



THAILAND TOURISM AND HOSPITALITY UPDATE

Thailand enters November and the traditional high season with encouraging signals. Weekly international arrivals are rising, long-haul markets are strengthening, wellness investment is accelerating and attention is increasingly turning towards Thailand's competitive position for 2027.

1. Thailand sets five tourism priorities for 2027

Thailand's tourism strategy for 2027 is taking clearer shape, with the Tourism Authority of Thailand identifying five principal areas for development:

1. **Wellness and longevity**
2. **Year-round festivals**
3. **Creative cultural experiences**
4. **Sustainable and regenerative tourism**
5. **Visitor confidence through Trusted Thailand**

The strategy targets at least **5% tourism revenue growth in 2027**, while seeking stronger links between tourism businesses and local communities.

The priorities reflect a broader shift towards strengthening Thailand's tourism offer through experiences, quality, confidence and sustainability.

Committee observation: The five priorities provide a useful framework. The next step will be translating them into measurable actions and results that can be tracked during 2027.



2. Good news: tourist arrivals continue to rise

TOURISM BY THE NUMBERS

Thailand enters the high season with international arrivals continuing to improve week on week.

Latest weekly arrivals, 18–24 October: 501,965, ▲ +2.99%

International arrivals YTD: 24.93 million, ▼ −4.43% year on year

International tourism revenue YTD: Bt1.21 trillion, ▼ −2.68% year on year

Average revenue per international visitor: approximately Bt48,500

MARKETS ON THE MOVE

Long-haul arrivals: ▲ +12.03%

Russia: ▲ +25.45%

India: ▲ +18.09%

United States: ▲ +11.52%

China: ▼ −24.17%

The figures contain an encouraging message as the high season begins. Weekly arrivals are moving upwards, while long-haul markets are showing particularly strong momentum.

Importantly, international tourism revenue is currently declining **less sharply than total arrivals**, with revenue down 2.68% compared with a 4.43% decline in visitor numbers.

Committee observation: The improving week-on-week trend gives Thailand positive momentum entering November. The challenge now is to sustain that improvement throughout the high season.



3. Asia-Pacific competition: how easy are we making it to buy Thailand?

Thailand remains one of Asia's strongest tourism brands, but our competitors are moving quickly. Vietnam, Japan, Malaysia and South Korea are all competing aggressively for international visitors.

Perhaps we should look at Thailand in the same way that we would look at any successful private business.

If we want to increase revenue, how easy are we making it for the customer to buy our product?

That means looking not only at hotels, beaches, restaurants and attractions, but at the complete process of choosing and entering Thailand.

Recent changes have reduced visa-exempt stays from **60 days to 30 days** for eligible visitors. Travellers must complete the **Thailand Digital Arrival Card before every entry**, while entry requirements vary according to nationality. At the same time, Thailand continues to discuss additional visitor charges, including the proposed **Bt450 foreign tourist arrival fee**.

Each measure may have its own justification. But viewed through the eyes of the customer, the cumulative effect also matters.

A traveller comparing Thailand with Vietnam, Japan, Malaysia or another Asian destination is effectively making a purchasing decision. **Price, convenience, accessibility and confidence all influence that decision.**

The tourism industry therefore needs to remain highly aware of how the **Thailand tourism product is perceived before the visitor even boards the aircraft**.

Committee observation: In business, increasing revenue begins with understanding the customer and making the product easy to buy. Thailand has an outstanding tourism product, but if we continue adding roadblocks, complexity or uncertainty around accessing it, we risk making our competitors easier to choose. As regional arrivals grow, ease of travel must itself become part of Thailand's competitive advantage.



4. Airports: details matter

Journalists travelling to Phuket on an official press invitation connected with **Minor Hotels and Gardens of Eden**, one of Phuket's most significant new tourism developments, encountered inconsistent application of Thailand's power-bank regulations.

One journalist travelled through Suvarnabhumi Airport carrying **three power banks**, openly presented them at security and was permitted to continue. On departing Phuket, however, security enforced the maximum allowance of **two power banks** and the third was confiscated.

The issue is not whether security regulations should be enforced. **Safety and security must come first.** The concern is consistency and communication.

New checked-baggage procedures effective since **16 October** also recommend passengers use **TSA-approved locks**, enabling baggage to be opened and re-locked for security inspection when required. If a non-TSA lock must be bypassed or cut, the passenger assumes the risk of resulting damage. TSA locks currently retail in Thailand from approximately **Bt400**, with branded models around **Bt800**.

But how many international visitors know this before they arrive in Thailand? Clear advance communication through airlines, airports and booking channels would help passengers prepare before travelling.

Passenger charges raise similar questions. The existing international passenger service charge is **Bt1,120**; a separate **Bt450 foreign tourist arrival fee remains proposed**; and a further **Bt1,000 international departure tax** has been considered but its introduction postponed.

Committee observation: One clear rule, one clear message, consistently communicated. For one of the world's leading tourism destinations, details matter.

5. Air connectivity: Middle East disruptions

Recent reductions and suspensions affecting airline services to parts of the Middle East highlight the importance of international air connectivity to Thailand.



Middle Eastern hubs are not only important source markets but major gateways connecting Thailand with Europe and other long-haul markets.

