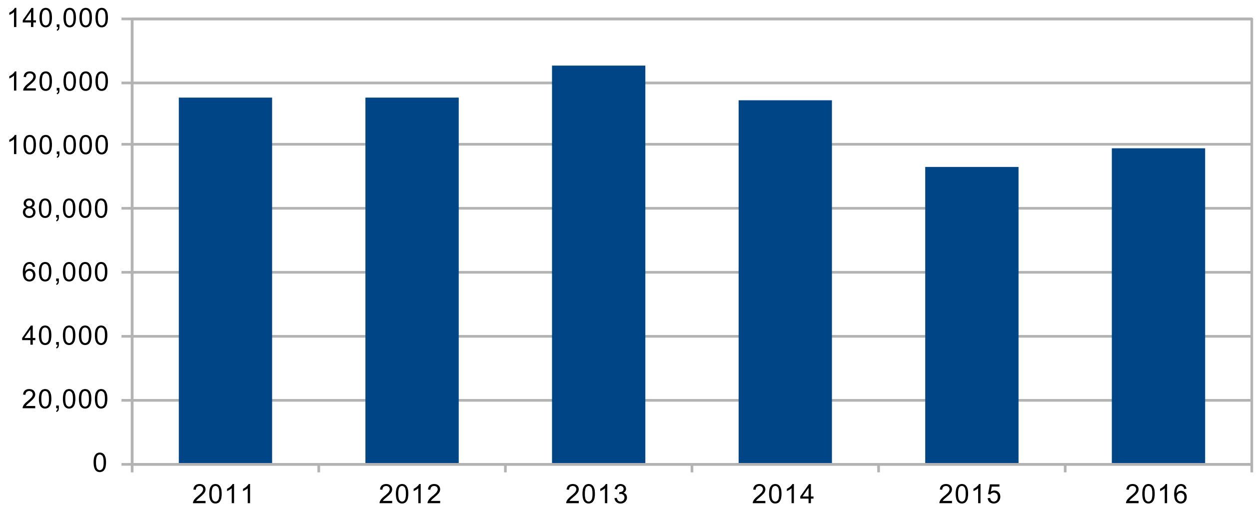
Growing strongly as access to the global cultural icon Angkor Wat becomes easier, overland border crossings improve facilitation, road networks expand and low cost airlines boost accessibility. Thais are investing heavily in Cambodian businesses, and Cambodian casinos are an attraction for Thais in pursuit of the “forbidden fruit”. As of January 2018, there were six international checkpoints on the Thai-Cambodian border.

INDONESIA

Thai Visitor Arrivals 2011-2016

By Nationality	2011	2012	2013	2014	2015	2016
Thai Visitors	115,036	114,867	125,059	114,272	93,590	98,864

Source: Ministry of Tourism, Indonesia
website: http://kemenpar.go.id/asp/detil.asp?c=119&id=3144



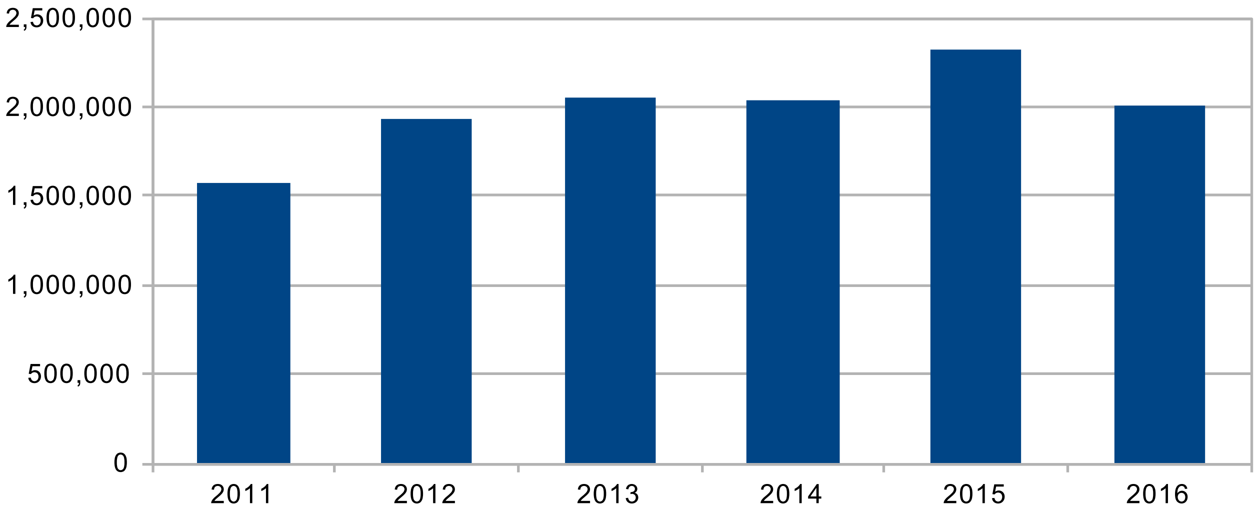
Indonesia is stepping up promotions in Thailand in order to rectify what it feels to be a serious imbalance between the number of Indonesians visiting Thailand and the number of Thais visiting Indonesia. However, promotions so far have been sporadic, lacking commitment and consistency. Most of the marketing efforts have been directed at attracting Thai Buddhist traffic to the Borobudur temple. They would be far better off opening a full-time office in Bangkok.

LAOS

Thai Visitor Arrivals 2011-2016

By Nationality	2011	2012	2013	2014	2015	2016
Thai Visitors	1,579,941	1,937,612	2,059,434	2,043,761	2,321,352	2,009,605

Source: Ministry of Information, Culture and Tourism, Tourism Development Department, Lao PDR
website: http://www.tourismlaos.org/show.php?Cont_ID=43



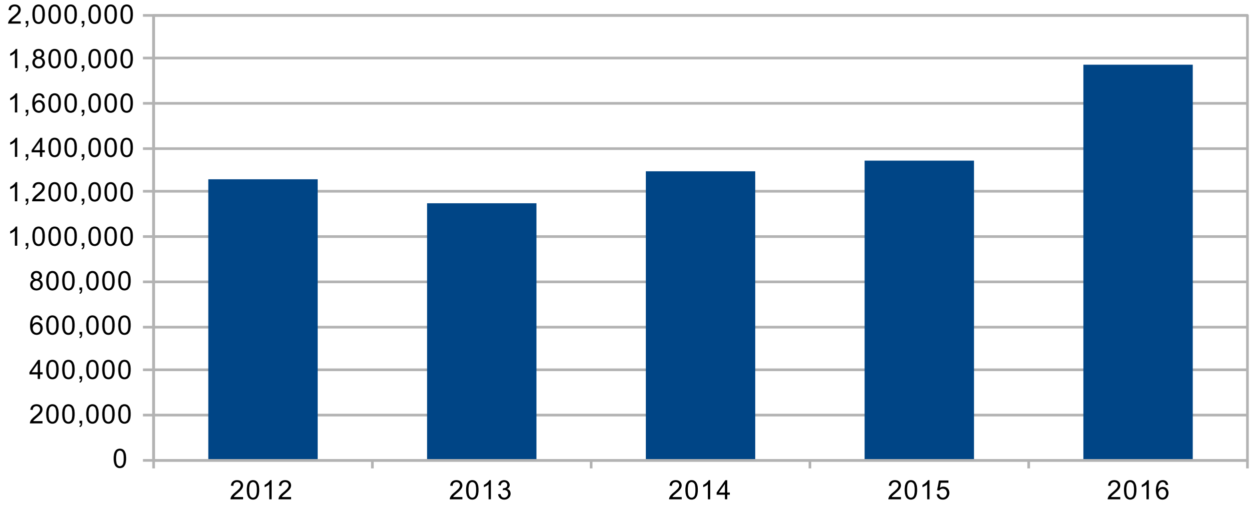
Due to the extensive similarities in language, culture, cuisine and traditions, Thais consider Laos to be an extended domestic trip. The opening of four Friendship bridges between the two countries has boosted cross-border travel. Many Thais make overnight trips to visit the Pha That Luang and other Buddhist temples in Vientiane. Direct flights from Bangkok to Luang Prabang are making that UNESCO World Heritage site more accessible. The opening up of Myanmar as a new and equally accessible cross border destination, with equally formidable Buddhist heritage sites, will pose a strong competitive threat.

MALAYSIA

Thai Visitor Arrivals 2012-2016

By Nationality	2012	2013	2014	2015	2016
Thai Visitors	1,263,024	1,156,452	1,299,298	1,343,569	1,780,800

Source: Tourism Malaysia with the cooperation of Immigration Department.
Website: http://mytourismdata.tourism.gov.my/wp-content/uploads/2016/03/TOP-45-DEC-2015-website.pdf



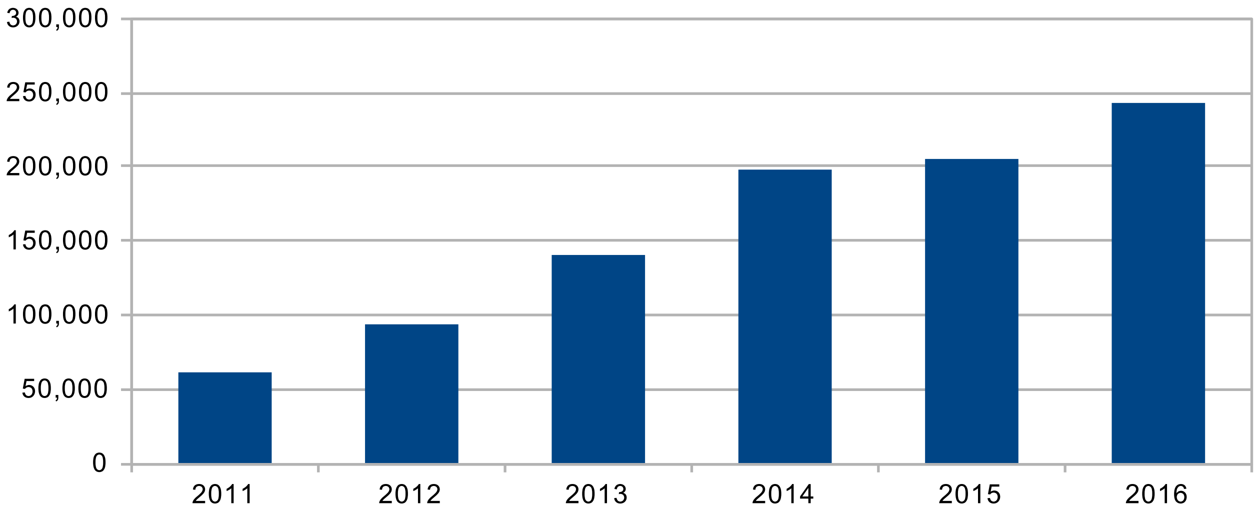
Thailand and Malaysia share sea and land borders, and multiple airline connections. Arrivals grew in 2016 but, according to preliminary stats just published at the time this report was released, fell again in 2017. Malaysia has yet to identify a strong unique selling proposition, a compelling “wow-factor” or “snob-value” reason for Thais to visit the country.

MYANMAR

Thai Visitor Arrivals 2011-2016

By Nationality	2011	2012	2013	2014	2015	2016
Thai Visitors	61,696	94,342	139,770	198,229	204,539	243,443

Source: Ministry of Hotels and Tourism, Myanmar
Website: http://tourism.gov.mm/wp-content/uploads/2017/08/Myanmar-Tourism-Statistics-2016-1.pdf



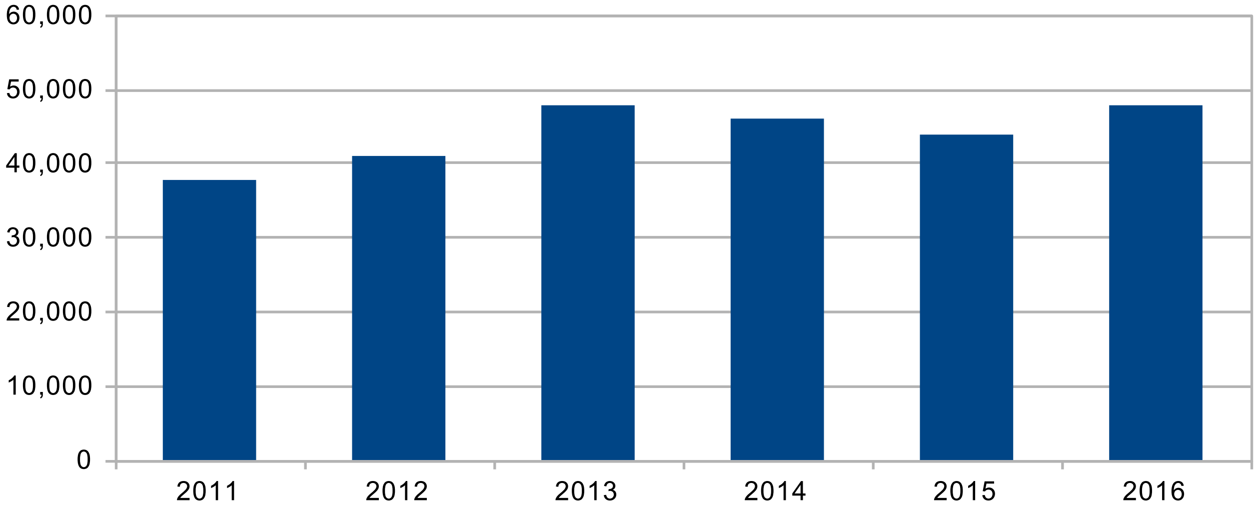
The new kid on the block, Myanmar is benefitting from the "novelty" of being a formerly closed country that is now much more accessible thanks to visa-free facilities and growing airline connections. Overland border crossings will become prime drivers of Thai tourism, especially for Buddhist travel.

PHILIPPINES

Thai Visitor Arrivals 2011-2016

By Residence	2011	2012	2013	2014	2015	2016
Thai Visitors	37,862	40,987	47,874	45,943	44,038	47,913

Source: The Department of Tourism, Manila, Philippines
Website: http://www.tourism.gov.ph/Pages/demand.aspx



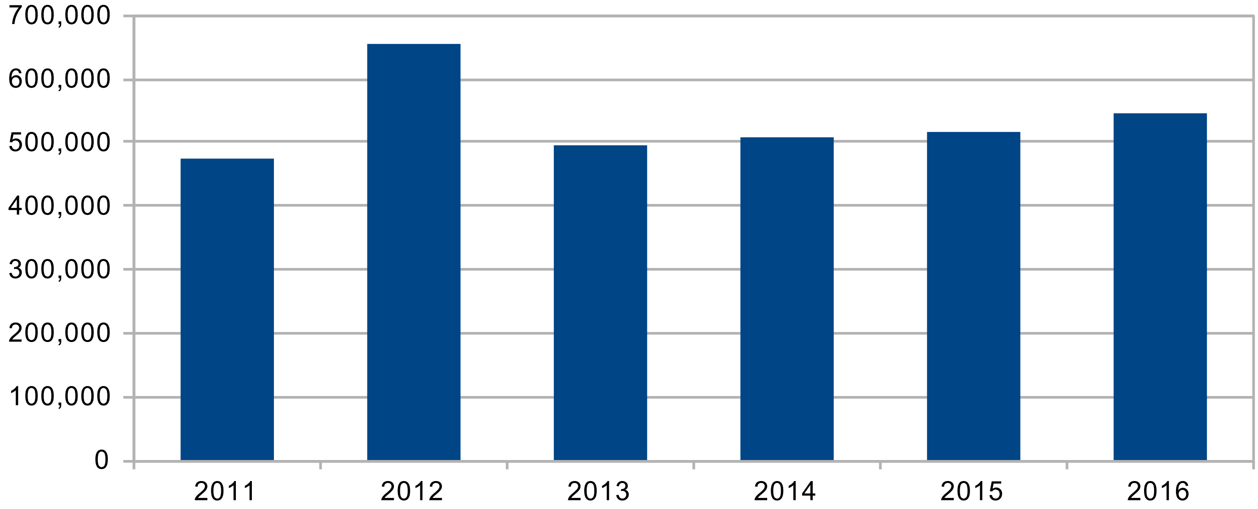
Another ASEAN country that has not marketed itself seriously and consistently in Thailand. The Philippines has a low image and is only just starting to capitalise on both airline connections and visa-free status for Thai visitors. It boosted its presence at the Thailand International Travel Fair in February 2018.

SINGAPORE

Thai Visitor Arrivals 2011-2016

By Residence	2011	2012	2013	2014	2015	2016
Thai Visitors	472,708	656,804	497,409	506,509	516,409	546,555

Source: Embarkation/Disembarkation Card, Singapore Tourism Board
Website: https://www.stb.gov.sg/statistics-and-market-insights



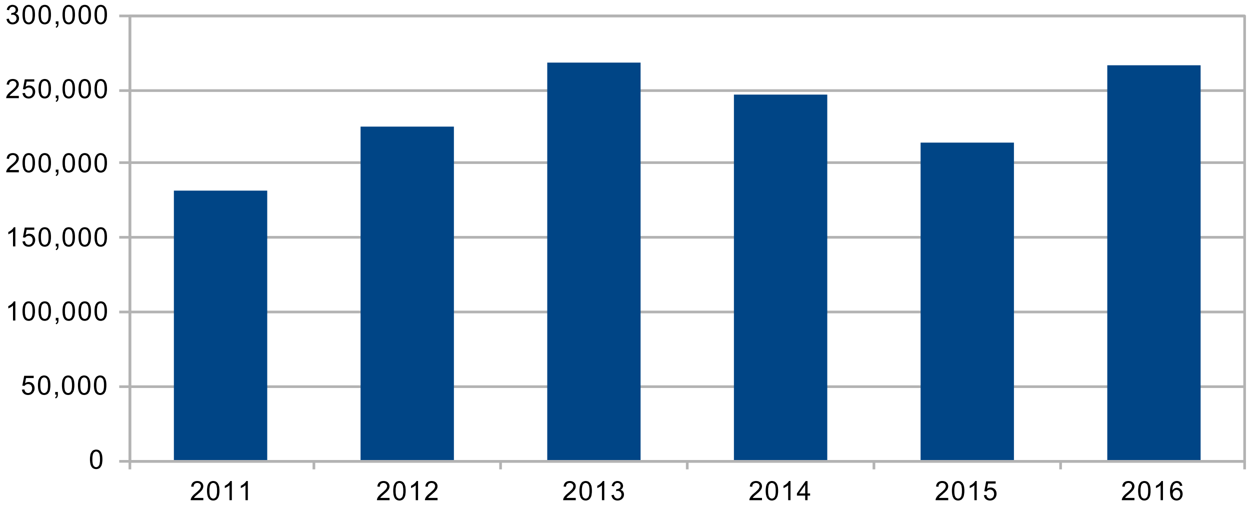
Although it has a good image in Thailand as a well-organised, clean and green city, it is also seen as an expensive country. Many similar man-made attractions such as theme parks are now available in Thailand. Singapore is one of Asia's most friendly countries for People with Disabilities, and has a unique opportunity to market itself to this very important and rapidly growing niche customer segment in Thailand.

