



SUMMARY REPORT

A STUDY ON THE POTENTIAL
OF
TOURISM DEVELOPMENT IN THAILAND

SUBMITTED TO
TOURISM AUTHORITY OF THAILAND

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THAILAND INSTITUTE OF SCIENTIFIC AND TECHNOLOGICAL RESEARCH

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SUMMARY REPORT

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CHAPTER 1

INTRODUCTION

There are more than 500 tourist attractions in Thailand, located in different provinces all over the country. A large budget is needed to develop each of them. However, the country will face budget restrictions if they have to be developed simultaneously. The Tourist Authority of Thailand (TAT) on account of this, awarded a study contract to the Thailand Institute of Scientific and Technological Research to identify the areas which are suitable for and indicate their potentials, using the projection of tourism demand and tourism supply in each of the provinces as a basis. The result of study will be used as a guideline for the development and planning of tourism.

The study focuses on the survey, data collection and analysis, and various other data such as those obtained from the study of the past national plans for the development of tourism. It also takes into account the physical features of the project areas, tourism demand, tourism supply, the identification of potential development areas and the effect of development projects on the tourist development program. The results of the study will be used as a basis for the short-term and long-term development of the tourist industry. The project areas are located in the following provinces :

Major tourism area : Pattaya, Phuket, Chiang-Mai and Songkhla/Hat Yai
Central & Eastern region : Kanchanaburi, Chanthaburi, Rayong, Trat,
Nakhon Nayok, Ayutthaya, Saraburi, Lop

Buri, Hua Hin, Cha-am/Phetchaburi, Ratchaburi
and Bang Saen.

Northern region : Sukhothai, Kamphaeng Phet, Phitsanulok, Tak,
Chiang Rai, Phayao, Lampang, Lamphun, Phetchabun,
Lom Sak and Loei.

Southern region : Samui/Surat Thani, Phangnga, Krabi, Nakhon Si
Thammarat, Phatthalung and Trang.

Northeastern region : Udon Thani, Sakon Nakhon, Nakhon Phanom, Khon
Kaen, Kalasin, Nakhon Ratchasima, Surin, and
Ubon Ratchathani.

CHAPTER 2

STUDY OF THE PAST NATIONAL PLAN ON THE DEVELOPMENT OF TOURISM

The national plan for the development of tourism, undertaken in 1977, has provided guidelines for development up to 1980. The study recommended different levels as centers for the development of tourism, namely regional centers, provincial centers and satellite towns. Bangkok is the center of the central region with Pattaya, Ayutthaya and Hua Hin as Satellite towns. The provincial centers are Kanchanaburi and Chanthaburi. Chiang Mai is the center of the northern region with Lamphun, Lampang and Chiang Rai as the satellite towns. The provincial centers are Sukhothai, Phitsanulok, Tak and Kamphaeng Phet. Nakhon Ratchasima is the center of the northeastern region with Buri Ram and Surin as satellite towns. The provincial centers are Khon Kaen and Ubon Ratchathani, with the satellite towns Udon Thani, Kalasin, Nakhon Phanom. Songkhla/Hat Yai is the center of the southern region, with the satellite towns Samui/Surat Thani and Pattani/Narathiwat and Phuket as the provincial center.

The estimate of the number of international and domestic tourists up to 1980 of the past planning report showed that there were 2 to 2.5 million international tourists who came to Thailand. About 50 percent of all the tourist-nights were spent in Bangkok and nearby provinces, 20 percent stayed in other tourist centers and 30 percent stayed at beach resorts. The number of tourists from European countries and from neighbouring countries were expected to increase in the short run, while the number of tourists from Australia, New Zealand, Japan and United States were expected to increase in the long-

run. The number of domestic tourists were expected to increase by 15 to 20 percent per year up to 1980. The majority of domestic tourists belonged to the medium and low income group.

In conclusion, the past plans for the development of tourism suggested that tourist centers be based on existing local transportation networks between the provinces and Bangkok and that a tourist infrastructure be available. In view of the rapidly changing socio-economic situation of the country it is recommended that the results of the present study, especially with respect to the estimation of tourist demand and supply, should be used to review the past development planning.

CHAPTER 3

THE PHYSICAL ENVIRONMENTS OF THE STUDY AREAS

The physical environment of the study areas, namely climate, topography and landuse can be summarized as follows.

3.1 Climate

The climate of Thailand has little variation from one region to another. Summer begins in March and ends in June. The rainy season starts in June and ends in October and winter lasts from November to February.

