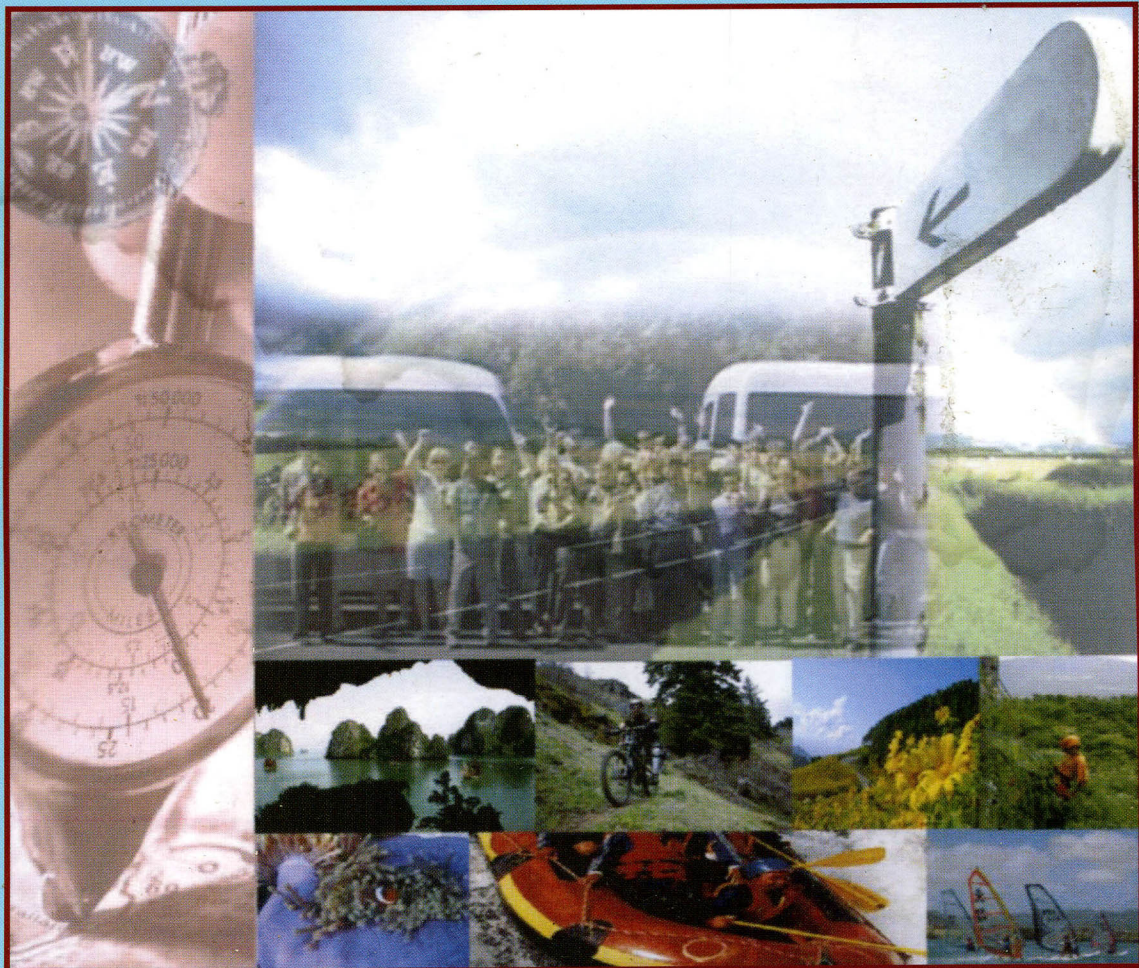


# Final Report

## Executive Summary

# Road Map of Tourism Marketing Research in Thailand



Submitted to  
**Tourism Authority of Thailand**



By  
**Thailand Institute of Scientific and Technological Research**

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# Road Map of Tourism Marketing Research in Thailand

## Executive Summary

By Thailand Institute of Scientific and Technological Research (TISTR)

Submitted to Tourism Authority of Thailand (TAT)

April 2008

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Representative, Ministry of Tourism and Sports	Project adviser
Representative, Thailand Research Fund	Project Adviser
Representative, Office of the National Economic and Social Development Board	Project Adviser
Representative, National Research Council of Thailand	Project Adviser
Deputy Governor, Policy and Planning, TAT	Chairman
Director of Planning Department, TAT	Member
Director of Marketing Strategy Division, TAT	Member
Director of Marketing Database Group, TAT	Member
Director of Project Evaluation Division, TAT	Member
Director of Marketing Research Division, TAT	Member
Director of Policy and Planning, TAT	Member
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## Foreword

Thailand Institute of Scientific and Technological Research (TISTR) has undertaken a study on the Roadmap of Tourism Marketing Research in Thailand as commissioned by the Tourism Authority of Thailand (TAT) under the contract No. 64/2550 dated 28<sup>th</sup> August 2008. The purpose of the study is to draw up a roadmap of tourism marketing research in Thailand and to set up a structure for networking collaboration and common practices related to research on tourism marketing. Also, glossary of some confusion or problematic tourism marketing terms is studied with an aim to align the use of words and vocabulary for better understanding in usage.

The results of the study discussed rationale of the project along with concept and tourism situation which have been used as a basis and framework of this study. Moreover, tourism strategies have been collected together with the reviews carried out by the agencies concerned. These strategies have been analysed and used for the formulation of the roadmap. Another related data includes the review of tourism research during 1997-2006. Lack of research in tourism marketing strategies, in particular some topic areas, has been investigated in order to identify and fulfill the research needed in the near future. The review of research and related literature during 1997-2006 and the interviews of the stakeholders who have expressed their research needs are shown in the Appendix. The results of the study is used in developing a roadmap for tourism marketing research in Thailand which comprises both short term and long term action plans. The conceptual framework and patterns for the development of networks working on tourism marketing research are also suggested. TAT is recommended to act as a host so that the research plan will be effectively implemented. The glossary of tourism marketing terms is submitted separately in another report, which includes language of tourism, key vocabulary in marketing, and other terms of which meanings are ambiguous or have been translated in different definitions. The study also suggests the guideline in building better understanding in the future.

As this executive summary report aims at providing information to the executives concerned in the decision making processes related to the projects, it is anticipated that TAT could gain ultimate benefits from the use of these research results for the development of tourism markets in Thailand in the long run.

**TISTR Research Team**

## Acknowledgements

The study on the Road Map of Tourism Marketing Research in Thailand is achievable due to the good support from the Project Committee comprising representatives from the organisations and the parties concerned and the executives of TAT. The results of the study have been reviewed and suggestions have been proposed. The Research Team has taken these suggestions on board for the improvement at each step of the study, leading to reliable and firm conclusions which are valuable to the research. In this regard, the Research team would like to express the sincere thanks to the above mentioned parties and their members.

In this study, information associated with tourism marketing is also collected in various formats, such as documents, data, and comments given by other government agencies, TAT Regional Offices, the private sector, academic institutions, universities, and experts, especially those involved with the roadmap discussion groups of which names are shown in the Appendix. Special thanks, therefore, are due to these groups together with other parties concerned of which names are not mentioned in this report.

Last but not least, the Research team would like to express their gratitude to TAT for the trust that has been given to TISTR in undertaking this research and kind support throughout the project.

## Abbreviations

4C's	Consumer, Cost, Convenience, Communication
4P's	Product, Place, Price, Promotion
CHE	Commission on Higher Education
CNTP	Committee of the National Tourism Policy
DASTA	Designated areas for Sustainable Tourism Administration
GDP	Gross Domestic Product
KM	Knowledge Management
LAO	Local administrative organisation
MICE	Meeting, Incentive, Convention and Exhibition
MTS	Ministry of Tourism and Sports
NESDB	Office of the National Economic and Social Development Board
NRCT	National Research Council of Thailand
OTD	Office of Tourism Development
OTOP	One Tambon , One Product (local products for tourism services)
TAT	Tourism Authority of Thailand
TISTR	Thailand Institute of Scientific and Technological Research
TRF	Thailand Research Fund
UNWTO	World Tourism Organization

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# Executive Summary

## Road Map of Tourism Marketing Research in Thailand

### 1. Introduction

Tourism industry in Thailand has been promoted and developed for more than 40 years with a rapid growth due to its contribution to the alleviation of critical economic problems in Thailand. The most values of tourism industry lies in the increase of national income, employment rate, and distribution of income to the locals and community. A five-year strategic plan for tourism promotion (2007-2011) formulated by the Tourism Authority of Thailand (TAT) represent a vision in the development of tourism industry up to quality standards of sustainability and high competitiveness. Six strategies applied for tourism promotion include: to promote Thailand's brand at its highest values, to increase balance of tourism in different aspects (location, time, client groups, and related businesses), to enhance competitiveness of the marketing operations, to promote tourism industry which links between provinces and the region, to promote education for creative learning and social values, and to develop best quality products and tourism services for the benefit of branding. In striving towards these strategies, it is necessary to manage currently existing knowledge and integrate all knowledge and information for further utilisation so that effective development of tourism industry can be achieved and Thai tourism industry can keep pace with global trends. Institutions working on research and technical activities related to tourism are considered as essential. These institutions have the important responsibilities to integrate the marketing potential with budget allocation in order to maximise the utilisation of research work. This is expected to eliminate the overlaps and unclear direction when carrying out the research, leading to low advantages of the research results used for further actions.

Consequently, the Thailand Institute of Scientific and Technological Research (TISTR) has been commissioned by the Tourism Authority of Thailand (TAT) to develop a roadmap of tourism marketing research in Thailand. This aims to improve quality, potential,

and sustainable competitiveness in tourism of Thailand in the future according to the 10<sup>th</sup> National Economic and Social Development Plan (2007-2011). The objectives of this study are as follows:

- 1) To review the results of previous research, collect the knowledge gained from it and evaluate the effectiveness of these research results for further utilisation related to tourism marketing;
- 2) To develop a roadmap of tourism marketing research for Thailand. This embraces the overall image of the country, global and domestic marketing, and marketing promotion during the period of the 10<sup>th</sup> National Social and economic Development Plan (2007-2011). The roadmap is divided into two phases: during 2007- 2008 and 2009-2011.
- 3) To collect all information concerned with the concept and theories of tourism marketing promotion as well as the alignment of terms and glossary in tourism marketing used in the research.

