



WHY CLMV AS TOURISM TARGET GROUP?

Limitation

TIME = \$



BOARDING PASS				BOARDING PASS			
ECONOMY				ECONOMY			
NAME OF PASSENGER DOE / JOHN	FLIGHT OKL018	DATE 12 NOV 2015	SEAT 24A	NAME OF PASSENGER DOE / JOHN	FLIGHT OKL018	DATE 12 NOV 2015	SEAT 24A
FROM: MOSCOW / DME				FROM: MOSCOW / DME			
TO: LARNAKA / LCA				TO: LARNAKA / LCA			
GATE 47	BOARDING TIME 11:30			GATE 47	BOARDING TIME 11:30		
ETKT 5552115239450				ETKT 5552115239450			
GATE CLOSURES 40 MINUTES BEFORE DEPARTURE				HAVE A NICE TRIP!			

TABLET OF CONTENT



INTRODUCTION



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LITERATURE REVIEW



CONCLUSION



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Introduction

1. Background

2. Research Questions

Population

(Potential Market Size)



15M



6M

164M!

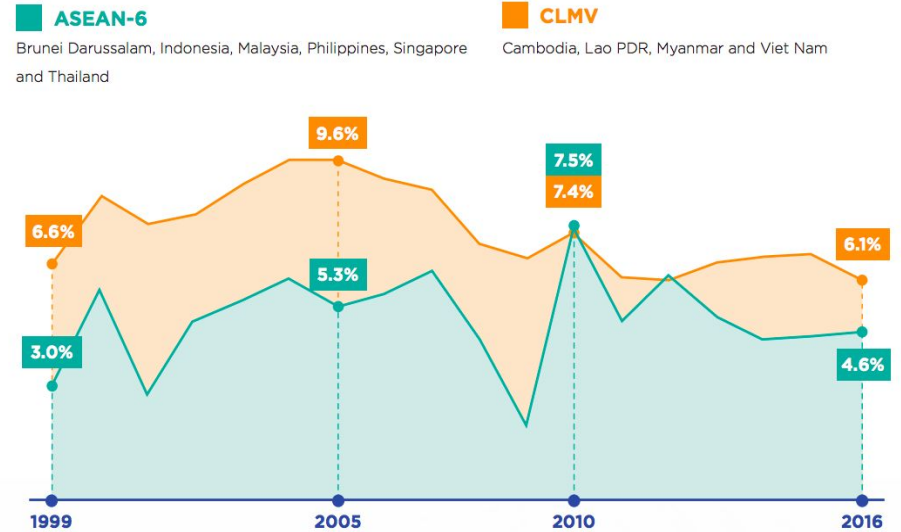
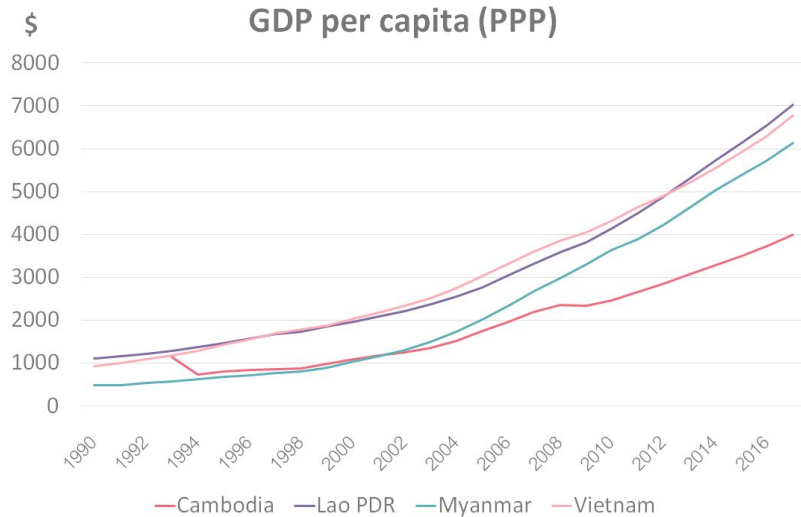