In the Northern region the average rainfall is lower than in other parts of the country. In winter temperatures are rather low. In the northeast the average rainfall is slightly higher than in the north, with low temperatures in winter and a warm summer. The temperature in the central plains is constant all year round, with the exception of Amphoe Thong Pha Phum where it can be very different between day and night. The temperature at the southeast coast varies according to seasonal changes caused by the northeast and southwest monsoons. In the southern part of Thailand the average amount of rainfall tend to be high. The peninsula westcoast receives a high rainfall from the southwest monsoon which mainly falls between April and September. The peninsula eastcoast receives a high amount of rainfall all year round,

3.2 Topography

1) Central plain

The Central plain mainly consists of flood plains, swamps, terraces and river levees. There are several interesting and attractive sceneries, such as natural bridges, a natural tunnel, subteranean streams and waterfalls most of which can be seen in Kanchanaburi province. Landuse in the central plains for the greater part consists of rice paddies and field crops. Flood often occur in the months of September and October.

2) Southeast coast

This area predominantly consists of marine terraces which were formed during subsequent changes in sea level. Northeast to southwest trending mountain ranges are made up of rocks ranging from Pre-cambrian to the present time. Beaches, islands, mountains and waterfalls are the main sceneries in this area. Landuse comprises orchards, field crops and rice. Natural hazards, mostly occurring in May to September, for the greater part are caused by floods and high tides.

3) Northern region

The northern region comprises intermontane basins and high mountains. There are several minerals, such as scheelite, tin and fluorite. Mountains, hot springs, and waterfalls are the main sceneries. Landuse for the most part consists of rice, orchards and field crops. Natural hazards are few and generally speaking there is none.

4) Northeast plateau

Plateaus, sandstone mesas, lava plateaus and plains make up this area. Major sceneries are mountains, Phu Kradung and Phu - Rua mesa. Casava, rice, kenaf and silk production are the main landuse types. Flooding in the monsoon period is a natural hazard.

5) Southern region

The southern region consists of east- and westcoast, with high mountain ranges trending north to south and forming the backbones of the peninsula. Landuse mainly comprises rubber, coconut and mining. Flooding and storms in monsoon season are the main natural hazards.

CHAPTER 4

TOURISM DEMAND

4.1 International tourism

In the past 20 years the number of international tourists increased rapidly from 81,340 in 1960 to 2,015,615 in 1981. The statistics of the last 5 years show that the largest group of tourists came from neighbouring countries, such as Malaysia and Singapore. The next group were from Asian, Pacific, European and North American countries and the smallest group came from African and Middle Eastern countries. Usually the tourists flow to Thailand is rather evenly spread over the year. The tourist high season is from January to April and again in August and from November to December. July and September are recorded as the months with the lowest number of tourist arrivals. The average duration of stay of an international tourist was almost constant, namely 4 to 5 days.

The 1981 survey, resulting from samples drawn from various groups of tourists, shows that 77.71 percent out of total number of international visitors come to Thailand for recreation and/or holiday. Up to 82.65 percent stayed in hotels. The rest stayed in guest houses, bungalows and other places. The average duration of stay as shown by the sample is approximately 39 percent within the 1 to 3 days range and about 25 percent in the 4 to 6 days range. The survey also revealed that the average daily expenditure of an international tourist is 2,223 baht per head (hotel, transportation, food and souvenirs). There are

different preference as regards to the favorite tourist destinations: 35.94 percent of the tourists prefer towns, 24.57 percent prefer historical and cultural attractions, 21.20 percent prefer beach resorts and 18.29 like natural attractions. Of the tourists coming to the Southern provinces 53.85 percent prefer towns, 26.28 percent prefer the beach resorts, 12.18 percent is interested in historical and cultural attractions and 7.69 percent like natural attractions.

The attitude of international tourists towards accommodation, food, souvenirs, transportation and other related services within the country are quite satisfactory. However, they wish that personnel working in the tourist industry should improve their foreign language, especially of English. Tourist information and security should also be improved.

The study on the correlation of the various factors affecting the interest of tourist, led to significant results. The age distribution of the tourists is related to places of tourist attraction. All age groups equally prefer towns. The low age group like the beach resorts more than the high age group while the latter group is more interested in natural, historical and cultural attractions. The low income group like the town more than the high income group while the other tourist attractions are not dependent upon income levels as compared with the low education group. The higher educated tourist has a greater preference for historical and cultural attractions than for the towns.