Extended disruption can affect connecting capacity, airfares, travel patterns and ultimately visitor flows into Thailand.

For hotels, tour operators and other tourism businesses, changes in aviation capacity can quickly influence forward bookings and market mix.

Committee observation: International air connectivity is fundamental tourism infrastructure. Capacity changes and disruption affecting major connecting hubs should be closely monitored as Thailand enters its high season.

6. Wellness: a Bt1.4 trillion opportunity for Thailand

Wellness is rapidly becoming much more than an additional hotel or spa service. It is increasingly a **reason for choosing Thailand as a destination**.

The Global Wellness Institute values Thailand's overall wellness economy at **US$42.7 billion, approximately Bt1.4 trillion**, with **wellness tourism alone worth US$14 billion**.

WELLNESS BY THE NUMBERS

Thailand wellness economy: US$42.7 billion

Wellness tourism: US$14 billion

Wellness tourism growth: ▲ +36.4%

Global wellness-tourism ranking: No. 15

Average international health and wellness tourist spending: approximately Bt60,650 per trip



TAT has made **Wellness and Longevity Tourism one of Thailand's five principal tourism priorities for 2027**, covering treatment and recovery, preventive health and longevity, and physical and mental wellbeing.

INVESTMENT IS FOLLOWING THE DEMAND

During a visit to Phuket last week, the scale of new investment was particularly evident. **Gardens of Eden Resort Phuket**, to be operated by Minor Hotels, will include a dedicated wellness centre exceeding **5,000 sq m** within the wider 33-acre development.

But Thailand is building on an established international reputation, with wellness investment and expertise increasingly spread across the country.

Bangkok: The Sukhothai Bangkok has made a substantial investment in its purpose-built Sukhothai Spa, creating a major urban wellness sanctuary alongside more than 7,000 sq m of hotel gardens.

Hua Hin: THE BARAI Spa celebrates 20 years in 2026 and has now evolved into THE BARAI Hua Hin, a 98-room beachfront wellness resort and Thailand's first Unbound Collection by Hyatt hotel. Together with Chiva-Som, Hua Hin has become one of Thailand's most established international wellness destinations.

North: Chiang Mai is actively positioning around wellness and longevity, while Chiang Rai's expanding luxury hospitality sector increasingly incorporates traditional northern treatments and healing traditions.

East/EEC: Wellness is being targeted as a premium tourism segment, with a new Bt520 million, 38-rai wellness sanctuary planned near Pattaya.

Phuket: Major new wellness investment continues, while the island will host the Global Wellness Summit, 10–13 November, bringing international wellness leaders to Thailand.

Koh Samui: Kamalaya continues to strengthen the island's international wellness reputation through specialist retreat and longevity programmes.

Southern Thailand: Songkhla is developing medical and wellness tourism centred on Hat Yai, combining healthcare, traditional medicine, local products and regional tourism.



Committee observation: Thailand's advantage is that it is not starting a wellness industry today. From pioneers such as Chiva-Som and THE BARAI to substantial new investments in Bangkok, Phuket, Pattaya and the islands, Thailand has developed genuine international wellness credentials. With TAT now making wellness and longevity a 2027 priority, the opportunity is to turn that established leadership into an even stronger reason to choose Thailand.

7. Regional aviation: Hua Hin–Pattaya flights now operating

A new scheduled regional air link is now operating between **Hua Hin and U-Tapao**, providing a direct connection with the Pattaya/Rayong region.

EZY Airlines began scheduled passenger services between **Hua Hin and U-Tapao on 23 October**, with flights taking approximately **40 minutes**. Promotional fares start from **Bt2,900 per person one way**.

The airline is also scheduled to introduce **Hua Hin–Surat Thani services from 7 November**, further expanding direct regional connectivity without requiring passengers to travel through Bangkok.

The services use the **Cessna 208B Grand Caravan**, providing a relatively small-scale but interesting test of demand for direct regional aviation links.

Committee observation: The scale may initially be modest, but this is an interesting test of demand for direct regional aviation. Forty minutes by air between Hua Hin and U-Tapao could significantly improve connectivity between two major tourism regions.

8. JFCCT at Sustainability Expo 2026

JFCCT will participate in **SX Sustainability Expo 2026** at the Queen Sirikit National Convention Center, Bangkok, from **6–15 November**, with its own JFCCT booth throughout the event.

JFCCT Committee Chairs and members of the working team are being invited to participate at the booth, supporting JFCCT's presence and engaging directly with visitors and participating organisations.

The exhibition provides a timely platform to consider how **sustainability is moving from policy into practical business action**, including within Thailand's tourism and hospitality sector.



Committee observation: Sustainability is one of Thailand's five tourism priorities for 2027. JFCCT's presence at SX2026 provides an opportunity to connect that national direction with the practical experience and priorities of the business community.

Further sustainable development updates will follow in next week's Tourism Report.

9. This week's takeaway

There is encouraging news as Thailand enters November. **Weekly international arrivals are rising, long-haul markets are strengthening, Thailand's 2027 tourism priorities are taking shape and significant private investment demonstrates the growing importance of wellness.**

At the same time, regional competition, aviation connectivity and the consistency of the visitor experience remain important issues.

Our new **Tourism by the Numbers** feature will continue to track a small number of key indicators each week, showing not simply the numbers but their **direction of travel**.