The methods of this study include:

- 1) To review documents from secondary sources such as research/ dissertations/ scholarly journals/related information/websites, etc., The review is also focused on the literature in tourism and the market development, glossary and terms/concept in tourism marketing which have been used during 1996 – 2005.
- 2) To conduct interviews and a forum for the brainstorming activities among the parties concerned in the government and private sectors together with organisations undertaking research, and research users.
- 3) To analyse and synthesise knowledge for identifying the trend in research and marketing development. The previous plans and research results were also assessed in order to foresee the outlook of marketing in the future (2007-2011), thus potential research framework can be developed while problems/needs/and limitations in conducting research can be pinpointed.
- 4) To draw a roadmap and develop a strategic plan which represents the concept and direction in conducting research in marketing, including both short and

long-term marketing plans, guidelines for developing and promoting tourism in Thailand, collaborative networks, processes, and marketing research practice.

- 5) To propose the guideline for establishing a network for marketing research between government agencies and academic institutions in order to reach full effectiveness of collaboration in conducting research.

The study process is as shown in Figure 1.

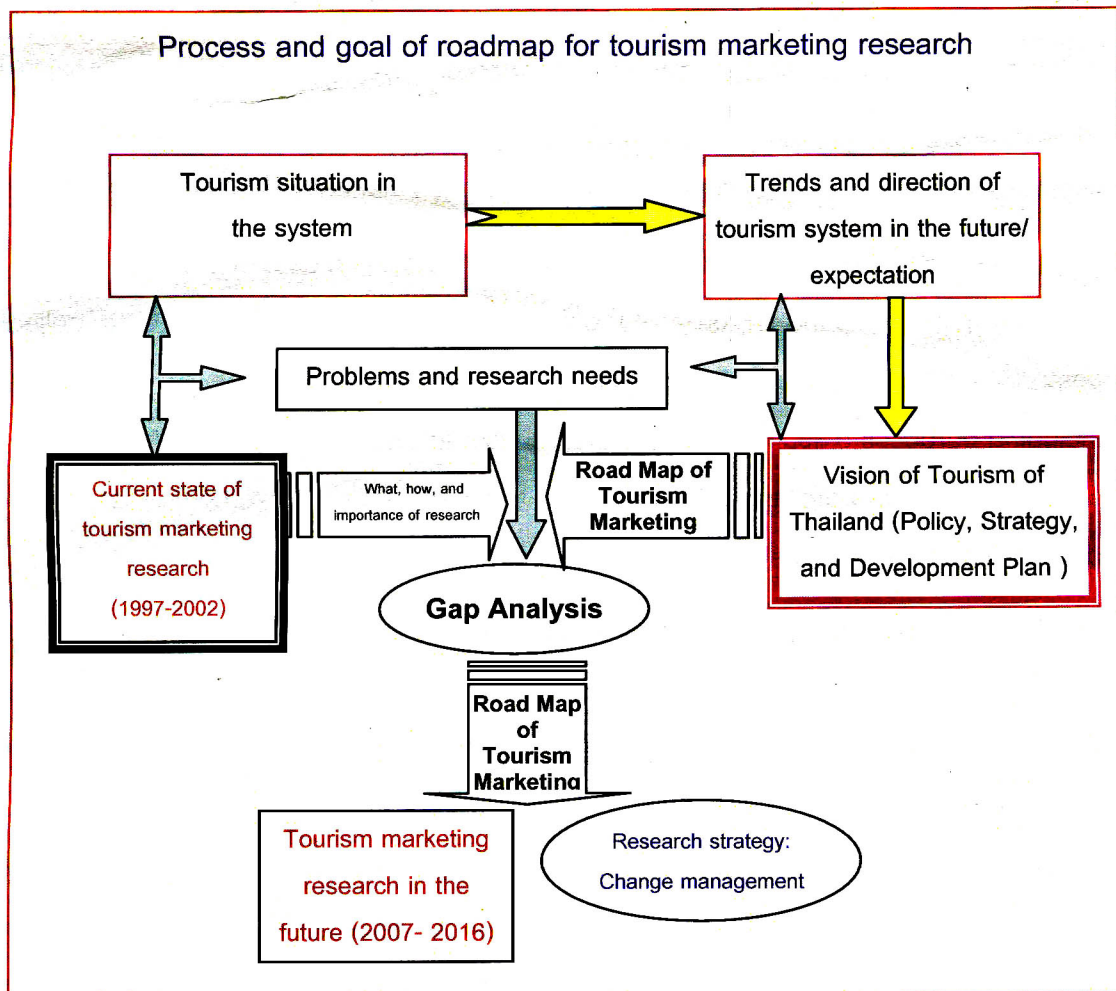


Figure 1 Processes and Goals

## 2. Research environment

### 2.1 Concept

In drawing a roadmap of tourism marketing research, there are several factors to consider, namely, rationale of the tourism system which is announced in the framework of national development, the concept of sustainability, and the self-sufficiency economic system. These are the national development trends appropriate to the current situation which requires high participation from the concerned parties. Consequently, apart from being in line with the philosophy of national development, the roadmap must be designed to meet demands of the continuously changing tourism marketing in various dimensions.

Research in tourism marketing will place emphasis on data collection and analysis of main market groups in order to gain better understanding. The data collected comprises different status of domestic and international tourists in generating areas, including purposes of journey, behaviours, tourism activities, attitudes, and affordability of tourists. These data are analysed in relation to other parameters (tourism resources and discrepancies between demand and supply)

The most important concept of tourism marketing, therefore, is the marketing strategy focusing on market segmentation, which is differently identified into small parts for each different product having similar characteristics. These products are classified depending each target group for the development of the products themselves and the marketing mix (4Ps : Products, Price, Place/Process of Delivery, and Promotion). The research should be conducted appropriate to the selected target groups and meet demands of the target consumers. Model 4Cs (consumer, cost, convenience and communications) is recommended to be applied in order to promote the products as part of consumers' lifestyle.

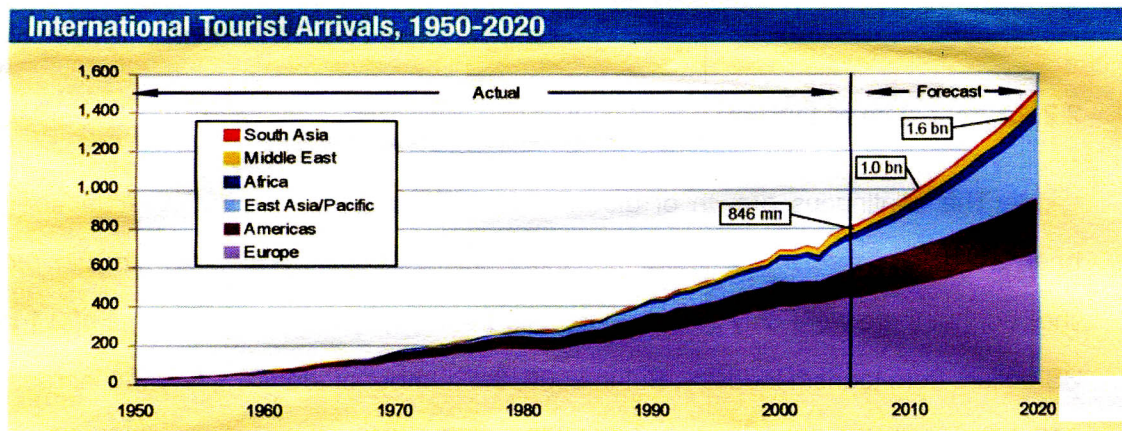
The framework of the study is developed based on the principle that tourism marketing research should study about the market potential of tourists focusing on their socio-economic characteristics, their dining out preferences, accommodation, attractions, purchasing power parity, etc. Moreover, there are other factors to bear in mind, such as

sales promotion, public relations, advertisement, maintenance of overseas offices, and a marketing cooperation among other ASEAN countries (Phimsomphong 2001). In this regard, tourism marketing research is necessary for the development of a roadmap in order to set the direction of research in the future, both in the short and long run. The roadmap can illustrate the status, changes, market trends and other critical factors in the future of tourism marketing. Meanwhile appropriate research can help the country to achieve effectiveness of tourism industry with flexibility, well-preparedness to the risks and adaptation to any changes.

## **2.2 Current state of tourism**

The continuous growth of global tourism industry during previous decades has been a driving force to the world economy. In the last 50 years, the statistic records showed that there were only 25 million tourists worldwide with the total income of 2.1 billion US dollars from tourism industry. But in 2006, the number of tourists has been increased to 846 million with the total income of 733 billion US dollars. Europe accounted for highest number of tourists and income, followed by Asia and Pacific (not including the Middle East countries). France was the country having highest number of tourists (79.1 million), followed by Spain, the USA, and China (58.5, 51.1 and 49.6 million respectively). However, the USA had the highest income of 85.7 billion US dollars, followed by Spain, France, and Italy (51.1, 42.9, and 38.1 billion respectively) (UNWTO, 2007). The growth rate of tourism industry was increasing, particularly of the Asia-Pacific region where numbers of tourists in 2006 were 167,228 million. The highest numbers of tourists were found in China 46,809 million, followed by Malaysia (17.547 million), Hong Kong (15,821 million), Thailand (13,882 million), and Macau (10,683 million). The changing rate during 2005-2006 was 7.7 percent, which was 0.1 percent decreased from 2005, and 9.3 percent decreased from 2001. The decreasing rate was due to the fact that there was an expansion of tourism base and the intensity of crisis in various countries. However, Thailand, Cambodia, Macau, and India were identified as the countries having increasing rate of tourism industry.

The forecast of world tourism conducted by UNWTO states that in 2020, there would be 397 million tourists coming into the Asia-Pacific region, the second from Europe. The increasing rate is 6.5 percent. A total number of tourists worldwide would be 1,561 million in 2020, with 4.1 percent increasing rate during 1995-2020 (Figure 2). It is estimated that the long-haul travel into the Asia-Pacific Region will increase to 62 percent annually while domestic travel within the region will increase to 6.6 percent annually.



Source: World Tourism Organization (UNWTO) ©

Source : UNWTO 2007

Figure 2 Tourism markets and tourism trends of worldwide tourists classified by regions

Tourism industry in Thailand is one of the powerful forces driving national economy throughout the four previous decades. It brings about high amount of income earning at the first or second ranking when compared to other export sectors. In 2007, there were 14,464,228 tourists, which increased from 13,821,808 in 2006. The income earned from tourism is 525,711 m. baht in 2008, increased from the previous year of 482,319 m. baht. Tourists were mainly from East Asia, Europe, the Americas, South Asia, Oceania, the Middle East, and Africa respectively. The highest increasing numbers were tourists from the East Asia which comprise those from China, Hong Kong, Japan, Korea, and Taiwan, followed by those from Europe while the increasing rate of tourist numbers from other regions was not significant. Regarding trade values, Thailand earned income from tourism industry at the amount of 9,442 million US dollars, or 5.2 percent of the national GDP, and was ranked as 30<sup>th</sup> of the world in market size, and 73<sup>rd</sup> in tourism values against

economic system of the country among the total of 174 countries (Chulalongkorn University 2005).