TABLE 4.1 PREFERENCE OF TOURISTS WITH RESPECT TO DIFFERENT TOURIST ATTRACTIONS

Tourist attraction	Unit-percentage		
	International tourist		Domestic tourist
	Whole country	Southern region	
Beach resort	21.20	26.28	23.82
Natural attraction	18.29	7.69	49.42
Historical & cultural attraction	24.57	12.18	16.45
Town	35.94	53.85	10.32

The trend in international tourist demand depends upon internal and external factors so that the demand projection will be based on assumptions which may or may not be favorable. This projection is based on the regression analysis method. The result indicates that demand increases 6.8 percent per year during the first five years, and declines to 5.5 percent, 4 percent and 3 percent during the second, third and fourth five years respectively. It is estimated that the number of foreign tourists in 1986 will be 2,607,100 people. This number is projected to increase to 4,828,200 people in the year 2001. The estimate of the number of tourists who find accommodation in hotels in the study areas, except Bangkok, Pattaya, Phuket, Songkhla/Hat Yai and Chiang Mai, will be 537,196 people in 1986. This number will increase to about 1,254,192 people in 2,001.

TABLE 4.2 FLOW OF INTERNATIONAL TOURISTS TO VARIOUS DESTINATIONS

Destination	Percent	Destination	Percent
<u>Major tourist area</u>		<u>Northern region</u>	
Bangkok	57.02	Chiang Rai	0.90
Pattaya	8.67	Sukhothai	0.48
Songkhla/Hat Yai	10.42	Lampang	0.09
Chiang Mai	4.93	Lamphun	0.04
Phuket	1.83	Phetchabun	0.04
<u>Central and eastern region</u>		<u>Northeastern region</u>	
Ayutthaya	2.27	Surin	0.17
Nakhon Pathom	5.06	Nakhon Ratchasima	0.44
Phetchaburi	0.04	Ubon Ratchathani	0.17
Samut Prakan	1.92	Khon Kaen	0.04
Prachuap Khiri Khan	0.26	Udon Thani	0.04
Kanchanaburi	1.40	<u>Southern region</u>	
Rayong	0.13	Surat Thani	1.61
Saraburi	0.09	Narathiwat	0.57
Chanthaburi	0.13	Phangnga	0.04
Ratchaburi	0.26	Pattani	0.04
Trat	0.17		
Nakhon Nayok	0.04		
Lop Buri	0.04		

Source : TISTR's survey in 1981.

The flow of international tourists to Bangkok is as high as 57.02 percent of the total number of arrivals. It is lower to other major tourism areas such as Pattaya, Songkhla/Hat Yai, Chiang Mai and Phuket, with respectively 8.67 percent, 10.42 percent and 1.83 percent. The other destinations visited by foreign tourists are Ayutthaya, Nakhon Pathom, Samut Prakan, Kanchanaburi, Chiang Rai and Surat Thani

4.2 Domestic tourism

To obtain travel characteristic on domestic tourists a survey has been carried out on household level and with respect to the tourists destinations in 1981. The two surveys showed similar results which indicate that about 78.35 percent of urban population in 1980 travelled for different purposes, such as recreation and leisure, business, visiting friends and family, religion and culture.

The average length of stay for domestic tourist is 4.08 days per year, and on the average they spend their vacation 1.79 times per year. The average duration is 2.3 days per time and the daily expenditure is about 266 baht per head (exclude expense for souvenirs). The provinces which are visited by domestic tourist are in a decreasing order of preference: Chiang Mai, Songkhla, Phuket, Chon Buri, Loei, Phangnga, Kanchanaburi, Prachuap Khiri Khan, Chiang Rai, Rayong, Bangkok, Nakhon Ratchasima, Chanthaburi, Lampang, Nakhon Nayok, Surat Thani, Sukhothai, Mae Hong Son, Phetchaburi and Surin etc. As for preferences of domestic tourists, it is shown that 49.42 percent of the domestic tourists is interested in natural attractions, 23.82 per-

cent in beach resorts, 16.45 percent in historical and cultural attractions and 10.32 percent like towns.

The attitude of domestic tourists toward accommodation, food, transportation, souvenirs, custom and culture is good. However, the security of the tourist destinations and their environments must be improved, especially security is considered a vital factor to the tourist and it, therefore deserves top priority. Cleanliness of the tourist destinations, the transportation system, the tourist information services and the conservation of the natural environment in the tourism areas must also be properly managed and controlled.