51M



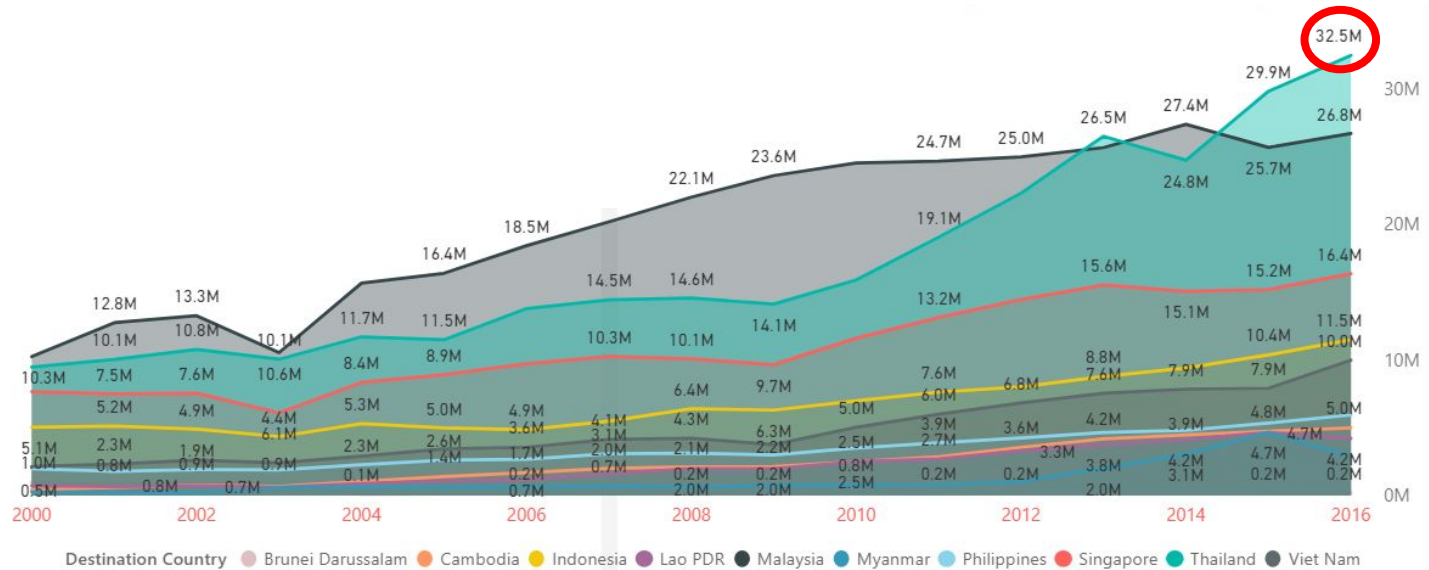
92M

CLMV Rapid Economic Growth



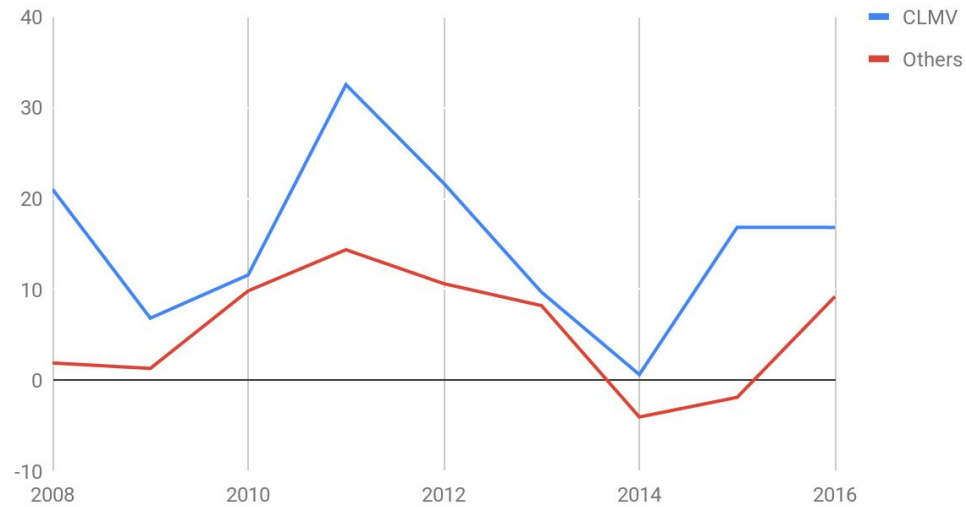
“The more people have higher income, the more likely they travel abroad”

Total Visits to ASEAN by Destination Country



Growth Rate of Number of tourist to Thailand

Growth rate of no. of tourist



Research Questions

1

What are Thailand's strong points and weaknesses?

2

What are the opportunities and threats?

3

Are CLMV countries the new target market for tourism in thailand ?



Literature Review

**1. Economic Factors on
Tourism Sector**

**2. Challenges &
Opportunities**

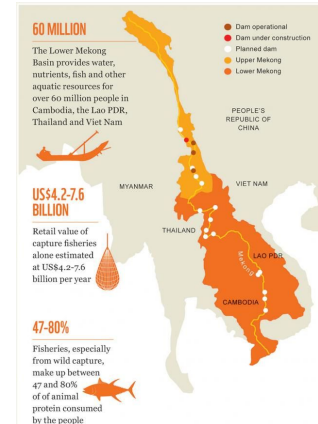
**3. Types of Tourism in
Thailand**

Economic Factors on Tourism Sector

- The demand for travelling has been increasing significantly over the past decade and also has the potential to grow continuously.
- The studies of **Phannida Sangdang and Prasert Chaitip (2016)**, analyzed macroeconomic factors affecting tourism demand of foreign tourists in Thailand, followed by the studies of **Akarapong Untong (2015)**, and **Pannatorn Anansiriprapha and Xiu Wu (2016)** who took another factor, elasticity, into their studies.

