Box 1: Long-haul tourists – a potential target for Thai tourism

Currently, long-haul tourist arrivals visiting Thailand have been growing rapidly. Over the first 9 months of 2025, long-haul tourist arrivals grew as high as 12%, which is higher compared to the pre-COVID average of 2% per year (2015-2019)[1/]. This resulted in the share of long-haul tourists rising from 25% in 2019 to 34% in the current period. Meanwhile, the share of tourism receipt from this group also increased from 36% to 50%. Comparing across nationality groups, tourist arrivals from most long-haul markets have recovered and surpassed pre-COVID levels since 2024 and are growing in a broad-based manner. Over the first 9 months of 2025, the number of tourists from France, the UK, Germany, Russia, Australia, and US grew by 16.3%, 13.7%, 11.7%, 9.7%, 7.5%, and 5.6%, respectively (Chart 1).

An assessment of factors affecting foreign tourist arrivals, using a gravity model applied to data from 112 countries for tourists traveling to 11 key destinations within the Asia-Pacific region, including Thailand, since 2017, identifies 2 major factor groups: (1) external factors that the country can neither control nor improve; and (2) domestic factors reflecting the competitiveness of the destination country. This is expressed by the formula:

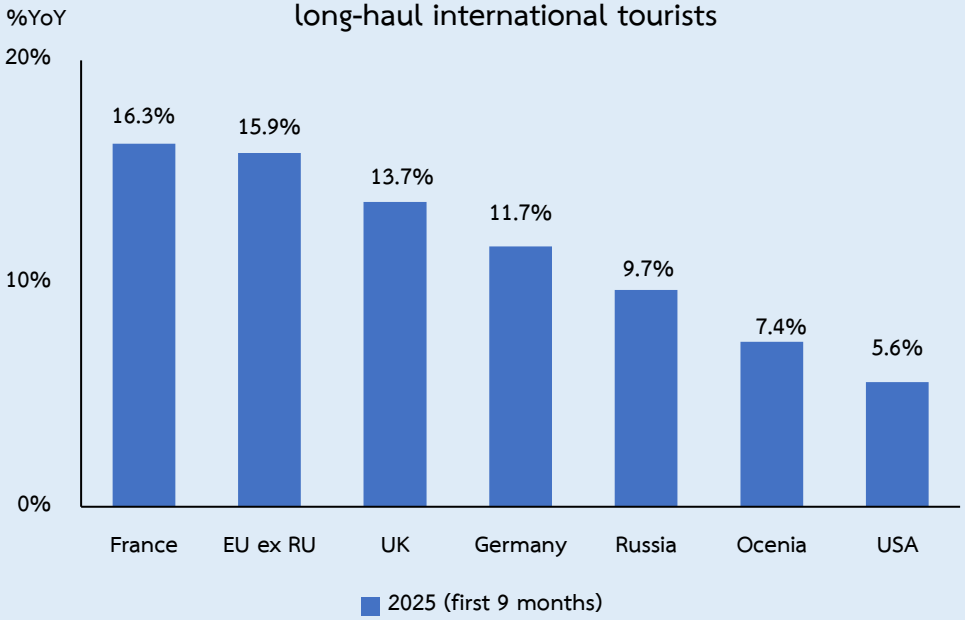
$$T_{ijt} = f(x_{ijt}, y_{jt})$$

wherein tourism demand as reflected by the number of tourists (T) traveling from the origin country (i) to the destination country (j) during each period (t), which is affected by (1) the control factors of the model (x_{ijt}) namely the distant between origin and destination, the income levels of the origin and destination countries, and dummy variables such as shared languages, shared borders, and historical colonial ties, which are external factors that cannot be changed; and (2) the competitiveness of the destination country (y_{jt}) as reflected by data from the World Economic Forum's Travel & Tourism Development Index (TTDI), including tourism infrastructure, tourism promotion policies, environment conditions, sustainability, and natural resources, which are factors that the destination country can improve and further develop.

Note

[1/] Source: Ministry of Tourism and Sports

Chart 1: The growth in the number of long-haul international tourists



Note: The Oceania region consists of 14 countries, including Australia, New Zealand, and various island nations.