The results of a correlation analysis among domestic tourists as to age distribution, level of education, income level and profession, reveal that age increases with a decrease in travelling time due to more work and responsibilities. The travelling time increases as the level of education and income increases, but only to a certain level. Due to his educational activities the student travels more than those belonging to other professions. The high age group likes historical and cultural attractions and towns more than the young age group. The young age group with a high education prefers natural attractions, those with a lower level of education show less interest. Also, for historical and cultural attractions there is less interest of the group with a high education. The preference for beaches is independent of the education level.

The estimate of the number of domestic tourists are based on data collected in 1979 and 1980. The results show that 78.25 percent of the people living in urban areas travel while only 23.40 percent of those

living outside the metropolitan areas do so, making the total number of people who can be called tourist approximately 15.5 million. The estimate of the total number of domestic tourists, based on per capita income in real term and rate of population increase, shows that the rate of increase in the first five year period is 4.5 percent per year, 4 percent per year in the second five year period, 3.5 percent per year in the third five year period and 3 percent in the fourth five year period. It is estimated that the number of domestic tourist is 20,207,200 people in 1986; this number will increase to 33,850,000 people in 2001. The estimate of tourist to be accommodated in hotels in the study area is 5,642,114 people in 1986; this will increase to 9,451,407 people in 2001. The estimate does not include Bangkok and other 4 major tourist destinations,

The number of domestic tourists coming to the 4 major tourists areas, namely Pattaya, Songkhla/Hat Yai, Chiang Mai, Phuket is respectively, 6.53 percent, 5.78 percent, 14.61 percent and 2.88 percent of the total number, which is in accordance with the distribution target of the fifth national plan. The other destinations which domestic tourists prefer are: Kanchanaburi, Rayong, Nakhon Nayok, Hua Hin, Bang Saen, Nakhon Ratchasima, Loei, Chanthaburi, Cha-am, Chiang Rai and Phangnga.

TABLE 4.3 FLOW OF THAI TOURISTS TO VARIOUS DESTINATIONS

Destination	Percent	Destination	Percent
<u>Major tourist area</u>		Phayao	1.86
Pattaya	6.53	Lampang	0.59
Songkhla/Hat Yai	5.78	Lamphun	1.47
Chiang Mai	14.61	Phetchabun/Lom Sak	0.42
Phuket	2.88	Loei	2.82
<u>Central and eastern region</u>		Tak	0.77
Kanchanaburi	4.22	<u>Northeastern region</u>	
Chanthaburi	2.08	Udon Thani	0.50
Rayong	4.15	Sakon Nakhon	0.47
Trat	0.29	Nakhon Phanom	0.80
Nakhon Nayok	3.10	Khon Kaen	1.24
Ayutthaya	1.60	Kalasin	0.18
Saraburi	1.09	Nakhon Ratchasima	3.33
Lop Buri	0.53	Surin	0.45
Hua Hin/(Prachuap Khiri Khan)	3.13	Ubon Ratchathani	1.28
Cha-am/ (Phetchaburi)*	1.60	<u>Southern region</u>	
Ratchaburi	0.88	Surat Thani	1.34
Bang Saen	4.50	Phangnga	1.54
<u>Northern region</u>		Krabi	1.02
Sukhothai	1.06	Nakhon Si Thammarat	0.37
Kamphaeng Phet	0.51	Phatthalung	1.47
Phitsanulok	1.27	Trang	0.32
Chiang Rai	1.86	Narathiwat	0.14
		Yala	0.26

Source : TISTR's survey in 1981

CHAPTER 5

TOURISM SUPPLY

The basic factors determining the supply side of the tourist industry are transportation, public utilities, restaurants, places of entertainment and various types of other tourist attractions. These factors help to satisfy the tourists. The detailed study of each important factor is as follows.

5.1 Hotels

The total number of hotels in 39 provinces within the boundary of the study area and in the other main tourist destinations, namely Narathiwat and Yala (Amphoe Betong), is 1,057 providing 38,148 rooms. Room rate and room service are used to differentiate the hotel and the other types of accommodation into 5 classes, namely first, second, third class hotels, guest houses and bungalows. First class hotels offer a room rate of 400 bahts per day or more. For second class hotels this is 250 bahts per day or more. The room rate in third class hotels is not higher than 250 baht per day. The room rate in guest houses ranges between 20 and 80 bahts per day and that of bungalows is from 50 baht per day. The study does not include small and low quality hotels and types of accommodation which are far away and unpopular to tourists. The number of rooms available in third class hotels is 64.25 percent, in first class hotel this is 14.56 percent, in second class hotels 12.88 percent, in bungalows 7.45 percent and in guest houses .83 percent.