VIETNAM

Thai Visitor Arrivals 2011-2016

By Residence	2011	2012	2013	2014	2015	2016
Thai Visitors	181,820	225,866	268,968	246,874	214,645	266,984

Source: Vietnam National Administration of Tourism
Website: http://vietnamtourism.gov.vn/english/index.php/cat/1501



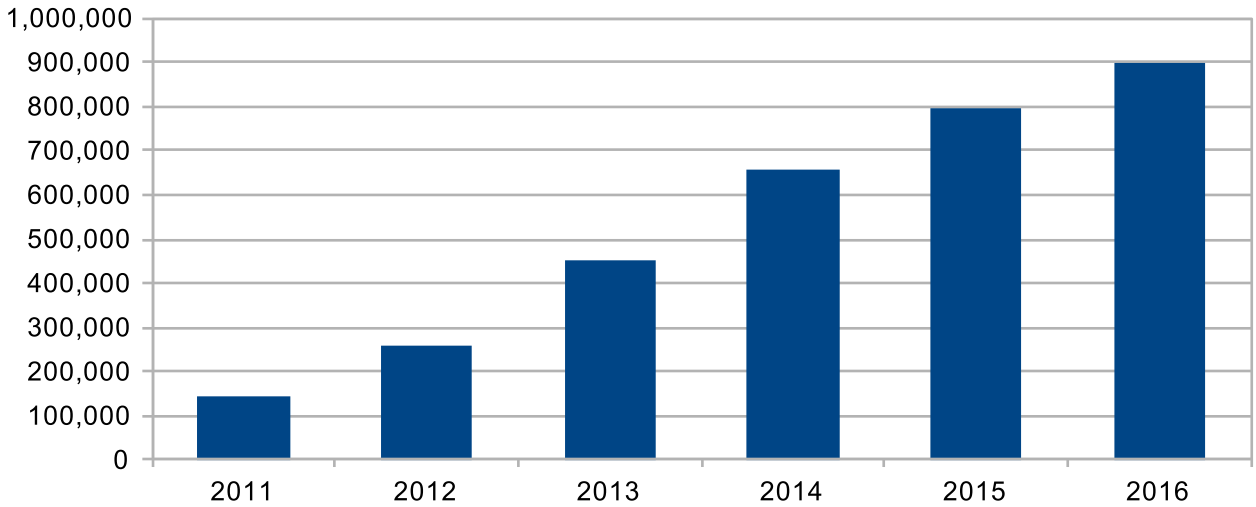
Another ASEAN country enjoying a boom in Thai visitor arrivals, thanks mainly to heavy-duty marketing by the low-cost airline VietJet, which also has a Thai subsidiary Thai Vietjet. Other airlines such as Bangkok Airways are also marketing flights to destinations such as Danang. The country has a positive image in Thailand, and visa-free facilities are an added advantage.

JAPAN

Thai Visitor Arrivals 2011-2016

By Nationality	2011	2012	2013	2014	2015	2016
Thai Visitors	144,969	260,640	453,642	657,570	796,731	901,525

Source: Japan National Tourism Organization
Website: https://www.jnto.go.jp/eng/ttp/sta/



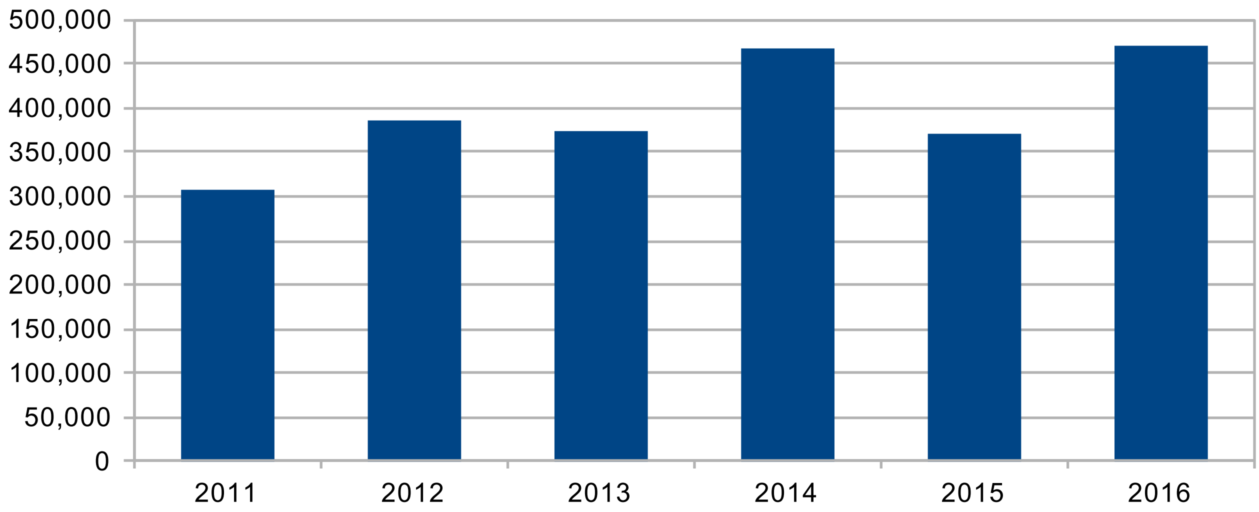
Once highly restrictive in terms of visa-issuance, Japan today is a shining example of a country which realised it had more to gain by eliminating visas. The move has paid off big time. Japan is one of the fastest growing destinations for Thai outbound travellers. Other destinations such as Europe, Australia and New Zealand have much to learn from this very practical move.

KOREA

Thai Visitor Arrivals 2011-2016

By Nationality	2011	2012	2013	2014	2015	2016
Thai Visitors	309,143	387,441	372,878	466,783	371,769	470,107

Source: Korea Tourism Organization
Website: https://kto.visitkorea.or.kr/eng/tourismStatics/keyFacts/KoreaMonthlyStatistics/eng/inout/inout.kto



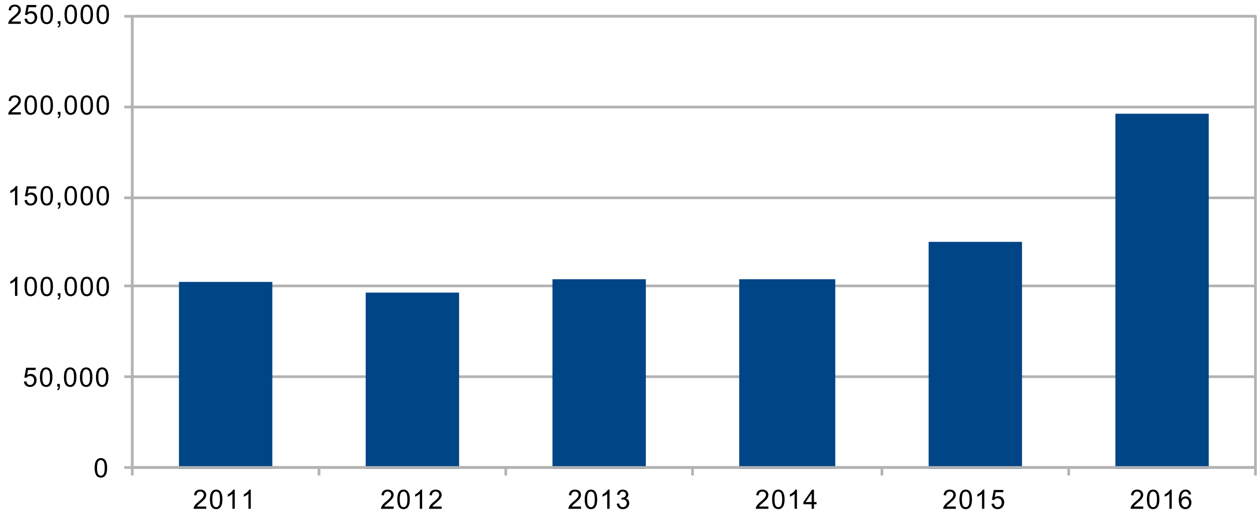
Another shining example of the results that can be achieved by the simple combination of visa free access and good airline connections. Korea, Japan and Taiwan are benefitting significantly. Other destinations need to start follow suit.

TAIWAN

Thai Visitor Arrivals 2011-2016

By Residence	2011	2012	2013	2014	2015	2016
Thai Visitors	102,902	97,712	104,138	104,812	124,409	195,640

Source: Tourism Bureau, M.O.T.C. Republic of China (Taiwan)
website: http://admin.taiwan.net.tw/statistics/release_en.aspx?no=7



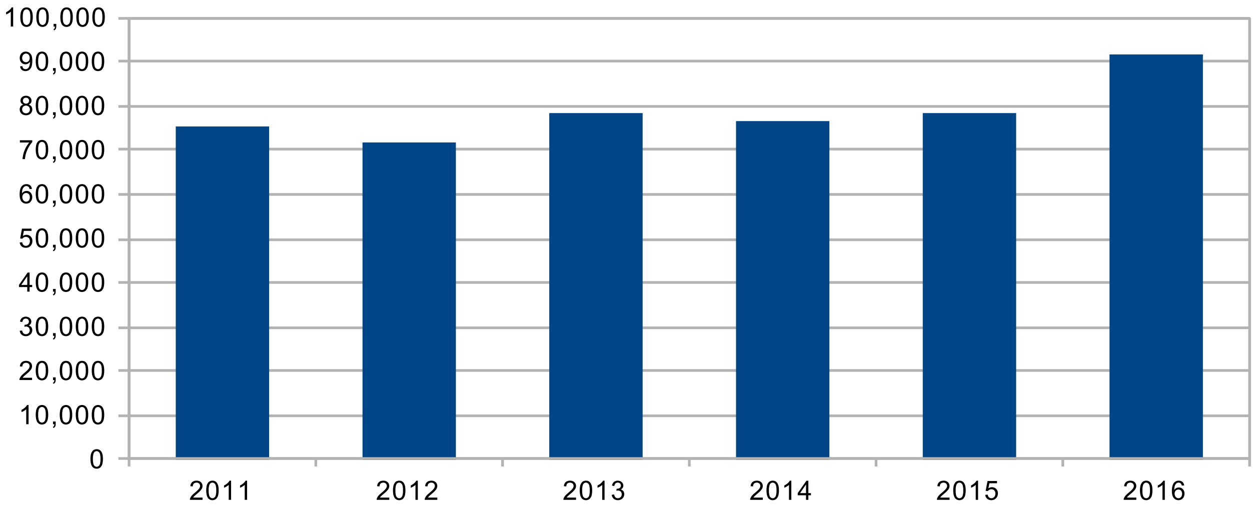
Taiwan has been stepping up its marketing in Thailand big time, aided by the visa-free facilities and extensive airline connections, especially low-cost carriers. It is also benefitting from three-way packaging of Korea, Japan and Macao as joint destinations, neither of which require visas. This increases the lure and saleability of the packages.

AUSTRALIA

Thai Visitor Arrivals 2011-2016

By Residence	2011	2012	2013	2014	2015	2016
Thai Visitors	75,700	71,800	78,600	76,900	78,200	91,800

Source: Tourism Australia
Website: http://www.tourism.australia.com/en/markets-and-research/tourism-statistics/international-visitor-arrivals.html



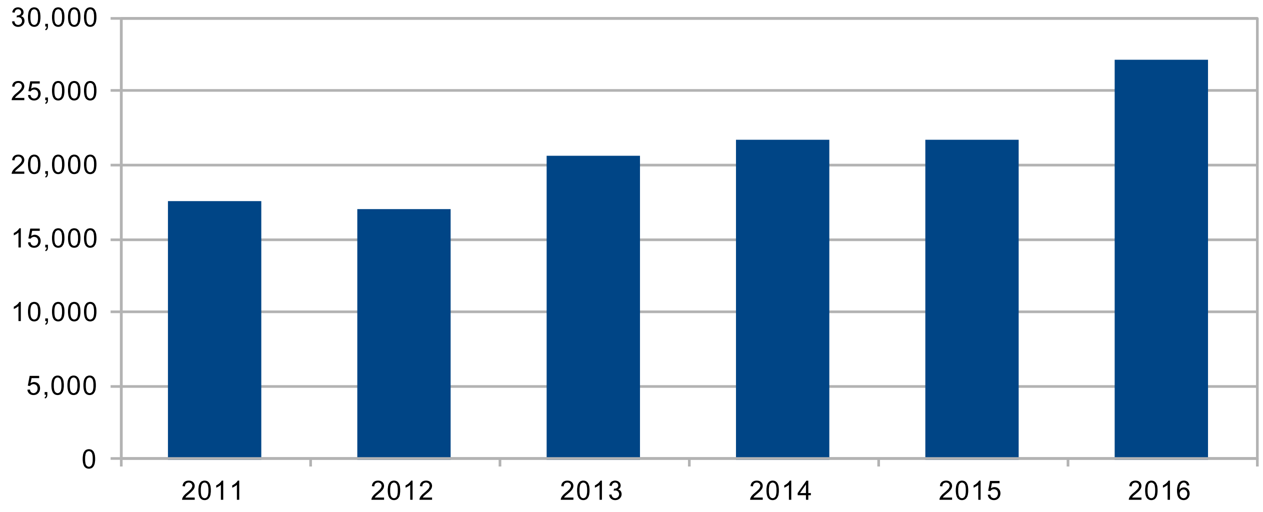
Tourism Australia once had a marketing representation in Thailand but shut down the office and downgraded its activities in recent years. Arrivals are edging up, however, as the lure of Australia-New Zealand combination packages improves. The biggest impediment is the cumbersome visa application process, plus the associated costs in terms of time and money, and the duplication involved.

NEW ZEALAND

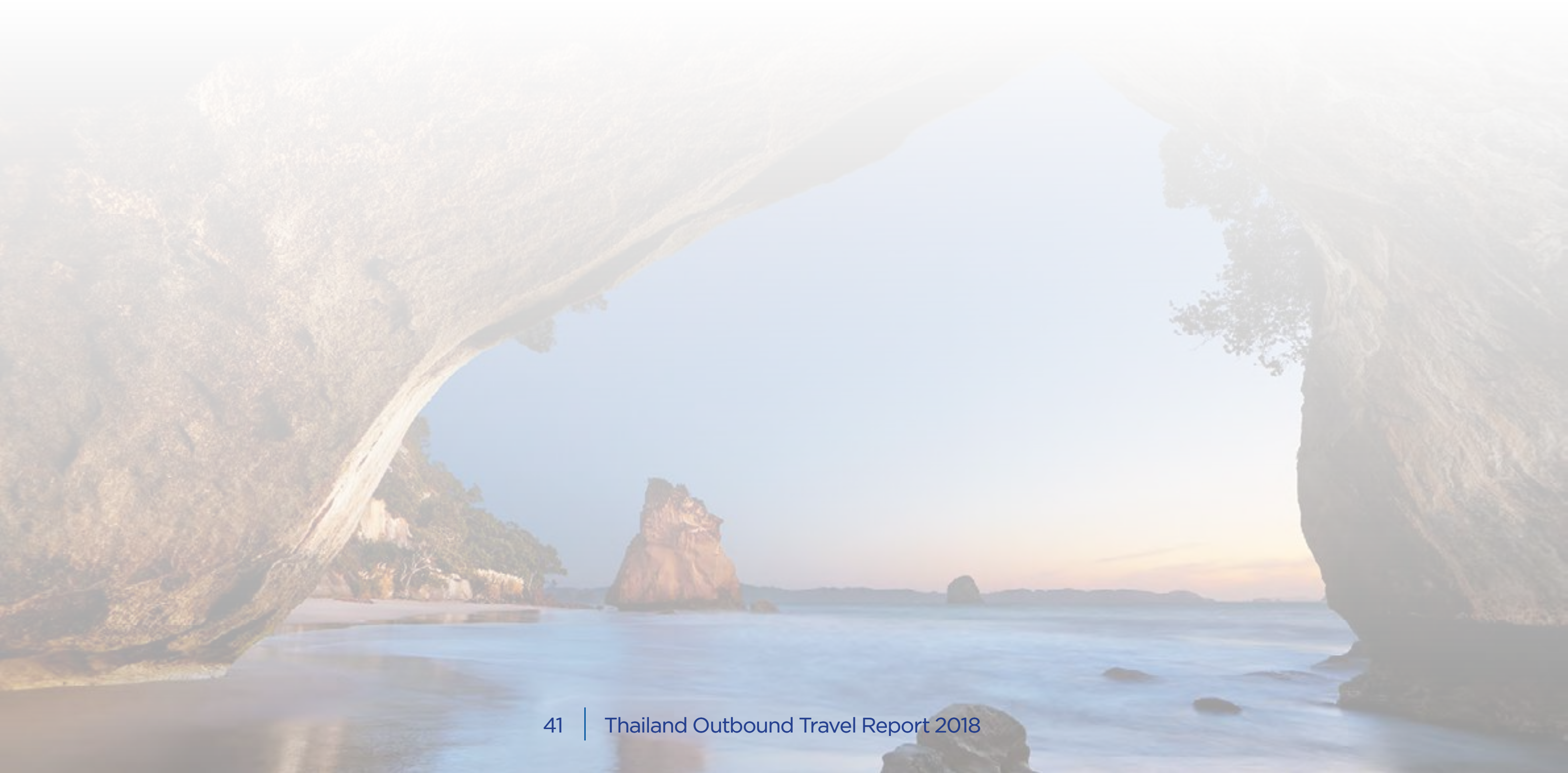
Thai Visitor Arrivals 2011-2016

By Residence	2011	2012	2013	2014	2015	2016
Thai Visitors	17,523	16,944	20,704	21,696	21,696	27,104

Source: Statistics New Zealand and Tourism New Zealand
website: http://www.stats.govt.nz/browse_for_stats/population/Migration/international-visitor-arrivals-dec-15.aspx



Thais were once granted visa-free access, but this was scrapped. New Zealand is marketing itself as a clean and green country, and producing some results, but it could go a very long way further if it coordinates the visa application process with Australia and works out some kind of a joint processing arrangement.

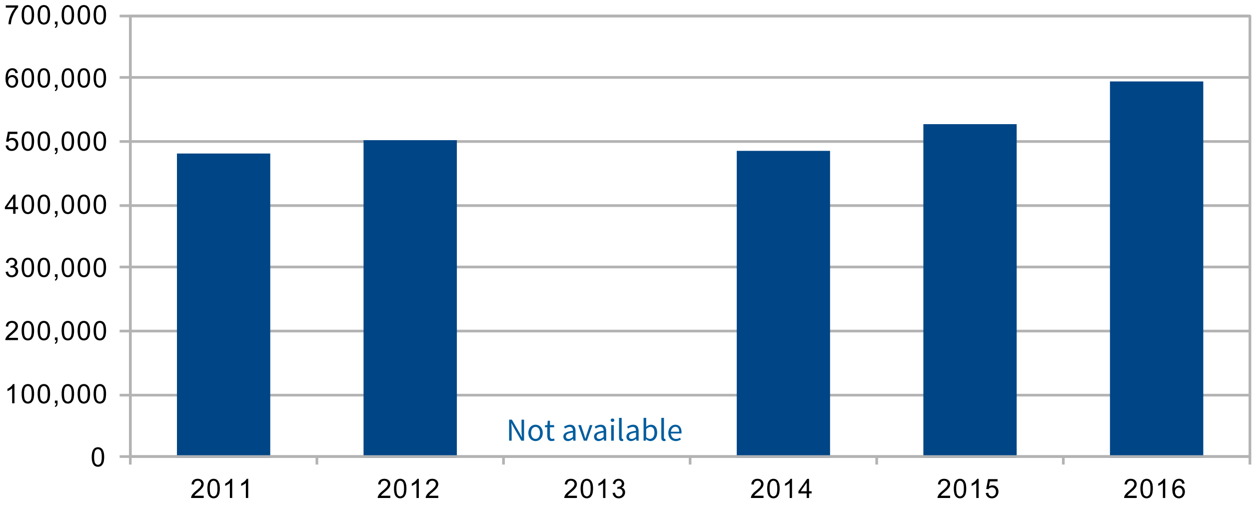


HONG KONG

Thai Visitor Arrivals 2011-2016

By Residence	2011	2012	2013	2014	2015	2016
Thai Visitors	480,497	501,759	N/A	485,121	529,410	594,615

Source: Immigration Department, HKTB Insight & Research
Website: http://partnernet.hktb.com/sea/en/research_statistics/latest_statistics/index.html?gvHelperp=2



Hong Kong, like Singapore, is a long-standing destination popular with Thais but now having to reinvent itself. An abundance of airline connections helps, plus easy access to Macau (which is also stepping up its marketing efforts in Thailand).