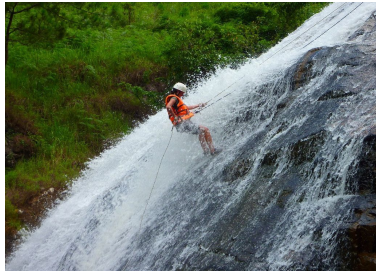
Challenges & Opportunities

- **John Walsh and Pawana Tachavimol (2007)** investigated the nature of Chinese tourism and their satisfaction in Thailand.
- Moreover, the study of **Sompong Amnuay-ngerntra and Hideki Sonoda (2013)** focused on the river tourism along Mekong river providing opportunities and concerns. Another study from **Suthinan Pomsuwan (2015)** identified the key success factors of Thailand tour business.



Types of Tourism in Thailand

- **Mohamed Ali Sharafuddin (2007)** identified each types of tourism in Thailand.





Methodology

1. Data

2. Framework

Data

- GDP growth rate of CLMV countries - World Bank 1990-2014
- Economic Growth Forecast - SCB EIC
- Direct contribution of tourism to Thailand GDP - World Travel & Tourism Council
- Total Contribution of tourism to Thailand GDP - World Travel & Tourism Council
- World real GDP growth - SCB EIC
- Total Population size in CLMV - Thammasat Institute for Study of International Cooperation(TISIC)
- Income per head averagely in CLMV countries - Thammasat Institute for Study of International Cooperation(TISIC)
- Travel Tourism and travel competitive Index - World Economic Forum
- Travel and Tourism Competitive ranking among ASEAN - World Economic Forum
- Tourism policy framework - Pornphatu Rupjumlong, Ph.D., tourism.go.th
- Greater Mekong Subregion tourism development plan - asean.org

Framework

SWOT ANALYSIS





Results

1. Strength

2. Weakness

3. Opportunity

4. Threat

SWOT For Thailand Tourism



Strengths

- The availability of infrastructure and tourism facilities
- Price competitiveness
- Support from government
- Thai arts ,culture and traditions
- Being a center of Southeast Asia
- More advanced technology



Weaknesses

- Some logistic problems
- Deterioration of tourist attraction
- Negative image in terms of safety
- Lack of languages skills



Opportunities

- GMS cooperation
- ACMECS cooperation
- Expansion of alternative tourism and specialized travel
- Expansion of low-cost airlines
- International cooperation in disease surveillance and prevention, and dealing with disasters



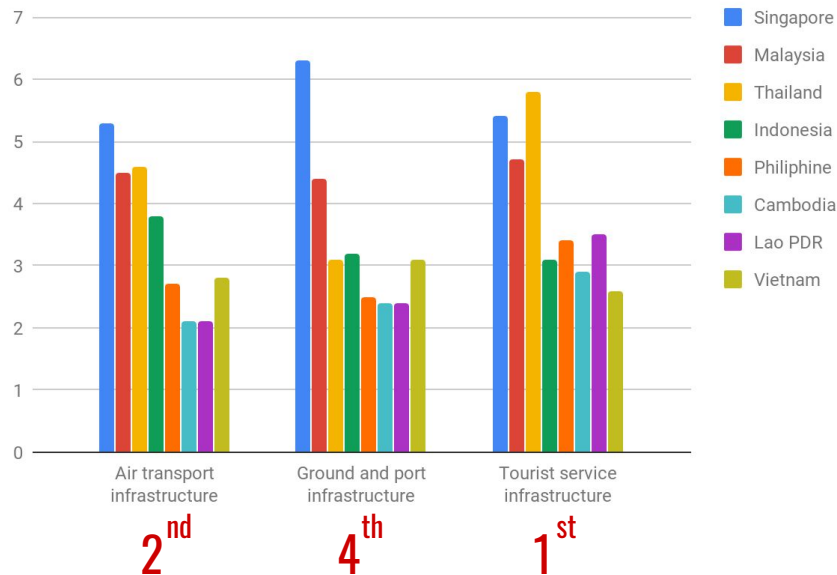
Threats

- Promoting tourism of other country
- Fluctuated economy
- Natural disasters, climate change and plague
- Competitiveness among ASEAN countries
- Counterfeit goods

S

Strength: Infrastructure and Tourism Facilities

Competitiveness Index on Infrastructure



16th TOURIST SERVICE INFRASTRUCTURE

S

Strength: Air Infrastructure

“Heart of global business and tourism”