The occupancy rate in various provinces ranges between a low range of 36-43 percent to a high range of 68-80 percent. The provinces which have high occupancy rates are Kanchanaburi and Khon Kaen. The majority of tourists accommodated in hotels, excluding those in Pattaya, Chiang Mai, Phuket, Songkhla/Hat Yai, are domestic tourists the number of whom ranges between 72 and 98 percent. Provinces which accommodated a population of international tourists which is higher than 10 percent are : Kanchanaburi, Hua Hin, Rayong, Nakhon Nayok, Sukhothai, Phitsanulok, Kamphaeng Phet, Lampang, Tak, Phangnga, Narathiwat and Yala (Amphoe Betong). The projection of future demand for hotel accommodation is based on the present occupancy rates of foreign and domestic tourists, assuming an increase in occupancy rate of .08 days per year in the provinces with a high foreign tourist accommodation level and .04 day per year in the provinces with a low foreign tourist accommodation level. The occupancy rate for domestic tourist is expected to increase .04 days per year for the provinces with a high accommodation requirement and .02 day per year for the provinces with a low accommodation requirement. The average for double occupancy is 1.6 persons per room for international tourist, while that for domestic tourist ranges between 1.54 to 2.87 persons per room, depending upon the type of accommodation. The occupancy rate of hotels ranges between 70 and 85 percent. Given the present supply of hotel rooms within the study area (excluding Pattaya, Chiang Mai, Phuket and Songkhla/Hat Yai, the total number of rooms of various types will be sufficient until 1986, with the exception of some provinces, namely Kanchanaburi, Chiang Rai,

TABLE 5.1 FORECAST OF FUTURE TOURIST VOLUME AND HOTEL ROOM REQUIREMENTS IN THE PROVINCE WITHIN THE PROJECT AREA

Item	Year	1982	1986	1991	1996	2001
International tourists accommodated in hotels in the project area* (per 1,000)		537.2	698.9	910.9	1,081.9	1,254.2
Domestic tourists accommodated in hotels in the project area* (per 1,000)		4,731.3	5,642.1	6,864.5	8,152.9	9,451.4
Total		5,268.5	6,341.0	7,775.4	9,234.8	10,705.6
Total rooms required (rooms)		18,125	24,750	32,133	40,726	50,351
Additional rooms required (rooms)		-	-	6,791	15,384	25,009

* Excluding Pattaya, Chiang Mai, Phuket and Songkhla/Hat Yai

Nakhon Ratchasima, Surin, Narathiwat, where room expansion plans should be made before 1986. Hotel rooms in Nakhon Nayok, Kamphaeng Phet, Phitsanulok, Tak, Udon Thani, Sakon Nakhon, Khon Kaen and Kalasin will be adequate up to 1987-1991.

The important problems found from the hotel study are : the occupancy rate in certain provinces is low which is not break-even because room expansion is faster than the demand for rooms. The design and location of the hotel is not in harmony with its surroundings. Finally, there is inadequate supply of well-trained hotel personnel. TAT is recommended to coordinate with the associations or agencies responsible for such industry in order to increase the occupancy rate. Measures such as the following have to be taken : formulate a room expansion plan, actual provide guidelines for the construction of new hotels to conform with the natural environment and provide personnel training at various levels.

5.2 Transportation

International tourists prefer air-conditioned buses for travelling from Bangkok to other provinces. This is followed by private car and regular buses, or expressed in percentage : 24.27, 18.15 and 17.53 per cent respectively. About 31.70 percent of the domestic tourists like to make a trip by private car, 19.70 percent by regular bus service and 17.04 percent by air-conditioned bus. Train as well as airplane are regarded as an unpopular means of transportation by domestic and international tourists. This indicates that transportation along highways is quite popular to tourists since the highway network is very convenient, giving direct access to most parts of the country. There are national

highways which connect Bangkok with the northern region, northeastern region, eastern region and southern region. Most of the roads, leading to and from the national highways, are in all-weather condition, except for a very few which have laterite surfaces. In the southern region most of the roads are laterite covered and security is poor due to robberies and terrorist activities resulting in the unpopularity of bus services and the use of private car, in this region.

At present the train is not so popular among tourists as the bus, except for the southern route. The construction of a new railway from Chachoengsao to Sri Racha and Sattahip will be finished in 1982-1983 and the railway connecting Surat Thani with Phuket, as mentioned in the Fifth Five year Plan, is to be constructed. Implementation of the above projects will be of significance to tourism as the railways once built, will provide better access to the eastern region and to Samui/Surat Thani.

