

B



Does zero-dollar tour help Thai economy?

The case of Chinese tourists in Thailand

Wirot Siri-Angkanakul

5704642601

Bachelor of Economics, International Program

Thammasat University

Asst. Prof. Dr. Wanwiphang Manachotphong

EE 489 Seminar in Industrial Economics

Semester 2/2017

Contents

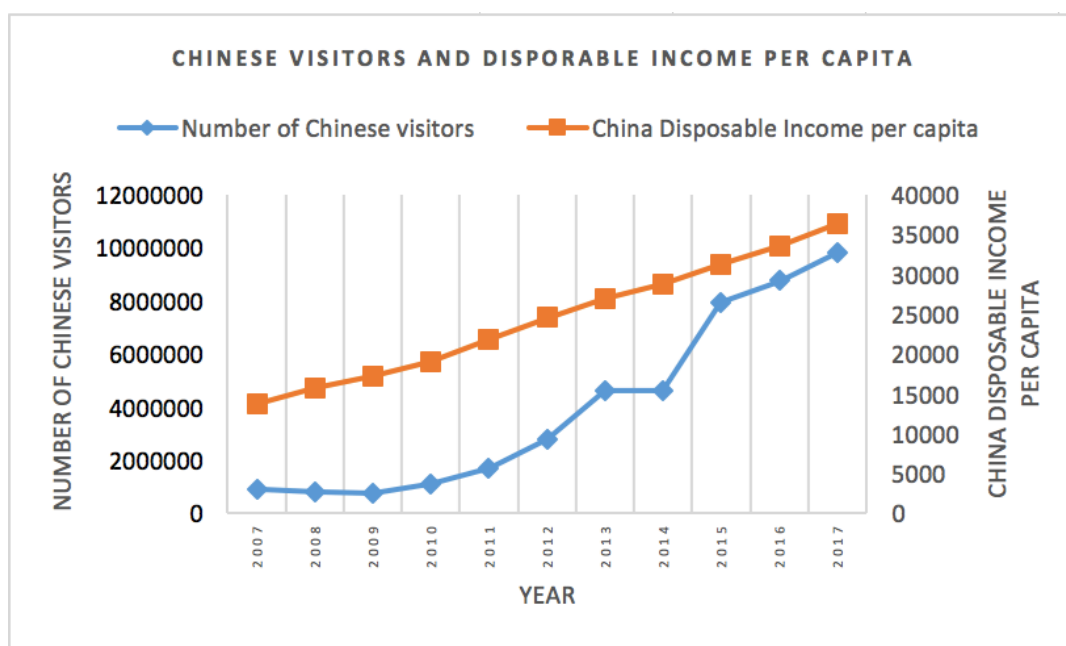
Contents	1
Abstract	2
Introduction	3
Literature Review	5
Methodology	8
Results	9
Zero-dollar tour versus Free Independent Travel	9
The Structure-Conduct-Performance (SCP) Paradigm	9
Further focus for Thailand's inbound tourism market	13
Evidence from empirical research	14
Turkish Governmental support on an inbound tourism industry	16
Conclusion	17
References	19
Appendices	22
Chinese Tourist Personas	22
Zero-dollar tour usually receives money from 3 Channels	23
Tourism Receipts of Thailand: China and other potential countries	24
Questionnaire to 5 shops	25
Shop 1	25
Shop 2	26
Shop 3	27
Shop 4	28
Shop 5	29

Abstract

Chinese tourists are coming to Thailand in many different ways, but for the past decades, a zero-dollar tour has become more popular and taking a significant portion of Thailand's inbound tourism market. As the research from scholars is implemented, the Structure-Conduct-Performance Paradigm is conducted to do an in-depth analysis of zero-dollar tour, with gathering relevant information as well as conducting interviews. We can see that zero-dollar tour does not benefit Thailand's economy even though it involves many parties, but all of them are Chinese-owned enterprises. If trace the flow of the money, it will go right back to Chinese's pocket, not Thai's. A case study from Turkey will be discussed in the paper for recommendation as well as Thailand should also focus on other types of inbound Chinese tourists, for example, free independent travellers, which will directly have positive impacts on Thai economy or focusing on other potential nations that have high purchasing power.

Introduction

Chinese considers Thailand as a country where there are so many differences from China yet comfortable to travel to. Chinese is a group of people who enter Thailand the most for many years now. The number of Chinese tourist in 2007 was less than a million visitors, but in 2017, there were more than 9 million visitors entered Thailand, with a jump by twice of visitors from 2012 to 2013, influenced by the movie 'Lost in Thailand', premiered in December 2012.



Reference: Department of Tourism Thailand and National Bureau of Statistics of China

As you can see, there is a positive relationship between number of Chinese tourists to Thailand and China's disposable income per capita. As China opens its country, people get more jobs and get payment check at the increasing rate throughout the years. Urbanization of people moving into the city has been a significant factor towards getting more job positions. As people getting richer and more productive, travel is one of the sign to show their wealth and pleasure from the middle class and higher classes, and even companies are given out tour packages to Thailand to their employees as an incentive to do a better job.

Visitors from China can enter Thailand through many channels. They can get VISA from the closest Thai Embassy. Some of the Chinese tourists come to Thailand not to travel

only, but a lot of them come to seek an opportunity to do business, for medication, or even media tourism that Thailand is keen on. There are many different ways for them to travel which are a full-trip tour, free-independent travel, and even paying super cheap promise for free food and accommodation so-called "zero-dollar tour". Zero-dollar tour is when the tour packages are sold at the little price, and sellers are focusing on quantity sold, but the tourists do not know that when they arrive in Thailand at first glance, the treat from (illegal) tour guides could hurt their image of the destination. Tourists often come in a large group then travel for a couple of days, and they need to purchase products or services from Chinese-owned shop, if they do not purchase, they could be holding up on the bus or not given hotel keys, the worst case is that they will be laid off with a little knowledge of Thailand and substantial language barriers to communicate.

In this paper, I will do an in-depth analysis on what zero-dollar tour is, its structure to see whether that it helps Thai economy or not, and how to improve economy by tourism, with a hypothesis that 'It does not help much since it relates to illegal activities and Chinese-owned supply chain. It hurts the image of Thailand in the eyes of foreigners coming into Thailand'.