Moreover, tourism industry of Thailand helps double the values of related industries, such as production industry, restaurants, logistics, and hotels and accommodations, amounting to 7.35 m. baht. Thus, it generates the investment, employment, and distribution of income to the communities. The study of WTTC (1999) estimates that there will be more of 1.6 million workers increasing in tourism industry of Thailand in 2010, from the numbers of 4 million workers in 2001, or 15.3 percent of the total manpower in Thailand. It is also estimated that the GDP of travel and tourism economy will increase as highly as 3.2 billion baht, or approximately 17.1 percent of the national GDP.

The markets of tourists travelling into Thailand in 2007 include:

**Asian market** – The highest numbers of tourists were from Malaysia (1,540,840), followed by Japan (1,277,638), Korea (1,083,652), and China (907,117), respectively.

**European market** – The three highest numbers of European tourists were from these following countries: United Kingdom (773,843), Germany (441,827), and France (276,840) respectively. The tourists from Europe were familiar with Thailand. Usually, they came on their own and were interested in various lifestyles and activities, for example, adventure, diving, and trekking, etc.

**The Americas market** – Tourists from the Americas and Canada came to Thailand at the numbers of 681,972 and 183,972, respectively. This group was interested in cultural and historical tourism.

**The Middle East market** – Tourists in this group were from Israel (128,674), the United Arab Emirates (74,957), and Kuwait (31,910), respectively. Tourists in this group were interested in the places of luxury, comfort, and cleanliness as well as the seaside location and shopping centres.

The estimated numbers of tourists travelling into Thailand are classified into regions, by considering the previous trends during 1998-2007. The trend of each region



then was forecasted by using three types of equations which are most reliable: linear, exponential and polynomial to calculate the estimated numbers of international tourists from 2008-2017. It is estimated that international tourists will increase from 14.46 million in 2007 to 24.58 million in 2017. The tourists having high tendency in increasing comprise those from the East Asia, Europe, the Americas, South Asia, Oceania, the Middle East, and Africa. There is a tendency of increasing numbers of tourists from East Asia, Europe, the Americas, South Asia, Oceania, Middle East and Africa, from 7.98, 3.69, 0.82, 0.69, 0.73, 0.54 and 0.10 million in 2007, to be 10.07, 7.58, 1.22, 1.87, 2.31, 1.35 and 0.18 million in 2017, respectively. Meanwhile, there is also a rapid and high increase of tourists from Asia, Oceania, the Middle East and Africa, which is in line to the global markets. There is a tendency to have a high proportion of new markets as well (See **Figure 3**). From this forecast, it is estimated the income obtained will be 0.955 and 1.88 m. baht in 2012 and 2017, respectively.

As for Thai tourists, there were 83,234 million Thai tourists travelling in the country in 2007, increasing 2.14 percent from 2006. The income obtained from domestic tourists amounted to 380,417.10 m. baht, increasing 4.15 percent from that obtained in 2006 (TAT 2008). This is due to the government policy in promoting domestic tourism or the project of Unseen in Thailand since 2003. During 2004-2008, there has been a policy in developing the potential of Thailand's competitiveness both at domestic and international levels by promoting Thailand as a gateway to Asia, improving information and communication technology systems, and promoting the world event marketing. Thai travellers in 2007 can be divided into 2 groups: tourists with 36.659 million trips and excursionists with 46.539 million trips (TAT 2008). The analysis of the statistics shows that the estimated trips in 2012 would increase to 119.331, comprising of 60.149 trips for excursionists and 59.182 million trips. In 2017, it is estimated that there would be 83.815 million trips for excursionists and 73.522 million trips for tourists, as shown in **Figure 4**.

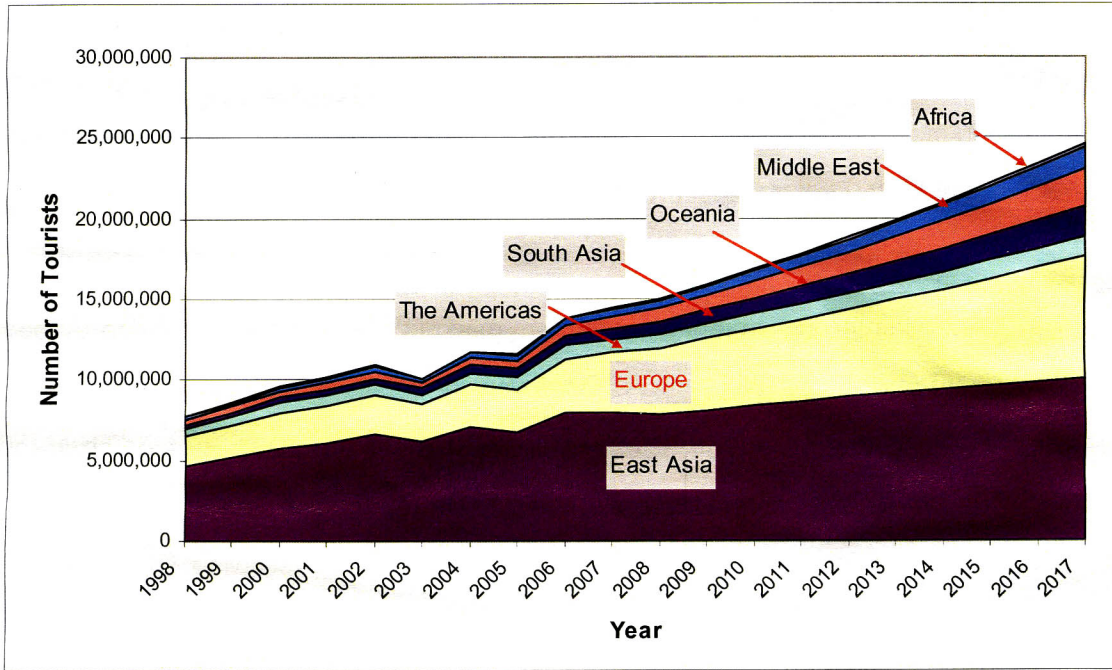
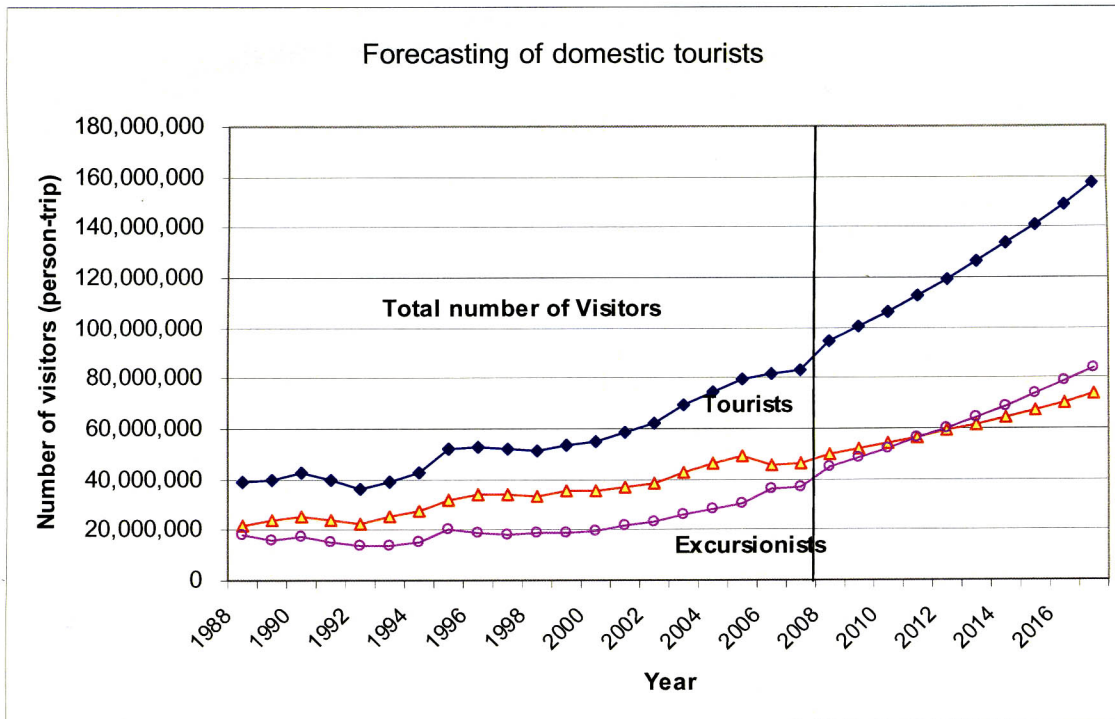


Figure 3 Estimated number of international tourists travelling into Thailand, divided by groups during 2008-2017



Note: Number from 2008 is estimated by TISTR Research Group.

Figure 4 Tendency of increasing domestic tourists

Therefore, in the situation where there is high competition among many newly-growing countries and innovative products in the region, Thailand needs to intensify the marketing management together with an offer of quality incentives to tourists. This will lead the country to its high competitiveness in increasing market share, or being the leading tourism country in Asia.

Activities for the promotion of tourism markets are varied and initiated by both the government and the private sectors. Moreover, the local communities have played more role in creating tourism activities. However, there is still the need of research in tourism marketing as it can help accelerate the growth of tourism industry effectively. The promotion of tourism marketing, thus, requires these three following sectors which are supply of tourism, components of the parties concerned, and research networks in tourism marketing.

In 2008, TAT started to identify types of tourism products with an aim to strengthen the brand "Amazing Thailand". The products are divided into seven categories, so-called 7 Wonders of Amazing Thailand, which included: Thainess, Treasures, Beaches, Nature, Health & Wellness, Treads, and Festivities.

### **3. Tourism strategies**

The tourism strategies of Thailand have been slightly modified since most governments view tourism strategies as one of the most indispensable factors in their policies. Yet, the focus might be different but not significantly. Even though this study emphasizes only strategies currently announced, the previous impact of the former governments' strategies was also studied.

The 10<sup>th</sup> National Economic and Social Development Plan (2007-2011) has stated the strategy for the restructuring of national economy and the achievements of balance and sustainability. Practically, three keys measures have been proposed: (1) Restructuring for the effectiveness of production sector and quality of products and services on the basis of local wisdom and Thai identity; (2) Marketing immunisation and risk management for the markets of products and services, finance, production factor, and treasury system;

and (3) Fostering of fair trade and income distribution. In the third measure, the issue of tourism development is described, in particular of the restructuring of service sector, with an aim to raise national income by developing tourism industry of the country. Possessing both uniqueness and variety in many terms such as natural resources, culture, and Thai identity, Thailand is set as a destination for tourists who prefer either natural or cultural diversity of the Asian region. Moreover, competitiveness of the service sector having high potential must be harnessed in order to expand production base as well as marketing to accommodate the whole region. Product diversity and characteristic services must be created in various businesses, namely, education, health and spa, retail and wholesale, financial services, information technology services, construction, Thai films, etc.

