

Thailand - Travel & Tourism: Government initiatives drive market growth (Strategy, Performance and Risk Analysis)

<https://marketpublishers.com/r/T95CA416F64EN.html>

Date: November 2017

Pages: 80

Price: US\$ 1,995.00 (Single User License)

ID: T95CA416F64EN

Abstracts

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SUMMARY

Thailand showcases strong potential in terms of domestic and international tourism. With regards to international arrivals, Thailand ranked ninth after Mexico, whilst in terms of volume growth of international arrivals, Thailand ranked 12th after Sweden in 2016.

In the car rentals segment, Thailand ranked tenth after Spain based on the number of rental days, and third after Colombia in terms of volume growth in the number of rental days. Thailand ranked seventh after France and 11th after Czech Republic based on the number of rental occasions with regards to volume growth. Growth of domestic tourism is a major driver behind the rise in the car rental segment as road is the preferred mode of transportation for domestic tourists.

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KEY HIGHLIGHTS

Passenger airlines revenue to increase over the forecast period

Thailand's passenger airlines revenue increased at a CAGR of 8.5%, from US\$11.9 billion in 2012 to US\$16.4 billion in 2016, and is forecast to increase at a CAGR of 12.7% to reach US\$29.3 billion by 2021. This is mainly due to increased revenue of full service airlines, which accounted for 83.9% of the total passenger revenue in 2016. Full service airlines' revenue increased at a CAGR of 7.1% over 2012-16 to reach US\$13.8 billion in 2016, and is forecast to increase at a CAGR of 12.1% to reach US\$23.9 billion by 2021.

Group tourism from China drives hotel revenue growth

Thailand's hotel revenue increased at a CAGR of 2.0%, from US\$17.9 billion in 2012 to US\$19.4 billion in 2016, and is forecast to increase at a CAGR of 5.7% to reach US\$25.2 billion by 2021. Growth in this segment is primarily due to the rise of revenue from midscale hotels, which contributed 45.1% towards total revenue in 2016. Revenue for midscale hotels is driven by an increase in group tourism (wherein people travel in groups) predominantly from China. These hotels tend to register a 70.0% occupancy rate in Thailand.

Revenue per passenger to increase over the forecast period

Revenue per passenger declined at a CAGR of -2.4%, from US\$517.2 in 2012 to US\$468.8 in 2016. This is mainly due to the decline in charter airlines' revenue per passenger, which fell at a CAGR of -4.5% during 2012-16 on account of the ban on charter airlines of Thailand from several countries. In April 2015, South Korea, China and Japan banned Thai charter flights due to significant safety concerns reported by the UN's International Civil Aviation Organization (ICAO).

SCOPE

Risk & Reward Index - This compares the position of the Thai travel and tourism industry with regards to other countries in the region in terms of specific risk and reward parameters.

Industry Snapshot and Industry View - Key travel and tourism industry statistics, including total revenue and expenditure for key industry segments and the trends driving market performance in the Thai travel and tourism market.

Industry SWOT Analysis - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investment in the Thai travel

and tourism market.

Industry Benchmarking - Benchmark how the Thai travel and tourism market is performing compared to regional and global markets in terms of car rental fleet size, car rental revenue, number of hotels, hotel revenue, passenger airline revenue, seats available and seats sold, revenue of travel intermediaries and tourism expenditure growth.

Competitive Landscape - Overview of the relevant players in the Thai travel and tourism industry including airlines, hotels and car rental companies, with each player in the relevant category compared with its peers in terms of relevant industry indicators.

REASONS TO BUY

How is the market performing in terms of indicators such as total tourist visits, passenger airline seats sold, seats sold by purpose of visit such as leisure, revenue, room nights available, room nights occupied, hotel revenue, car rental days among others.

How risky is it to invest in the Thai travel and tourism industry compared to other countries in the Asia-Pacific?

What is driving the performance of key industry segments such as passenger airlines, accommodation and car rentals?

Who are the leading players in the Thai travel and tourism industry, and what is their overview and product portfolio?

What trends are being witnessed within the Thai travel and tourism industry?

What are the Thai travel and tourism industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

What are the recent developments and innovations in the Thai travel and tourism industry?

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