Literature Review

Nowadays, Thailand has gained more popularity over tourists across the globe, since there are interesting sights to visit, great food, and great hospitality. However, one of the biggest nations that have come to Thailand is Chinese. China has just recently opened its country, as Chinese having money in their pocket and ready to spend, Thailand has become one of the first choices for them to travel on their abroad experience. They are mostly taking trips to visit places as much as possible in a short 4 to 6-day trip (Chetanont, 2015). The number of tourists has increased by 8.8% from 2016 to 2017 at 35.38 million people, which accounted for almost half of Thai population (Xinhuanet, 2018). In that number, Chinese tourists were accounted for 9.92 million, which had the increased of 13.23%, making more of the tour groups from Mainland China to increase as well. By traveling in groups, they exposed to the minimal of Thai environment (Cohen, 2014).

Zero-dollar tour has been dominating tourism industry since the beginning of its invention. Many of the Chinese might not understand true meaning and what is hidden under low price, which comes the expensive payment during the stay. Zero-dollar tour is a tour where agencies sell prepaid, inclusive tours, that are priced cheaper than usual which can be below the operational cost, then they are sent to Thailand with a drag from illegal tour guides to shops and sights which those tourists need to pay by tactics of illegal tour guides, for commission (Wang et al., 2015). However, nowadays, Chinese has been changing the trend of traveling to Thailand slowly, by being more free-independent traveller or FIT, which the Tourism Authority of Thailand (TAT) was impressed by (Bangkok Post, 2011). As mentioned that Chinese zero-dollar tour has been very popular in Thailand, but there are other countries getting impacts on this as well. Russia has a very close political relationship which attracts more Chinese tourists, but those tourists contribute none or little to the local economy as they are eating at Chinese-owned restaurants and buy rooms in bulk at meager

prices. Vietnam is another country suffering on this, but the country has banned non-Vietnamese tour guides from helping ease the problem somehow.

Of course, once there are many Chinese coming into Thailand, it must have the negative side of the event. Many people mentioned terrible points of having many Chinese tourists into the country as they present their not-the-best behavior abroad. The Chinese government tried to eliminate or ease down the problem by writing a guide of traveling abroad. However, the situation got worse when it spreads into social networks and press, conflicting with the way of life of Thai and some customary norms. For example, not flushing toilet, not getting in lines, or even talks loudly in public (Yongcharoenchai, 2013). According to Xu and McGehee (2016), lousy manner situation is mainly performed by the older generation. Cultural sensitivity is being perceived and concerned by the younger generation more. In the end, Thailand still needs to tolerate with Chinese bad manners in the country to compensate the loss of revenue in the weak capital exports.

Sparks and Wen Pen (2008) states about understanding attitudes, constraints, and use of information sources of Chinese tourists paper that the primary source of information comes from lifestyle media or television programs to see the image of the destination, then the list go down to word-to-mouth from friends and family and internet, respectively. From the survey conducted over 500 observations to see the behavior of the Chinese, the result suggested that more than half of the respondents took a trip outside China less than once a year and more people are willing to purchase packaged tour than another type of traveling.

According to Xu and McGehee (2016), they mentioned zero-fare tour, which purposed tour guides problems under zero-dollar tour, and Minus-fare tour. Tour guides face risks of pressuring tourists into facing driver problems, optional tour, and shopping issues. It induces the lack of trust between the employer and guides as tourists pay a minimum fee to cover the cost of the tour (Xu & McGehee, 2016). Zero-dollar tour first appeared in Thailand

around 1996 bounded by the Chinese, according to Baidu Encyclopedia (2013). Money that tourist paid is transferred to outbound tour operators (OTOs) in China, not the inbound tour operators (ITOs) in the destination which in this case is Thailand. ITOs rely on income from commissions and kickback from an extra or even unexpected expenditure from tourists.

To be able to understand the effect of tourism in Thailand, we need to focus on the expenditure of international tourists contributed. Thailand has been ranked in one of the top destinations by people around the world. According to Pongsirirushakun and Naewmalee (2013), international tourists in Thailand spend relatively low to other Asian destinations but tends to stay longer. The investigation in this topic is divided into two parts where one is due to a macroeconomic factor, and the other is tourist profiles. It was founded one of the significant effects on the macroeconomic factor. Income and price are significant as well.

Methodology

This paper will be mainly focused on Thailand inbound tourism market, and zero-dollar tour from China to Thailand as tourists from China to Thailand can be traveled through many different channels. The analysis will be proposed using the Structure-Conduct-Performance Paradigm to describe an in-depth detail of zero-dollar tour as we need to know what it is and how it does business in Thailand. Later in the paper, I will analyze the spending of Chinese tourists while traveling in Thailand, in a unit of a person and also the total receipts from Chinese from Department of Tourism Thailand and National Bureau of Statistics of China, then compare with different nationalities traveling in Thailand as well. Data could explain some parts of contribution to Thai economy, whether to keep focusing on Chinese tourist or to change the potential nation.

As having zero-dollar tour in Thailand, I would like to see who gain and who lose from zero-dollar tour, concerning quantitative and qualitative, and does it help Thai economy or not. Information and data will be gathered by researching from educationists, government agencies (For example, Thailand Tourism Authority and Royal Thai Embassy), news, and travel agencies, as well as gathering information by interviewing people who involve in tourism, and entrepreneurs.

Results

Zero-dollar tour versus Free Independent Travel

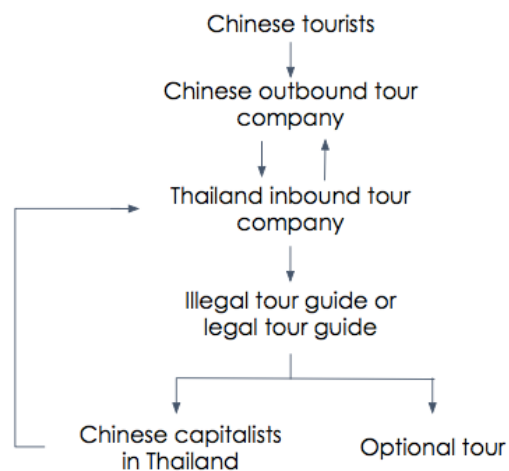
To deeply understand the nature of Chinese outbound tourism market, the research from Chinese International Travel Monitor 2017 by Hotels.com says that Chinese tourist personas can be proportioned into five broad groups, referencing to '*Chinese Tourist Personas*' in Appendices.