SAMPLE PROFILES OF OUTBOUND THAI TRAVELLERS

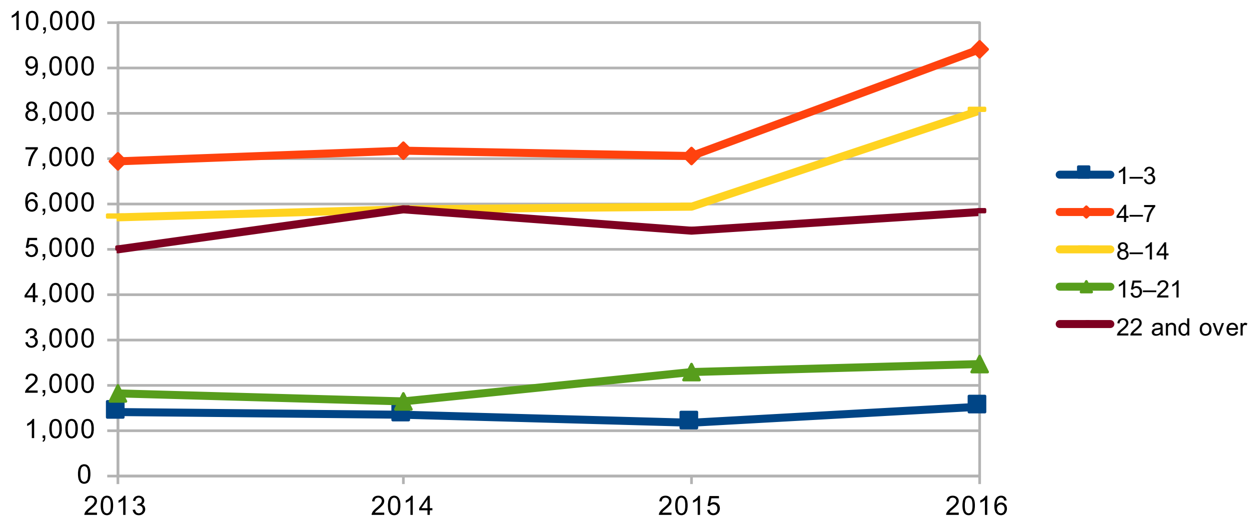
NEW ZEALAND

Key characteristics of Thai Visitor Arrivals 2013–2016

KEY CHARACTERISTICS	Year ended December			
	2013	2014	2015	2016
Total visitor arrivals	**20,704**	**21,696**	**21,696**	**27,104**
Travel purpose				
Holiday	10,016	11,312	11,296	15,552
Visiting friends & relatives	3,328	2,928	3,328	3,952
Business	1,616	1,360	1,440	1,600
Education	3,008	3,344	3,056	3,424
Conferences & conventions	352	512	272	480
Age group (years)				
Under 15	2,496	2,560	3,040	2,992
15–24	2,832	3,072	2,688	3,296
25–34	3,264	3,600	3,424	4,192
35–44	4,272	4,704	4,352	5,584
45–54	4,048	3,936	4,096	5,120
55–64	2,736	2,816	2,736	3,696
65+	1,056	1,008	1,360	2,224
Length of stay (days)				
1–3	1,408	1,296	1,168	1,488
4–7	6,896	7,120	7,024	9,360
8–14	5,680	5,824	5,904	8,016
15–21	1,776	1,616	2,240	2,448
22 and over	4,944	5,840	5,360	5,792
Median	9	10	10	9

Source: Statistics New Zealand

(By Length of Stay, Days)



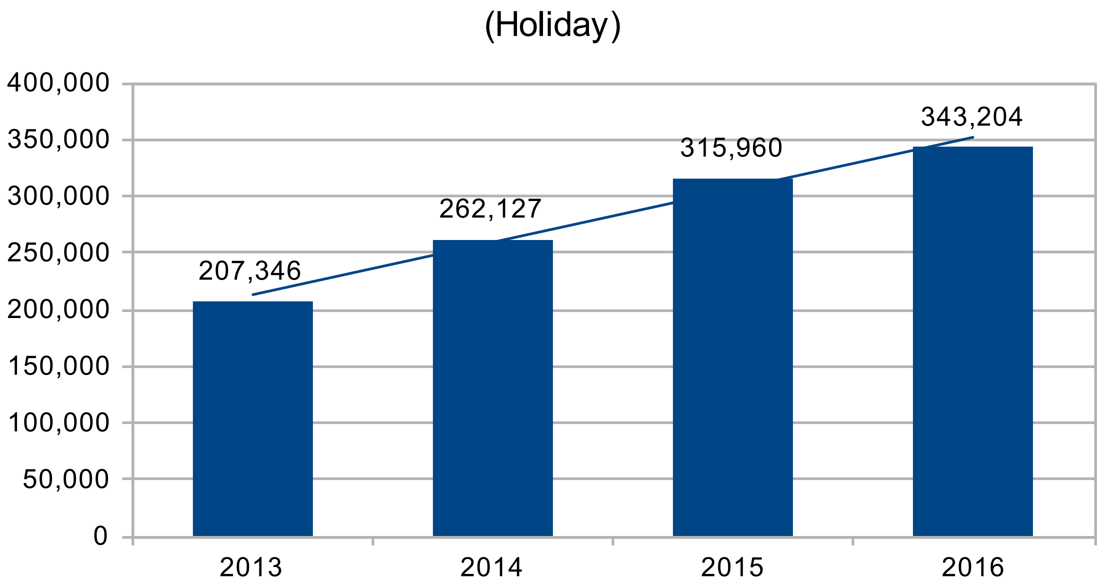
The number of Thai visitors to New Zealand has increased steadily but the real story is the increase in the average length of stay. Student travel to New Zealand is also on the rise, especially for learning English.

CAMBODIA

Thai Visitor Arrivals to Cambodia by purpose of visit 2013-2016

Year	Holiday	Business	Others	Total
2013	207,346	9,742	4,171	**221,259**
2014	262,127	12,223	5,107	**279,457**
2015	315,960	16,972	16,976	**349,908**
2016	343,204	20,734	34,143	**398,081**

Source: Statistics and Tourism Information Department, Ministry of Tourism, Cambodia

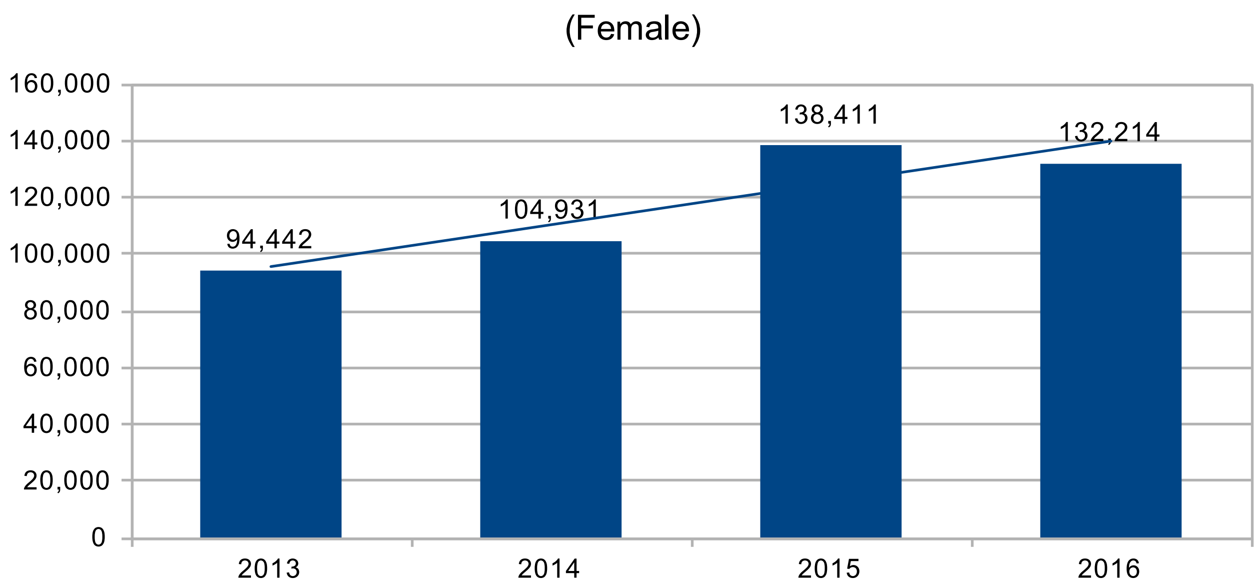


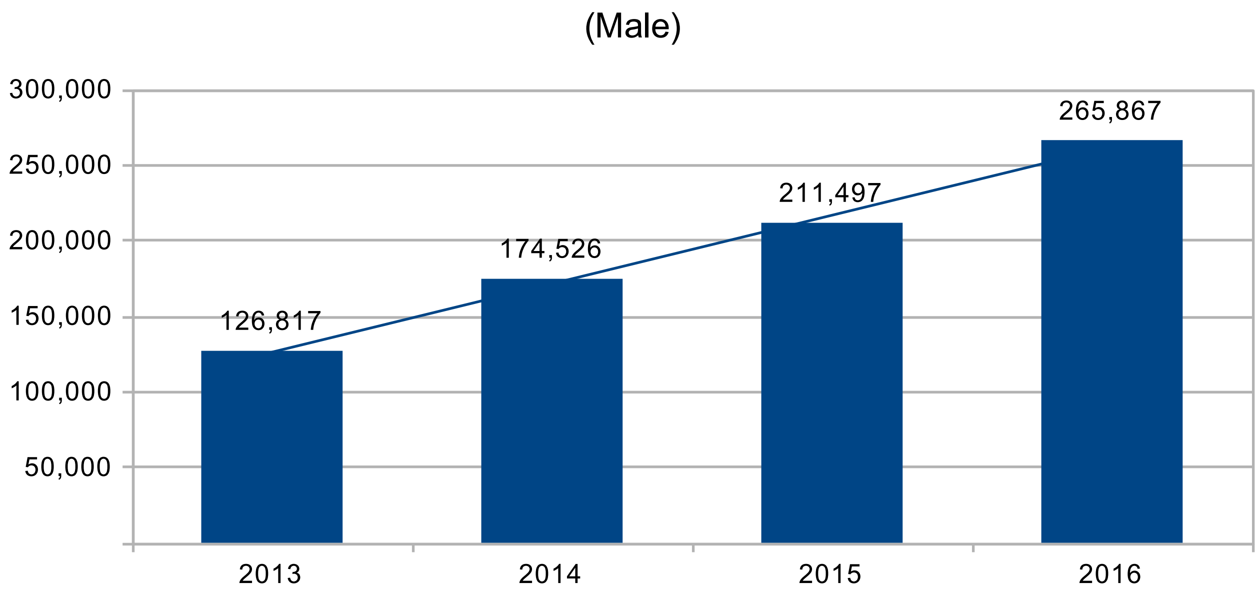
The prime destination of Thai holiday visitors is of course the famous UNESCO World Heritage Site of Angkor Wat. However, business traffic to Cambodia is increasing as Thais step up their investments in the neighbouring kingdom.

Thai Travellers to Cambodia by purpose of visit and sex 2013-2016

Year	Female	Male	Total
2013	94,442	126,817	**221,259**
2014	104,931	174,526	**279,457**
2015	138,411	211,497	**349,908**
2016	132,214	265,867	**398,081**

Source: Statistics and Tourism Information Department, Ministry of Tourism, Cambodia





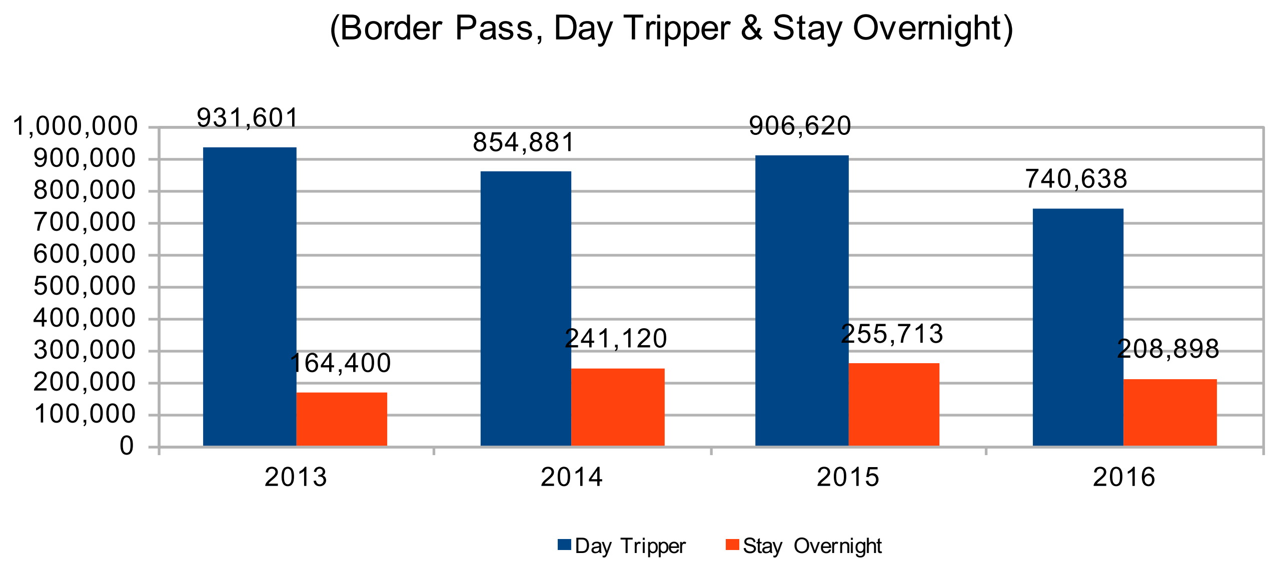
Thai male visitors to Cambodia are nearly double the number of female visitors. Clearly a deficiency that the Cambodian tourism authorities need to rectify.

LAOS

Thai Visitor Arrivals to Laos by Category 2013-2016

Category	Border Pass		Border Pass	Passport	Total
Year	Day Tripper	Stay Overnight			
2013	931,601	164,400	1,096,001	963,433	**2,059,434**
2014	854,881	241,120	1,080,604	963,157	**2,043,761**
2015	906,620	255,713	1,162,333	1,159,019	**2,321,352**
2016	740,638	208,898	949,536	1,060,069	**2,009,605**

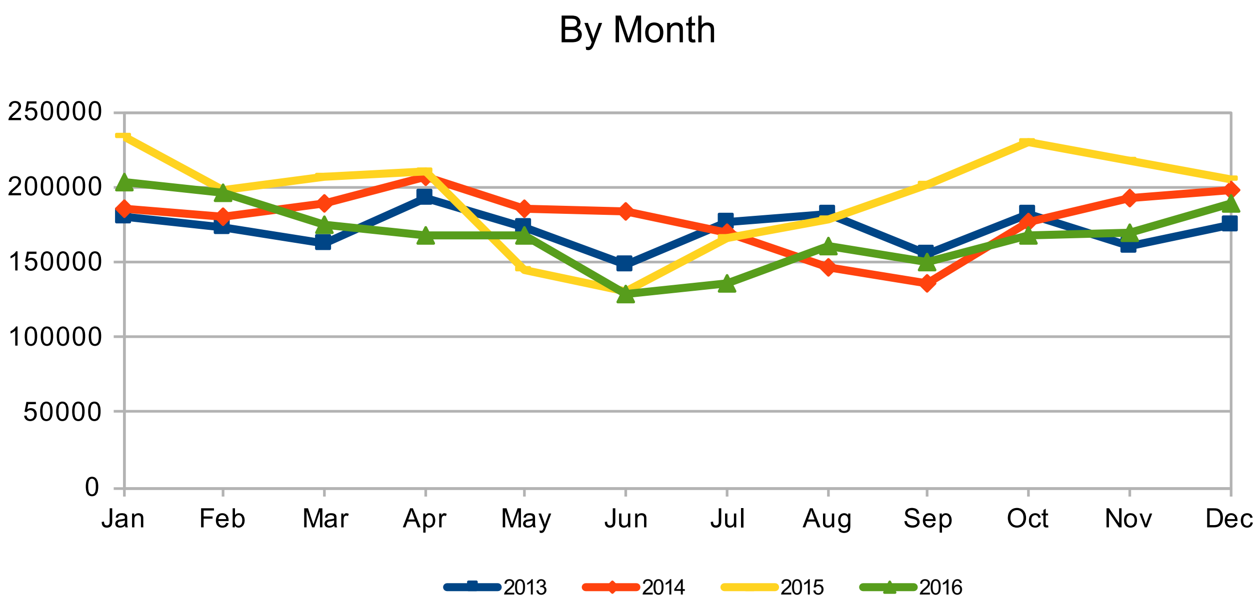
Source: Ministry of Information, Culture and Tourism, Tourism Development Department, Lao PDR



Laos is one of the primary beneficiaries of the many overland border crossings between the two countries. It should be stepping up its marketing campaigns to the high-volume expatriate community in Thailand. Although the numbers may be smaller than the number of Thai visitors, both the expenditure and average length of stay will be higher.

By Month 2013-2016

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2013	179,397	173,095	163,127	192,463	173,109	147,310	176,516	181,907	155,665	181,921	160,312	174,612	**2,059,434**
2014	184,652	180,053	188,452	206,015	185,700	182,727	169,232	145,734	136,253	175,910	192,102	196,931	**2,043,761**
2015	233,633	197,445	206,628	210,569	145,200	130,591	166,625	177,886	201,777	229,999	216,512	204,487	**2,321,352**
2016	202,829	196,313	174,658	166,992	168,192	129,247	136,452	161,113	149,306	167,829	168,684	187,990	**2,009,605**



By Port of Entry

Port of Entry	2016	2015	2014	2013
Mitthaphab Bridge II	592,671	738,091	751,771	775,652
Mitthaphab Bridge I	778,307	925,043	789,390	767,382
Vang Tao	193,943	230,796	126,270	138,584
Houie Xay	61,572	64,502	59,118	71,232
Mitthaphab Bridge III	102,862	85,747	69,874	62,514
Nam Nguen	43,680	48,157	44,508	47,049
Dane Savanh	32,659	31,749	26,499	33,576
Nam Hueang Bridge	42,680	42,478	44,935	33,153
Wattay Airport	38,135	26,722	28,211	30,874
Thak khek	44,293	46,709	33,246	27,722
Boten	18,405	22,018	23,018	24,194
Pakxan	22,457	25,475	19,137	16,362
Luang Prabang Airport	11,938	13,710	11,840	14,866
Naphao	5,626	5,616	10,203	9,484
Namphao	1,843	2,666	2,052	1,924
Savanh Airport	1,089	1,036	1,062	1,350
Thana Leng Railway Station	1,084	1,241	1,071	1,261
Phou Keua	529	1,410	601	735
Pang Hok	989	422	425	599
Pakse Airport	353	176	241	450
Nong Nok Khian	635	242	164	308
Nam Kanh	1,072	108	92	100
Nam Souy	21	28	33	63
Lam Tuai				
Phou Dou	12,762	7,210		
Total	**2,009,605**	**2,321,352**	**2,043,761**	**2,059,434**

These figures are a clear proof of the success of the infrastructure and highway development projects carried out since the 1980s to boost trade, travel and transport linkages between the Greater Mekong Subregion countries. Laos has succeeded in converting itself from a landlocked to landlinked country.