122 Operating Airlines



5.0 Rating for **Quality of Air Transport Infrastructure**

S

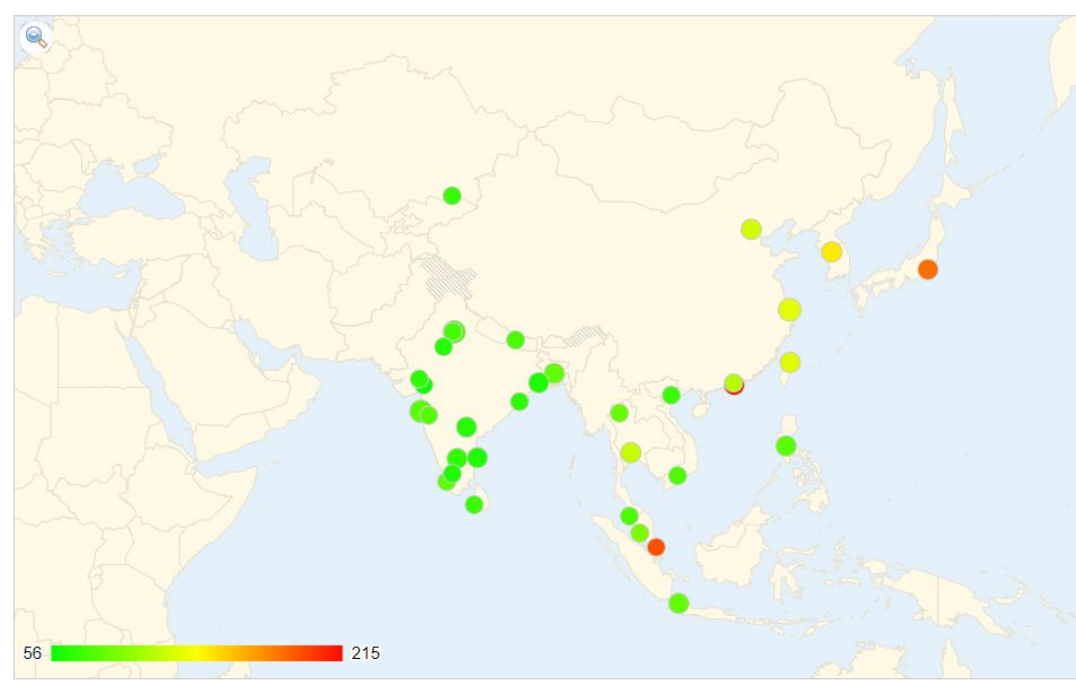
Strength: Price Competitiveness

Air Asia Flight Cost

	Cambodia	Indonesia	Laos	Malaysia	Myanmar	Philippine	Singapore	Thailand	Vietnam
Cambodia	-	6034	-	4673	4639	6731	6973	2860	9138
Myanmar	4569	5406	4360	2616	-	6662	5787	1674	7952
Laos	-	8824	-	6034	4534	10,080	8371	2406	8685
Vietnam	6383	87200	-	5929	5615	9766	8266	3488	-



Strength: Price Competitiveness



S

Strength: Thailand Location

Center of ASEAN



Connected with
5 Countries

S

Strength: Government Support



Creative, Culture & High Value Services

a technology used to help industries that use wisdom, culture, and creativity to design, develop products and services



S

Strength: Government Support



Variety and Value for Money Destination → Quality Leisure Destination

Promoting

Sport Tourism

Gastronomy Tourism

Marine Tourism

Wedding & Honeymoon Tourism

Medical and Wellness Tourism

Community Based Tourism

Leisure Destination

S

Strength: Thai Arts, Cultures and Traditions

CNN

8th GLOBAL MOST
DELICIOUS FOOD



Reader's
Digest 1st MOST BEAUTIFUL
TEMPLE IN ASIA

S

Strength: Thai Arts, Cultures and Traditions



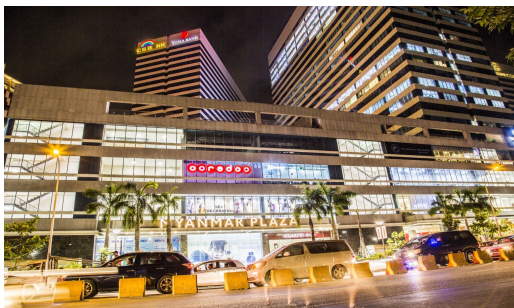
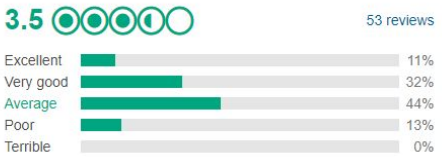


Strength: More Modern

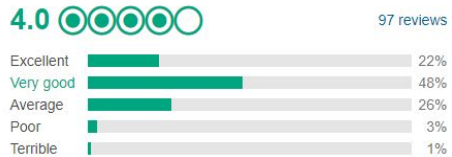


Overview

Shopping center with multiplex cinemas, restaurants,... This sort of shop

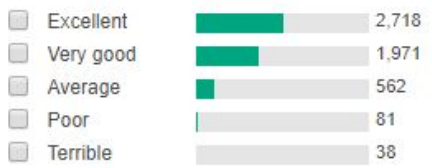


Overview



Reviews (8,958)

Traveler rating

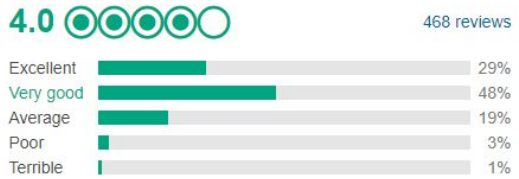




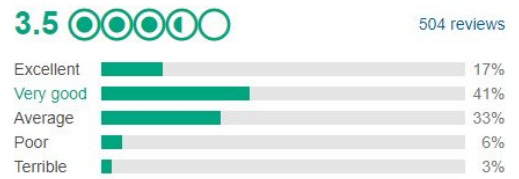
Strength: More Modern



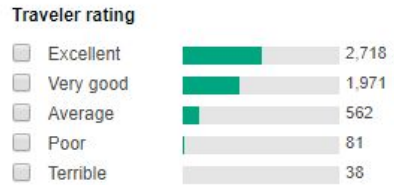
Overview



Overview



Reviews (8,958)



S

Strength: More Modern



PRADA

Cartier

S

Strength: Medical Tourism

Thailand is one of the well-known countries for international health services.