Chinese outbound tourism market trend has changed throughout the years depending on the age of the traveller. There is an increasing trend from teenagers to travel by FIT or Free Independent Travel using technology to plan their itineraries. Parties related to FIT could be an online travel agent, social media, and companies or business in Thailand that they can contact directly.

As you can see that it has so much different parties relating to FIT versus zero-dollar tour. Zero-dollar tour relates with many more people involved and entirely in a different structure as it will be mentioned in the next section.

The Structure-Conduct-Performance (SCP) Paradigm

In the analysis of zero-dollar tour by using Structure-Conduct-Performance Paradigm, structure of outbound traveling market for Chinese is categorized as 'Differentiated Oligopoly'. It is categorized to zero-dollar tour, what we are focusing on, full-trip tour, and free-independent travel where it is mentioned in the previous section. Each category gives a different way of traveling into the country.



The structure of zero-dollar tour will affiliate with the Chinese tourists itself, Chinese tour company that will advertise to attract the tourists then sell a whole group of them to tour company in Thailand, which mostly is Chinese owned. Those companies in Thailand will hire a tour guide that can speak Chinese, which could be an illegal tour guide. Once tourists arrive in Thailand, tour guides will take them to places including Chinese-owned shops. Those shops could be jewelry shops, leather shops, or even shows that are rated. Tourists will be charged at the over-priced or the extreme price in order for a tour company in Thailand to make money to pay for their travel, accommodation, and costs related, and to make a profit. Besides, tour guides will receive commissions from those shops and operator of optional tour.

Since 2015, 15 companies had been shut down and revoked their licenses. Those companies were using 'nominee' to set up a company in Thailand. The method to do this is to use fake ID card of Thai with a picture of Chinese entrepreneur on it. In 2015, the data showed that 70% of Chinese traveling to Thailand in group tours and that 80 % out of 70% coming in group tours were zero-dollar tours. There are barriers to entry since they need to use nominee to collaborate with Thai laws, inducing less competitiveness. It is hard to enter zero-dollar tour market because there are laws and regulations to collaborate with Chinese tour company in China as well. Language barriers are significant as well since English is not

the language that Chinese uses widely, so Chinese language is an essential key to stay in business. The focus from uncertified tour groups is to capture the quantity of Chinese traveling into Thailand via zero-dollar tour as they try to achieve economies of scale. For example, tourists in a group are often fly via charter flights. Once the Chinese outbound tour company receive flight schedule, the more people to fill up seats, the better they save the cost of that particular flight.

Zero-dollar tour gives an entirely different style of traveling relatively to full-trip tour, where it has a well-developed program, taking tourists to quality places and giving the most satisfaction to tourists. The program will include great hotels, great food, excellent services and none of forcing to shop, whereas zero-dollar tour is the opposite. Full-trip tour will focus on the quality of traveling rather than the quantity of traveling.

If to see barriers of the full-trip tour, it is quite high since they must have licenses, similar to zero-dollar tour, and the number of players is quite a lot. It is even more competitive. This is one of the reasons why there is an invention of zero-dollar tour to compete on attracting Chinese tourists, and even you have to suffer some loss or buy the headcounts of Chinese tourists from outbound tour operators from China.

Looking at conduct, in the price competition, using Entry-Limit Pricing should be the best choice because, for entrants to entry, they need resources from both Thailand and China. Zero-dollar tour is generally sold at the meager price and categorized in a price-driven market, where price equals only the price of a flight. Bangkok Post had an interviewed with Chart Chantanaprayura, president of Professional Tourist Guide Association of Thailand, and stated that an online package of 3-4 days is priced at 699-800 Yuan (3,500-4,000 Baht) a person who is only a half of minimum rate that China National Tourism Administration or CNTA sets. (Bangkok Post, 2017). It is apparent that it does not cover other cost components,

leaving the choice of charging more from optional tours and if tourists do not follow what tour guides, they could be punished in one way or another.

For the non-price competition, distribution channel, as language barriers are high for Chinese, they often book packages through travel agents directly or use Chinese platform to book. For example, AliTrip and C-Trip. Also, WeChat, possibly one of the most influential communication tools in China with around 650 million active users, can be used in many different ways. Using WeChat official company account for a direct way to reach the customer and spread out promotions about the tour packages. Tour companies often make deals with low-cost airlines and airlines to do charter service directly between different airports in China and Thailand. Zero-dollar tour receives commission from 3 channels, through shops, through optional tours, and through shows. An in-depth details on each channel is provided in '*Zero-dollar tour usually receives money from 3 channels*' in Appendices.

For performance, zero-dollar tour company often receives much profit due to commissions, tax evasion, money laundering and volume sales. It attracts more of illegal operations from new companies establishing into zero dollar tour business. The tour does not have much of the quality compare with traveling to Thailand in a full-trip tour or by free independent travel. Tourists coming into the country with zero-dollar tour often forced to purchase products and optional tour at the higher price than it should be so consumer surplus has been decreased. Adaptation of zero-dollar tour will not be significant because there is no incentive to do so. It is a repeating action of advertising trips, take tourists to fly to a destination, forcing tourists to purchase at the high pricing, then send them back to China.

Further focus for Thailand's inbound tourism market

From the table of *'Tourism Receipts of Thailand'* in Appendices, referencing from Ministry of Tourism and Sports, I have chosen China and other potential nations that come to Thailand with a daily spending per capita higher than Chinese daily spending per capita from the year of 2013 to 2016. 2013 is the year that Chinese came to Thailand with twice the number of tourists arrival than the year before. They spent 5,097.20 baht a day on average within 8.04 days stay. However, eight other nations spend more than Chinese spending. Still, Chinese ranked number 1 on total tourism receipts of 188,912.67 million Baht, deriving from China has more people travel to Thailand. This is a repeat action from the year 2013 to 2016. Unsurprisingly, Thailand received tourism receipts from the Chinese with an increasing growth rate. The growth from 2013 to 2016 was about 142% in Chinese tourism receipts along with 91% of the number of Chinese arrivals. We can see that to focus on Chinese tourism is a good thing because they bring money into Thailand, but the question here is that is it worth focusing on Chinese arrivals this much or not.