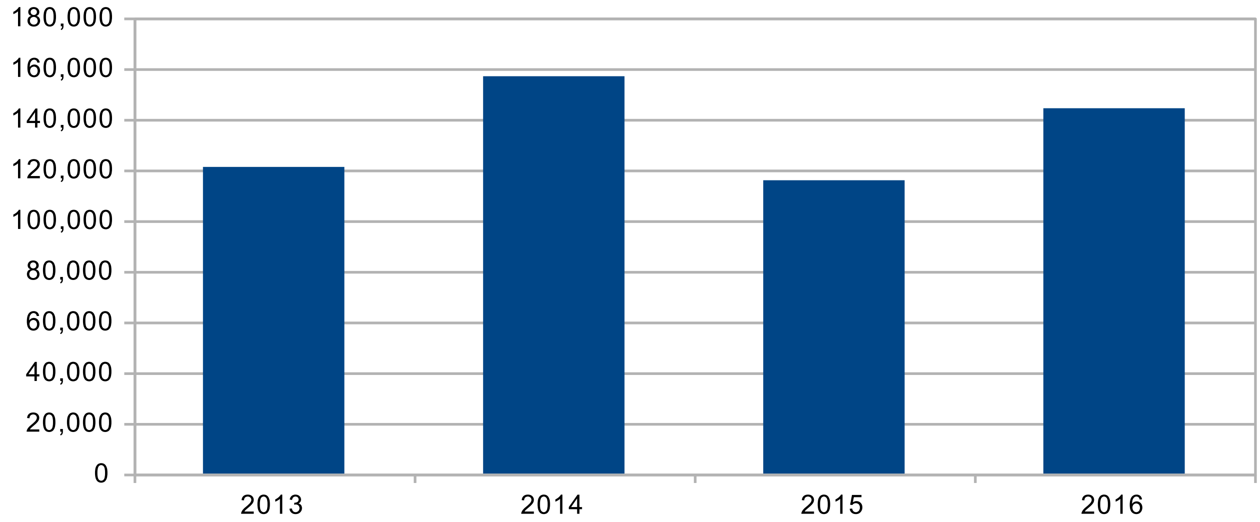
KOREA

Thai Visitor Arrivals to Korea 2013-2016 by Gender

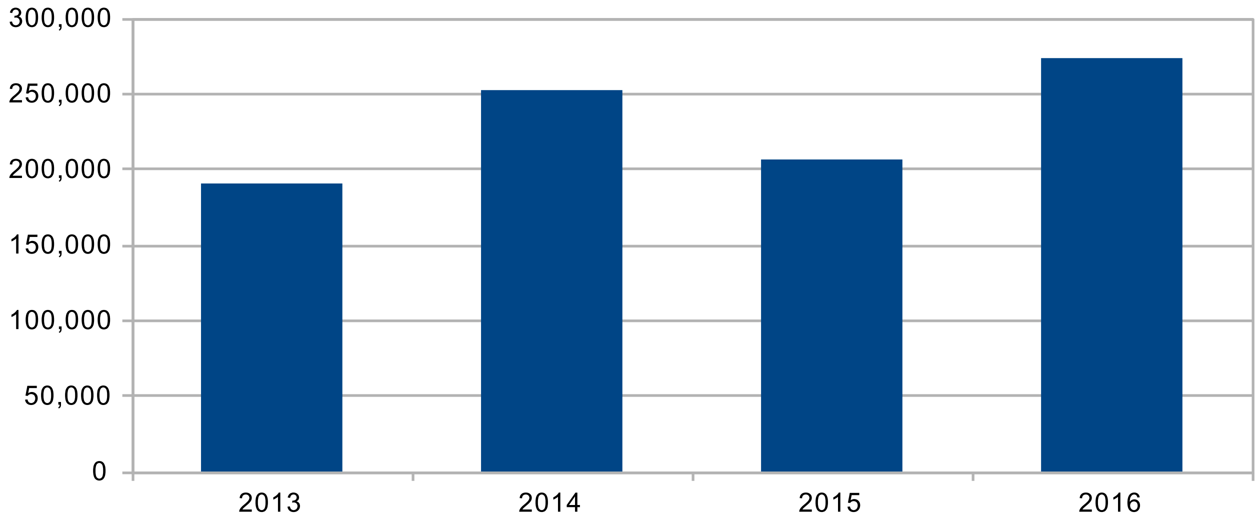
Year	Male	Female	Crew	Total
2013	121,242	189,714	61,922	**372,878**
2014	157,180	252,202	57,401	**466,783**
2015	115,724	206,248	49,797	**371,769**
2016	144,365	273,435	52,307	**470,107**

Source: Korea Tourism Organization

(Male)



(Female)

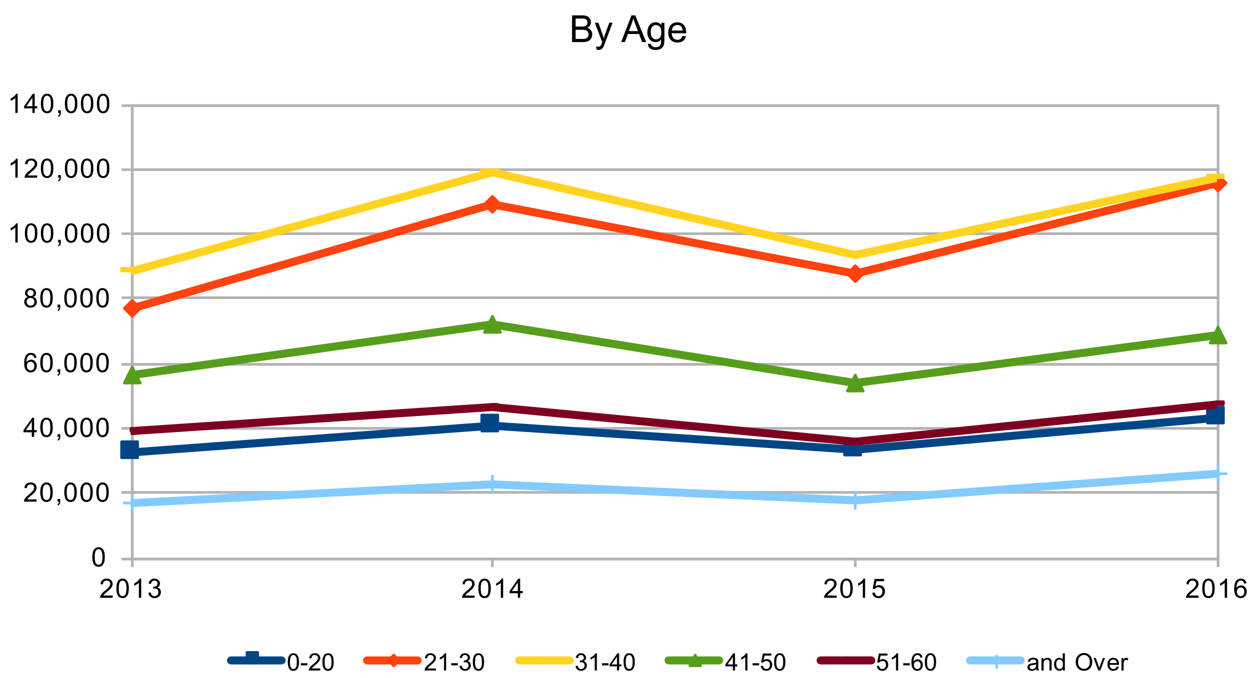


Korea has now become the "hip" destination for Thai female travellers, thanks to slick marketing and the popularity of K-Pop and Korean soap operas. The number of Thai female travellers is nearly double the number of males.

Thai Visitor Arrivals to Korea 2013-2016 by Age

Year	0-20	21-30	31-40	41-50	51-60	and Over	Crew	Total
2013	32,937	76,762	88,924	56,693	38,829	16,811	61,922	**372,878**
2014	40,725	109,367	119,007	71,674	46,291	22,318	57,401	**466,783**
2015	33,561	87,327	93,753	53,917	35,588	17,826	49,797	**371,769**
2016	43,201	115,376	117,626	68,492	47,057	26,048	52,307	**470,107**

Source: Korea Tourism Organization



Thai travellers to Korea have increased across all age groups, but those in their 20s and 30s are clearly the fastest growing.

SINGAPORE

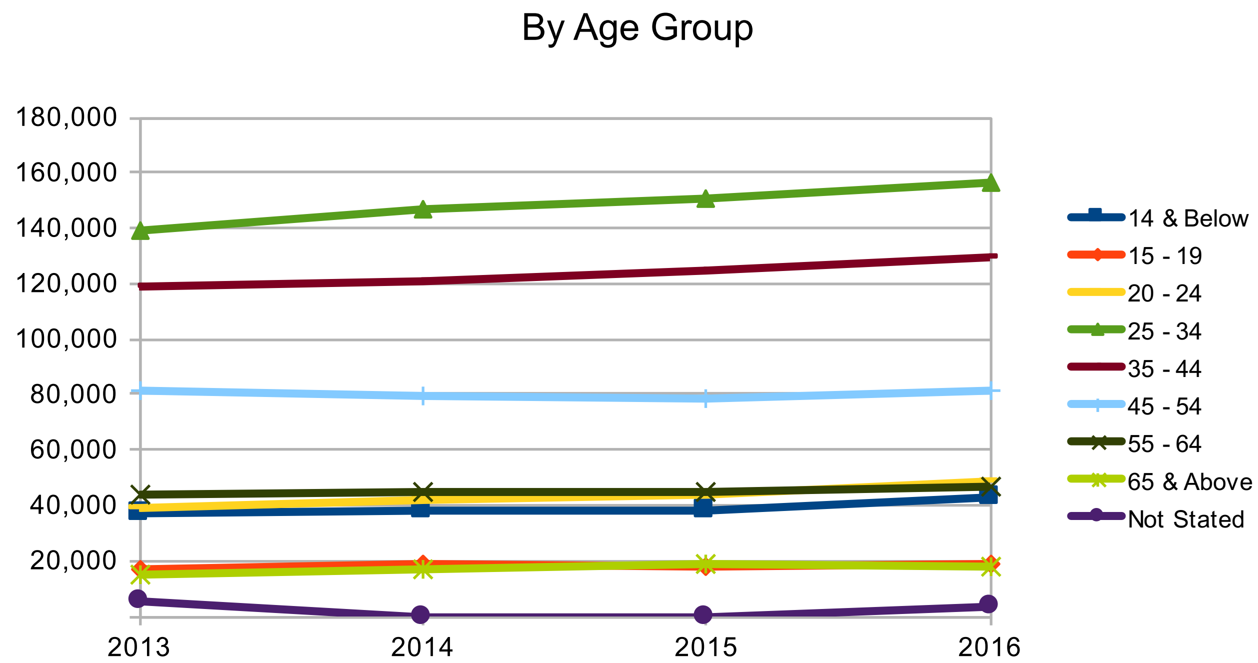
Profile of Thai Visitor Arrivals to Singapore 2013-2016

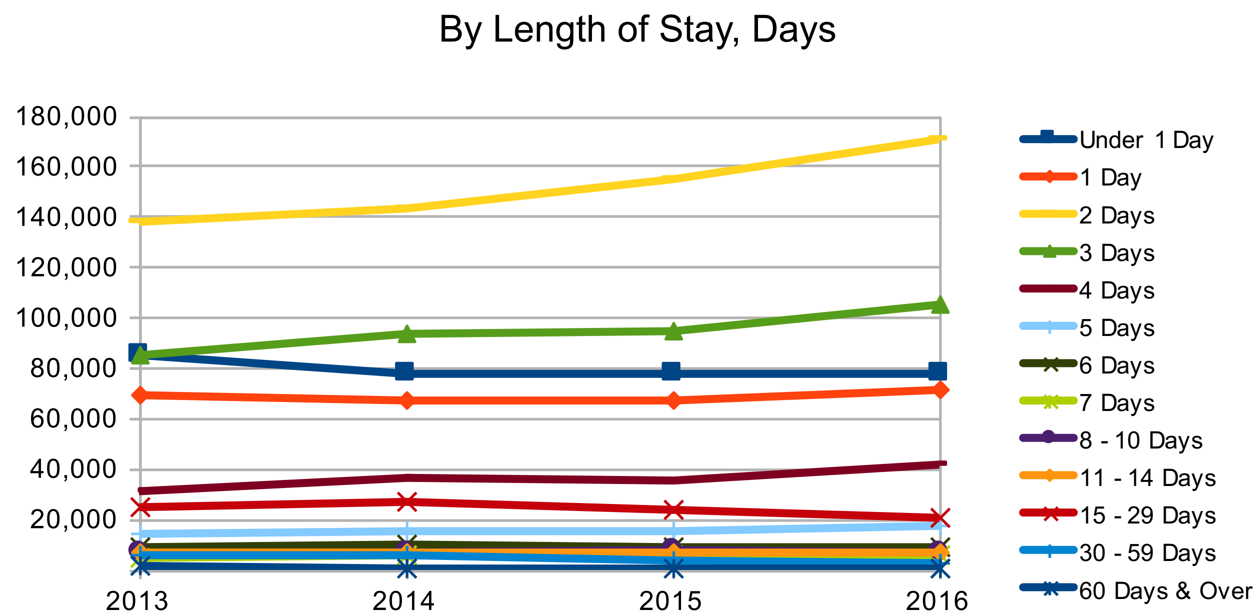
Singapore was once one of Thailand's most popular destinations, but is now facing stiff competition from many others. A clear window of opportunity which Singapore is perhaps not exploiting is to attract Thailand's aged travellers and people with disabilities. The island state is arguably Asia's most PwD-friendly country. Yet, its marketing campaigns in Thailand focus on the usual stereotype attractions and entertainment options targetted at the run-of-the-mill demographic markets.

CHARACTERISTICS	2013	2014	2015	2016
MODE OF ARRIVAL				
Air	386,108	413,094	430,239	461,337
Sea	10,219	9,309	9,843	10,627
Land	101,082	83,929	76,327	74,420
GENDER				
Male	231,970	233,911	235,190	244,812
Female	265,122	272,421	281,219	301,572
Not Stated	317	NA	NA	NA
AGE GROUP (YEARS)				
14 & Below	37,166	37,679	38,353	42,917
15 - 19	17,324	18,388	17,858	18,666
20 - 24	39,178	42,170	44,005	48,501
25 - 34	139,387	146,830	150,203	156,777
35 - 44	118,964	120,734	124,782	129,534
45 - 54	81,007	79,137	78,145	81,737
55 - 64	44,010	44,488	44,766	46,673
65 & Above	15,031	16,906	18,297	18,191
Not Stated	5,342	NA	NA	3,388
Average Age (Years)	36	36	36	36
LENGTH OF STAY (DAYS)				
Under 1 Day	85,237	77,936	77,757	77,528
1 Day	69,779	67,047	67,196	71,472
2 Days	138,687	143,248	155,525	170,837
3 Days	84,943	93,934	94,411	105,879
4 Days	31,707	36,403	35,803	42,070
5 Days	14,550	15,330	15,455	17,121
6 Days	8,929	9,590	8,878	9,062
7 Days	4,955	5,372	5,802	5,666
8 - 10 Days	7,091	7,009	7,790	7,037
11 - 14 Days	7,276	7,197	6,985	6,481
15 - 29 Days	25,120	27,511	24,238	21,165
30 - 59 Days	6,299	5,864	3,586	2,584
60 Days & Over	1,512	1,051	780	686
Average Length of Stay (Days)	4.10	4.20	3.79	3.50

Source: Singapore Tourist Board

By Age Group



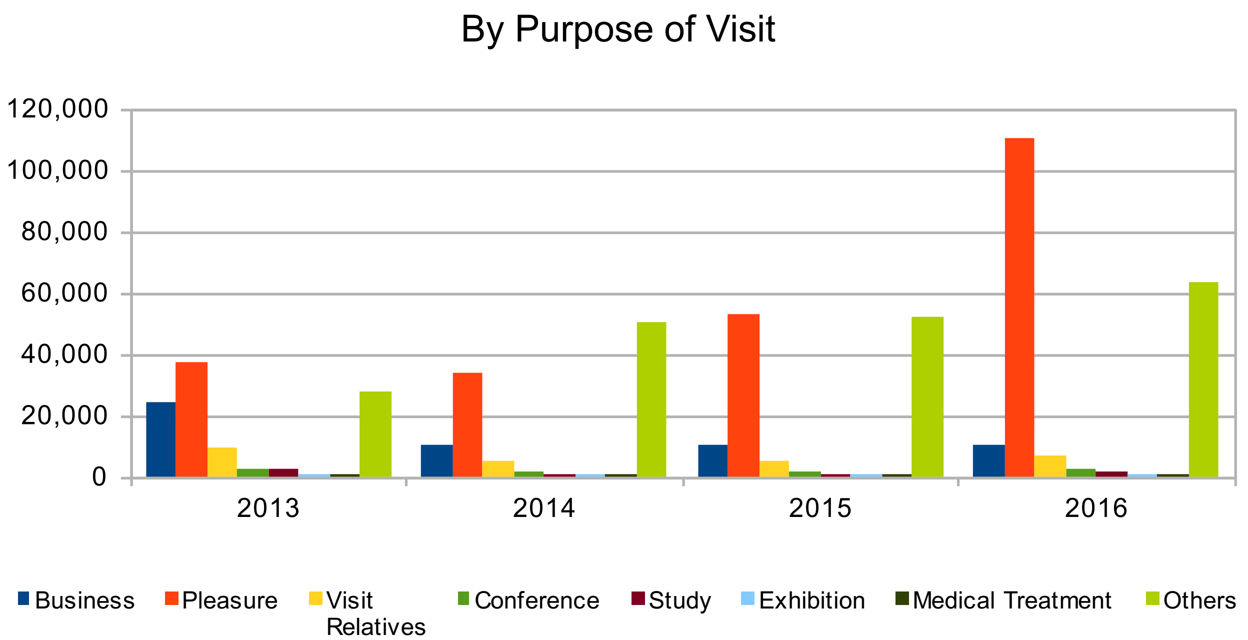


The number of Thai visitors to Singapore has risen, thanks to strong airline connections, but the average length of stay is dropping. If Singapore starts targetting the senior-citizen segment, it could achieve better results in terms of ALS.