More than the domestic tourists, foreign tourists like to make trips by airplane. There are 3 international airports out of the 18 airports in the country, namely the Bangkok, Hat Yai and Chiang Mai airport. In complying with fifth five year plan the government will improve the Bangkok airport and will construct the second airport at Amphoe Bang Plee, Samut Prakan province, and develop Phuket airport to become an international airport.

The occupancy rate of regular buses to the provinces in the study areas is between 20 and 65 percent, that of air-conditioned buses

is between 46 and 80 percent. Compared with the northern region the occupancy rate in the southern region is low. Bus services are considered to be adequate and satisfactory. The demand for these services is high during festivals and long-weekends, justifying the increase of the number of bus trips to meet this demand.

The occupancy rate of the train to the northern, northeast and southern provinces is between 29 and 66 percent. The occupancy rate to Hat Yai, Chiang Mai and Udon Thani is higher than that to other provinces namely 66, 31 and 39 percent respectively. The occupancy rate is low in the central provinces except for the trip from Bangkok to Kanchanaburi with an occupancy rate of up to 97 percent, indicating that the number of trips should be increased.

The occupancy rate of airplanes to the northern region and southern region is between 12 and 72 percent. The occupancy rate is 72 percent to Chiang Mai and 63 percent to Phuket. The airplane service is considered sufficient for the present demand.

It can be concluded that under normal condition the various modes of transportation, offering various services, can easily cope with the present tourist flows. The transportation network is very good. The only improvement required is that of bus services, cleanliness and advance booking services for airplane tickets, etc.

5.3 Public Utility

Public utility is a basic necessity vis-a-vis the provision of facilities to tourists. Public utility in this study can be categorized as follows :

- Communication and telecommunication comprising postal and telegraph services, telex service, mobile and stationary radio service, international telephone service, domestic telephone service.
- Water supply
- Electricity
- Refuse disposal service and
- Health service

1) Communication and telecommunication

(1) Postal and telegraph services. There are postal and telegraph offices situated in every district in the project areas. There are authorized private postal services in some major districts and postal services at the train stations. Some tambons, which are located far away from the district center, may have mail delivery services.

(2) Telex service. There are a small number of provinces in the project areas which are operating telex services. All major tourist destinations have telex services. Telex services are available in 4 provinces of the northern tourist destinations. Due to insufficient telex services in the country, the Communication Authority of Thailand (CAT.) has established a Five Year (from 1980 to 1984) Development Planning for the installation and the expansion of telex services to all business centers in the provinces.

(3) Radio paging service. At present radio paging services are only available in Bangkok and Khon Kaen. Expansion of these services will be extended to some business centers in the provinces.

(4) Mobile and stationary radio service. Two mobile and stationary radio systems are used in Thailand. These are manual and automatic systems. For the manual system uses Very High Frequency (VHF) radio waves. Its operation covers 14 out of the 18 provinces in the project areas. Ultra High Frequency (UHF) radio waves are used in the automatic system. Two main radio stations of the latter type are located at Bangkok and Kao Kieo in Nakhon Nayok province. The two stations cover 18 provinces in the country, of which 8 provinces are located in the project areas. The range of operation of the radio stations covers an area with a radius of 250 kilometers around each station. To develop services CAT has within 3 years established 2 projects (1982-1984) which include the installation of the central radio station and the expansion of the present manual system of mobile and stationary radio services. The first project will include the setting up 10 central radio stations per year in non-radio operation provinces. A second project is proposed which includes the extension of services within the province and neighboring areas and the replacement of obsolete equipment of the main radio station by new and modern equipment at a rate of 5 stations per year, and also the increase of the substation line service to 200 numbers each year.

(5) International telephone service. The central line station of the international telephone service is located at Bangkok and Pattaya. International telephone calls from other provinces have to dial through the central line station in Bangkok.

(6) Domestic telephone service. There are two different types of domestic telephone services in Thailand ; one for local and the other for long distance calls. At present on automatic telephone systems are installed for long distance calls between province. It can also be operated by some business centers in the districts of each province. The Telephone Organization of Thailand has planned a project to increase the number of telephone lines in the period between 1977 to 1984. After the implementation of the telephone development project there may be sufficient telephone services in the country.

2) Water supply The water supply in the study areas is regarded as insufficient. Some problems may arise from the shortage of water which mainly comes from rivers and canals. These may dry up during summer. Other problems may be caused by the limited capability of the authorities concerned to expand the water supply service.

3) Electricity The electricity service in the provinces general is performing well, particularly in the major business centers in the districts. By contrast, none of the backward rural areas have any electricity services.