'Quality Leisure Destination through Thainess' is a campaign promoting to Arabian Travel Market, where UAE, Saudi Arabia, and Kuwait are the countries that are coming into Thailand a lot. They mostly spend money on traveling in a luxury tour, and health care as Thailand is known as a medical tourism hub. Medical tourism is bringing much money into Thailand since it contributes the most value-added comparing to other types of tourism. From the data, those nations tend to increase their spending from year to year. So, they should be considered as the very high trends of potential.

Another fascinating country is Australia, even though they tend to spend less than China in 2016, but the total receipts are still relatively high. We can see the potential of promoting Thailand to become a dream destination to the Australian since it is a big country

with a population of 24.13 million people and it is not too far from Thailand with an entirely different culture. Majority of Australian gets four weeks of vacation a year, so they often travel on vacation with more days. This country has a vast potential to help Thai economy with convenience and cheap flights to travel from Australia to Thailand.

Another three countries that I would say they are potential outbound tourism markets are the United Kingdom, USA, and Russia. Those three countries might not have higher daily spending per capita than China, but they have a longer length of stay in days as they live further across the world. The UK has an increasing trend of total tourism receipts. It is shown that if we promote them to come to Thailand more, it will benefit Thai economy much. USA tourism receipts in Thailand has been stable from 2013 to 2015, but in 2016, it jumped from 55,577 million baht to 67,124.98 million baht, which we should take a look further in the future.

Russia is a very interesting country with a population of 144.3 million people. In 2013 and 2014, they spent a huge amount of money in Thailand, 122,501.98 million baht and 112,699.95 million baht, respectively. It is almost a half of Chinese spending in Thailand, but the number of tourists arrivals are a quarter of Chinese arrivals only. In 2015 and 2016, the spending from Russian tourists dropped dramatically along with a reduction of the number of tourists as well. Even though it is due to domestic problems of bankruptcy and loss of income for Russians, but it is essential to create strong confidence and promote Russian tourists to come back to Thailand.

Evidence from empirical research

I have conducted 4-question interviews from 5 shops around the Grand Palace and surrounding area to see an effect of Chinese tourists in the overall and zero-dollar tour, as well as the impact of Chinese tourist to Thai economy in their perspective. The shops range

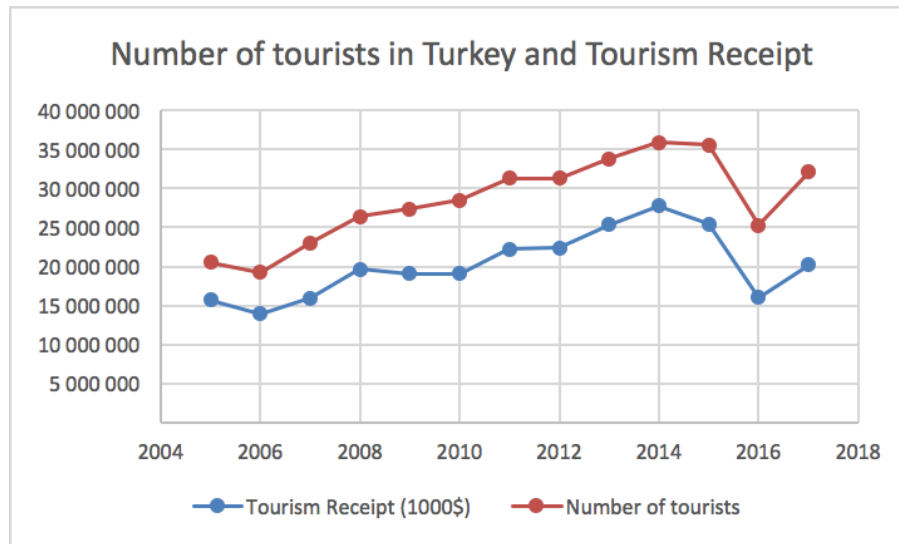
from food cart to restaurant and souvenir shop. It is interesting that 2 of them has a little knowledge about Chinese tourist and give almost to none of the opinions to the interview conducted, possibly they are workers from the neighboring country, meaning they have almost none of any interesting answers. However, other three shops gave matching ideas with myself on the hypothesis earlier.

On the first question, "Do you have any Chinese customers?", All 3 shops have Chinese customers coming into their shops. The second question is "Do you know zero-dollar tour?" which 2 out of 3 shops said yes and explained the correct definition of them. On the third question, "Do you get any benefit from Chinese tourists in a group of zero-dollar tour? Also, how?". The coffee shop answered yes, and it follows the goal of the shop as they cannot categorize which type of Chinese tourists are. The fruit cart answered not much because tourists coming with zero-dollar tour have their shops which are Chinese-owned and they do generally not purchase from her fruit cart much. The restaurant answered none because the same reason as the fruit cart but the owner added zero-dollar tour group does not enter her shop at all except the tourists coming as Free Independent Traveller. However, before, about 7-8 years ago, there was zero-dollar tour group coming into her restaurant which brought by a tour guide.

So the last question is "By having more Chinese tourists traveling to Thailand, what is the impact on Thai economy?". The coffee shop answered that when tourists are coming into Thailand, it undoubtedly create a positive effect more than an adverse effect. The fruit cart answered none because they have their supply chain, so they only benefit themselves. The restaurant said it seems to be a positive for the airport and the state, but the SMEs are none, and they only go to their shops in the chain, and most of the tourists are from rural area, as before coming to Thailand, it seems like they were programmed by tour guides saying that when you are in Thailand, you should eat only this and that. So, it naturally scoped out things

that tour does not want to interact with as tour guide take a quick walk not giving much time for tourists to purchase products.