The current government (as of 2008) has set a policy for tourism industry and service sector as follows:

1) To speed up the income earning by improving the quality and standards of sustainable tourism and locating new tourist attractions in the potential areas. These activities is focused on the combination of nature with arts, culture, and life styles of the communities. Cooperation with neighbouring countries will be promoted together with the boosting of marketing for quality tourists such as the seniors, the health concerned group, the convention and trade fair group, and the group interested in ecotourism, local culture, and historical sites. Safety of tourists is also the key focus, thus various measures will be launched to protect them from any crime, dishonesty, and accidents caused by carelessness of business owners.

2) To develop the high potential service businesses so that production bases and marketing can be expanded in the local communities, for instance, health services, convention and trade fair services, international education, construction, film industry, as well as sports and recreation activities. This aims to strengthen the potential of business owners, promote the investment, create standards of businesses, and improve the quality of manpower in this sector to be well-prepared to the expanding businesses and markets.

3) To promote cooperation among trade and service groups in order to develop potential tourism attractions, cultural identity of the communities, and performance of personnel, leading to increasing economic values. These businesses include health and services which link to research and development on medicine and medical supplies.

Moreover, some particular policies of the previous governments have still been continuously implemented. These are the strategy for the development of Thai tourism during 2004 – 2006 and the strategic plan of the Ministry of Tourism and Sports (2004 – 2008) in positioning the country as a tourism capital of Asia within 2008. Even though, the implementation is not a great success, the strategies have been an important framework for the next step of development.

An analysis of these strategies then has been undertaken, resulting in the formulation of marketing strategies of Thailand's tourism. Other information relevant to the strategic planning is also used in the analysis, for example, a corporate plan of TAT under the framework of the 10<sup>th</sup> National Economic and Social Development Plan, which focuses on TAT's role in active marketing and a mission related to the strategic development of the process. Eventually, the roadmap of tourism marketing has been written as a trend for tourism development during 2007 – 2016. The roadmap states as follows:

1) Development of marketing database

- (1) Developing the advanced database system (2009);
- (2) Formulating the strategic plan (in 2011, then every three years);
- (3) Updating information for current changing of global markets (2010 until 2013 and every year);
- (4) Managing marketing during crisis (preparing for 2009 and so on);
- (5) Developing Thailand's status as a gateway to Indo-China/ as the capital of Asia (continuously).

2) Branding Strategies (Macro to micro scales)

- (1) Identifying products' strengthong points and attractions (branding of 2009 and continuously);
- (2) Building brand loyalty (continuously);

- (3) Creating alliance and networks, finding trade partners and building relationship with competitors (continuously);
- 3) Promotion of tourism marketing of overseas tourists
- (1) Finding new markets in new location for new groups of tourists, especially the high budgeted tourists (continuously);
  - (2) Increasing performance in marketing promotion for quality tourists or specific groups of tourists (continuously);
  - (3) Creating mechanisms for increasing income from tourists ( gross income per head or activity, etc.) (continuously);
  - (4) Giving an incentive to tourists, such as offering additional period of stay, tourism programmes, and re-visits (continuously);
- 4) Development of products for specific groups
- (1) Identifying quality products (urgently in 2009);
  - (2) Identifying the target area for the development (Major, minor, specific) (urgently in 2009);
  - (3) Promoting markets for the target developing areas (continuously until 2010);
  - (4) Distributing tourists to various areas for a balance in number (continuously until 2010).
- 5) Increase of competitiveness
- (1) Restructuring marketing operations (urgently in 2009 and continuously every year);
  - (2) Developing marketing networks, support mechanisms of the government and services and sales (urgently in 2009 and continuously);
  - (3) Improving marketing organisations (urgently in 2010);
  - (4) Applying modern media in promoting marketing (urgently in 2010 and continuously).
- 6) Promoting domestic tourism
- (1) Promoting tourism for education and learning (continuously);
  - (2) Launching campaigns in environmental conservation (continuously);
  - (3) Building concept of tourism as people's lifestyle (continuously).

The analysis of tourism strategies initiated by various governments has resulted in the tourism strategies in 2007-2011, which can be implemented continuously until 2016 as shown in **Table 1**. These strategies are set for Thailand's tourism marketing, including goals and objectives, and time frame. This could be used as a roadmap of Thailand's tourism marketing, or a framework for any research to be conducted regarding tourism. It is recommended that further research in the future should be based on the previous results of the current ones or the needs of tourism industry so that the development of tourism marketing would be attained and in line with the marketing strategies that have been set in the long run.

Marketing strategies	Strategy goals	2009	2010	2011	2012-2016
<p>➤ Promotion of tourism marketing of overseas tourists</p>					
<p>○ Finding new markets in new location for new groups of tourists, especially the high end budget tourists</p>	To increase the volume and quality of tourism marketing by expanding the target markets	Continuously from previous plans			
<p>○ Increasing performance in marketing promotion for quality tourists or specific groups of tourists</p>	To develop marketing capability of the government and private sectors in order to support the expansion and change	Continuously from previous plans			
<p>○ Creating mechanisms for increasing income from tourists (gross income per head or activity, etc.)</p>	To increase income from tourism by offering incentives, stimulating, promoting, and creating new processed to attract tourists in spending money	Continuously from previous plans			
<p>○ Giving an incentive to tourists, such as offering additional period of stay, tourism programmes, and re-visits</p>	To create mechanisms to meet demands of markets for tourists' impression, resulting in longer stay or re-visits	Urgently			
<p>➤ Development of products for specific groups</p>					
<p>○ Identifying quality products</p>	To classify quality tourism products into a variety of product groups for serving different demands	Urgently			Operating
<p>○ Identifying the target area for the development (Major, minor, specific)</p>	To divide areas into different strategic zones for the development of tourism to meet different purposes	Urgently			Operating
<p>○ Promoting markets for the target developing areas</p>	To promote and stimulate the tourism markets in the specified areas			Continuously from previous plans	
<p>○ Distributing tourists to various areas for a balance in number</p>	To balance the distribution of tourists and to expand the markets in the specified areas			Continuously from previous plans	



Table 1 Tourism marketing strategies

Marketing strategies		Strategy goals	2009	2010	2011	2012-2016
<b>Development of marketing database</b>						
<ul style="list-style-type: none"> <li>Developing the advanced database system</li> </ul>	To set up the database on tourism and marketing which includes research from all countries at all scales and is easily accessible and applied.	Market database				
<ul style="list-style-type: none"> <li>Formulating the strategic plan</li> </ul>	To draw a strategic plan in marketing.			Plan		Plan
<ul style="list-style-type: none"> <li>Updating information for current changing of global markets</li> </ul>	To keep pace with the situation of tourism marketing and use information for an analysis and planning in order to adapt to the change and growing competitiveness of global markets.				Investigate style and behaviour in tourism	
<ul style="list-style-type: none"> <li>Managing marketing during crisis</li> </ul>	To prepare for tourism management in the urgency when crisis occurs.	Preparing			Estimating and responding instantly	
<ul style="list-style-type: none"> <li>Developing Thailand's status as a gateway to Indo-China/ as the capital of Asia</li> </ul>	To develop Thailand as a centre of Southeast Asia and to promote tourism in the region.				Continuously	
<b>Branding Strategies (Macro to micro scales)</b>						
<ul style="list-style-type: none"> <li>Identifying products' strength points and attractions</li> </ul>	To develop tourism products to meet customers' demands	Branding				Following-up, evaluating and publicising continuously
<ul style="list-style-type: none"> <li>Building brand loyalty</li> </ul>	To improve tourism products to meet quality standards so that tourists are impressed and call again				Continuously from previous plans	
<ul style="list-style-type: none"> <li>Creating alliance and networks, finding trade partners and building relationship with competitors</li> </ul>	To find a variety of products or alternative ones and to seek collaboration and coordination for the growth of regional markets				Continuously from previous plans	

Marketing strategies		Strategy goals				2009	2010	2011	2012-2016
<p>↓ Increase of competitiveness</p>									
O Restructuring marketing operations		To improve the operations in marketing up to the changing environments and to establish marketing mechanisms which can serve all demands of each group					Urgently		Continuously from previous plans
O Developing marketing networks, support mechanisms of the government and services and sales		To enable rapid and accurate linking of information, news, and marketing management which can be useful to the concerned sectors				Urgently			Continuously from previous plans
O Improving marketing organisations		To increase capability of marketing organisations, particularly in planning, promoting and serving market demands appropriately					Urgently		
O Applying modern media in promoting marketing		To promote the use of technologies in management for effective marketing and increasing competitiveness in order to respond rapidly in the changing situation and high competition							Continuously from previous plans
<p>↓ Promoting domestic tourism</p>									
O Promoting tourism for education and learning		To develop new tourism styles and promote quality of domestic tourism which gives benefits to tourists						Continuously from previous plans	
O Launching campaigns in environmental conservation		To use tourism as a tool for building the conservation sense awareness of conservation of natural resources and environment						Continuously from previous plans	
O Building concept of tourism as people's lifestyle		To increase the number of domestic tourists						Continuously from previous plans	

Source : TISTR Research Team

Remark : The mentioned strategies are collected and analysed from previous policies of strategies ever written in Thailand, which is comparable to the tourism marketing roadmap. These strategies might be changed in the future. In this study, these strategies are used as a framework for conducting research in tourism marketing, and need to be adjusted in the future.

## 4. Tourism marketing research and needs

In this study, research in tourism marketing and research plans of Thailand during 1996 – 2006 has been collected and categorised by the research objectives, philosophy/concept, applications, opinions/attitudes, and site research. The review of research of Thailand and other countries has also been conducted to obtain the overall image of tourism in terms of importance/market potential, tourists, service providers/products and services. These factors are analysed in order to investigate if there is any gap between research and tourism marketing strategies, thus further studies or research can be recommended. The results of the analysis coupled with comments of the parties concerned are used as the basis for the recommendation of research trend in the future as follows:

### 4.1 Collection of related research

The study was undertaken by reviewing academic publications and relevant information such as research papers, scholarly printings, information from website, etc. during 1996-2006. It was found that some of research on tourism marketing were as follows: the studies of number of tourists, budgets and quantitative change, and tourists' activities and behaviours, which were categorised by tourists' countries of origin and their destination. The research on tourism marketing was related to the markets and was categorised by types or tourism styles, and marketing plans. The research can be divided into 3 categories as follows:

1) **Research on policies.** There were 38 research reports, 31 in Thai and 7 in English. The main content of the research was about policies and implementation of marketing plans as well as manuals on following-up and assessment. The research was undertaken with an aim to be used in planning and developing strategies of tourism, development guidelines, and roles and responsibilities of the government sector.