4) Refuse disposal service The problem of the refuse disposal service in most of the cities of the project area is caused by the fact that refuse collection is far behind refuse disposal. The method of transferring solid waste from the storage receptacle to the

places of disposal is inefficient. The disposal of solid waste in most municipalities in the study areas cannot serve as example of what good sanitation is.

5) Health service. There are government hospitals in every district in the provinces. But shortage of medical staff and of equipment pose serious problems. There are however a number of private hospitals in the large towns and business centers in the districts which offer good services.

5.4 Other facilities to support the tourist industry.

The attitude of foreign tourists and domestic tourists towards restaurants, places of entertainment and financial institutions is reasonably good. Some provinces have sufficient souvenir shops whereas other have very few of them. The problem is the lack of legal control on the price and quality of the handicraft. However, tourist regards the supporting facilities are satisfactory. In order to justify private investment in these services the government should pursue a policy vis-a-vis tourist destinations which should pay special attention to the following : the security factor, especially in the tourist destinations, is vital and of great concern to the tourists, travel agencies are not available in many provinces except in the major tourist areas, the lack of well trained guides who really understand and have sufficient knowledge of the culture of the various societies including that of historical sites. In order to provide standard services to the tourist there must be a long-term plan to train guides in speaking a foreign language, as well as to instill a knowledge of the history and culture of the local

peoples. TAT should also provide liaison officers who should cooperate with the police and help the tourist in dealing with issues and who should report to them later on.

5.5 Tourist attractions

There are 762 tourist attractions in the provinces of the study area. of which 203 are in the northern region, of these up to 49.75 percent are historical places. The next group, or 42.86 percent of the total, consist of natural attractions. The central region has 270 tourist areas, divided into natural attractions (43.70 percent), historical attractions (38.52 percent) and beach resorts (8.15 percent) the northeastern region has 78 tourist attractions, divided into historical places (69.23 percent) and natural attractions (19.23 percent). The southern region has 211 tourist attractions, divided into natural attractions (57.82 percent), historical places (22.28 percent) and beach (12.27 percent).

All 762 tourist areas are shown in the Appendix. The attractiveness of these tourist areas has been ranked according to the following factors: the type of scenery which attracts tourists, the number of tourists who travel to these places, the interest of tourists and the promptness of the service facilities. These variables are assigned a weight, then divided into high, medium and low attractiveness. These groups are used as guidelines for development and planning. The study brought out the following problem : the natural environment of most beaches was destroyed and sometimes people use the seashore illegally there was no architectural control to bring the construction

of buildings in harmony with the environment, illegal cutting down of forest trees, lack of maintenance and the absence of signs to provide information about interesting points. Problems are the lack of conservation of sites with historical attractions and of information at the sites, and the lack of security and safety in the towns. These problems form the basis for the development planning of the various destinations.

CHAPTER 6

PRIORITY OF TOURIST DESTINATION

In determining the priority and importance of tourist destinations all provinces within the area of the project have been assessed by means of assigning scores which are based on the principal aspects, i.e. tourism demand, tourism supply and development plan. These aspects are then divided into 9 factors, namely, tourist requirements, supporting facilities for tourists, hotels, transportation, communication and public utilities, the economic and social conditions of each province, the attractiveness of the tourist destinations, town planning and the physical features. Each province is to be given scores in accordance with its individual components. Judgments will be made by various means; with respect to demand percentage is to be considered on the basis of the popularity of the tourist destination and the most favorable impression by the tourists. All these can be inferred from the answers in the questionnaires presented to them.

With regard to the supply of hotels, facilities to support tourists, transportation, communication and public utilities, the score will be based on the level of sufficiency. As for the tourist destination this will be based on the tourist attractions,

Each factor is given 1-5 scores which will be classified into a demand side and a supply side. The scores of the demand and the supply will be decided separately for each province. Their arrangement on the basis of an order of priority is as follows :-

1. Criteria for determining priority of tourist destinations :

(1) The province with a high development potential as regards demand and supply receive 3 or more marks.

(2) The province with moderate development potential as regards demand and supply receive 2 or more.

(3) The province with low development potential as regards demand and supply receive 1 or more.

The order of importance of each type of attraction is categorized as follows :-

Beach resorts :

Provinces with a high potential comprise : Chon Buri/Bang - Saen, Rayong, Prachuap Khiri Khan/Hua Hin, Surat Thani/Samui, Chanthaburi.

Provinces with a moderate potential : Phetchaburi/Cha-am, Krabi.