Turkish Governmental support on an inbound tourism industry



Reference: Ministry of Culture and Tourism, The Republic of Turkey

Just before entering 2016, the thriving tourism brought in revenue equal to 3.7% and directly generated 600,000 jobs and another million jobs in the related sector. Turkish inbound tourism industry has suffered in 2016 due to an increase in terrorist attacks and political conflict with Russia. The number of inbound tourists arrival, from the graph above, has dropped by 29.01% from 35,592,160 to 25,265,406 in just one year. The Turkish government responded by implementing a policy to subsidize flights traveling to Istanbul Atatürk Airport and other main airports in the country by \$6,000 fuel subsidies per flight to a group of travel agencies operating at 10 or more airports. Cruise ships with a capacity of at least 100 people are also being subsidized for \$30 a person. From the graph, in just one year after policy implementation, the number of tourists has gone up to 32,079,527 people, which can be seen as quite successful and to continue using this policy in 2018 as well but the subsidizing money is subject to be changed according to the period of travel and cities. Tourism receipt has gone up by more than 25% in 2017 but still lower than 2015. The policy has gained tourists not just in Istanbul, but also in other cities, such as Antalya, Bosphorus, and port cities.

Conclusion

From the research for this paper aiming to see whether it helps Thai economy or not, it is hard to say there is undeniable evidence saying that it helps nor does not help the economy, it can be seen as controversial. Admittedly, there will be a small benefit on Thai micro-economic such as vendor market and small shops around tourist attraction or along the street, but in the tiny group. They have a positive impact on revenue of tourist attractions. For example, to enter the Grand Palace, a foreign tourist need to pay 500 Baht a person, so it generates a revenue stream to that particular place.

However, zero-dollar tour undoubtedly creates a bad reputation for Thailand in the long run. That kind of tourists does not get much of utility while they are here in the country since they are forced to buy products and services, if not they will be punished. Also, those shops that zero-dollar tour often go to, it is a Chinese-owned shop where the money or income will flow back to their motherland, without paying taxes to compensate the loss of reputation and resources of Thailand, as well as hotels and restaurants. In the long run, Thailand tourism industry will be perceived as aiming to be more of 'cheap destination' rather than being 'quality destination'. It spread widely by word-to-mouth to not just to people in China, but people across the World as well. If to see whether there is zero-dollar tour from another country or not, the answer is 'Yes', but the difference is those in another country are set up by its government, not the ones set up by 'nominee' in Thailand. So, it generates more of the positive impact and can keep track of them quickly.

The free independent traveller is mostly the younger generations who use technology as a tool of their traveling, and they will surely help Thai economy from the small shops to the large ones. Full-trip tour has been contributing to Thai economy, as the ones coming with zero-dollar tour does not contribute.

By holding the assumption of 'It does not help much because it relates to illegal activities and Chinese-owned supply chain. It hurts the image of Thailand in the eyes of foreigners coming into Thailand', as it has been proved from the study that it is true. Money that flows within the zero-dollar tour can be traced back to China, and not much has been contributed to Thai economy.

Many other countries have potential to make Thailand as their dream destination, such as the United Kingdom, USA, and Russia. These countries have many tourists coming into Thailand already, but there could be more in the future given that they have high spending per capita during their stay in Thailand.

For recommendation under the case of Turkey, we can see that it improves the economy and promote inbound tourism industry, which Thai could take as a lesson to help our economy. Thailand may able to promote culture and uniqueness of the smaller cities similarly to be successful as what Turkey did. Another recommendation would be if Thailand were to have zero-dollar tour, it should be set up by Thai government so it can be checked and qualified. It is essential to crack down Chinese zero-dollar tour strictly.

References

- Arlt, W. G. (2008). Chinese Tourists in 'Elsewhereland': Behaviour and Perceptions of Mainland Chinese Tourists at Different Destinations. *Asian Tourism*, 135-144.
doi:10.1016/b978-0-08-045356-9.50016-3
- Arlt, W. G. (2007). *China's Outbound Tourism*. London: Routledge.
doi:10.1016/j.tourman.2007.07.004
- Barbosa, N. (2017, May 18). Evolution of New Tourism Feeder Markets in Thailand.
Retrieved from <http://syndacast.com/evolution-of-new-tourism-feeder-markets-in-thailand/>
- Cai, L. A., Li, M., & Knutson, B. J. (2008). Research on China Outbound Market: A Meta-Review. *Journal of Hospitality & Leisure Marketing*, 16(1-2), 5-20.
doi:10.1080/10507050802096778
- Chinese International Travel Monitor 2017. (2017). *Hotels.com*. Retrieved from https://www.ipsos.com/sites/default/files/ct/publication/documents/2017-08/CITM_2017_Report_English.pdf.
- Gao, H., Huang, S. (., & Brown, G. (2017). The influence of face on Chinese tourists' gift purchase behaviour: The moderating role of the gift giver–receiver relationship. *Tourism Management*, 62, 97-106. doi:10.1016/j.tourman.2017.03.013
- Hazel, Y. X., & McGehee, N. G. (2016). Tour guides under zero-fare mode: Evidence from China. *Current Issues in Tourism*, 20(10), 1088-1109.
doi:10.1080/13683500.2016.1149155
- Hinsdale, M. (2018, March 29). With Chinese Tour Groups, Numbers Aren't Everything.
Retrieved from <https://jingtravel.com/with-chinese-tour-groups-numbers-arent-everything/>

- Is Thailand really losing Russian arrivals? (2014, September 10). Retrieved from <http://www.samuitimes.com/thailand-really-losing-russian-arrivals/>
- Kim, S. S., Guo, Y., & Agrusa, J. (2005). Preference and Positioning Analyses of Overseas Destinations by Mainland Chinese Outbound Pleasure Tourists. *Journal of Travel Research*, 44(2), 212-220. doi:10.1177/0047287505278979
- Nielsen, N. F. (2017, February 23). Turkey's Economy Hit By Declining Tourism. Retrieved from <https://www.imf.org/en/News/Articles/2017/02/21/NA230217Turkeys-Economy-Hit-By-Declining-Tourism>
- Patarateerakul, N. (2017). A case study with real numbers and Chinese tourists' travel preferences in Thailand. *Hsm.ai*. Retrieved from <https://higherlogicdownload.s3.amazonaws.com/HSM/1e8cd6e8-21bf-476f-bc30-b600b33c652d/UploadedImages/Event Presentations/Bangkok Breakfast Dec 2016/3. Baidu Presentation.pdf>
- Pongsirirushakun, A., & Naewmalee, K. (2003, February 20). An Analysis of Foreign Tourist Expenditure in Thailand. Retrieved from https://www.nomurafoundation.or.jp/en/wordpress/wp-content/uploads/2014/09/20030220-21_Apichat_Pongsirirushakun_-_Kiratipong_Newmalee.pdf
- Rittichainuwat, B. N., Qu, H., & Brown, T. J. (2001, April 1). Thailand's International Travel Image. Retrieved April 14, 2018, from <http://journals.sagepub.com/doi/abs/10.1177/0010880401422008>
- Sparks, B., & Pan, G. W. (2009). Chinese Outbound tourists: Understanding their attitudes, constraints and use of information sources. *Tourism Management*, 30(4), 483-494. doi:10.1016/j.tourman.2008.10.014