2) **Research on tourism situation.** There are 14 research reports, all in Thai. The main content covered the factors having an impact on tourism such as economic and social changing situation, global physical change / natural disasters, international travels, tourist attractions, readiness.

3) **Research on tourism marketing.** This type of research comprises research papers, theses, seminar papers related to the issues of demand and supply of tourism marketing. There were 113 research studies, 99 in Thai and 14 in English. The content of these documents described the tourism markets, information on tourist attractions, and communications patterns. The results of the research could be used in further studies of tourism marketing, for example, tourism records, the marketing guidelines for executives of both the government and private sectors.

#### 4.2 Analysis of research previously conducted

The research on tourism marketing of Thailand since 1996-2006 aimed to study for the improvement of tourism supply so that the tourism location could be prepared together with other components such as, personnel, nature and environment, facilities, etc. The study of demand was also undertaken, focusing on behaviours of tourists who used electronic media, and travel records of Thai tourists in different parts of Thailand. The studies on demand and supply were used for the development of a master plan of TAT, including the studies of image, advertisements, and public relations of the national tourism.

The results showed that the research on tourism of Thailand were conducted mostly on demand to accelerate the supply push, which is not suitable for highly competitive situation of the present. It is obvious that, currently, it tends to be a niche, demand-driven market which serves different needs of the target groups. However, only few research on demand-driven market could be found.

The research mostly found in Thailand involves the study of 4Ps (Product, Place, Price, and Promotion), carried out by academics and students who were not in tourism industry, thus having a little understanding on tourism industry. This resulted in the lack of diversified topics of research, particularly in the demand-driven focus. As for international tourists, the research method mostly used was an exit survey by investigating tourists upon departure. There was still a lack of research on tourists' behaviours of the target groups, data of research on tourism, most of which were dispersive and too difficult to access.

Some observations arisen from the analysis of research work are as follows:

(1) The role of government and organisations concerned with tourism marketing research is limited only where products and target markets can be clearly identified.

(2) An analysis of tourism markets, competition, and related environment specifies only the groups of tourists having effects to tourism patterns.

(3) Strategies on safety and security standards in tourism have not been fully developed and the enforcement does not cover all sectors.

(4) Most of research aim to promote tourism products. Yet, there is still the lack of guidelines in planning, particularly in the issues of sales and distribution or stimulation measures for tourists to buy products or use services continuously.

(5) The trend of tourism will be the development of products and tourism patterns that accommodate the ever changing situation.

(6) There is not much research on marketing of promising products both in current and new markets.

(7) There is a need of research concerning publicising of information and marketing news to enhance competitiveness of tourism business in international markets.

(8) Research on technologies used in tourism industry must be promoted. More attention should be paid on, for example, the development of E-commerce, online marketing, tourism databases, and information management systems. The data regarding tourism of the country also need to be integrated.

(9) Following research is needed: enhancement of effectiveness of synergistic management at all levels and for the private and government sectors, the domestic and international communities; development of performance and potential in making tourism policies, strategies and innovative thinking; strategies in legislation reform and amendment of rules and regulations regarding tourism, which are rarely found and need to be integrated as well.

From the review of research on tourism, it is found that a large number of research tend to focus on the ecotourism (places and location) and sustainable development of

ecological attractions, health tourism, and specialised activities in niche markets. Thailand needs to improve marketing strategies and seek new markets that can serve demands and fulfil satisfaction of target customers both in the short and long run. The strategy of niche oriented approach is recommended while further studies on health tourism must be conducted comprehensively. Strategies in tourism marketing must give clear objectives regarding market areas, target tourist groups, limitations of these tourist groups, and selection of products to suit tourists' needs. This must be implemented in line with the development of service quality to meet national and international standards or to continuously serve customers' demands and satisfactions.

#### **4.3 Needs in Tourism Research**

The study request ideas from the parties concerned with tourism marketing research , which comprise TAT staff, private entrepreneurs, and researchers. Each party has different ideas and objectives. The needs in marketing research can be concluded as follows:

##### Research needs as recommended by TAT staffs

- 1) The tourism marketing research on tourists' behaviours, and new services and products.
- 2) Research on policy, tourism trends, attentiveness to changing political situation, promotion and tourism development, and social impact.
- 3) Research on marketing, especially new markets, Muslim tourists, and health tourism.
- 4) Research on stakeholders, quality of life of the communities, and benefits of tourism activities to the locals.
- 5) Research on promotion and marketing: guidelines for ultimate benefits of promotion and marketing in Asian markets.
- 6) Research on development of other supportive factors to tourism marketing, for instance, personnel, locations for ecotourism, health and cultural tourism, shopping centres, service standards, facilities, tourism activities in different tourism locations in each region, impression in tourist attractions.

- 7) The trends of marketing still head towards mass tourism and the niche market while there is an increasing trend of alternative tourism, especially the group from the middle-east who prefer cultural and heritage tourism styles. A large group of tourists desire more of environmentally friendly tourism, or Buddhist merit- making and monastery tour, which can be developed as a national brand. Meanwhile, the post-modern tourism is still the new concept that needs to be clarified to gain better understanding. Thus, further studies on this topic are important and should be planned in order to cope with the rapid growth and environmental aspects.
- 8) To apply these research results for promoting marketing, some problems and obstructions arisen are as follows: lack of budget, lack of organisations responsible for research evaluation, repetition of research topics too often conducted, lack of precise research results for further applications, and impracticability of research results due to policy changing of the government and other physical changes. It is also found that some research work indicates the promising marketing trends but it is not possible in practice due to a lack of marketing budget. Meanwhile, the data is not up-to-date and there is only few of research on tourists' behaviours.

#### Research needs as recommended by the private sector

The private sector thought that the results of existing research had not been used effectively because of the inaccessibility problem. They did not know about what topics had been conducted and what results had been suggested. As a result, there should be the development of research database which is easily accessible so that entrepreneurs can make benefits from the use of it. The research issues mostly required by the private sector are as follows:

(1) The research on seasonal tourism marketing. Marketing of each seasonal tourism should be investigated, thus appropriate public relations and decision making in marketing and product development can be made.

(2) Quarterly statistical records of tourists. The updated data of tourists will be useful in marketing planning.

(3) International tourists' behaviours, particularly their demands and various segments concerned.

(4) Other research topics which support current tourism strategies.

(5) MICE markets

(6) Forecast of tourists and their series models in each geographical area.

(7) Tourists' needs, especially behaviours and desire of each target group.

(8) Community tourism.

Research needs as recommended by concerned researchers

It is recommended that the research topic on marketing positioning product development should be undertaken. Moreover, the research results should be disseminated to the parties concerned. Other research issues which are recommended for further studies include:

(1) Tourism promotion in different aspects, namely, short-course training in language, Thai culinary arts and culture, culture-oriented tourism style, long-stay tourism, and branding of Thai products.

(2) Medical Hub tourism. This will invite quality tourists into the country.

(3) Demand of market segmentation and global segment of high potential.

(4) Expansion of tourism markets and the distribution.

(5) Laws and regulations that support the investment in tourism.

(6) Repeat visiting tourists and their targets.

(7) Development of communication systems for both international and local tourists.

(8) Supply of man-made tourist spots in replacement of natural sites. This can help create the modern style of tourism, for instance, the attractions of interesting legends or folktales in some particular areas .

(9) Accommodating capacity of tourism sites.

(10) Management of key tourism cities.

(11) Development of tourism services, for example, personnel, logistics, etc.

(12) Safety in life and properties of tourists



#### 4.4 Analysis of research needs

The analysis of research needs in tourism marketing was conducted by reviewing previous research, tourists' needs, and existing tourism strategies combined with the concept, related theories, and stakeholders' needs in order to find the research gap and propose the issues for further studies and for the planning of TAT's research in the future. The results can be concluded that most previous research are undertaken under the framework of marketing strategies, namely, database development, branding strategies (macro to micro scales), marketing strategies, development of products for target tourists, and enhancement of competitiveness capability. It is interesting to note that there is not research on management of marketing in crisis (marketing database development strategies) and improvement of the market organisation. Therefore, the research gap and needs can be classified according to marketing strategies as follows:

1) Development of marketing database. The most urgent need is the updating of information. This should be a quarterly update so that the private sector can keep pace with the changing situation and use the updated information for planning. The database and information provided need to be easily accessible, for instance, having the portal website, or the Call Centre, the consortium of the integrated tourism information, research on tourists' behaviours categorised by seasons to investigate the market sharing. Also important, there should be research on efficiency improvement of personnel in the government sector who provide services to tourists.

2) Branding strategies (Macro to micro scales). The research needed is the finding of marketing channels covering various types of products, incentives offered to tourists, behaviours of repeat visiting tourists with high budget, and introduction of Thailand to global markets.

3) Promotion of tourism products for international tourists. The research needed is the development of new products which can serve tourists' needs and behaviours, especially the international tourists, thus improving the market share. The research should focus on studies of quality tourist groups, mass tourism /alternative tourism /post-modern tourism in order to make plans for the expansion.

4) Development of products for target tourists. The research in this area should focus on outstanding resources and tourism location, needs in unique and cultural products, ultimate promotion and marketing, marketing communications, and government's roles in developing tourism location .

5) Enhancement of competitiveness capability. The research needs in this topics include studies of market groups, identification tourist attractions and tourist markets, establishment of an organisation for screening of research projects to prevent repetition, and effective information provision via the Internet and websites.

## **5. Roadmap of Tourism Marketing Research**

### **5.1 Roadmap Framework of tourism marketing in Thailand**

A roadmap presents the destination to be reached in the future, thus it is an effective tool for creating the vision and planning of organisational or national achievements. It is also suitable to be used in management, visualising the implementation and practicality. In this context, the roadmap of tourism marketing research in Thailand can be defined as a plan and recommendations in conducting research on tourism marketing research so as to keep pace with the changing situation and to obtain the accurate information of either national and global markets. As a result, the tourism markets of Thailand can be effectively developed.

The roadmap of the tourism marketing is undertaken on the basis of analysis of the three factors concerned: changing situation, national and global tourism, and development strategies in tourism, marketing, as well as research needs in tourism marketing.