TAIWAN

Thai Visitor Arrivals to Taiwan 2013-2016 by Purpose of Visit

Year	Business	Pleasure	Visit Relatives	Conference	Study	Exhibition	Medical Treatment	Others	Total
2013	24,151	37,062	9,853	2,318	2,236	841	110	27,567	**104,138**
2014	10,464	34,344	4,894	2,115	1,276	772	96	50,851	**104,812**
2015	10,285	52,640	4,982	2,156	952	873	89	52,432	**124,409**
2016	10,179	110,116	6,652	2,490	1,367	866	94	63,876	**195,640**

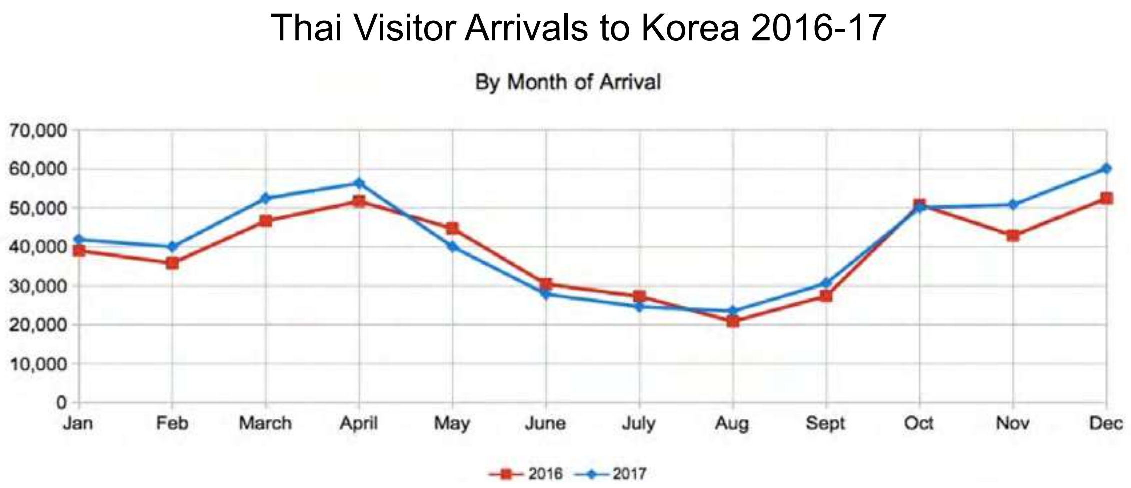


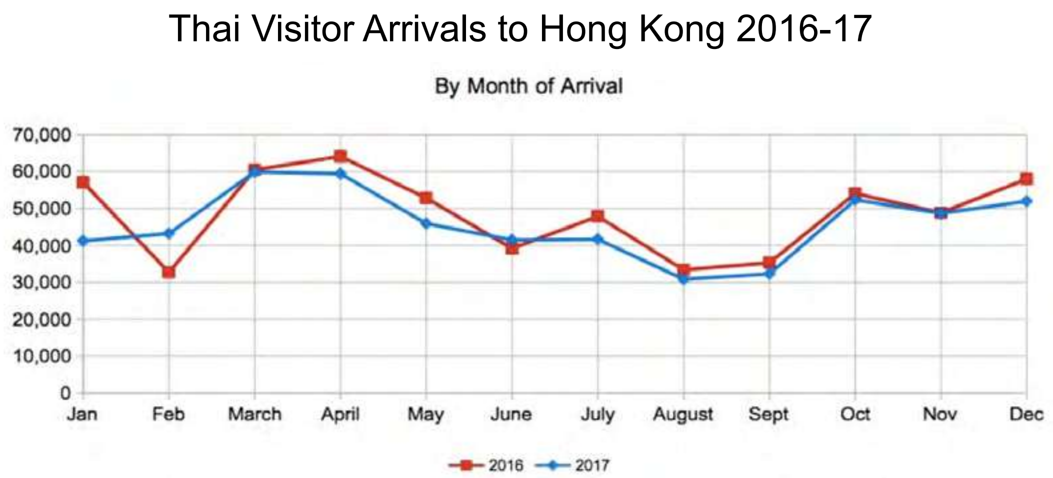
Another great example of the immediate benefits that accrue by a simple visa relaxation policy. Holiday traffic has more than doubled between 2015-2016 and is climbing steadily.

Seasonality of Thai Travel

These two charts are examples of the sharp peaks and troughs of seasonality in Thai outbound travel. The school holiday months of March-April-May and October are usually the peak outbound period. This applies across all destinations.

December 2017 was also an unusually high month for Thai outbound as it marked the end of the official mourning period for the late monarch HM King Bhumibhol Adulyadej.





Note: The figures for Hong Kong are accurate. Thai visitors to Hong Kong dropped in 2017 over 2016.

Thai Travel Agents Association

The Thai Travel Agents Association (TTAA) is the dominant industry body representing the outbound travel trade. As of early 2018, it had a total membership of 809 members, including wholesalers, outbound tour operators and ticketing agents. Their membership controls about 80% of the outbound travel market.

The list includes

- 626 ordinary members (mainly in Bangkok and its surrounding provinces);
- 47 members in the Upper South (Mainly Phuket and Krabi);
- 16 in the Lower South (mainly Haad Yai and the provinces bordering Malaysia);
- 37 in the North (mainly Chiang Mai and Chiang Rai);
- 14 in the Northeast (mainly Udon Thani, Nong Khai and Ubon Ratchathani);
- 69 extraordinary members (airlines, NTOs, car-rentals, marketing representatives, etc).

Although many Thai wholesalers and tour operators are selling tours and other travel products and services online, the industry structure is still dominated by the legacy system. That will undergo a shakeout and evolve in much the same way in other countries. Direct bookings and stepped up activities by online travel agents, low-cost airlines, hotel websites, etc will eventually put more pressure on the role of the travel agent.

The traditional means of gaining a market presence in the past has been to link with a number of wholesalers and provide brochure support, backed by email promotions, social media and advertising. However, this has produced mixed results. Many destinations are preferring to focus on growing direct consumer awareness and then letting the consumer decide their destination and preferred booking channel.

Several niche-market operators and specialists are also emerging offering study tours, health & wellness, adventure travel, golf, MICE etc.

The full list of the TTAA members can be found here: www.ttaa.or.th/member-directory/

Look Before You Book: Travel Agents Association Cautions Thai Travellers

There have been several reported instances of consumers being defrauded by fictitious tour operators. At the same time, many repeat travellers are inclined towards direct bookings. Both pose a potential risk to outbound tour operators and travel agents.

To address both, the Thai Travel Agents Association used the guidebook pamphlet distributed to all visitors at Thailand International Travel Fair in February 2018 to extend some words of advice on how to raise the peace-of-mind factor for consumers.

The following is an unofficial translation of the circular.

Why travel with a professional tour operator

1. All the homework is done: Foreign travel requires a lot of detailed preparations and homework. Using a reliable tour operator gives travellers the peace of mind and assurance that all this will be done thoroughly. Much better than trying to do it independently.
2. The budget does not increase: Most basic costs are included in the tour package. If the tour includes any promotional prices, they are designed to benefit the customers. The customers only have to prepare pocket money for tips and shopping.
3. The itinerary is set: Group tours follow a pre- and well-planned itinerary, with all transportation taken care of, including baggage-handling.
4. Not to worry about language problems: The group is always accompanied by a local tour guide and supervisory team who are ready to provide whatever information ranging from the country to food, as well as tips for shopping and souvenirs.
5. Better safety and security: Group travel is safer and more comfortable. Local guides can help with do's and don'ts to ensure travellers don't

How to choose a professional tour operator?

Consumers have a lot of choice. Many tour operators are available. Which company will makes your dream trip come true.

1. Use only licensed and registered tour operators: Check out the website of the Tourism Business Travel Bureau and Tourism Department www.tourism.go.th to ensure using a professional, licensed and registered operator.
2. Choose a company that is trusted by travellers: Networking with other travellers via trusted websites and studying reviews can be helpful.
3. Study tour program carefully: Do not focus just on cheap tour prices. Ensure that the tour itinerary meets your needs. ***Avoid vague and unclear itineraries. Focussing only on price increases risk of travellers becoming a victim of fraud***.
4. Money Transfer: Check the bank account to ensure that it belongs to the right company.

Thailand International Travel Fair February 2018

The Thailand International Travel Fair is the country's leading outbound travel show, organised primarily by the Thai Travel Agents Association every February and August in time to capture the peak outbound travel months of April-May and October.

Key sponsors are Krungthai Card PLC (KTC), Thai-Amadeus Southeast Asia, Thaivivat Insurance, Total Access Communication PLC (DTAC), and Canon Marketing (Thailand).

Visitation is estimated at 500,000, mostly middle-income Thais and expatriates seeking deals.

Exhibitors are roughly equally divided between domestic and international booths.

Japanese exhibitors are the dominant participants, often occupying upto 25% of the space. Their presence has grown rapidly since 2013 when Thais were granted visa-free access to Japan.

New destinations emerging include China, Iran, Nepal, Maldives, Central European countries, Ethiopia and South Africa.

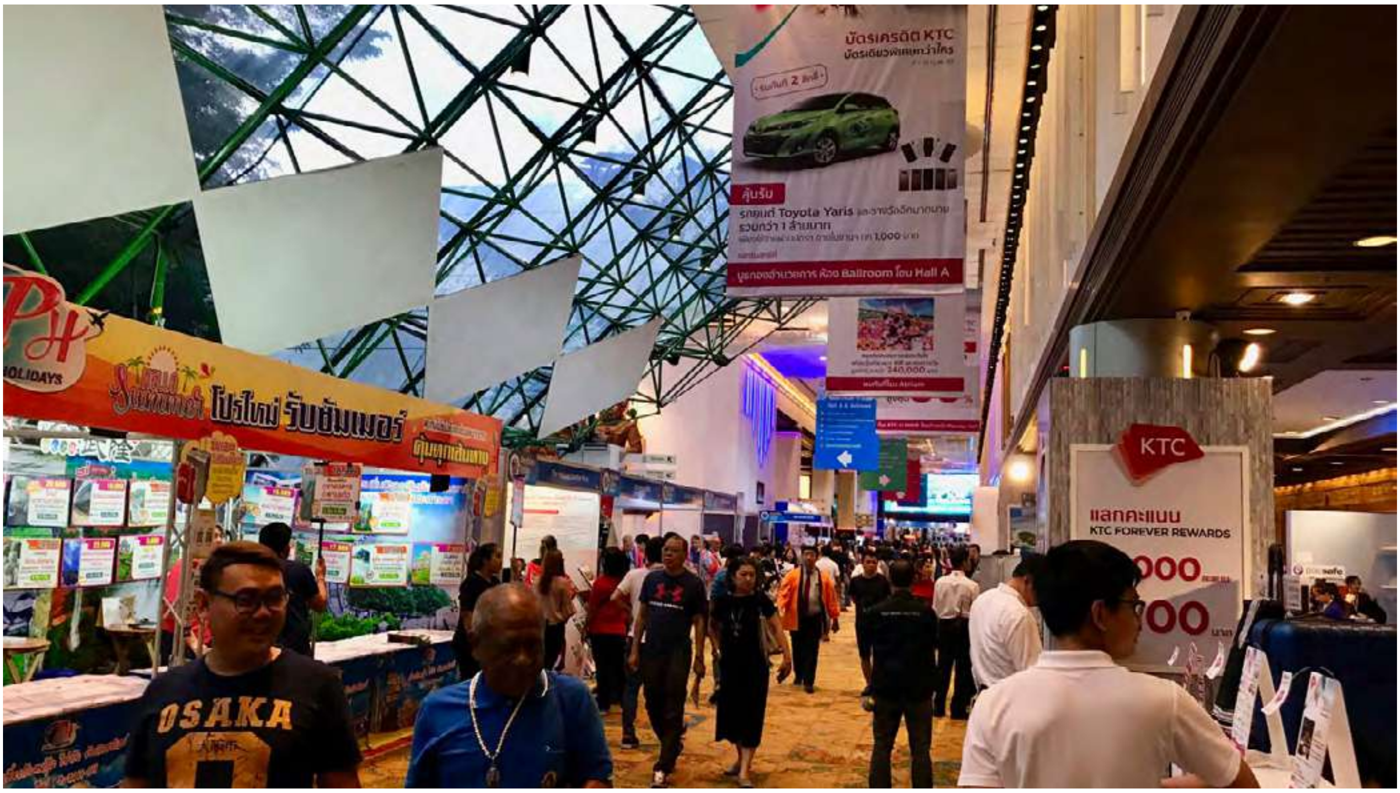
Airline participation includes a prominent presence by the low-cost carriers, such as AirAsia, Jetstar, NokAir and ThaiSmile, subsidiaries of Thai Airways International. Bangkok Airways is a regular exhibitor.

Cruises are growing rapidly and will be a dominant sector.

Multinational hotel chains and NTOs such as Australia are conspicuous by their absence. The partnership with KTC gives MasterCard a prominent presence at the show. Other credit cards such as Amex and Citibank do not exhibit.

General Scenes

The TITF is held at the Queen Sirikit National Convention Centre. The Thai Travel Agents Association, the organiser, combines the fair with the Robinson Department store which takes up about 250 booths, giving consumers a chance to shop for daily household goods as well as their next holiday. The show is running out of space.

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Japan

Japan is by far the most dominant foreign country at the TITF, with a comprehensive presence across all customer segments. Visitor arrivals have nearly tripled since the visa-waiver took effect in 2013. The Japanese come exceptionally well prepared and hungry for business. Collaterals are always in Thai. Special offers are a dime a dozen. Consumers are lured by word of mouth references, advertising campaigns and trade.


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JAPAN

Northeast Asia

Led by Japan, the Northeast Asian destinations of Korea, Taiwan, Macau, Hong Kong and, as of the 2018 TITF, China, are doing a great job in attracting Thai travellers through well-researched marketing campaigns, powerful communications and trade networking. The more Thais they attract, the more publicity they get via social media. The cycle keeps spinning.


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Taiwan
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ASEAN

ASEAN has a scattered and disjointed presence, in contradiction to the regional's professed claim to promote itself as a single destination. All the pavilions were in different halls. Malaysia, Indonesia, the Philippines and Singapore had official NTO pavilions. The other four countries had only private sector participation by hotels or tour operators. The ASEAN logo "One Vision, One Identity, One Community" is conspicuous by its absence


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RESORT & HOTEL
RESORT TENT (นาวโอพี)
RESORT AIR (นาวโอพี)
VILLA AIR (นาวโอพี)
สิทธิ์ตั๋วจอง
(เฉพาะงานนี้)
จอง 1,000 บาท
รับส่วนลด
500 บาท ทุกโปรแกรม
รับจัดสัมมนา/จัดเลี้ยง
หลังบ้านติดภูเขา เกาะ
VILLA VIEW

South Asia

India, Sri Lanka, Maldives and Bhutan all raised their profile at the Feb 2018 TITF. Sri Lanka is looking to diversify beyond just attracting the Buddhist tours. Bhutan is building on its increased aviation connectivity and common Buddhist heritage. However, the Maldives has gained more aviation access and also has prominent Thai hotel chains such as Dusit Thani and Centara. The Maldives pavilion was relatively quiet at the Feb 2018 TITF due to the news of the political unrest. India, too, is doing well thanks to online visa facility for Thais, and rapidly growing air linkages.


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101
Nepal
Lanka
101


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Maldives
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Bhutan
BHUTAN


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Africa

Only two African countries were represented, South Africa and Ethiopia, the former for the first time. This is a region of enormous future potential for both inbound and outbound. Both Kenya Airways and Ethiopian Airlines operate to Bangkok but their NTOs have never had a presence. A few African countries, such as South Africa, offer visa-free and visa-on-arrival facilities to Thai citizens. They could do well to build on this advantage and boost their tourism marketing presence.

Pricing

The pricing posters that clutter nearly the entire trade show give some example of the kind of costs for bookings made at the TITF itself. There is no shortage of choice, especially to the popular destinations of Asia and Europe.


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ชมสนาม OLD TRAFFORD
49,999
เริ่มต้น
SCANDINAVIA SHOCK PRICE 8วัน 5คืน
เดินทาง : มี.ค.-พ.ค. 61
นั่งเรือ DFDS สุดหรู
บินหรูสายการบิน 5 ดาว
53,999
เริ่มต้น
EUROPE
ZONE
BLOSSOM IN BENELUX 7วัน 5คืน
เดินทาง : เม.ย. 61
เริ่มต้น
EVA AIR
52,999

Airlines

Clearly, the low-cost airlines are the most popular. They come armed with their reservation systems and take immediate bookings. Other legacy airlines are mainly there to wave the flag. All of them have to follow the crowd, and market their discounts and deals.


NOK AIR
บริการด้วย
รอยยิ้ม
ตอบโจทย์
NOK AIR


OMAN AIR
الطيران العماني
OMAN AIR


CHINA AIRLINES
CHINA AIRLINES


air astana


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QANTAS
QANTAS
SUPER TRIPS

Tour Operators

These are some of the major wholesalers and tour operators. With a few exceptions, the booths are full of brochure clutter largely based on price. For the foreseeable future, this will remain the prime magnet for the mass-market tours by first-time travellers.


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ให้บริการอย่างครบวงจรด้านการท่องเที่ยว
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Online Travel Agents

Like in other countries, online travel agents are emerging. They are a little more discerning and focussed than the mass-market wholesalers, and will gain traction in the years ahead.


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More Than 500,000 Hotels Worldwide
Find Both Domestic and International Flights
Worldwide Car Rent from Leading Brands.
Worldwide Package Tour in Popular Destinations.
Worldwide Attraction and Football League Tickets
Online Travel Insurance Get Instantly Confirmation

Cruises

Growing rapidly in popularity, especially amongst the family and senior-citizen segment. Cruise companies have stepped up their travel trade marketing big-time, especially those operating out of Singapore, Malaysia and Hong Kong. This segment will grow as Thailand advances its own cruise terminal project.

KTC

KrungThai Card Public Company Ltd has been a long-standing partner of the TITF. It has a dominant status and presence and gets all the business. If other credit card companies were to join the show, the consumer would have more choice and the market would grow accordingly.

Other Products

Other products such as rail passes, SIM cards, car rental occupy a small amount of space. The only Thai hotel group present is the Centara which has properties in the Maldives, Sri Lanka, Vietnam, Laos, China, Oman, Qatar and the UAE. It makes good use of its 1-Card scheme to promote travel amongst its formidable database of cardholders linked to its associate company, the Central Department Store group.


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Aviation linkages

Thanks to its unmatched geographical location, superb inbound tourism flows and liberalised aviation regimes, Thailand is served by more scheduled and charter airlines than any other country in the Association of Southeast Asian Nations (ASEAN).

The main hub, Suvarnabhumi airport in Bangkok, is served by 101 airlines (as of January 2018). The Thai capital's second airport Don Mueang is served by 17 airlines, giving Bangkok a total of 118 airlines linked to nearly 200 cities around the world. The rapidly growing Phuket resort is served by 59 airlines.

Each of these cities linked to Thailand is also a potential target as a source of future Thai outbound visitors.

The following list of airlines serving Thailand is sourced from the Airports of Thailand and includes only the six international gateway airports under the AoT's control. It does not include privately owned airports such as Samui (which is owned by Bangkok Airways).