- Teng, W. (2005). Risks perceived by Mainland Chinese tourists towards Southeast Asia destinations: A fuzzy logic model. *Asia Pacific Journal of Tourism Research*, 10(1), 97-115. doi:10.1080/1094166042000330245
- Thailand entices the Middle East market by offering a Quality Leisure Destination through Thainess. (2016, April 27). Retrieved from <https://www.tatnews.org/thailand-entices-the-middle-east-market-by-offering-a-quality-leisure-destination-through-thainess-3/>
- Tourism Strategy of Turkey - 2023. (2007). *Ministry of Culture and Tourism, I*. Retrieved from <https://www.kultur.gov.tr/EN,138780/tourism-strategy-of-turkey.html>.
- Tours and Activities in the Chinese Outbound Market. (2017, February 14). Retrieved from <https://www.rezdy.com/blog/webinar-tours-activities-chinese-outbound-market/>
- Tse, T. S. (2014). A Review of Chinese Outbound Tourism Research and the Way Forward. *Journal of China Tourism Research*, 11(1), 1-18. doi:10.1080/19388160.2014.984798
- Where Are Australians Going. (n.d.). Retrieved from <https://www.hbf.com.au/travel-insurance/content/where-are-australians-going>
- Yarcan, S. (2007). Coping with Continuous Crises: The Case of Turkish Inbound Tourism. *Middle Eastern Studies*, 43(5), 779-794. doi:10.1080/00263200701422691
- ชาวสอาด, ม. (2016, November 9). ทวีร์ศุณย์เหรียญ...ใครได้? ได้เท่าไร? Retrieved from <http://www.bangkokbiznews.com/blog/detail/639394>
- ประเมินผลกระทบทวีร์ศุณย์เหรียญ 'ยอมเจ็บ...เพื่อจะจบ'. (2016, October 9). Retrieved from <http://www.thansettakij.com/content/103691>
- แก้วพรหมมาลัย, ช. (2015). ปัญหาทวีร์ศุณย์เหรียญและผลกระทบต่อประเทศไทย. *กองบัญชาการกองทัพไทย*, 6(4), 38-50. Retrieved from <https://www.tci-thaijo.org/>.

Appendices

Chinese Tourist Personas

- 1.) 30% by Detailed Explorers - this group mostly consists of mixed generation and uses money up to 26% of yearly income on traveling. They mostly are less price-elastic.
- 2.) 30% by Cautious Connectors - rural-middle-class-born in the 1960s and 1970s with the intention of traveling to build a relationship with their family. This group of people tends to be more price-elastic.
- 3.) 17% by Basic Pleasure Seekers - This group of people are mostly born in the post-1990s with an eager to spend less but seek into a different culture with a new style of travel.
- 4.) 14% by Experience Seekers - A higher income class living in the city spending about 29% of income in traveling to seek for experience in life. This group of people loves having a suggestion from friends and family.
- 5.) 9% by Indulgers - They are mostly middle age from tier 1 or 2 cities, who loves to stay in 5 stars hotel.

Zero-dollar tour usually receives money from 3 Channels

- 1.) Through shops - Tour guides usually have tactics to gain confidence on the first day when tourists arrive by taking them to famous places. For example, the Grand Palace and Floating Market. Along the ride, they often indirectly advertise products. There was one research mentioning "If tourists feel that a jewelry shop in Bangkok is too expensive and not buying them, tour guides will tell a story that jewelry shop in Pattaya has much better quality, better shop, and cheaper". This persuades tourists to be more interested in buying products even though, in some cases, it is more expensive and worse quality. Tour guides will get a commission of 20%-25% of sales from that specific group of tourists and 40%-50% of sales to Thai tour company.
- 2.) Through optional tours - This is a way of forcing tourists, when sales at the shop do not reach the target to cover the cost of food and accommodation along the trip, to buy an optional tour to go somewhere else at a costly price. For example, one-day trip to Kanchanaburi at 1,5000 Baht a person or to Samed Island at 2,000 Baht a person. If no ones buy, the bus will not go back to the hotel with the engine off until tourists purchase an optional tour.
- 3.) Through shows - Even Thailand has excellent cultural shows, these kinds of tours often take tourists to see shows that they could not see in China because it is illegal such as 'Ladyboy show'. They have tactics of saying it is 500, without currency noted, once they arrive, they say it is 500 Yuan or \$US500. Thai tour company and show operator receives a massive amount of money and profit from this kind of action.