Well Trained Doctors



Worthiness of Payment



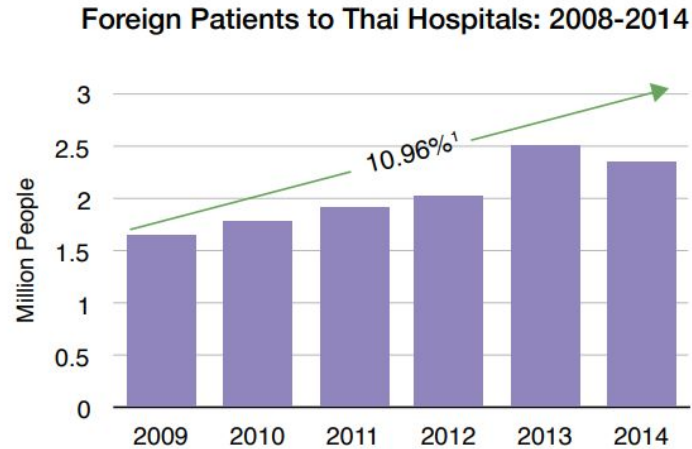
Joint Commission
International (JCI)



S

Strength: Medical Tourism

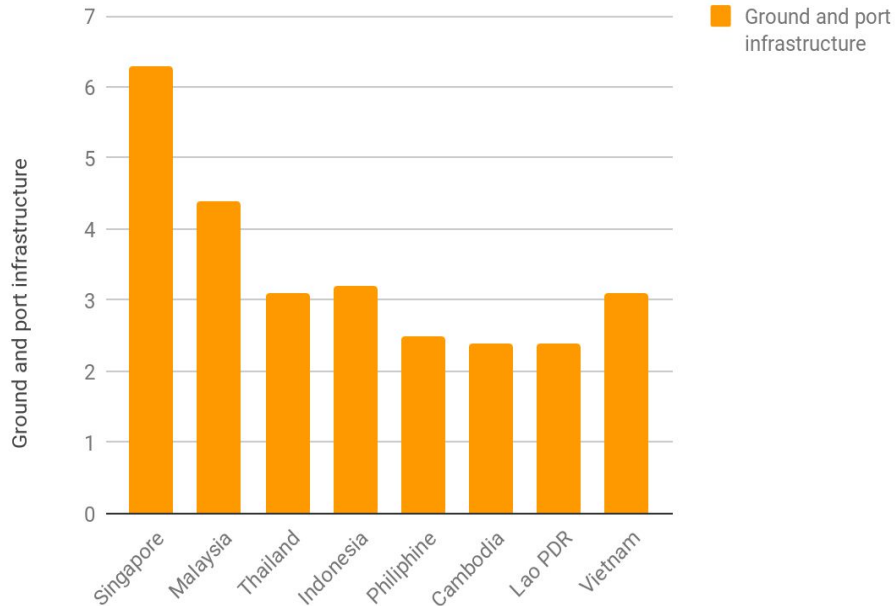
“1st in Top Destinations for Medical Tourism*”



Source: Department of International Trade Promotion, Ministry of Commerce, Thailand: *Healthydietbase, 2015

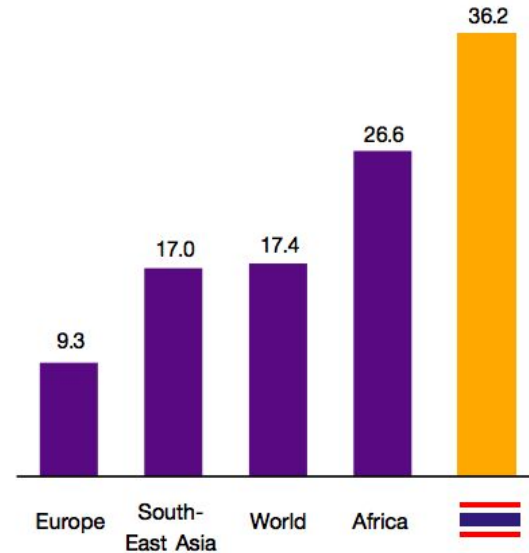
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Weakness: Logistics Tourism Problems



Road Traffic Fatality rate

Unit: persons per 100 000 population





THAILAND TRANSPORTATION



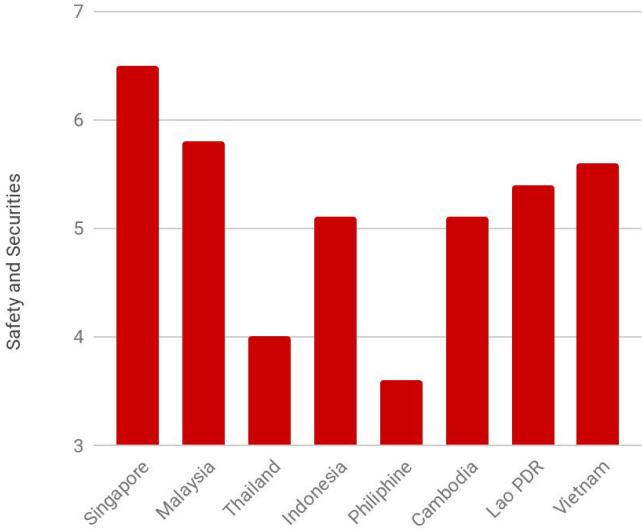
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Weakness: Damage From Tourist Behavior