Tourism marketing strategies of Thailand, in particular of TAT, have been developed as a roadmap of tourism marketing and as a framework of research planning in tourism issues that support the operations in tourism marketing. Apart from being a roadmap of tourism, it also serves as a roadmap for research in tourism marketing.

The strategies of tourism marketing in Thailand are launched as a driving force for the conduct of marketing research that covers both the demand and supply of tourism

markets domestically and internationally. The marketing research needed includes the topics involved with marketing demand, competition, consumers, product development, distribution and promotion, and marketing trend. Below are strategies of tourism marketing.

### 5.1.1 Research strategies on demand

#### 1) Research strategies on marketing demand

1.1) Needs of tourism products for the high budget tourists, i.e. in developed countries and the middle-east countries, who can high cost per head.

1.2) Alternative tourism, for instance, ecotourism, adventurous trips, agro-tourism, and community tourism.

1.3) Tourism needs of emerging markets having high potential.

1.4) Tourism needs of tourists from neighbouring and competitive countries.

1.5) Target markets, needs, and tourism behaviours of specific groups of tourists.

2) Distribution and marketing promotion – finding channels for distribution of tourism products which can meet the needs of target markets.

#### 3) Image building and branding

3.1) Identify destination brand of the country

3.2) Develop tourism image

4) Building brand loyalty of Thailand's tourism products for attracting tourists to repeat their visits.

4.1) Research on behaviours of high budget tourists who repeat visiting.

4.2) Research on activities and tourism patterns which can meet demands of high budget tourists who repeat visiting.

5) Increasing competitiveness. The research needed are:

5.1) Development of broad-band network for tourists in hotels and resorts

- 5.2) Advertisement and public relations via website.
- 6) Tourism situation analysis, monthly or quarterly.
- 7) Crisis management
  - 7.1) Building task force
  - 7.2) Setting up a crisis management fund
  - 7.3) Disseminating information and positive images of the country to tourists via the marketing channels in 2) Distribution and marketing promotion

#### **5.1.2 Research strategies on supply**

- 1) Research strategies in development of tourism products
  - 1.1) Identify the target location for the development so as to serve the needs of major and minor tourists as well as specific tourist groups.
  - 1.2) Develop products for specific groups.
  - 1.3) Balance the distribution of tourists.
  - 1.4) Develop marketing database
- 2) Research strategies in establishing organisations for driving tourism marketing
  - 2.1) Develop an alliance between the government and private sectors in conducting research on promotion of tourism marketing.
  - 2.2) Develop the system in planning, management, budgeting, and following-up activities of organisations involved with tourism strategies.
  - 2.3) Enhance effectiveness of government personnel involved with tourism services.
  - 2.4) Develop an integrated system of tourism information among the parties concerned.
  - 2.5) Manage knowledge in tourism.

## 5.2 Programmes for research projects on tourism marketing

The results of previous studies on tourism market, tourism situation, tourism development strategy, research needs and tourism marketing strategy were used to determine the programmes of research projects on tourism marketing in Thailand. Such that the improved tourism marketing strategy could particularly be a flagship for the conduct of research projects on tourism marketing, basically including both demand and supply of tourism markets either domestically or internationally.

Strategies for tourism marketing research, so called a road map, mentioned above could be used to determine 6 research programmes for tourism marketing in Thailand as follows:

- Programme 1 Research plan for the analysis and monitoring of Thailand world tourism situation
- Programme 2 Research plan for the needs of tourism markets
- Programme 3 Research plan for tourism sales promotion
- Programme 4 Research plan for tourism competition
- Programme 5 Research plan for the development of tourism products
- Programme 6 Research plan for the development of organisation driving tourism marketing

All of these 6 programmes would respond to the needs in research project on tourism marketing in Thailand. The fundamental programmes could be categorised into 25 projects of which proposals, time, budget and parties responsible for undertaking the projects are summarised in **Tables 2**

The initiated projects will be continuously conducted within the period of the 10<sup>th</sup> National Economic and Social Development Plan (2007-2011). The main project will commence in the year 2009 and the rest will be continuously proposed until the year 2016. The total budget of all project amounts to 1,156 m. baht, of which 977 m. baht will be under responsibility of the Tourism Authority of Thailand (TAT), and the rest 179 m. baht will be distributed to other relevant organisations, such as Ministry of Tourism and Sports, the key provinces concerned, Tourism Council of Thailand (TCT), National Research Council of Thailand (NRCT), Local Administration Organization (LAO), Office of Tourism Development (OTD), the Thailand Research Fund (TRF), and the Office of the National Economic and Social Development Board (NESDB) and local administrative organizations. Details of annual budgets are as shown in **Table 3**.

Table 2 Programmes for research projects on tourism marketing in Thailand

Strategy	No.	Project	Objectives	Period	Budget (m. baht)	Host/Network
Research strategy on demand						
Programme 1: Research plan for the analysis and monitoring of Thailand and world tourism situation						
Research strategy to analyse the world tourism situation	1	Development of the database for tourism marketing (establishment of Tourism Marketing Information Centre )	1) To develop the system for all-time updating of the tourism marketing information through the collection, assessment and analysis in daily, weekly, or monthly basis. This should be a portal for all other networks 2) To enable this information centre as to develop and monitor the tourism development and sale promotion including the planning of tourism during critical time or in special situation	Phase 1: 2009 Phase 2: 2010-2011 Phase 3: 2012 onwards	Phase 1: 6 m. baht Phase 2: 200 m. baht Phase 3: 3 m. baht annually	Tourism Authority of Thailand, Ministry of Tourism and Sports
Research strategy to analyse the world tourism situation	2	Research on analysis of the world tourism situation in monthly and quarterly periods and monitoring of the site situation and target groups (by using poll)	1) To follow the monthly and quarterly world tourism situations by analysing the information from UNWTO and other research institutes; to analyse tourism situation in collaboration with other governmental and related private organizations; and to	2010 and continuously conducted every year	15 m. baht annually	TAT as the host with outsourcing consultancy services

Strategy	No.	Project	Objectives	Period	Budget (m. baht)	Host/Network
			promulgate this information to the private sector			
			2) To follow the direction, trend, and movement of tourism markets, as well as the consequent impact and changes in accordance with the tourism situation (by using poll)			
Research strategy to analyse the world tourism situation	3	Research and forecast of tourists in the main regions of the world (review secondary information)	To follow the tourism situations in each main region of the world and disseminate the information to the private sector by using information network system	2010 onward	3 m. baht for every 3 years	TAT
<b>Programme 2: Research plan for demand of tourism markets</b>						
Research strategy on needs of tourism market	4	Research on needs and behaviours of tourists in the main market (foreign market)	To study the attitude and needs of tourists from the main market visiting Thailand including the future forecast	2009, survey conducted every 2 years	238 m. baht	TAT as the host with outsourcing consultancy services
Research strategy on needs of tourism market	5	Research on needs and behaviours of tourists in tourism products (domestic market)	To study the attitude and needs of Thai tourists travelling to various tourism destinations in the country including the future forecast	Commencing in 2009	70 m. baht, studies to be conducted every 3-5 years, each 70 m. baht	TAT as the host with outsourcing consultancy services

Strategy	No.	Project	Objectives	Period	Budget (m. baht)	Host/Network
Research strategy on the needs of tourism market	6	Research on the needs of alternative tourism (foreign market)	To study the attitudes and behaviours of tourists who prefer the alternative tourism and use the study results to determine the strategy for marketing planning and sale promotion including tourism product development to cover all Thai tourism market demands	2009-2012	60 m. baht Phase 1: 30 m. baht Phase 2: 30 m. baht	TAT as the host with outsourcing consultancy services
Research strategy on needs of tourism market	7	Research on the needs and behaviours of quality tourist groups (foreign market)	1) To perceive more details on marketing behaviours and expand the quality tourist groups by emphasizing more on the income than the number of tourists. The quality tourists are composed of high level market, family group, elderly people, MICE and niche market 2) To determine the life cycle of tourism products in Thailand in the quality market 3) To plan for selling tourism products in the quality tourist market	2010-2013	27 m. baht Phase 1: 12 m. baht Phase 2: 17 m. baht	TAT as the host with outsourcing consultancy services



Strategy	No.	Project	Objectives	Period	Budget (m. baht)	Host/Network
Research strategy on the needs of tourism market	8	Research on the needs and behaviours of tourists in the competitive market (foreign market)	<p>1) To determine the decision factors for tourists to travel to the competitive markets (e.g. the attractiveness, services, and tourists' attitude)</p> <p>2) to understand the product life cycle of tourism products from the competitive market</p> <p>3) to improve tourism products to meet the needs of tourists</p> <p>4) to set up the plan for selling tourism products in the competitive market or turn the competitor to alliance</p>	2010-2011	48 m. baht	TAT as the host with outsourcing consultancy services
<b>Programme 3: Research plan for tourism sales promotion</b>						
Research strategy on sale and marketing promotion	9	Research on specific selling channel of tourism products to meet the needs of target group	<p>1) To implement the value creation for tourism product development</p> <p>2) To promote the sell of tourism product up to the market needs</p> <p>3) To determine the competition patterns and maintain the competitive advantage</p>	2011-2012	12 m. baht	TAT as the host with outsourcing consultancy services

Strategy	No.	Project	Objectives	Period	Budget (m. baht)	Host/Network
Research strategy on sale and marketing promotion	10	Research on sale and marketing promotion in cooperation with the business sector	To introduce the business extension strategy into the sale and tourism marketing promotion	2011	10 m. baht	TAT with support from the Office of Tourism Development
Research strategy on competitiveness increase	11	Research on development of broadband networking system	To improve the communication networking system to provide efficient services to tourists focusing on accommodation in hotels and resorts	2010	10 m. baht	Office of Tourism Development
Research strategy on sale and marketing promotion	12	Research on the improvement of communication and dissemination of tourism marketing information	1) To study each media style and potential, the evolution of media consumption, trend in making public relations media and consumers' behaviours 2) To improve the provision of tourism information through modern media related to the target group	2009-2010	10 m. baht (5 m. baht each year)	TAT
Strategy on image creation and branding	13	Research on methodology and channel to advertise the image of tourism products of the main tourism provinces	To create and advertise the image of Thai tourism products and other tourism destinations to stimulate and inspire the consumers and use as the competitive strategy	2009-2012 2009-2010: 20 m. baht 2011-2012: 20 m. baht	40 m. baht	TAT