Tourism Receipts of Thailand: China and other potential countries

Year	Country of Residence	No. of Arrivals	Length of Stay (Days)	Per Capita Spending		Tourism Receipts	
				Baht/Day	\$US/Day	Mil. Baht	Mil. \$US
2013	China	4,609,717	8.04	5,097.20	165.87	188,912.67	6,147.50
	Hong Kong	694,084	6.14	5,471.60	178.05	23,318.17	758.81
	India	1,028,414	7.14	5,505.39	179.15	40,425.36	1,315.50
	Sri Lanka	76,484	6.77	5,224.43	170.01	2,705.19	88.03
	Australia	906,004	13.19	5,401.68	175.78	64,550.97	2,100.58
	Kuwait	75,388	11.06	5,621.49	182.93	4,687.15	152.53
	Saudi Arabia	26,121	10.38	5,665.68	184.37	1,536.17	49.99
	U.A.E.	164,710	10.62	6,009.54	195.56	10,512.03	342.08
	South Africa	73,657	12.90	5,229.39	170.17	4,968.84	161.69
	United Kingdom	847,678	17.80	3,970.76	129.21	59,913.68	1,949.68
	USA	788,819	14.56	4,740.17	154.25	54,441.99	1,771.62
Russia	1,745,779	15.19	4,619.51	150.33	122,501.98	3,986.40	
2014	Brunei	13,927	6.47	5,714.61	175.94	514.93	15.85
	China	4,631,981	7.88	5,497.49	169.26	200,658.69	6,177.92
	Hong Kong	559,284	5.87	5,832.09	179.56	19,146.73	589.49
	India	906,428	7.22	5,724.70	176.25	37,464.85	1,153.47
	Sri Lanka	76,755	6.46	5,502.28	169.41	2,728.24	84.00
	Australia	837,497	12.73	5,716.88	176.01	60,949.51	1,876.52
	Kuwait	61,303	11.41	6,012.60	185.12	4,205.61	129.48
	Saudi Arabia	17,970	10.35	6,214.33	191.33	1,155.80	35.58
	U.A.E.	153,594	10.09	6,513.10	200.53	10,093.79	310.77
	United Kingdom	871,226	17.13	4,095.48	126.09	61,121.31	1,881.81
	USA	734,514	14.33	4,955.76	152.58	52,162.44	1,605.99
Russia	1,596,542	15.49	4,557.13	140.31	112,699.95	3,469.83	
2015	China	7,981,407	8.14	5,982.79	174.68	388,694.10	11,348.73
	Hong Kong	708,435	6.47	6,120.61	178.70	28,054.18	819.10
	Australia	816,053	13.43	6,001.49	175.23	65,773.90	1,920.41
	Kuwait	72,830	12.08	6,282.27	183.42	5,527.05	161.37
	Saudi Arabia	25,153	11.30	6,724.58	196.34	1,911.32	55.80
	U.A.E.	171,516	9.87	6,812.86	198.92	11,533.23	336.74
	United Kingdom	896,591	17.29	4,294.89	125.40	66,579.60	1,943.93
	USA	827,110	13.38	5,021.99	146.63	55,577.00	1,622.69
Russia	877,120	17.07	4,587.00	133.93	68,678.73	2,005.22	
2016	Singapore	1,163,309	5.47	6,292.74	178.26	40,042.58	1,134.35
	China	8,821,148	8.24	6,300.15	178.47	457,934.94	12,972.66
	Hong Kong	690,465	6.30	6,425.83	182.03	27,951.89	791.84
	Egypt	24,913	10.75	6,379.78	180.73	1,708.60	48.40
	Kuwait	68,168	12.70	6,888.13	195.13	5,963.27	168.93
	Saudi Arabia	33,038	11.50	7,214.80	204.39	2,741.17	77.65
	U.A.E.	187,665	9.91	7,205.11	204.11	13,399.76	379.60
	Australia	813,017	13.78	5,670.23	160.63	63,525.78	1,799.60
	United Kingdom	961,471	17.90	4,218.28	119.50	72,598.24	2,056.61
USA	938,862	13.98	5,114.18	144.88	67,124.98	1,901.56	
Russia	1,085,890	16.90	4,445.63	125.94	81,584.17	2,311.17	

Questionnaire to 5 shops

Shop 1

แบบสอบถามร้านค้าและผู้ประกอบการในย่านวัดพระแก้วและสถานที่ใกล้เคียง

เพื่อศึกษาลักษณะของนักท่องเที่ยวชาวจีน โดยจัดขึ้นเพื่อการศึกษาเพื่อทำวิจัยในวิชา EE489

ของนักศึกษาคณะเศรษฐศาสตร์ ภาควิชาภาษาอังกฤษ มหาวิทยาลัยธรรมศาสตร์เท่านั้น

1.)ท่านมีลูกค้าชาวจีนหรือไม่

= ไม่

2.)ท่านรู้จักทัวร์ศูนย์เหรียญหรือไม่

= ไม่

3.)ท่านได้ผลประโยชน์จากนักท่องเที่ยวชาวจีน(นักท่องเที่ยวแบบธรรมดาและแบบทัวร์ศูนย์เหรียญ)

อย่างไรบ้าง

= ได้

4.)ท่านคิดว่าการที่มีนักท่องเที่ยวชาวจีนเข้ามาในประเทศไทยมากขึ้นจะทำให้เศรษฐกิจไทยไปในทิศทางใด(มีผลดีหรือผลเสีย)

= ดี

Shop 2

แบบสอบถามร้านค้าและผู้ประกอบการในย่านวัดพระแก้วและสถานที่ใกล้เคียง

เพื่อศึกษาลักษณะของนักท่องเที่ยวชาวจีน โดยจัดขึ้นเพื่อการศึกษาเพื่อทำวิจัยในวิชา EE489

ของนักศึกษาคณะเศรษฐศาสตร์ ภาควิชาภาษาอังกฤษ มหาวิทยาลัยธรรมศาสตร์เท่านั้น

1.)ท่านมีลูกค้าชาวจีนหรือไม่

= มี

2.)ท่านรู้จักทัวร์ศูนย์เหรียญหรือไม่

= ไม่

3.)ท่านได้ผลประโยชน์จากนักท่องเที่ยวชาวจีน(นักท่องเที่ยวแบบธรรมดาและแบบทัวร์ศูนย์เหรียญ)

อย่างไรบ้าง

= ยอดขายเพิ่มขึ้น

4.)ท่านคิดว่าการที่มีนักท่องเที่ยวชาวจีนเข้ามาในประเทศไทยมากขึ้นจะทำให้เศรษฐกิจไทยไปในทิศทางใด(มีผลดีหรือผลเสีย)

= ในทางที่ดีเพราะทำให้เศรษฐกิจดีขึ้น

Shop 3

แบบสอบถามร้านค้าและผู้ประกอบการในย่านวัดพระแก้วและสถานที่ใกล้เคียง

เพื่อศึกษาลักษณะของนักท่องเที่ยวชาวจีน โดยจัดขึ้นเพื่อการศึกษาเพื่อทำวิจัยในวิชา EE489