SUVARNABHUMI AIRPORT

Airline	From/To
Aeroflot	Moscow–Sheremetyevo
Air Astana	Almaty, Astana
Air Austral	Saint–Denis de la Réunion
Air China	Beijing–Capital, Chengdu (resumes 12 February 2018), Hangzhou, Lianyungang, Shanghai–Pudong, Tianjin
Air France	Paris–Charles de Gaulle
Air India	Bhubaneswar, Chandigarh, Delhi, Mumbai
Air Macau	Macau
All Nippon Airways	Tokyo–Haneda, Tokyo–Narita
Asia Atlantic Airlines	Charter: Denpasar/Bali, Harbin, Sapporo–Chitose, Shenyang
Asiana Airlines	Seoul–Incheon
Austrian Airlines	Vienna
Azerbaijan Airlines	Baku

Airline	From/To
Bangkok Airways	Chiang Mai, Chiang Rai, Da Nang, Ko Samui, Krabi, Lampang, Luang Prabang, Malé, Mandalay, Mumbai, Naypyidaw, Phnom Penh, Phu Quoc, Phuket, Siem Reap, Sukhothai, Surat Thani, Trat, Vientiane, Udon Thani, Yangon
Beijing Capital Airlines	Guiyang, Xi'an, Zhanjiang
Biman Bangladesh Airlines	Dhaka
Bhutan Airlines	Kolkata, Thimphu/Paro
British Airways	London–Heathrow
Cathay Pacific	Hong Kong, Singapore
Cebu Pacific	Manila
China Airlines	Kaohsiung, Taipei–Taoyuan
China Eastern Airlines	Chengdu, Fuzhou, Kunming, Lanzhou, Nanchang, Nanjing, Ningbo, Qingdao, Shanghai–Pudong, Wenzhou, Wuhan, Wuxi, Taiyuan, Xi'an, Xining, Yinchuan Seasonal: Beijing–Capital, Hangzhou, Hefei
China Eastern Airlines	Beijing–Capital, Chongqing, Shanghai–Pudong, Wenzhou
China Southern Airlines	Changsha, Guangzhou, Guilin, Guiyang, Jieyang, Lanzhou, Nanning, Shenyang, Shenzhen, Urumqi, Wuhan, Zhengzhou
Druk Air	Bagdogra, Gaya, Guwahati, Kolkata, Thimphu/Paro
Eastar Jet	Jeju, Seoul–Incheon
EgyptAir	Cairo
El Al	Tel Aviv–Ben Gurion
Emirates	Dubai–International, Hong Kong, Sydney
Ethiopian Airlines	Addis Ababa, Hong Kong (resumes 4 June 2018)
Etihad Airways	Abu Dhabi
EVA Air	Amsterdam, London–Heathrow, Taipei–Taoyuan, Vienna
Finnair	Helsinki
Flydubai	Dubai–International
Garuda Indonesia	Jakarta–Soekarno–Hatta, Mumbai
Gulf Air	Bahrain
Hainan Airlines	Beijing–Capital, Haikou, Nanning, Sanya
Hebei Airlines	Shijiazhuang
Hong Kong Airlines	Hong Kong
IndiGo	Kolkata
Japan Airlines	Nagoya–Centrair, Osaka–Kansai, Tokyo–Haneda, Tokyo–Narita
Jeju Air	Busan, Seoul–Incheon Seasonal: Cheongju
Jet Airways	Delhi, Mumbai
Jet Asia Airways	Tokyo–Narita, Jakarta–Soekarno–Hatta
Jetstar Airways	Melbourne
Jetstar Asia Airways	Singapore
Jetstar Pacific Airlines	Ho Chi Minh City

Airline	From/To
Jin Air	Busan, Seoul–Incheon Seasonal: Jeju Charter: Cam Ranh
Juneyao Airlines	Shanghai–Pudong, Shenyang
Kenya Airways	Guangzhou, Nairobi–Jomo Kenyatta
KLM	Amsterdam
Korean Air	Busan, Seoul–Incheon
Kuwait Airways	Kuwait City
Lao Airlines	Luang Prabang, Savannakhet, Vientiane, Pakse
LOT Polish Airlines	Seasonal charter: Warsaw–Chopin
Lucky Air	Kunming
Lufthansa	Frankfurt
Mahan Air	Tehran–Imam Khomeini
Malaysia Airlines	Kuala Lumpur–International
Maldivian	Chengdu, Hangzhou, Malé
MIAT Mongolian Airlines	Ulaanbaatar
Myanmar Airways International	Mandalay, Yangon
Myanmar National Airlines	Mandalay, Yangon
Nepal Airlines	Kathmandu
Nordwind Airlines	Moscow–Sheremetyevo
Norwegian Air Shuttle operated by Norwegian Long Haul	Copenhagen, Oslo–Gardermoen, Stockholm–Arlanda
Okay Airways	Tianjin, Xi'an
Oman Air	Muscat
Orient Thai Airlines	Charter: Tokyo–Narita
Pakistan International Airlines	Karachi
Peach	Naha
Pegas Fly	Seasonal charter: Khabarovsk, Ulan-Ude, Yuzhno–Sakhalinsk
Philippine Airlines	Cebu, Manila
Qantas	Sydney
Qatar Airways	Doha, Hanoi
Regent Airways	Chittagong, Dhaka
Royal Brunei Airlines	Bandar Seri Begawan
Royal Jordanian	Amman–Queen Alia, Hong Kong, Kuala Lumpur–International
S7 Airlines	Irkutsk, Novosibirsk
Scoot	Singapore
Shandong Airlines	Jinan, Kunming, Qingdao, Urumqi, Xiamen
Shenzhen Airlines	Fuzhou, Jieyang, Nanjing, Quanzhou, Shenzhen, Wuxi, Xi'an, Yuncheng
Sichuan Airlines	Chengdu, Haikou, Sanya
Singapore Airlines	Singapore
SpiceJet	Ahmedabad, Delhi, Kolkata

Airline	From/To
Spring Airlines	Beihai, Changchun, Changzhou, Chengdu, Dalian, Fuzhou, Harbin, Hangzhou, Hohhot, Jinan, Lanzhou, Luoyang, Nanchang, Ningbo, Shanghai–Pudong, Shenyang, Shijiazhuang, Yangzhou, Yinchuan
SriLankan Airlines	Colombo, Guangzhou
Swiss International Air Lines operated by Swiss Global Air Lines	Zürich
Thai Airways	Auckland, Bangalore, Beijing–Capital, Brisbane, Brussels, Busan, Chengdu, Chennai, Chiang Mai, Colombo, Copenhagen, Delhi, Dhaka, Denpasar/Bali, Dubai–International, Frankfurt, Fukuoka, Guangzhou, Hanoi, Ho Chi Minh City, Hong Kong, Hyderabad, Islamabad, Jakarta–Soekarno–Hatta, Karachi, Kathmandu, Koh Samui, Kolkata, Krabi, Kunming, Kuala Lumpur–International, Lahore, London–Heathrow, Manila, Melbourne, Milan–Malpensa, Moscow–Domodedovo, Mumbai, Munich, Muscat, Nagoya–Centrair, Osaka–Kansai, Oslo–Gardermoen, Paris–Charles de Gaulle, Perth, Phnom Penh, Phuket, Rome–Fiumicino, Sapporo–Chitose, Seoul–Incheon, Shanghai–Pudong, Singapore, Stockholm–Arlanda, Sydney, Taipei–Taoyuan, Tehran–Imam Khomeini, Tokyo–Haneda, Tokyo–Narita, Vienna, Vientiane, Xiamen, Yangon, Zürich
Thai Smile	Changsha, Chiang Mai, Chiang Rai, Chittagong, Chongqing, Hat Yai, Jaipur, Kaohsiung, Khon Kaen, Krabi, Kuala Lumpur–International, Luang Prabang, Lucknow, Mandalay, Mumbai, Narathiwat, Penang, Phnom Penh, Phuket, Siem Reap, Surat Thani, Ubon Ratchathani, Udon Thani, Vientiane, Yangon, Zhengzhou Seasonal: Gaya, Varanasi
Thai Vietjet Air	Chiang Mai, Chiang Rai, Da Lat, Hai Phong, Phuket Charter: Can Tho, Hualien, Hue, Taichung, Thanh Hoa
TUI Airways	Birmingham, London–Gatwick, Manchester
Turkish Airlines	Istanbul–Atatürk
Turkmenistan Airlines	Ashgabat
T'way Air	Daegu, Seoul–Incheon
Ukraine International Airlines	Kiev–Boryspil
Ural Airlines	Beijing–Capital, Changchun, Harbin, Irkutsk, Khabarovsk, Ordos Seasonal: Vladivostok
US-Bangla Airlines	Chittagong, Dhaka
Uzbekistan Airways	Tashkent
VietJet Air	Hanoi, Ho Chi Minh City
Vietnam Airlines	Da Nang, Hanoi, Ho Chi Minh City Charter: Gaya
XiamenAir	Dalian, Fuzhou, Hangzhou (begins 25 March 2018), Quanzhou, Xiamen

DON MUEANG AIRPORT

Airline	From/To
AirAsia	Johor Bahru, Kuala Lumpur–International
China Express Airlines	Zhanjiang
Indonesia AirAsia	Denpasar/Bali, Jakarta–Soekarno–Hatta, Medan
Indonesia AirAsia X	Jakarta–Soekarno–Hatta
JC International Airlines	Phnom Penh
Malindo Air	Kuala Lumpur–International
New Gen Airways	Guilin, Huangshan, Xuzhou Charter: Baotou, Changsha, Fuzhou, Guiyang, Hefei, Huai'an, Jinan, Nanchang, Nanning, Ningbo, Wenzhou, Yiwu
Nok Air	Buriram, Chiang Mai, Chiang Rai, Chumphon, Hat Yai, Hefei, Ho Chi Minh City, Khon Kaen, Krabi, Lampang, Loei, Mae Sot, Nakhon Phanom, Nakhon Si Thammarat, Nan, Phitsanulok, Phrae, Phuket, Ranong, Roi Et, Sakon Nakhon, Surat Thani, Trang, Ubon Ratchathani, Udon Thani, Yangon Seasonal: Nanjing
NokScoot	Dalian, Nanjing, Qingdao, Shenyang, Taipei–Taoyuan, Tianjin, Xi'an Seasonal charter: Tokyo–Narita
Orient Thai Airlines	Changsha, Nanchang, Shanghai–Pudong
R Airlines	Charter: Chiang Mai, Hat Yai, Khon Kaen, Narathiwat, Phuket
Scoot	Osaka–Kansai, Singapore, Tokyo–Narita

Airline	From/To
Siam Air	Changsha, Guangzhou, Hong Kong, Macau, Singapore, Zhengzhou
Thai AirAsia	Bangalore, Buriram, Changsha, Chengdu (begins 1 February 2018), Chennai, Chiang Mai, Chiang Rai, Chongqing, Da Nang, Denpasar/Bali, Guangzhou, Hangzhou, Hanoi, Hat Yai, Ho Chi Minh City, Hong Kong, Jaipur, Johor Bharu (begins 10 February 2018), Khon Kaen, Kochi, Kolkata, Krabi, Kuala Lumpur–International, Kunming, Loei, Luang Prabang, Macau, Malé, Mandalay, Nakhon Phanom, Nakhon Si Thammarat, Nan, Nanjing, Narathiwat, Penang, Phitsanulok, Phnom Penh, Phuket, Ranong (resumes 16 February 2018), Roi Et, Sakon Nakhon, Shantou, Shenzhen, Siem Reap, Singapore, Surat Thani, Tiruchirapalli, Trang, Ubon Ratchathani, Udon Thani, Vientiane, Wuhan, Xi'an, Yangon Charter: Gaya, Ningbo, Varanasi, Wenzhou
Thai AirAsia X	Osaka–Kansai, Seoul–Incheon, Shanghai–Pudong, Sapporo–Chitose (resumes 10 April 2018), Tokyo–Narita Charter: Shenyang
Thai Lion Air	Changzhou (begins 23 February 2018), Chengdu, Chiang Mai, Chiang Rai, Chongqing, Denpasar, Guangzhou, Hangzhou, Hanoi, Hat Yai, Ho Chi Minh City, Jakarta–Soekarno-Hatta, Jinan (begins 23 February 2018), Khon Kaen, Kochi (begins 1 March 2018), Krabi, Kunming, Mumbai, Nakhon Si Thammarat, Nanchang, Nanjing, Phitsanulok, Phuket, Shanghai–Pudong, Singapore, Surat Thani, Taipei–Taoyuan, Tianjin (begins 1 February 2018), Trang, Ubon Ratchathani, Udon Thani, Xi'an, Yangon, Zhengzhou Charter: Taiyuan
Tigerair Taiwan	Taipei–Taoyuan

U-TAPAO AIRPORT

Airline	From/To
AirAsia	Kuala Lumpur–International
Azur Air	Seasonal charter: Krasnoyarsk–Yemelyanovo, Khabarovsk
Bangkok Airways	Ko Samui, Phuket

Airline	From/To
China Southern Airlines	Shanghai–Pudong
Donghai Airlines	Shenzhen
Hainan Airlines	Haikou, Sanya
Kan Air	Chiang Mai
New Gen Airways	Charter: Zhengzhou
Nok Air	Charter: Baotou, Changsha, Haikou, Linyi, Meizhou, Nanchang, Yichang, Yinchuan
Pegas Fly	Seasonal charter: Krasnoyarsk–Yemelyanovo
Qatar Airways	Doha
S7 Airlines	Seasonal: Irkutsk
Shenzhen Airlines	Guangzhou
Thai AirAsia	Chiang Mai, Hangzhou, Hat Yai, Macau, Nanchang, Nanning, Phuket, Ubon Ratchathani, Udon Thani
Thai Lion Air	Changsha

PHUKET AIRPORT

Airline	From/To
Aeroflot	Moscow–Sheremetyevo
AirAsia	Kuala Lumpur–International
Air China	Beijing–Capital, Hangzhou
Asia Atlantic Airlines	Charter: Harbin, Shenyang
Asiana Airlines	Seoul–Incheon
Azur Air	Seasonal charter: Krasnoyarsk–Yemelyanovo, Moscow–Domodedovo
Bangkok Airways	Bangkok–Suvarnabhumi, Chiang Mai, Hat Yai, Ko Samui, Pattaya–U-Tapao
Beijing Capital Airlines	Sanya
Cathay Dragon	Hong Kong

Airline	From/To
China Eastern Airlines	Chengdu, Hangzhou, Kunming, Nanjing, Ningbo, Taiyuan, Xi'an
China Eastern Airlines operated by Shanghai Airlines	Shanghai–Pudong
China Southern Airlines	Changsha, Guangzhou, Guiyang, Nanning, Shenzhen, Wuhan, Zhengzhou
Chongqing Airlines	Chongqing
Edelweiss Air	Seasonal: Zürich
Emirates	Dubai–International
Etihad Airways	Abu Dhabi
Finnair	Seasonal: Helsinki
Firefly	Penang
Hainan Airlines	Beijing–Capital, Haikou, Shenzhen
HK Express	Hong Kong
Jetstar Airways	Melbourne, Sydney
Jetstar Asia Airways	Singapore
Jin Air	Seasonal: Seoul–Incheon
Juneyao Airlines	Nanjing, Shanghai–Pudong
Korean Air	Seoul–Incheon
Kunming Airlines	Kunming
Lucky Air	Kunming, Zhengzhou
Mahan Air	Seasonal charter: Tehran–Imam Khomeini
Malaysia Airlines	Kuala Lumpur–International
Malindo Air	Kuala Lumpur–International
Myanmar National Airlines	Yangon (Begins 25 March, 2018)
Neos	Seasonal: Milan–Malpensa
New Gen Airways	Nakhon Ratchasima Charter: Hangzhou, Hohhot, Wuxi
NokAir	Bangkok–Don Mueang, Beijing–Capital Charter: Chengdu, Nanning, Nantong
Nordwind Airlines	Seasonal charter: Irkutsk, Khabarovsk, Krasnoyarsk–Yemelyanovo, Mineralnye Vody, Novosibirsk, St. Petersburg, Vladivostok
Okay Airways	Tianjin, Xi'an Seasonal: Hangzhou
Orient Thai Airlines	Charter: Chengdu, Chongqing, Denpasar, Nanning, Tokyo–Haneda, Xi’an
Pegas Fly	Charter: Blagoveshchensk, Irkutsk, Khabarovsk, Krasnoyarsk–Yemelyanovo, Novosibirsk , Yakutsk, Yekaterinburg
Qatar Airways	Doha
Rossiya	Seasonal charter: Moscow–Vnukovo
Royal Flight	Seasonal charter: Moscow–Sheremetyevo
Scoot	Singapore
Shandong Airlines	Changsha, Jinan, Qingdao, Xiamen

Airline	From/To
Shenzhen Airlines	Chengdu, Shenzhen
Sichuan Airlines	Chengdu, Chongqing
SilkAir	Singapore
Spring Airlines	Ningbo, Shanghai–Pudong, Yangzhou
Thai AirAsia	Bangkok–Don Mueang, Chiang Mai, Hong Kong, Khon Kaen, Kunming (begins 1 February 2018), Macau, Pattaya–U-Tapao, Siem Reap, Singapore, Udon Thani, Wuhan
Thai Airways	Bangkok–Suvarnabhumi, Beijing–Capital, Frankfurt, Hong Kong Seasonal: Copenhagen, Stockholm–Arlanda
Thai Lion Air	Bangkok–Don Mueang, Nanjing, Shanghai–Pudong, Xi'an Charter: Chongqing, Nanjing
Thai Smile	Bangkok–Suvarnabhumi, Chiang Mai, Guangzhou
Thai Vietjet Air	Bangkok–Suvarnabhumi, Chiang Rai
Tianjin Airlines	Chongqing, Tianjin
TUI Airways	Seasonal: Birmingham, London–Gatwick, Manchester Seasonal charter: Copenhagen, Helsinki
TUIfly Nordic	Charter: Billund, Copenhagen, Gothenburg–Landvetter, Malmö, Oslo–Gardermoen Seasonal charter: Helsinki, Stockholm–Arlanda
Turkish Airlines	Istanbul–Atatürk
VietJet Air	Ho Chi Minh City
XiamenAir	Fuzhou, Xiamen (both begin 25 March 2018)

CHIANG RAI AIRPORT

Airline	From/To
Bangkok Airways	Bangkok–Suvarnabhumi
Beijing Capital Airlines	Haikou
China Eastern Airlines	Kunming

Airline	From/To
HK Express	Hong Kong
Nok Air	Bangkok–Don Mueang
Sichuan Airlines	Seasonal: Chengdu
Thai AirAsia	Bangkok–Don Mueang, Hat Yai
Thai Lion Air	Bangkok–Don Mueang, Changsha, Guangzhou
Thai Smile	Bangkok–Suvarnabhumi
Thai Vietjet Air	Bangkok–Suvarnabhumi, Phuket

HAAD YAI AIRPORT

Airline	From/To
Bangkok Airways	Phuket
Jetstar Asia Airways	Singapore
Kunming Airlines	Kunming
Malindo Air	Kuala Lumpur–Subang, Penang
Nok Air	Bangkok–Don Mueang
Scoot	Singapore
Thai AirAsia	Bangkok–Don Mueang, Chiang Mai, Chiang Rai, Khon Kaen, Kuala Lumpur–International, U–Tapao-Pattaya
Thai Lion Air	Bangkok–Don Mueang, Udon Thani
Thai Smile	Bangkok–Suvarnabhumi

CHIANG MAI AIRPORT

Airline	From/To
AirAsia	Kuala Lumpur–International
Air China	Beijing–Capital, Wuhan
Asiana Airlines	Seasonal charter: Seoul–Incheon
Bangkok Airways	Bangkok–Suvarnabhumi, Hanoi (begins 25 March 2018), Ko Samui, Krabi, Mae Hong Son, Mandalay, Phuket, Siem Reap, Yangon
Beijing Capital Airlines	Haikou
Cathay Dragon	Hong Kong
China Eastern Airlines	Beijing–Capital, Kunming, Shanghai–Pudong Seasonal: Nanjing (begins 1 February 2018)
China Southern Airlines	Guangzhou
Hainan Airlines	Shenzhen
HK Express	Hong Kong
Jeju Air	Seasonal: Seoul–Incheon, Jeju
Jetstar Pacific	Dong Hoi
Juneyao Airlines	Shanghai–Pudong
Korean Air	Seoul–Incheon
Lao Airlines	Luang Prabang
Myanmar National Airlines	Yangon
New Gen Airways	Nakhon Ratchasima
Nok Air	Bangkok–Don Mueang, Udon Thani Charter: Nanning
Qatar Airways	Doha
Scoot	Singapore
Shandong Airlines	Chongqing, Jinan
Sichuan Airlines	Chengdu
SilkAir	Singapore
Spring Airlines	Shanghai–Pudong

Airline	From/To
Thai AirAsia	Bangkok–Don Mueang, Changsha, Hangzhou, Hat Yai, Hong Kong, Khon Kaen, Krabi, Macau, Pattaya–U–Tapao, Phuket, Surat Thani, Ubon Ratchathani, Udon Thani (begins 15 February 2018)
Thai Airways	Bangkok–Suvarnabhumi, Kunming (ends 25 March 2018)
Thai Lion Air	Bangkok–Don Mueang, Chengdu, Guangzhou
Thai Smile	Bangkok–Suvarnabhumi, Phuket
Thai Vietjet Air	Bangkok–Suvarnabhumi
VietJet Air	Ho Chi Minh City

Road Travel

The Thai tourism industry has benefitted significantly from the liberalised aviation sector. Road travel is next.