Strategy	No.	Project	Objectives	Period	Budget (m. baht)	Host/Network
<b>Programme 4: Research plan for tourism competition</b>						
Strategy on image creation and branding	14	Research on creation of tourism image and determine the tourism brand and destination brand of the country	1) To determine the tourism brand of the country 2) To determine the destination brand of the country emphasizing on the main tourism destination provinces 3) to find out the specific channel for public relations and the marketing communication of national images to tourists	2009-2010	25 m. baht	TAT
Strategy on image creation and branding	15	Research on national culture as a selling point	1) To determine the selling point of cultural products in tourism aspects 2) To find out the cooperation guideline for market promotion in neighbouring countries	2010-2011	10 m. baht	TAT with financial support from other sources e.g. Thailand Research Fund which gives research budget on tourists in neighbouring countries
Strategy on brand loyalty of tourism products	16	Research on creation of brand loyalty and the behaviour of repeat/high budget visitors	To study the behaviour of tourists who repeat their visits to both key and emerging markets including the study on the factor affecting the	2009-2010	15 m. baht	TAT with financial support from Thailand Research Fund

Strategy	No.	Project	Objectives	Period	Budget (m. baht)	Host/Network
			repeat visiting in order to set up the measure of making brand loyalty of national image and other tourism destinations in the country			
<b>Research strategy on the demand</b>						
<b>Programme 5: Research plan for the development of tourism products</b>						
Research strategy on development of tourism products	17	Research on determination of the target areas to be developed in order to meet the needs of major and minor groups of tourists, and a specific group	1) To review and determine the patterns of product promotion, especially those ready to sell in quality market group <u>Major Key cities</u> : theme park / MICE, education and health services, etc <u>Secondary cities</u> : eco-tourism, long stay, religion and public charity, etc. 2) To maintain a customer base of mass tourism and support the expansion of alternative and post-modern tourisms	2011	20 m. baht (5 m. baht each province)	TAT with financial support from the committee and provinces
Research strategy for development of tourism	18	Research on the development of tourism network and balance of the tourist distribution	1) To study and monitor the conditions of tourism resources as tourism destination and activity including new ready to sell tourism products	2011	40 m. baht	TAT

Strategy	No.	Project	Objectives	Period	Budget (m. baht)	Host/Network
products			2) To distribute tourists to other potential tourism destinations according to accommodation capacity			
Research strategy for development of organisation for driving tourism market	19	Research on the study and review of national potential in being the Capital of Asia and the gateway to Indo-China	1) To study the pattern of tourism in linking with neighbouring countries either by land, waterway and air for further development, which serves the demands of the target group and facilitate the international cooperation 2) To conserve the Thai unique tourism services	2010	15 m. baht	TAT with supports from Thailand Research Fund, National Research Council
Research strategy for development of organisation for driving tourism market	20	Research on development of the tourism logistic system	To obtain the clarity and plan to develop the transportation system for tourism (land, waterway, air) in harmonization with the expanded tourism routes	2010-2011	20 m. baht	Office of the National Economic and Social Development Board
Research strategy for development of organisation for driving tourism market	21	Research on safety of tourists' lives and properties	To improve and set up the measure for the safety of life and property of tourists	2010-2014	25 m. baht (5 m. baht annually)	Office of Tourism Development, Local Administration Organisation, Province, Thailand

Strategy	No.	Project	Objectives	Period	Budget (m. baht)	Host/Network
						Research Fund, National Research Council
<b>Programme 6: Research plan for the development of organisation driving tourism marketing</b>						
Research strategy for the development of organisation driving tourism marketing	22	Research on the development of the alliance between the governmental and private sectors, and network creation	1) To establish the efficient alliance between the governmental and private sectors 2) To transfer tourism knowledge between the governmental and private sectors	2010-2011	16 m. baht (overall budget 5 m. baht, pilot province 2.5 m. baht each)	Ministry of Tourism and Sports, Tourism Council of Thailand, Thailand Research Fund
Research strategy for the development of organisation driving tourism marketing	23	Research on the development of planning system, budget management, and monitoring of the implementation of the parities concerned with tourism strategies	To implement the development of tourism industry under the set-up strategy framework without any changes affected by political situation	2010	5 m. baht	Ministry of Tourism and Sports by Office of Tourism Development
Research strategy for the development of organisation	24	Research on the development of effective governmental personnel in tourism services	1) To review the patterns and courses on personnel development in tourism 2) To develop personnel in tourism services to provide impressive	2010-2014	3 m. baht 2010 : 1 m. baht 2011-2014 :2 m. baht (0.5 m. baht	Office of Tourism Development

Strategy	No.	Project	Objectives	Period	Budget (m. baht)	Host/Network
driving tourism marketing			services to tourists		annually)	
Research strategy for the development of organisation driving tourism marketing	25	Research on knowledge management in tourism Thailand	1) To establish the knowledge management system in tourism of Thailand 2) To create the channels in effectively disseminate knowledge to the parties concerned	2010-2012	15 m. baht	Ministry of Tourism and Sports by TAT

Note : Some conditions are attached to the above programmes as follows : 1) Apart from an emphasis on tourism market (as well as some issues of product demand), there might be some other projects from relevant organisations; 2) The host refers to the main host only; 3) The host will be able to describe the project into details or create as sub-projects depending on group, area, or goal; 4) All of the budget can be practically adjusted depending on the support from any funding agency; 5) Researchers and research fund can be allocated from other sources such as the Commission for Higher Education, Thailand Research Fund, and National Research Council, which give such financial support for researchers in educational institutes; 6) Tourism Policy Committee and Tourism Development Fund are not mentioned in this article though they are the important supporting organizations as well.

Table 3 Annual programmes and research projects on tourism marketing (2009-2016)

Programme No.	Project	2009	2010	2011	2012	2013	2014	2015	2016	Budget	Host
<b>Programme 1: Research plan for the analysis and monitoring of Thailand and world tourism situation</b>											
1	1 Study and development of information system for tourism marketing (establishment of Tourism Marketing Information Centre)	6	100	100	3	3	3	3	3	Phase 1: 6 m. baht Phase 2 : 200 m. baht Phase 3 : 3 m. baht <b>Total budget 221 m. baht</b>	TAT
1	2 Research on analysis of the world tourism situation in monthly, quarterly periods and monitor the site situation and target group (by making poll)		15	15	15	15	15	15	15	Commencing in 2010 and continuing, 15 m. baht <b>Total budget 105 m. baht</b>	TAT
1	3 Research and forecast of tourists in the main regions of the world (research from secondary information)		3				3			Commencing in 2010 and continuing by 3 m. baht for every 3 years <b>Total budget of 6 m. baht</b>	TAT
<b>Programme 2: Research plan for the needs of tourism market</b>											
2	1 Research on the needs and behaviours of tourists in the main market (foreign market)	79.3			79.3			79.4		Commencing in 2009 and periodically conducted for every 2 years <b>Total budget 286 m baht</b>	TAT
2	2 Research on the needs and behaviours of tourists in tourism products (domestic market)	70				70				Commencing in 2009, <b>Total budget 140 m. baht</b>	TAT



Programme No.	Project	2009	2010	2011	2012	2013	2014	2015	2016	Budget	Host
2	3 Research on the needs of alternative tourism (foreign market)	15	15	15	15					During 2009-2012, 60 m. baht Phase 1 : 2009-2010 for 30 m. baht Phase 2 : 2011-2012 for 30 million bath	TAT
2	4 Research on the needs and behaviours of quality tourist group (foreign market)		6	6	7.5	7.5				During 2010-2013, 27 m. baht Phase 1: 2010-2011 for 12 m. baht Phase 2 : 2012-2013 for 15 m. baht	TAT
2	5 Research on the needs and behaviour of tourists in the competitive market (foreign market)		24	24						Commencing in 2010-2011, 48 m. baht	TAT
<b>Programme 3: Research plan for tourism sales promotion</b>											
3	1 Research on specific selling channel of tourism products to meet the needs of target group			6	6					Commencing in 2011-2012, 12 m. baht	TAT
3	2 Research on sale and marketing promotion in cooperation with the business sector			10						In 2011, 10 m. baht	TAT
3	3 Research on the development of broad-brand networking system		10							In 2010, 10 m. baht	TAT

Programme No.	No.	Project	2009	2010	2011	2012	2013	2014	2015	2016	Budget	Host
3	4	Research on the improvement of communication and dissemination of tourism marketing information	5	5							During 2009-2010, 10 m. baht (5 m. baht each year)	TAT
	5	Research on methodology and channel to advertise the image of tourism products of the main tourism provinces	10	10	10	10					During 2009-2012, 40 m. baht During 2009-2010, 20 m. baht During 2011-2012, 20 m. baht	TAT
<b>Programme 4: Research plan for tourism competition</b>												
4	1	Research on creation of tourism image and determine the tourism brand and destination brand of the country	12.5	12.5							Commencing on 2009-2010, 25 m. baht	TAT
	2	Research on national culture as a selling point		5	5						During 2010-2011, 10 m. baht	TAT
4	3	Research on creation of brand loyalty and the behaviour of repeat/high budget visitors	7.5	7.5							During 2009-2010, 15 m. baht	TAT
<b>Programme 5: Research plan for the development of tourism products</b>												
5	1	Research on determination of the target areas to be developed in order to meet the needs of major and minor groups of tourists, and a specific group			20						In 2011, 20 m. baht (5 m. baht for each province)	Province/ TAT

Programme No.	Project	2009	2010	2011	2012	2013	2014	2015	2016	Budget	Host
5	2			40						In 2011, 40 m. baht	TAT
5	3		15							In 2010, 15 m. baht	Committee, TRF/NRCT, TAT
5	4		20	20						During 2010-2011, 20 m. baht	NESDB
5	5		5	5	5	5	5			During 2010-2014, 25 m. baht (5 m. baht each year)	OTD, LAO, Province, TRF, NRCT
<b>Programme 6: Research plan for the development of organisation driving tourism marketing</b>											
6	1		5	11						During 2010-2011, 16 m. baht (overall 5 m. baht, pilot area for 2.5 m. baht each province)	Committee/ FTI, TRF
6	2		5							In 2010, 5 m. baht	Committee

Programme No.	Project	2009	2010	2011	2012	2013	2014	2015	2016	Budget	Host
6	3		1	0.5	0.5	0.5	0.5			During 2010-2014, 3 m. baht	OTD/ Provinces
										2010, 1 m. baht 2011-2014, 2 m. baht (0.5 m. baht each year)	
6	4		5	5	5					During 2010-2012, 15 m. baht	Committee
										1,156 m. baht	
		205.3	269	292.5	146.3	101	26.5	97.4	18		
		205.3	213	191	135.8	95.5	21	97.4	18	977 m. baht	
			56	101.5	10.5	5.5	5.5			179 m. baht	

Note  Phase 1  Phase 2  Phase 3

## 6. Patterns and processes for creating the network of tourism marketing research

The advantage of research on tourism markets lies in the fact that it can be used as a guideline for tourism management, but so far, there is still a lack of a network responsible for setting the direction for the conduct of research on tourism markets. As a result, an organisation must be set up to deal with this. In addition, research on tourism marketing has not been an interesting topic for the funding agencies. Most of research work has emphasized only on the production of tourism products or resources. Therefore, it is necessary to establish the responsible organisation for tourism marketing research which can be self-supporting in terms of research fund while having connection with other networks such as funding agencies, organisations requiring research, researchers, and end-users of research results, as shown in **Figure 5**. TAT is recommended to act as the host in connecting network members as TAT has involved with either requiring research, identifying research topics, dealing with funding, conducting research projects or supervising researchers. In other words, TAT's mission directly serves the need in tourism marketing of Thailand.