ของนักศึกษาคณะเศรษฐศาสตร์ ภาควิชาภาษาอังกฤษ มหาวิทยาลัยธรรมศาสตร์เท่านั้น

1.)ท่านมีลูกค้าชาวจีนหรือไม่

= มี

2.)ท่านรู้จักทัวร์ศูนย์เหรียญหรือไม่

= ไม่รู้จัก

3.)ท่านได้ผลประโยชน์จากนักท่องเที่ยวชาวจีน(นักท่องเที่ยวแบบธรรมดาและแบบทัวร์ศูนย์เหรียญ)

อย่างไรบ้าง

= ก็กลุ่มลูกค้าทั่วไป เป็นไปตามกลุ่มเป้าหมายของร้านที่เน้นขายชาวต่างชาติ

4.)ท่านคิดว่าการที่มีนักท่องเที่ยวชาวจีนเข้ามาในประเทศไทยมากขึ้นจะทำให้เศรษฐกิจไทยไปในทิศทางใด(มีผลดีหรือผลเสีย)

างใด(มีผลดีหรือผลเสีย)

= ที่เห็นก็เข้ามาท่องเที่ยว ย่อมเกิดการกระจายรายได้ ผมมองว่ามีผลดีมากกว่าผลเสีย

Shop 4

แบบสอบถามร้านค้าและผู้ประกอบการในย่านวัดพระแก้วและสถานที่ใกล้เคียง

เพื่อศึกษาลักษณะของนักท่องเที่ยวชาวจีน โดยจัดขึ้นเพื่อการศึกษาเพื่อทำวิจัยในวิชา EE489

ของนักศึกษาคณะเศรษฐศาสตร์ ภาควิชาภาษาอังกฤษ มหาวิทยาลัยธรรมศาสตร์เท่านั้น

1.)ท่านมีลูกค้าชาวจีนหรือไม่

= มี

2.)ท่านรู้จักทัวร์ศูนย์เหรียญหรือไม่

= รู้จักดีเลย เพราะว่าค้าขายเป็นรถเข็น เลยพบเห็นคนจีนบ่อย รวมถึงรู้เรื่องทัวร์ศูนย์เหรียญดีด้วย

มันคือทัวร์ที่มีแต่นายทุนคนจีนทำกันเอง

3.)ท่านได้ผลประโยชน์จากนักท่องเที่ยวชาวจีน(นักท่องเที่ยวแบบธรรมดาและแบบทัวร์ศูนย์เหรียญ)

อย่างไรบ้าง

= ไม่ได้เลย เพราะว่าเค้าก็กินแต่อาหารของเค้า เค้าไม่ได้ซื้อของของเราหรอก น้อยคนมากๆ

ที่จะแวะมาซื้อ

4.)ท่านคิดว่าการที่มีนักท่องเที่ยวชาวจีนเข้ามาในประเทศไทยมากขึ้นจะทำให้เศรษฐกิจไทยไปในทิศทางใด(มีผลดีหรือผลเสีย)

างใด(มีผลดีหรือผลเสีย)

= ก็ตามทีเห็น ไม่ได้ช่วยอะไรขนาดนั้น คนที่ได้ก็ได้เพิ่มขึ้น เค้าไม่ได้มีความเกี่ยวกับเรา

คนที่ได้มีแต่รัฐบาลกับพวกสนามบิน ร้านค้าระดับเล็กถึงกลางไม่ได้กัน

Shop 5

แบบสอบถามร้านค้าและผู้ประกอบการในย่านวัดพระแก้วและสถานที่ใกล้เคียง

เพื่อศึกษาลักษณะของนักท่องเที่ยวชาวจีน โดยจัดขึ้นเพื่อการศึกษาเพื่อทำวิจัยในวิชา EE489

ของนักศึกษาคณะเศรษฐศาสตร์ ภาควิชาภาษาอังกฤษ มหาวิทยาลัยธรรมศาสตร์เท่านั้น

1.) ท่านมีลูกค้าชาวจีนหรือไม่

= มี ส่วนใหญ่จะเป็นนักท่องเที่ยวอิสระหรือเดินทางด้วยตนเอง

คนจีนที่เข้ามาที่ร้านส่วนใหญ่มาจากชนบท เป็นกลุ่มลูกค้าที่มาเป็นคู่หรือมากับครอบครัว

เมื่อก่อนเคยมีทัวร์มาลง แต่ก็ไม่เกิน 20 คน

2.) ท่านรู้จักทัวร์ศูนย์เหรียญหรือไม่

= รู้ ก็กลุ่มคนที่มา แล้วก็มีส่วนทางการเดินของเค้า เป็นไปตามทัวร์

มีกลางวันกินที่ร้านอาหารจีน แล้วลงเรือ

3.) ท่านได้ผลประโยชน์จากนักท่องเที่ยวชาวจีน(นักท่องเที่ยวแบบธรรมดาและแบบทัวร์ศูนย์เหรียญ) อย่างไรบ้าง

อย่างไรบ้าง

= ที่ร้านไม่ได้ประโยชน์อะไร อาจจะเป็นเพราะว่าเป็นร้านที่อยู่ลึกก็ได้ สมัยก่อน 7 - 8

ปีที่แล้วมีไกด์ชอบพามา แต่ตอนนี้ไม่มีแล้ว

4.) ท่านคิดว่าการที่มีนักท่องเที่ยวชาวจีนเข้ามาในประเทศไทยมากขึ้นจะทำให้เศรษฐกิจไทยไป

ในทิศทางใด(มีผลดีหรือผลเสีย)

= เหมือนภาพรวมจะดี เช่น สนามบิน แต่ SME ไม่ค่อยได้ มีเห็นแต่ที่ขายผลไม้หอบหิ้วได้

เพราะคนจีนเหมือนถูกโปรแกรมมาว่า มาที่นี่ต้องซื้ออะไร กินอะไร

การค้าขายให้คนจีนต้องเข้าไปหานักท่องเที่ยวแบบเร็วๆ เพราะไกด์เดินนำเร็วมาก

ในอนาคตก็เฉยๆ แต่ต้องรีบกำจัดทัวร์ศูนย์เหรียญ แต่ระวังแบบเคส OA Travel ที่เขาฟ้องกลับ