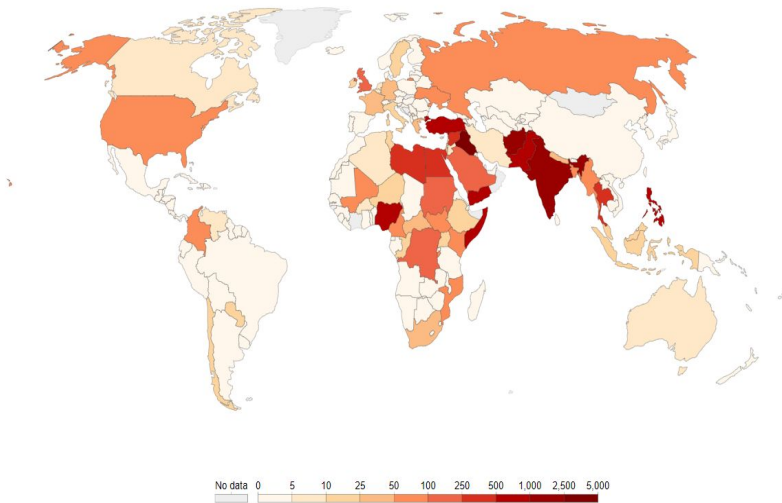
Weakness: Statistic Rate of Safety & Security



■ Safety and Securities

Number of terrorism-related incidents, 2016

The total number of terrorism-related incidents per year. The source defines a terrorist attack as: "the threatened or actual use of illegal force and violence by a non-state actor to attain a political, economic, religious, or social goal through fear, coercion, or intimidation."



Source: Terrorism incidents - Global Terrorism Database

OurWorldinData.org/terrorism - CC BY-SA

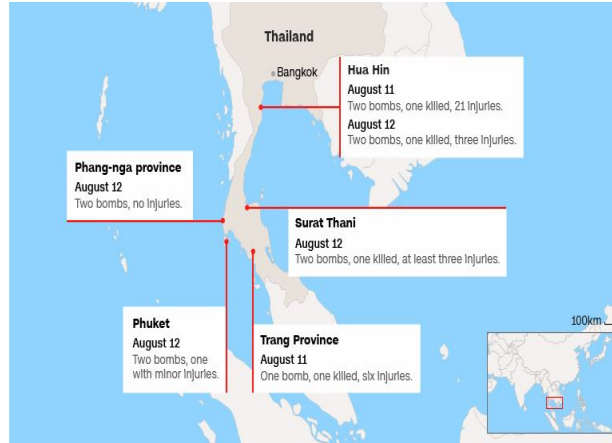
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Violent Events Happened in Thailand

2015 Bangkok bombing



2016 Thailand bombing



2017 Pattani bombing



W

Weakness: Low English Proficiency Level



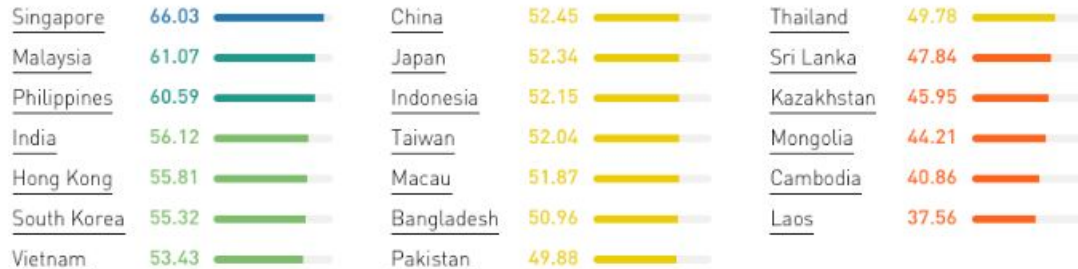
Source: Education First English Proficiency Index