The cooperation network will be set up amongst the research organisations, researchers, the Thailand Research Fund, the Bureau of the Budget, Ministry of Finance, National Research Council of Thailand, and the Tourism Fund. The cooperation will be promoted having the central organisation as a communication centre (referred to TAT) or having the network secretary to facilitate communications amongst network members. Moreover, members can communicate directly with each other. TAT can also set up the coordinating committee composed of TAT's concerned departments to act as a host to identify research topics, create research cooperation with other organisations, allocate research fund, and to facilitate other research organisations or researchers to access funding. However, direct communications amongst researchers and research organisations are also promoted. (Star 1997).

The operation processes of the administration and management of the tourism marketing research network are schematically shown in **Figure 6**. Under the framework of the national policy, TAT will act as the main host for the integrated system. The funding agency will select and give financial support to researchers based on the interesting and relevant research topics. The key aim of these research projects must be applicable and meet the needs of end-users. In this regard, the Tourism Marketing Information Centre, so called the War Room, must be established in order to manage the conduct of research for the complete, compact, and long-term research work could be obtained in the appropriate timeframe. The War Room, collaboratively supervised by the Ministry of Tourism and Sports, TAT, and Office of Tourism Development, will have its mandate to collect the information concerned both in the past and present, and provide future forecast which will be used in all kinds of planning, for instance, emergency plan, or short- and long-term plans.

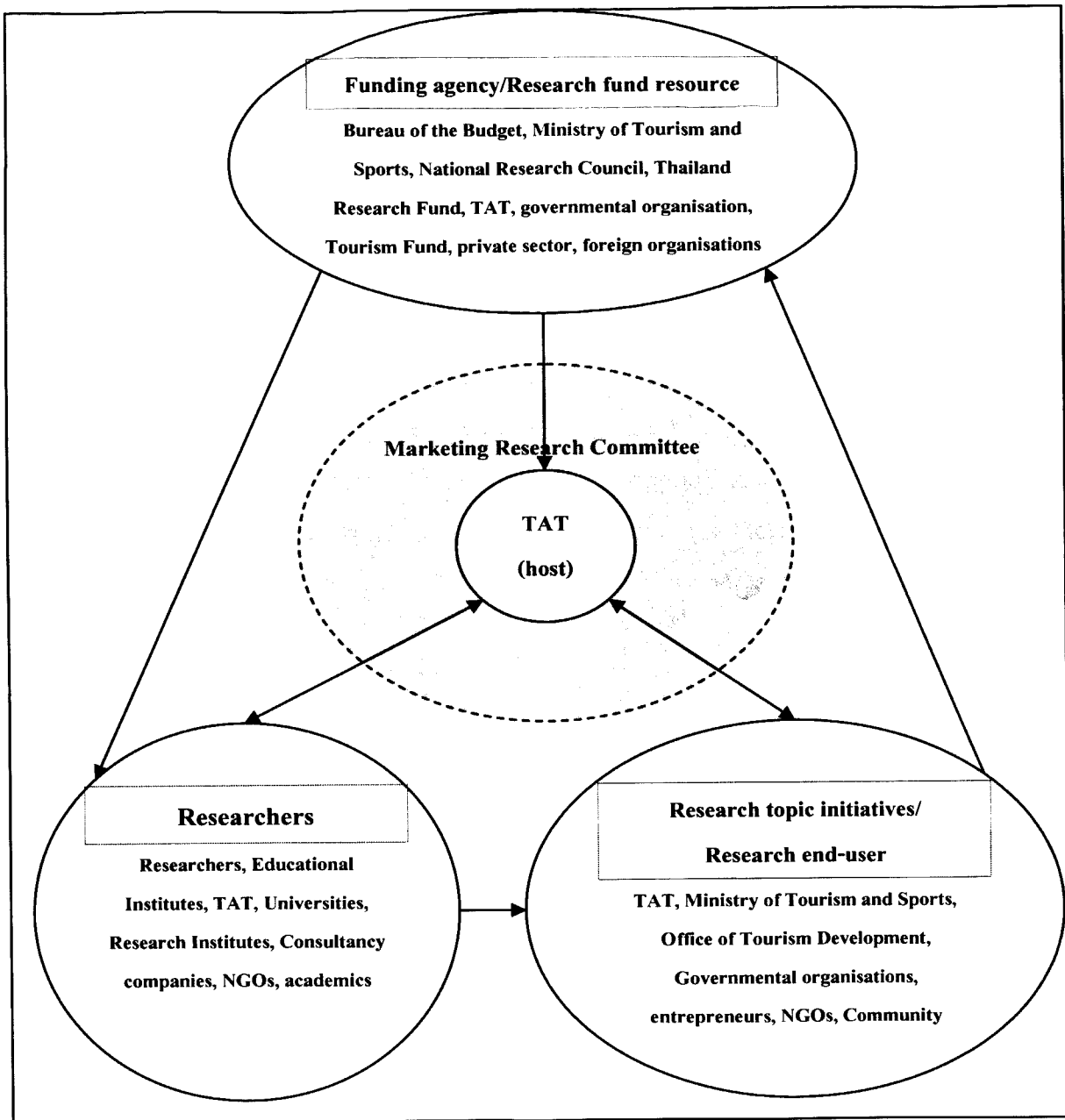


Figure 5 Network of the parties concerned with tourism marketing research

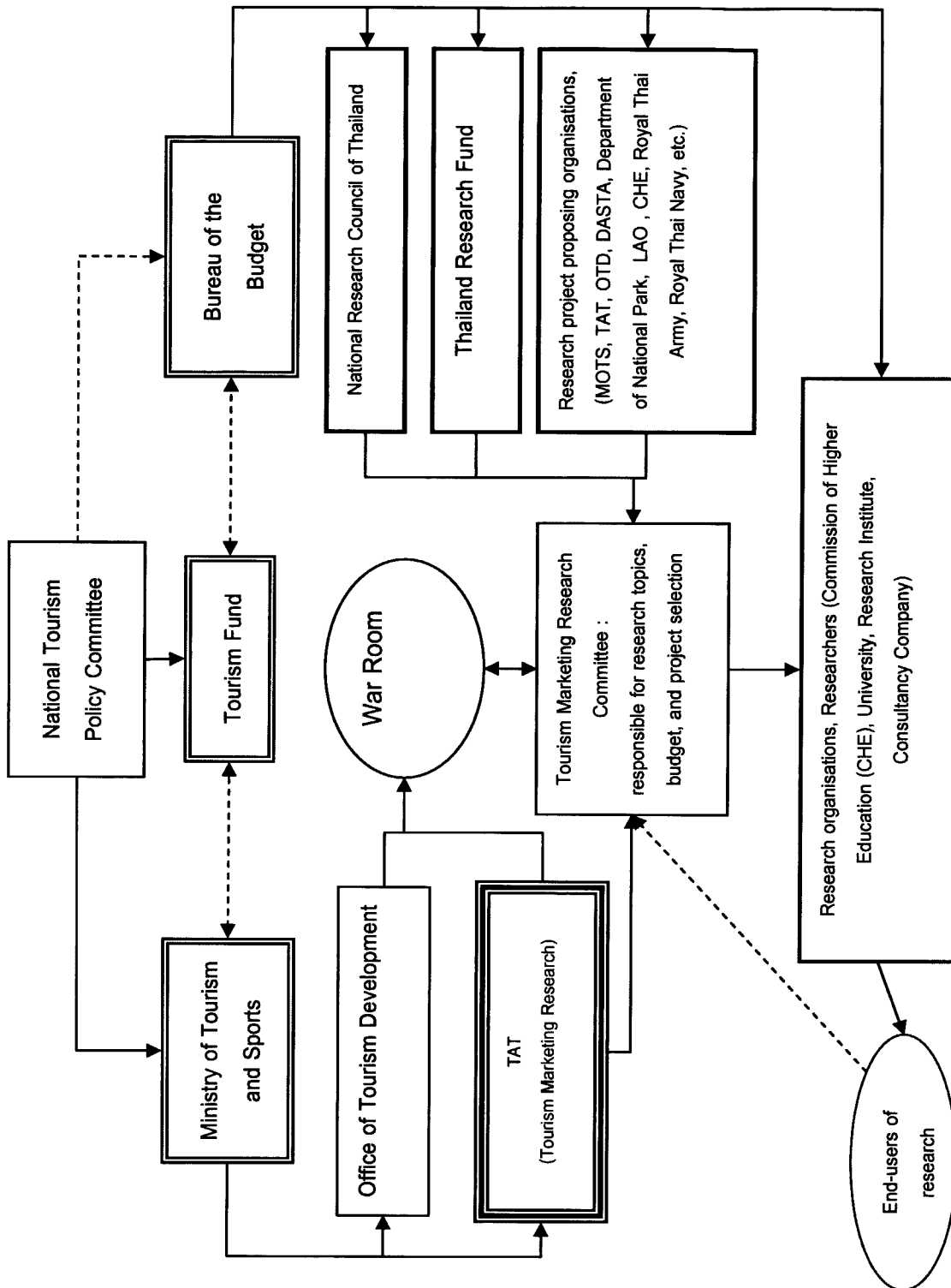


Figure 6 The proposed research processes for tourism marketing in the network system



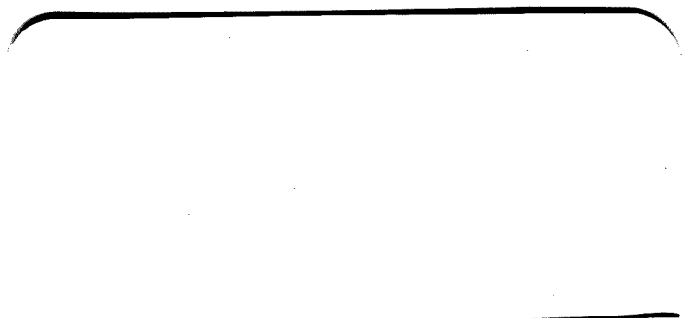
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