Thai overland travel to its neighbouring countries of Cambodia, Laos, Myanmar and Malaysia is set to boom with the October 2017 signing of the ASEAN Framework Agreement on the Facilitation of Cross Border Transport of Passengers by Road Vehicles (CBTP).

This agreement is designed to make it easier for buses and coaches from one ASEAN country to enter another ASEAN country. According to a media release issued after the 23rd ASEAN Transport Ministers meeting in Singapore, "Upon implementation, ASEAN citizens will find it more convenient to travel by bus within the region, be it for business or for leisure. This will create more commercial and investment opportunities, especially for our trade and tourism sectors. Our citizens will also find it easier to interact with one another, deepening social and cultural understanding within the ASEAN community."

Under the agreement, each ASEAN member state will be allowed a quota of 500 non-scheduled buses that will enjoy facilitated entry to or transit through other member states. Scheduled cross-border bus services covered under this agreement would still be subject to mutual agreement between adjacent AMSs on the routes, stopping points, number of buses, technical requirements and fares.

Like the aviation liberalisation process, details will take time to be finalised and phased in, but will eventually be implemented. The hardware is now in place, the software will follow.

Again, Thailand's unique geographical location will prove advantageous. Thailand is at the heart of the Asian Highway, a network of 141,000 kilometers of standardized roadways crisscrossing 32 Asian countries with linkages to Europe.

More than 5,000 kilometres of the highway runs through Thailand, from North to South and East to West. Beyond the immediate neighbours, facilitated road transport will allow Thais to drive further to India, China and Vietnam.

According to the UN Economic and Social Commission for Asia and the Pacific, a total of US$26 billion has already been invested in the improvement and upgrading of the Asian Highway network. However, there is still a shortfall of US$18 billion. The UNESCAP secretariat is now working with its member countries to identify financial sources for the development of the network to improve their road transport capacity and efficiency.

To further facilitate land travel within ASEAN, the ASEAN tourism ministers have also done studies to "Promote Development of Road Connectivity along Major Tourism Corridors". Unfortunately, the ASEAN secretariat does not release these studies publicly.

Marketing and promotion opportunities

The Thai outbound travel sector abounds with opportunities across multiple marketing and media formats which can reach multiple target markets.

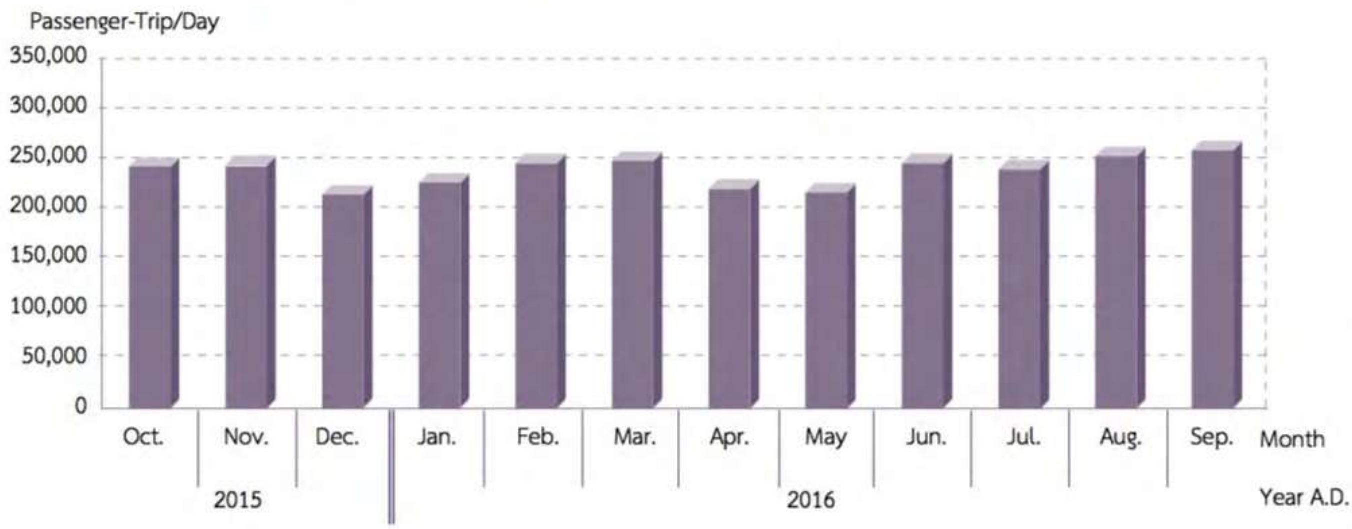
Bangkok Mass Transit Systems: Bangkok's two mass transit systems are used by millions of middle-class commuters every day. Prominent advertisers are airlines such as AirAsia and more recently the Traveloka OTA. It is an effective form of advertising as it allows the mobile phone users to swing into action while onboard train or waiting at the station.

Ridership of Bangkok Skytrain Mass Transit System 2017

Month	Total Ridership	% Change (YoY)	Average daily ridership
January	19,685,157	1.56%	**635,005**
February	18,906,338	-0.22%	**675,226**
March	21,469,176	3.51%	**692,554**
April	18,197,128	2.18%	**606,571**
May	19,303,645	4.51%	**622,698**
June	20,541,021	1.74%	**684,701**
July	20,178,041	-0.14%	**650,905**
August	21,402,153	0.76%	**690,392**
September	20,600,395	1.63%	**686,680**
October	19,352,649	-2.70%	**624,279**
November	21,078,853	5.31%	**702,628**
December	20,352,638	2.40%	**656,537**

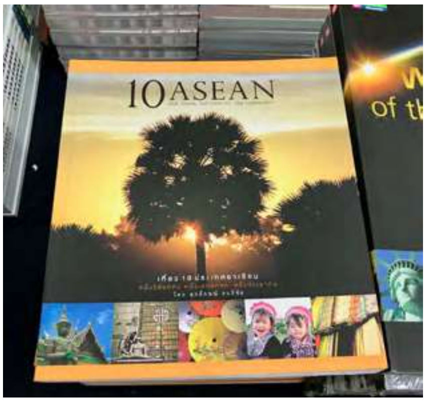
Source: BTS Group Holdings Public Company Limited

Average Ridership of the M.R.T. Chaloem Ratchamongkhon Line per Day



Source: Mass Rapid Transit Authority of Thailand

Television: TV channels have exploded since the introduction of Cable TV. Many have dedicated travel programmes and documentaries.



Newspapers and magazines: All the Thai media, both Thai and English, from the daily newspapers to the business publications, have travel sections in some shape or form, including supplements and classified advertising. Two dedicated travel publications are Checktour and DPlus Guide, both of which also have websites.

Department stores and shopping malls: Visited by several hundred thousand tourists and middle These are good places to hold more elaborate festivals. But they are complicated to organise, can prove expensive and their return on investment value is questionable. Newly opened department stores like Show DC are almost entirely dominated by Korean products, which gives them a competitive advantage. In July 2017, the Russian embassy organised a three-day festival of travel, culture, education at the Siam Paragon shopping complex to mark the 120th anniversary of Thai-Russian diplomatic relations. In January 2018, the Russian embassy again used the Siam Paragon complex as the venue of a photo exhibition "In the Cradle of the Russian civilization".

In November 2017, the Indonesian embassy organised an Indonesian Festival at the World Trade Centre, but made the mistake of holding it outdoors. An unexpected downpour drenched the entire pavilion for a day.

PR companies: Hiring a professional PR company is an effective and good-value way of generating quality communications and building brand awareness. Although the legacy media is undergoing a shakeout, new forms of media are emerging, all of which are potential recipients of well-targetted, focussed and interesting content.

Joint Venture promotions: Airlines, hotel groups and credit card companies, which have huge loyalty programme databases, are potential joint venture partners for tactical campaigns targeted at specific demographic and customer segments at specific periods. They can prove expensive but they are effective and focussed.

Popular Thai Websites: One of the most popular social networking websites is https://www.pantip.com/ which also has a dedicated travel section for users to exchange and offer guidance and advice.

Digital Billboards: These are the new rage in Bangkok. Strategically positioned at many of the inner-city's traffic-choked intersections, they are being used to good measure by Japan and Taiwan.

Radio: This is a popular media, with a wide variety of programmes covering everything from lifestyle and health to education and politics. Well worth trying via creative campaigns.

More information about Thailand's advertising scene can be gained here:

Digital Advertising Association of Thailand:
http://www.daat.in.th/

Advertising Association of Thailand:
http://www.adassothai.com/i

Public transport: Taxis and the upgraded new buses can also be used for advertising.

Advertising Expenditure in Thailand by Medium

MEDIUM
Exclude Section : Classified, House ads

YTD Dec 2017 VS YTD Dec 2016 BAHT MILLIONS

MEDIA	2017	SOV %	2016	SOV %	DIFF	% Change
ANALOG TV	40,966	40.38	47,151	43.69	-(6,185)	-(13.12)
CABLE/SATELLITE	2,913	2.87	3,450	3.20	-(537)	-(15.57)
DIGITAL TV	21,907	21.59	20,393	18.90	1,514	7.42
RADIO	4,476	4.41	5,263	4.88	-(787)	-(14.95)
NEWSPAPERS	7,706	7.60	9,857	9.13	-(2,151)	-(21.82)
MAGAZINES	1,943	1.92	2,926	2.71	-(983)	-(33.60)
CINEMA	6,807	6.71	5,445	5.05	1,362	25.01
OUTDOOR	6,391	6.30	5,667	5.25	724	12.78
TRANSIT	5,878	5.79	5,337	4.95	541	10.14
IN STORE	946	0.93	703	0.65	243	34.57
INTERNET	1,513	1.49	1,731	1.60	-(218)	-(12.59)
TOTAL	101,445	100.0	107,923	100.0	-(6,478)	-(6.00)

Source: Nielsen, Advertising Association of Thailand

New trend developments

Railway packages in South Thailand: In October 2017, Malaysian Rail Packages were launched at Hatyai Junction Railway Station, Songkhla. Tourism Malaysia and the Malayan Railways Limited (KTMB) jointly marked the 60th anniversary of Thai-Malaysian diplomatic relations by promoting the packages to travel agents in Southern Thailand. The target market segments were family travel, leisure-seekers, religious travel and shopping lovers. Starting at THB 4,451, the packages covered train experience, accommodation, meals, theme parks and city and night tours. Hatyai and Padang Besar Railway Stations were selected as the spots to link the borders.

Russia-Thailand Travel Club: In February 2018, the Russian Embassy inaugurated a Russia-Thailand Travel Club, as part of its "Visit Russia – Asia" strategy. The club was designed to create a captive-audience group of travel trade representatives to whom the Russian embassy can offer product updates. This is the next best alternative to opening a full-fledged tourism rep office.

Opportunities for short-break holiday marketing campaigns in 2018

This list gives a good idea of the long weekends coming up in 2018, to facilitate forward planning of marketing campaigns for short-break holidays.

Day	Date	Holiday
Thursday	March 01	Makha Bucha Day
Friday	April 06	Chakri Day
Friday	April 13	Songkran Thai New Year
Saturday	April 14	Songkran Festival Thai New Year
Sunday	April 15	Songkran Festival Thai New Year
Monday	April 16	Songkran Festival Thai New Year
Tuesday	April 17	Songkran Festival Thai New Year
Monday	April 30	Likely bridge Holiday before May Day
Tuesday	May 01	Labour Day
Friday	May 11	Royal Ploughing Ceremony (for Government offices only)
Tuesday	May 29	Visakha Bucha Day
Friday	July 27	Asahna Bucha Day
Friday	July 27	Buddhist Lent (for Government offices only)
Monday	July 30	H.M. King's Birthday (substitute holiday for July 28)
Sunday	August 12	Mother's Day
Monday	August 13	H.M. Queens Birthday Substitute Holiday
Monday	October 15	Anniversary of the Death of H.M. King Bhumibol (Substitute for Oct 13)
Monday	October 22	Likely Bridge Holiday before Chulalongkorn Day
Tuesday	October 23	Chulalongkorn Day
Wednesday	December 05	Father's Day (late King Bhumibhol's birthday)
Monday	December 10	Constitution Day
Monday	December 31	New Year's Eve

National Tourism Organizations & Marketing Representatives In Thailand

Although Bangkok's two airports are served by a total of 118 scheduled, charter and low-cost airlines, only 11 national tourism organisations maintain a permanent presence in Bangkok. Others cover Thailand through regional offices in Singapore, Kuala Lumpur, Hong Kong or Japan. In most instances, marketing is done by either the foreign airlines or the embassies or tour operators appointed as GSAs. Activities include roadshows, press conferences, and events to launch specific products and marketing campaigns.

This opens up a window of opportunity for NTOs to establish a strong presence in the emerging potential of the Thailand market.

1. **China National Tourism Administration (CNTA)**
   Olympia Thai Tower, 22nd floor,
   444 Rachadapisek Road, Samsennok,
   Huay Kwang, Bangkok 10310
   Tel: 02 541 4138

2. **Christchurch & Canterbury Tourism, Tourism New Zealand**
   c/o New Zealand Embassy
   14th floor, 87 M-Thai Tower, All Seasons Place,
   Wireless Road, Lumpini, Pathumwan, Bangkok 10300
   Tel: 02 254 2530

3. **Hong Kong Tourist Board**
   c/o World Discovery Travel Network Co., Ltd.
   9th floor, PB. Tower, 1000/28 Zone A-Z,
   Sukhumvit 71, Klongton, Wattana,
   Bangkok 10110
   Tel: 02 713 2283

4. **Japan National Tourism Organization**
   10th floor, Serm Mitr Tower, 159 Sukhumvit 21 Road,
   Wattana, Bangkok 10110
   Tel: 02 261 3525

5. **Korea Tourism Organization**
   25th floor, Unit 3, 399 Interchange Building,
   Sukhumvit Road, Klongtoey Nua, Wattana,
   Bangkok 10110
   Tel: 02 611 2731

6. **Malaysia Tourism Promotion Board**
   Unit 1, 3rd floor, Zuellig House,
   1-7 Silom Road, Bangrak, Bangkok 10500
   Tel: 02 636 3380

7. **Munich Tourist Office**
c/o Pacific Leisure Group
195 Empire Tower, South Sathorn Road,
Yanawa, Sathorn, Bangkok 10120
Tel: 02 670 1000

8. **Macau Government Tourist Office**
Marketing Representative Thailand
888/202 Mahatun Plaza Building, 3rd floor,
Ploenchit Road, Lumpini, Pathumwan,
Bangkok 10330
Tel: 02 650 9336, 081 849 2150

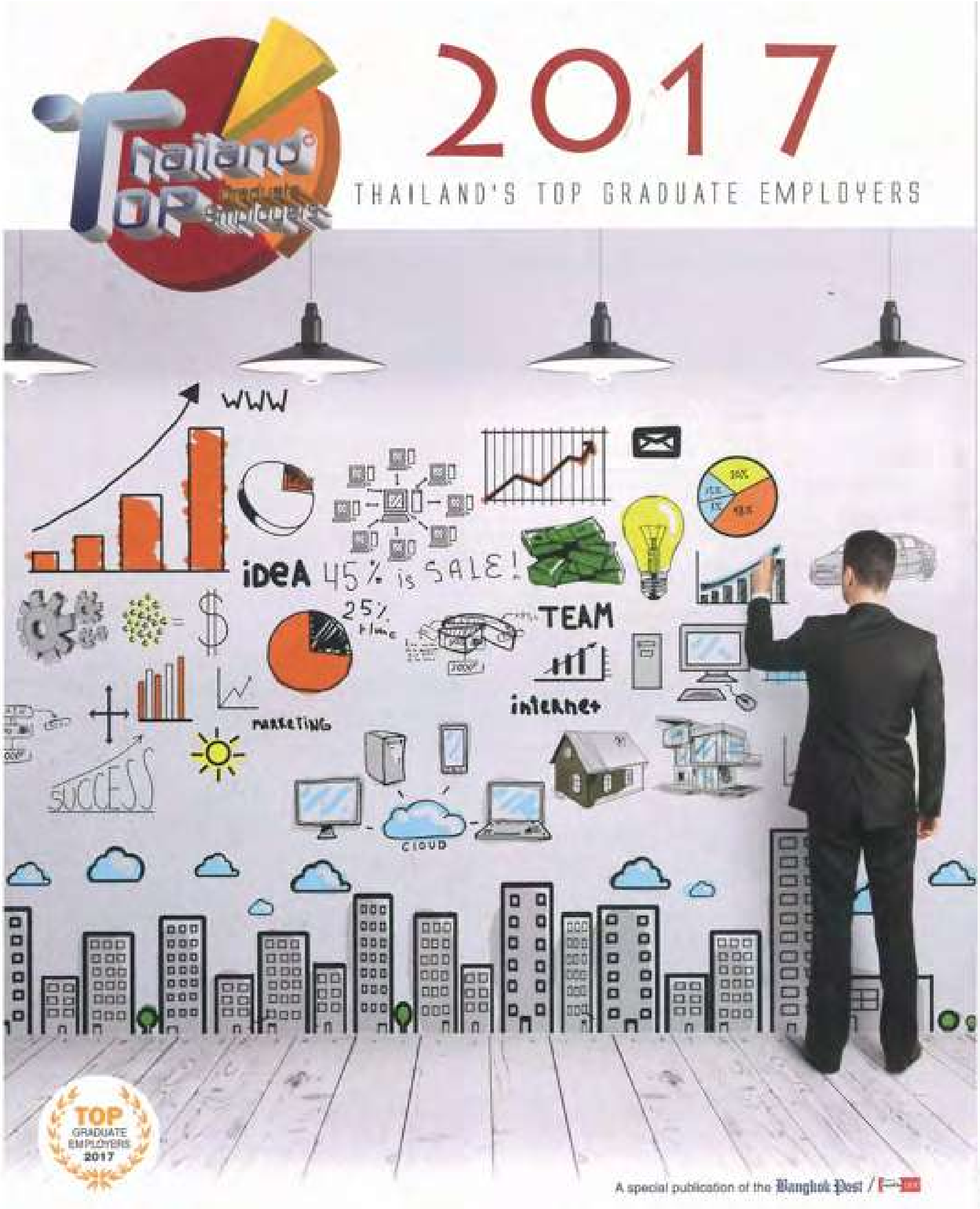
9. **Singapore Tourism Board (Thailand)**
Unit 1702-1703, 17th floor, Sathorn Square
98 North Sathorn Road, Silom, Bangrak,
Bangkok 10500
Tel: 02 108 1273 – 74

10. **Taiwan Tourism Bureau**
20th FL.,Empire Tower 195
South Sathorn Road, Yannawa
Bangkok 10120
Tel: 02 670 0200

11. **Fukushima, Japan (Representative)**
Yo & Francisco Co., Ltd.
109 C.C.T. Building, 3rd floor, Suriyawong,
Bangrak, Bangkok 10500
Tel: 02 634 3247

Thailand’s Top 200 Corporations

This listing compiled in a special publication by the Bangkok Post newspaper provides a good indicator of roughly 200 top corporations in Thailand, both Thai and foreign-owned, which employ high-income staff. They are captive-market opportunities for pitching incentives, training and education programmes, study trips and recreational holidays.