W

Weakness: Low English Proficiency Level

English in Asia: as diverse as the continent itself

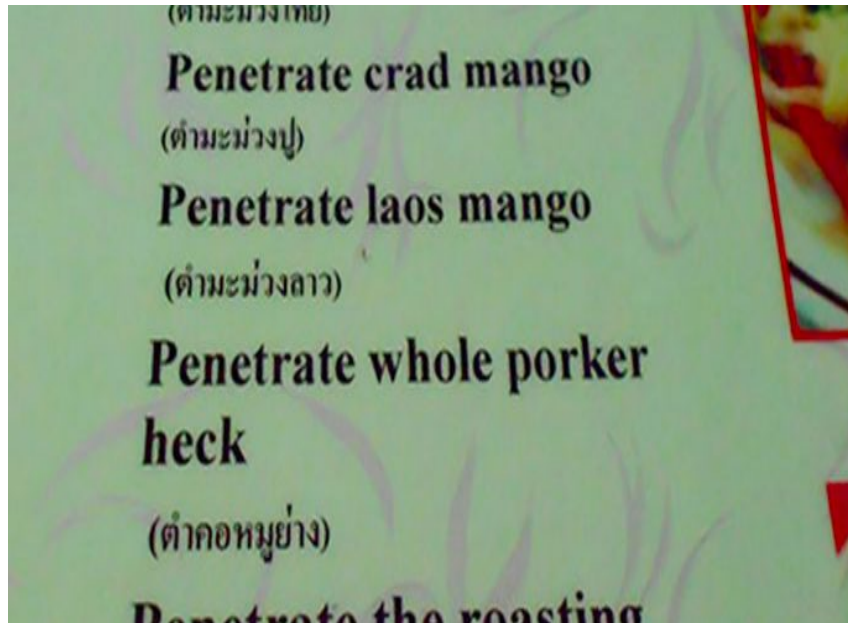
The average English proficiency of adults in Asia is the second highest in the world, only behind Europe. A closer look at the data, however, reveals that Asia has wider proficiency disparities than any other region.



2017

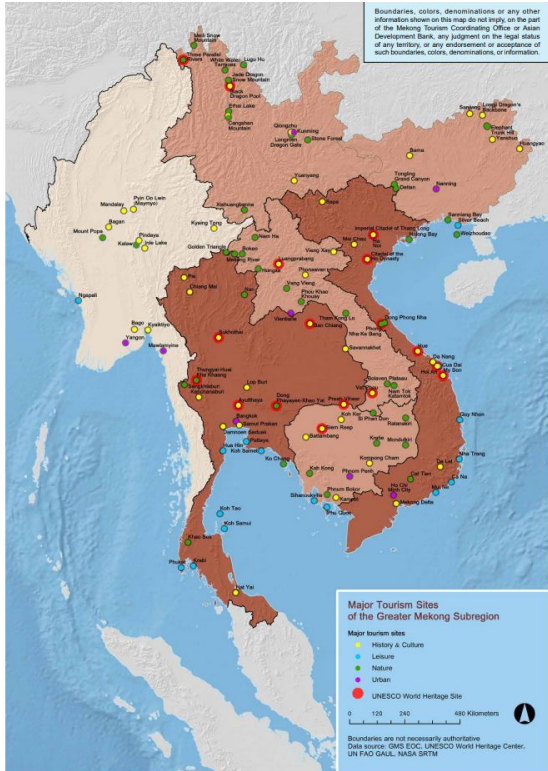
W

Weakness: Low English Proficiency Level



O

Opportunities : Greater Mekong Subregion



Fields of Cooperation

- Transportation
- Telecommunication
- Energy
- Trade
- Investment
- Agriculture
- Environment
- **Tourism**
- Human Capital development

O

Opportunities : **GMS Tourism Development**

Mekong Tourism Forum: MTF

- Sustainable Tourism Development Project: STDP
- “Six Countries One Destination” or “Six Countries One River”
- GMS Cross Border Transport Agreement: CBTA



Mekong Tourism Coordinating Office: MTCO

Tourism Strategic Priorities

Thailand

- Develop quality products and services
- Enhance international competitiveness
- Manage and protect the environment

0

Opportunities : ACMECS Cooperation

ACMECS Master Plan

1. Seamless ACMECS to promote seamless connectivity (Hardware)
2. Synchronized ACMECS to promote software connectivity



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Opportunities : Expansion of alternative tourism

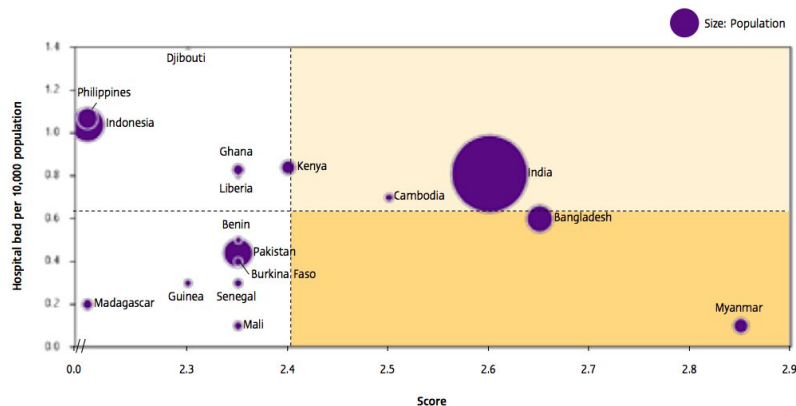
Medical Tourism

Countries that seek for healthcare in Thailand

- lower cost
- higher quality***



Countries with affluent patients seeking better treatment abroad



Note: Scoring from 5 attributes: 1) Ratio of hospital beds to 10,000 population, 2012, 2) GINI Index 2014, 3) GDP growth forecast, 2016-2021, 4) Per capita healthcare cost growth, PPP, 2009-2014, 5) Distance to Thailand
Source: EIC analysis based on data from World Bank