Source: Ministry of Tourism and Sports, BOT calculation

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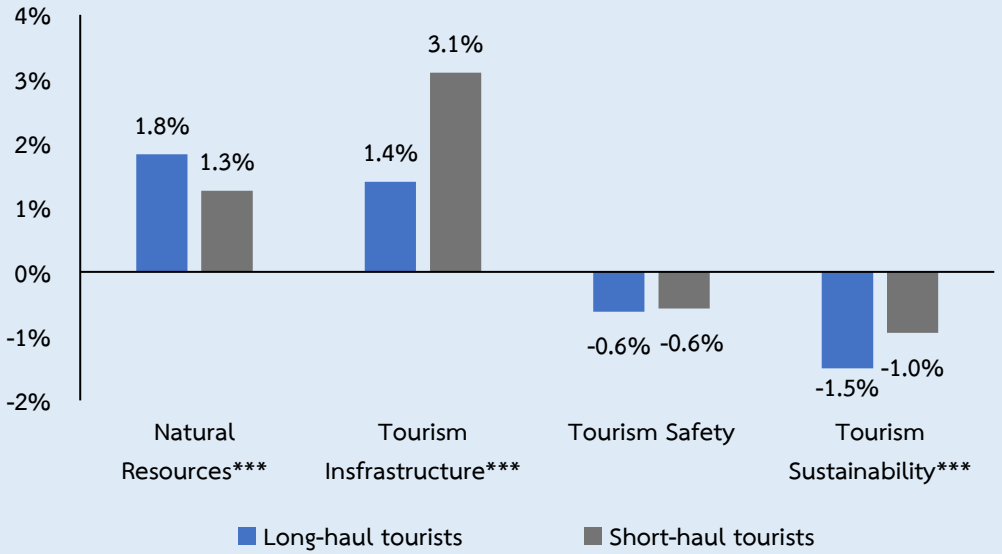
The study founds that, among external factors, tourism demand mainly depends on the income of the origin country and has an income elasticity of 1.4 (i.e. a 1% increase in the income of the origin country would result in a 1.4% increase in outbound tourists). Countries with shared borders or borders within proximity are likely to have higher bilateral tourism flows than countries that are further away from each other. This also applies to countries with other common factors such as language and culture, where the tourism between the origin and destination countries will be higher than countries without any common factors.

An assessment of factors affecting long-haul tourists shows that, while the distance from origin country presents an obstacle to traveling to Thailand, expanding transportation services could help overcome this limitation. In recent periods, air transportation infrastructure has played a part in reducing the obstacles for long-haul tourists, as reflected by **the number of seats on flights traveling between countries in the long-haul group and Thailand growing by around 10% from the pre-COVID period**[2/] and **Thailand's upgraded aviation safety standards** as recognized by the US Federal Aviation Administration (FAA) after a prior downgrade 10 years ago. The latter has enabled possibilities of opening direct flight routes between Thailand and the US, and increasing the number of flights from long-haul countries.

Regarding competitiveness, which is a factor within Thailand's control to improve, a key finding is that **long-haul tourists are relatively insensitive to weaknesses in the tourism sector** (Chart 2). Long-haul tourists place less importance to tourism infrastructure, such as transportation, compared with short-haul tourists partly because long-haul tourists tend to spend more time in their accommodation and do less traveling within the province of stay. Safety concerns, measured using sources such as the Global Terrorism Index, indicators of organized violence and fatalities, survey on confidence in nighttime travel and of local polices, have limited impact on travel decisions of long-haul tourists.

However, **long-haul tourists place high importance on natural attractions, which is Thailand's strength** with seas and beaches that rank among the world's top 10 destinations such as Koh Samui[3/] as well as the warm climate. While Thailand shares its equatorial location with countries such as Indonesia, Malaysia, and the Philippines, competition in this market segment is limited, allowing Thailand to compete effectively.

Chart 2: Impact on the number of international tourists when each dimension of the competitiveness score increases by 1%



Note: *** indicates factors that have a statistically significant impact on the number of tourists, namely natural resources and infrastructure that attract visitors. In contrast, tourism sustainability contributes to limiting the number of tourists at destinations. Meanwhile, safety factors do not significantly affect the number of long-haul tourists. TTDI data shows that some countries with low safety scores still have a high number of tourists.

Source: Travel and Tourism Development Index score (2017-2024) by World Economic Forum, BOT calculation

Note

[2/] Source: PATA (data as of Sep 2025)

[3/] Source: Survey by American Express in 2025

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Sustainability, which relates to managing tourist density within an area to preserve the quality of attractions, is also an important factor. This includes measures to protect the attractions and reduce pollution, which might limit growth in tourist numbers. In this regard, **diversifying tourism from major-destination cities to secondary-destination cities will be key to balancing sustainability goals with economic benefits.** Not only would this prevent overcrowding that could reduce Thailand's attractiveness as a destination in the future, but it could also help distribute income to tourism businesses in the secondary cities. Currently, 90% of long-haul tourists are concentrated in only 6 key areas namely Bangkok, Phuket, Pattaya, Surat Thani, Chiang Mai, and Krabi.

In summary, Thailand's tourism sector faces challenges from declining short-haul tourist arrivals but continues to see strong growth thanks to long-haul tourists, a potential target that warrants continued focus. This includes **upgrading the competitiveness of the tourism sector,** which is something that Thailand can develop further, and **expanding tourism businesses so that Thailand could capitalize on new tourism trends** such as preventive medical care and wellness tourism, which are already among Thailand's strengths. Thailand ranks third globally in this area according to Mastercard and has potential to become the region's medical hub[4/].

Note

[4/] Value of medical services Thailand provided to foreigners grew as much as 16% in the first 8 months of 2025