Thailand's Top Graduate Employers
Initial Survey as of 2017

Thailand's Top Graduate Employers (TTGE), established over a decade, is a valuable resource for master's graduates and professional career job seekers to provide in-depth and trustworthy recruitment data for Thailand's most highly reputed firms. It benchmarks Thailand's most recognised companies among high-caliber target professionals while Employers of Choice represents the most preferred companies among career seekers. A qualitative survey is annually conducted among the potential applicants in international academies of master's degree level and those in business whose ages are not over 28. Our initial survey result has indicated the most attractive corporations classified by different industries and the survey does focus on Fast Moving Consumer Products in different categories, only 3 most recognised brands and firms as the followings:-

CONGLOMERATES	CP	TCC Group	Intouch Holdings

CLASSIFICATION BY INDUSTRY			
Agricultural Products	CP	Betagro	Corn Products
Automotive	Toyota	Honda	Isuzu
Aviation Logistics	AirAsia	Bangkok Airways	Thai Airways
Banking & Finance	Kasikorn Bank	Siam Commercial	Bank of Ayudhaya
Chemical Products	PTT Chemical	Dow Chemical	BASF
Computer & Notebook	APPLE	DELL	LENOVO
Construction & Materials	SCG	Chor Karnchang	Italthai
Department Store	The Mall	Siam Paragon	Central
Electronics – AV	Samsung	LG	Sony
Electronics – Household	Mitsubishi	Daikin	Panasonic
Energy – Alternative	Banpu	Thai Solar Energy	Bangchak Corporation
Entertainment Content	Workpoint	BBTV (channel 7)	Bangkok Entertainment
Entertainment Venue	Major Cineplex	SF	Siam Paragon
Furniture & Built-in	IKEA	SB Furniture	Index Living
High Speed Internet	TRUE	3BB	AIS
Hospital-Private	BDMS	Bumrungrad	Samitivej
Hotel	Dusit Thani	Marriot	Centara
Language Institute	Wall Street	British Council	AUA
Life Insurance	AIA	Ayudhaya Alliance	Muang Thai
Logistics & Distribution	DKSH	DHL	Kerry
Media – Print	Thairath	Bangkok Post	Nation Multimedia
Mobile Phone	Apple	Huawei	Oppo
Non-Life Insurance	Bangkok Insurance	Viriya Insurance	Tokyo Marine
Oil Petroleum & Gas	PTT	Bangchak	Esso
Out-of-Home Media	VGI Global Media	JCDecaux	Three Sixty Five (365)
Pharmaceutical & Medical	Pfizer	Johnson & Johnson	Novartis
Power Plant	EGCO	Ratchburi	Glow
Prime Office	Park Ventures	Sathorn Square	Phirat Emquatier
Real Estate & Property	Sansiri	AP Property	Land & House
Retails Store	Tesco Lotus	7 Eleven	Big C
Software	Microsoft	Intel	Oracle
Sport & Fitness	Fitness First	Virgin	WE Fitness
Sportswear	Sport World	FBT	Grand Sport
Tyre	Michelin	Bridgestone	Goodyear
Utilities	EGAT	BANPU	EGCO

DIGITAL TECHNOLOGY			
Social Media	FACEBOOK	INSTAGRAM	TWITTER
Telecommunication	DTAC	AIS	TRUE
Airline Application	AirAsia	NokAir	Thai Lion Air
Application-Chat	Line	WhatsApp	WeChat
Electronic Commerce	Lazada	Alibaba	Line
Electronic Mail	Gmail	Hotmail	Yahoo
Food Delivery	Wongnai	Line Man	Eatigo
Hotel Booking	Agoda	Booking	Expedia
Live Television	Line TV	3 Live	Thairath
Mobile Banking	Kasikorn	SCB	Bualuang iBanking
Movie Application	YouTube	HOOQ	Netflix
Music Application	JOOX	TrueMusic	Apple Pay Music
Payment Gateway	mPAY	7-Eleven	Samsung Pay
Taxi / Car	UBER	GrabTaxi	AllThaiTaxi
Ticketing / Traveling	Traveloka	Trivago	Skyscanner

FAST MOVING CONSUMER GOODS (FMCG)			
Beverage	CHANG	Pepsi	Coca-Cola
	Thai Beverage	PepsiCo Drink	Coca-Cola
Canned	Select Tuna	Malee	Dole
	TUF	Malee Sampran	Dole Thailand
Coffee	Nescafé	Moccona	Birdy
	Nestlé	Moccona Thailand	Ajinomoto
Coffee Outlets	Starbuck's	Amazon PTT	Black Canyon
Cosmetics & Perfume	L'ORÉAL	Shiseido	Elca
Daily Consumable	Foremost	Meiji	Dutchmill
	FrieslandCampina	CP Meiji	Daily Plus
Drinking Water	Singha	Crystal	Nestlé Pure Drink
	Boonrawd Brewery	Sermsuk	Nestlé
Energy Drinks	M-150	Red Bull	Carabao Deaeng
	Osotspa	TC Pharmaceutical	Carabao Tawandang
Food & Restaurant	MK	Oishi	Fuji
Food Ingredient	Rod Dee	Maggi	Deksomboon
	Ajinomoto	Nestlé	Yan Wal Yun
Footware	ADIDAS	NIKE	Scholl
	Adidas Thailand	Nike Thailand	H & F Shoes
Frozen Food	CP	S&P	Prantalay
Green Tea	Oishi	Ichitan	Lipton
Hair Care	Sunsilk	Pantene	Feather
	Unilever	Procter & Gamble	Kao Commercial
Household Cleaning	Magiclean	Duck	Vixol
	Kao Commercial	SC Johnson	IP Manufacturing
Household Wash Items	Breeze	Attack	Downy
	Unilever	KAO Commercial	Procter & Gamble
Ice Cream	Wall's	Nestlé	Glico
	Unilever	Nestlé	Glico
Infant Health Products	Enfa	Dumex HI Q	S26
	Mead Johnson	Danone Thailand	Nestlé
Instant Dining Outlets	KFC	McDonald's	The Pizza
	Yum Restaurant	Mc Thai	Minor Food
Instant Noodle	Mama	Yum Yum	Wai Wai
	Sahapat	Wanchai – Ajinomoto	Thai Preserved Food
Lighting	Philip	Osram	Sylvania
Oral Care	Colgate	Paradontax/	Salz
	Colgate-Palmolive	Sensodyne Lion Corporation	Novartis
Personal Wash Care	Lux	Shokubutsu	Protex
	Unilever	Lion Corporation	Colgate-Palmolive
Pets Food	Pedigree / Whiskas	Alpo / Friskies	Smart Heart/MeO
	Mars	Nestlé	Perfect Companion
Skin Care	Vasline	Nivea	Be Nice
	Unilever	Beiersdorf	Bio Consumer
Snack Food	Frito-Lay	TaoKaeNoi	Koh Kae
Teen's Body Skin	Garnier	L'ORÉAL	Nivea
	L'ORÉAL	L'ORÉAL	Beiersdorf
Tissue & Napkin	Kleenex	Cellox	Lifree
	Kimberly-Clark	BJC	Uni-charm
Vegetable Oil	Morakot	Grape	Yok
	Morakot Industries	Thai Vegetable Oil	Lam Soon

Foreign Chambers of Commerce in Thailand

The Joint Foreign Chambers of Commerce in Thailand is the umbrella body for various Thai-foreign chambers or business associations operating in Thailand. As of January 2018, there were 30 chambers and business associations representing more than 9,000 companies.

More details about each chamber and membership can be found here: http://www.jfcct.org/

The JFCCT also has a dedicated tourism committee. Click here: http://www.jfcct.org/jfcct-committees/tourism-committee/

1. Armenian - Thai Chamber of Commerce
2. Belgian/Luxembourg - Thai Chamber of Commerce
3. Thai - Canadian Chamber of Commerce
4. Danish - Thai Chamber of Commerce
5. Franco-Thai Chamber of Commerce
6. German-Thai Chamber of Commerce
7. India-Thai Chamber of Commerce
8. Irish-Thai Chamber of Commerce
9. Japanese Chamber of Commerce
10. Korean-Thai Chamber of Commerce
11. Malaysian - Thai Chamber of Commerce
12. Mexican – Thai Chamber of Commerce
13. Netherlands-Thai Chamber of Commerce
14. New Zealand-Thai Chamber of Commerce
15. Singapore-Thai Chamber of Commerce
16. Thai - Christian International Chamber of Commerce
17. Swiss-Thai Chamber of Commerce
18. Thai-Chinese Chamber of Commerce
19. Thai-Finnish Chamber of Commerce
20. Thai-HongKong Trade Association
21. Indonesia – Thai Chamber of Commerce
22. Thai-Israel Chamber of Commerce
23. Thai-Italian Chamber of Commerce
24. Thai-Norwegian Chamber of Commerce
25. South African – Thai Chamber of Commerce
26. Thai-Pakistan Chamber of Commerce
27. Thai-Russian Chamber of Commerce
28. Thai-Sri Lanka Chamber of Commerce
29. Thai-Swedish Chamber of Commerce
30. Thai-Taiwan Business Association

International Schools in Thailand

The growing expatriate population in Thailand has led to a surge in demand for schooling for their children. Many upper-income Thai families are also sending their children to these schools in order to give them a more global perspective, foreign-language education and prepare them for tertiary studies abroad.

As of December 2017, Thailand had 133 international schools across various nationalities, languages and denominations. They are located in Bangkok and increasingly in key provincial cities such as Phuket, Samui, Chiang Mai, Pattaya and more.

These schools are excellent sources of study trips, exchange programmes, holidays and meetings. Their various inter-school competitions both within Thailand and around Asia also lead to both inbound and outbound travel.

Here is a full list of the schools registered under the International Schools Association of Thailand.

Further contact details of each are available at the website: http://www.isat.or.th/schools

More detailed info can be accessed here: https://internationalschoolsbangkokthailand.org/

1. ABC Pathways International Kindergarten
2. Adventist International Mission School
3. American Pacific International School
4. American Pacific International School (Primary)
5. American Prep International School
6. Anglo Singapore International School
7. Anglo Singapore International School Sukhumvit 31
8. Annabel's Early Years International Kindergarten
9. Ascot International School
10. Aucksara International School
11. Bangkok Adventist International School
12. Bangkok Christian International School
13. Bangkok Grace International School
14. Bangkok International Preparatory & Secondary School
15. Bangkok Patana School
16. Beaconhouse Yamsaard International School
17. Berkeley International School
18. Bloomsbury International School Hatyai
19. Bluewater International School
20. Brighton College International School
21. British Columbia International School Bangkok
22. British International School, Phuket
23. Bromsgrove International Primary School
24. Bromsgrove International School Thailand
25. California Prep International School
26. Cambridge College (Thailand)
27. Charter International School
28. Chiang Mai International School
29. Chiang Rai International Christian School
30. Chiang Rai International School

1. ABC Pathways International Kindergarten
2. Adventist International Mission School
3. American Pacific International School
4. American Pacific International School (Primary)
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6. Anglo Singapore International School
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29. Chiang Rai International Christian School
30. Chiang Rai International School
31. Christian German School Chiangmai
32. Concordian International School
33. Crescent International School
34. Ekamai International School
35. Garden International School
36. Garden International School, Bangkok
37. Global Indian International School
38. Grace International School
39. Hampton International School
40. Hana Christian International School
41. Harrow International School
42. HeadStart International School
43. Heathfield International School
44. Hua Hin International School
45. International Community School
46. International Pioneers School
47. International School Bangkok
48. International School Eastern Seaboard
49. International School of Chonburi
50. International School of Samui
51. IPC International Kindergarten
52. Kajonkiet International School Phuket

53. Keera-Pat International School
54. Kensington International Kindergarten
55. Kevalee International School
56. Kiddykare International Kindergarten
57. Kids Kingdom International Kindergarten
58. Kids' Academy International Pre-School
59. Kidz Village International Kindergarten
60. Kincaid International School of Bangkok
61. KIS International School
62. Lanna International School
63. Little Dragons International School
64. Lycée Français International de Bangkok
65. Magic Years International School
66. Manorom International Christian School
67. Melodies International Kindergarten
68. Modern International School, Bangkok
69. Modern Montessori International Pre-School
70. Montessori Academy Bangkok International School
71. Mooltripakdee International School
72. Mulberryhouse International Pre-Shool
73. Nakornpayap International School
74. New Bambino International Kindergarten
75. New International School of Thailand
76. New Sathorn International School
77. NIST International School
78. Niva International School
79. Norwich International School Bangkok
80. Pan-Asia International School
81. Panyaden International School
82. PPMAS-Singapore International School
83. Prem Tinsulanonda International School
84. Prep International Kindergarten
85. QSI International School of Phuket
86. Ramkhamhaeng Advent International School
87. RBIS-Rasami British International School
88. RC International School
89. Regents International School Pattaya
90. RIS Swiss Section
91. Ruamrudee International School
92. Saint John Mary International School
93. Saint John's International School
94. SCL International School
95. Seeh Phinong International Kindergarten
96. Shrewsbury International School
97. Siam International School
98. Silver Fern International School
99. Singapore International School Chiangmai
100. Singapore International School of Bangkok
101. Singapore International School Suvarnabhumi
102. Southern International School Hat Yai
103. St. Andrews International School Bangkok
104. St. Andrews International School Dusit
105. St. Andrews International School Samakee

106. St. Andrews International School Sathorn
107. St. Andrews International School, Green Valley
108. St. Andrews International School, Sukhumvit 107
109. St. Mark's International School
110. St. Stephen's International School (Bangkok)
111. St. Stephen's International School, Khao Yai
112. Talents International Pre-school
113. Tara Pattana International School
114. Thai-Chinese International School
115. Thai-Sikh International School
116. Thai-Singapore International School
117. The American School of Bangkok
118. The American School of Bangkok, Sukhumvit
119. The Early Learning Centre International School
120. The First Steps International Pre-School
121. The Regent's School, Bangkok
122. The Tiny Seeds International PreSchool
123. Theodore International School
124. Topsy Turvy International School
125. Traill International School
126. Trinity International School
127. Udon Thani International School
128. Unity Concord International School
129. UWC Thailand International School
130. Wells International Kindergarten
131. Wells International School
132. Wells International School - On Nut
133. Wesley International School

Conclusions

Here are some suggestions that could help Thai outbound tourism grow strongly well into the future.

1) Visa-free countries should step up their publicity and marketing

Many Thais are unaware of how many countries they can visit without a visa. Countries that give visa-free, visa-on-arrival and online visas to Thai citizens are not doing enough to promote themselves. Japan set a very good example by becoming the first to publicise the visa-waiver immediately following its implementation in 2013 and convert it into a first-rate marketing opportunity.

As destinations such as Europe, North America, Australia and New Zealand still impose stringent visa restrictions, high fees or onerous and complicated paperwork, the visa-free or visa-online destinations are well-placed to exploit the clear window of opportunity. Three of the most high-potential areas are Latin America, Africa and Russia.

Latin America – Countries which give visa free access to Thai citizens include Peru, Ecuador, Brazil, Argentina, Chile, Panama and more. Colombia gives conditional visa-free access to holders of valid Schengen or US visas. This provides a wide-open opportunity for these visa-free Latin American countries to step up their joint marketing efforts in Thailand. Latin American tourism promotions in Thailand are rare. Apart from an occasional booth by Latam Airlines there has never been a prominent Latin American presence at the Thailand International Travel Fair. Varig Brazilian Airlines once flew to Bangkok but stopped the flights due to lack of commercial viability. This may change in future as the Tourism Authority of Thailand is looking into opening a full-fledged marketing office in Sao Paulo. Indeed, Latin American countries need to boost their marketing presence in Thailand and the entire ASEAN region. More awareness building campaigns in cooperation with the travel trade, airlines and their respective embassies will boost two-way tourism flows and enhance South-South economic linkages.

Africa – The Royal Thai Government is working independently as well as with the ASEAN countries to expand economic, trade, travel and transportation linkages with Africa. Airlines flying to Thailand include Ethiopian Airlines and Kenya Airways. South Africa is one of just a few African countries which gives visa-free access to Thai citizens. Negotiating more visa-free access with other countries would open up more access right across Africa, enable more flexible tour operating opportunities and enhance the attraction of the region as a whole.

Russia – Russia is moving strongly to exploit its visa-free access advantage. Led by its pro-active Ambassador Kirill Barsky, a Russia-Thailand Travel Club has been set up. Thai Airways International and Aeroflot both fly to Moscow, but there is potential to add more cities in Russia.

2) Visa requiring countries need to simplify the application processes

The visa application processes for Europe, the UK, the U.S., Canada, Australia and New Zealand are insulting, offensive and expensive. Nearly 90% of the documentation required is identical, with complicated variations in the rules and regulations. Technologically, it should be possible for some kind of a single-visa system to be worked out. Aside from being a money-spinning profit centre, it is not clear what security or immigration threats these visa-requiring countries are hoping to alleviate. Some of the questions asked in the application forms are totally irrelevant. The requirement for proof of financial support is also questionable in an era when thousands of well-off Thais are well armed with credit cards and far better off financially than citizens of the visa-requiring countries.

South Asia as a whole gets dragged down because only Maldives gives visa-free access to Thais. India, Pakistan, Bangladesh and Sri Lanka all require visas. Although India and Sri Lanka have on-line visas, cumulatively, the cost and time factors involved in getting visas reduces the appeal of these countries vis a vis competing countries.

3) More ASEAN countries need to open tourism offices in Bangkok

All nine member countries of ASEAN allow Thai citizens visa-free access. Given their geographical proximity via land, air and sea, this should make the ASEAN countries the most promising destinations for Thai outbound travellers. Unfortunately, that is not the case. In recent years, Japan, Korea and Taiwan have opened visa-free access for Thais, which has enhanced their popularity significantly. Along with Hong Kong and Macau, these Northeast Asian countries are gaining market share.

Of the 10 ASEAN member countries, only two have full-time tourist offices in Thailand – Singapore and Malaysia. The remaining ASEAN countries need promotional chapters or tourism offices to step up marketing in cooperation with airlines, embassies, chambers of commerce as well as non-traditional sources such as culture clubs, museums and universities. In addition to the traditional hard-sell marketing campaigns, ASEAN-focussed lectures, music performances, shows, culture, art exhibitions, food festivals would go a long way towards enhancing ASEAN economic and socio-cultural integration by promoting intra-ASEAN travel, one of the over-arching mandates of ASEAN integration.

4) Upgrade the quality of the TITF

Now in its 11th year, the bi-annual show remains a three-star dumping ground for mass-market targetted travel deals. The absence of many big-ticket destinations, airlines and hotel groups is proof of its mediocre quality. More market briefings and insights to attract the trade, MICE event organisers, niche-market specialists such as adventure operators and religious tourism experts could help enhance its value. Some recent actions include a business networking session and a half-day seminar. But a full-fledged one-day conference with some meaningful topics and discussions would take it to a higher level. Having all the visa-free or visa-on-arrival countries exhibit in one pavilion under one common theme would also attract enormous attention.

There is a clear opportunity for another trade show specifically targeted at the rapidly emerging market of more sophisticated and well-travelled, upper-middle class Thais and expatriates.

5) Upgrade the quality of the TTAA website

The TTAA website is of poor quality, the English version even worse. Revamping and redesigning it would make it a central hub of information on Thai outbound travel rather than just a mediocre source of news on TTAA activities. This will only happen if and when the TTAA realises the importance of seriously investing in upgrading the professionalism of its communications platforms.