0

Opportunities : Expansion of Low-cost airlines

Number of Low Cost Carriers(LCC)

Thailand LCC fleet size (number of aircraft in service) by airline: past five years

Airline	30-Apr-2013	30-Apr-2014	30-Apr-2015	30-Apr-2016	30-Apr-2017	30-Apr-2018
Thai AirAsia	28	37	43	48	53	59
Nok Air	14	17	24	29	30	28
Thai Lion Air	N/A	5	10	20	25	32
Thai AirAsia X	N/A	N/A	3	6	6	7
NokScoot	N/A	N/A	2	3	3	5
Thai VietJet	N/A	N/A	1	1	3	5
LCC Total	42	59	83	107	120	136
<i>Overall Thailand Total</i>	<i>200</i>	<i>241</i>	<i>246</i>	<i>272</i>	<i>279</i>	<i>304</i>

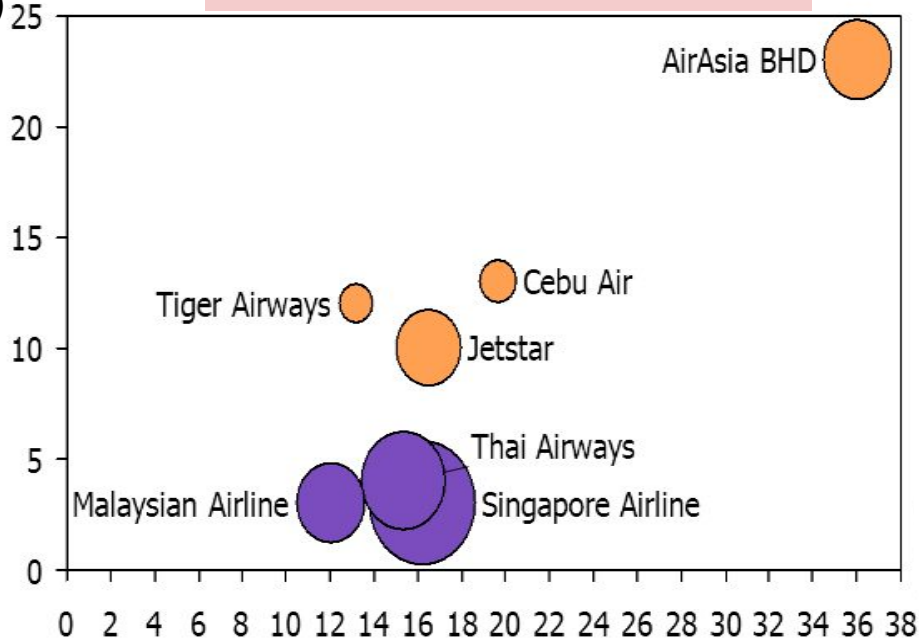
Source: CAPA Fleet Database.

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Opportunities : Expansion of Low-cost airlines

RPK Growth 2009-2012

(RPK Growth)



*The size of the circle = size of RPK

2012
(EBITDAR Margin)

0

Opportunities : Cooperation in Disease Surveillance and Prevention



- Ministry of Agriculture and Cooperatives, Ministry of Natural Resources and Environment, Ministry of Interior, Ministry of Social Development and Human Security, Ministry of Labor, Ministry of Education, Ministry of Public Health and Thai Red Cross Society

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Opportunities : Cooperation in Disease Surveillance and Prevention

Lower Mekong Initiative : LMI



Other international organizations



Thailand MoPH and US.CDC. (TUC)

- Strengthen National One Health Coordination and networks, building One Health and Policy advocacy



กรมควบคุมโรค
Department of Disease Control

T

Threat : Natural disasters, climate change and plague



Forest Fire



Flood



Thunderstorm



Drought

T

Threat : Competitiveness among ASEAN countries



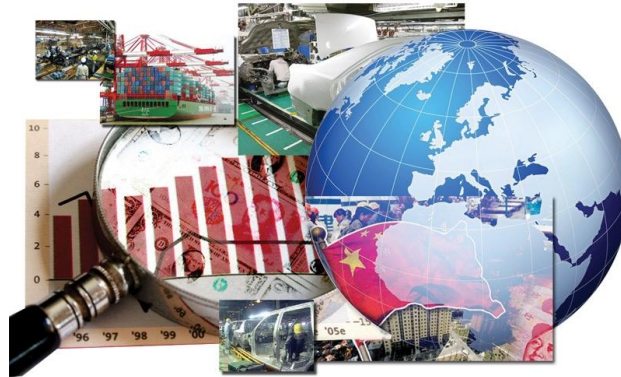
- Lower in currency
- Small market
- Higher competitiveness



T

Threat : Fluctuated economy

Global economy



T

Threat : Counterfeit goods

- Lower price



T

Threat : Promote Tourism From Other Countries



- Reduction of tourism market share due to higher global competitiveness



Conclusion

1. Summary

2. Policy Recommendation

Summary

CLMV should be a new target customer for tourism in Thailand.

Policy Recommendation

- 1) Strengthen laws and regulations
- 2) More equal distribution of education in rural areas
- 3) Develop ground and port infrastructure



THANK YOU!

Q & A

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