Provinces with a low potential : Nakhon Si Thammarat, Trat.

Natural Attractions :

Provinces with a high potential include : Chon Buri, Nakhon - Ratchasima, Kanchanaburi, Rayong, Prachuap Khiri Khan/Hua Hin, Surat Thani/ Samui, Chanthaburi.

Provinces with a moderate potential : Phangnga, Loei, Chiang Rai, Nakhon Nayok, Ubon Ratchathani, Lampang, Saraburi, Krabi, Tak.

Provinces with low potential : Phetchabun, Trang, Sakon Nakhon, Phayao, Lamphun, Phatthalung.

Historical religious and cultural attractions :

Provinces with a high potential comprise : Nakhon Ratchasima, Kanchanaburi.

Provinces with a moderate potential : Khon Kaen, Phra Nakhon Si Ayutthaya, Phetchaburi/Cha-am, Ubon Ratchathani, Phitsanulok, Lampang, Sukhothai, Ratchaburi, Nakhon Phanom, Surin.

Provinces with a low potential : Nakhon Si Thammarat, Udon Thani, Sakon Nakhon, Kamphaeng Phet, Lop Buri, Kalasin.

2. Order of priority by provinces :

(1) Provinces with a high development potential have high potentials for at least 2 types of attractions. To these belong Chon Buri/Bang Saen, Chanthaburi, Rayong, Nakhon Ratchasima, Kanchanaburi, Surat Thani/Samui, Prachuap Khiri Khan/Hua Hin.

(2) The provinces with a potential for moderate development are subdivided into two following divisions :-

1st Division : Classified as satellites of a highly developed province. It is either called a regional or a provincial centre and is located 100 to 200 kilometers within the radius of town with high potential for development. A one-day round trip should be sufficient to reach it. Tourists must be able to benefit from the services in the town centre. Such provinces include Krabi, Phangnga, Loei, Chiang Rai, Nakhon Nayok, Lampang, Ayutthaya, Ratchaburi, Sukhothai, Nakhon Phanom, Surin.

2nd Division : Provinces not classified as satellites, but entitled to further development because of an inherent potential. Certain provinces which come under this division have sufficient demand but are short of supply, while the opposite is true for some other provinces. Such provinces are : Phetchaburi/Cha-am, Ubon Ratchathani, Saraburi, Tak, Khon Kaen, Phitsanulok, Loei.

(3) Provinces with a low development potential comprise those with less capability for both supply and the demand. These are : Nakhon Si Thammarat, Trat, Phatthalung, Sakon Nakhon, Kamphaeng Phet, Lop Buri, Kalasin, Trang, Phetchabun, Phayao, Lamphun.

In accordance with the Fourth National Development Plan the above mentioned classification has also been applied to the reviewing of tourist planning. With the revision of the development plan, the current trend of tourist demand and supply has been brought up for consideration, resulting in a slight changes in regional-level tourist destinations which is in harmony with the development plan as well as with the tourists' own point of view. The development pattern, generally speaking, was in harmony with previous performances (see figure 6.1)

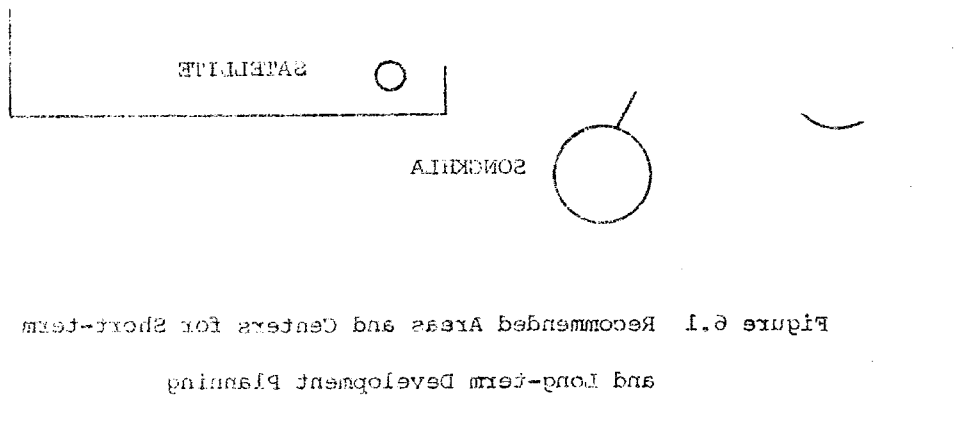


Figure 6.1 Recommended Areas and Centers for Short-term and Long-term Development Planning

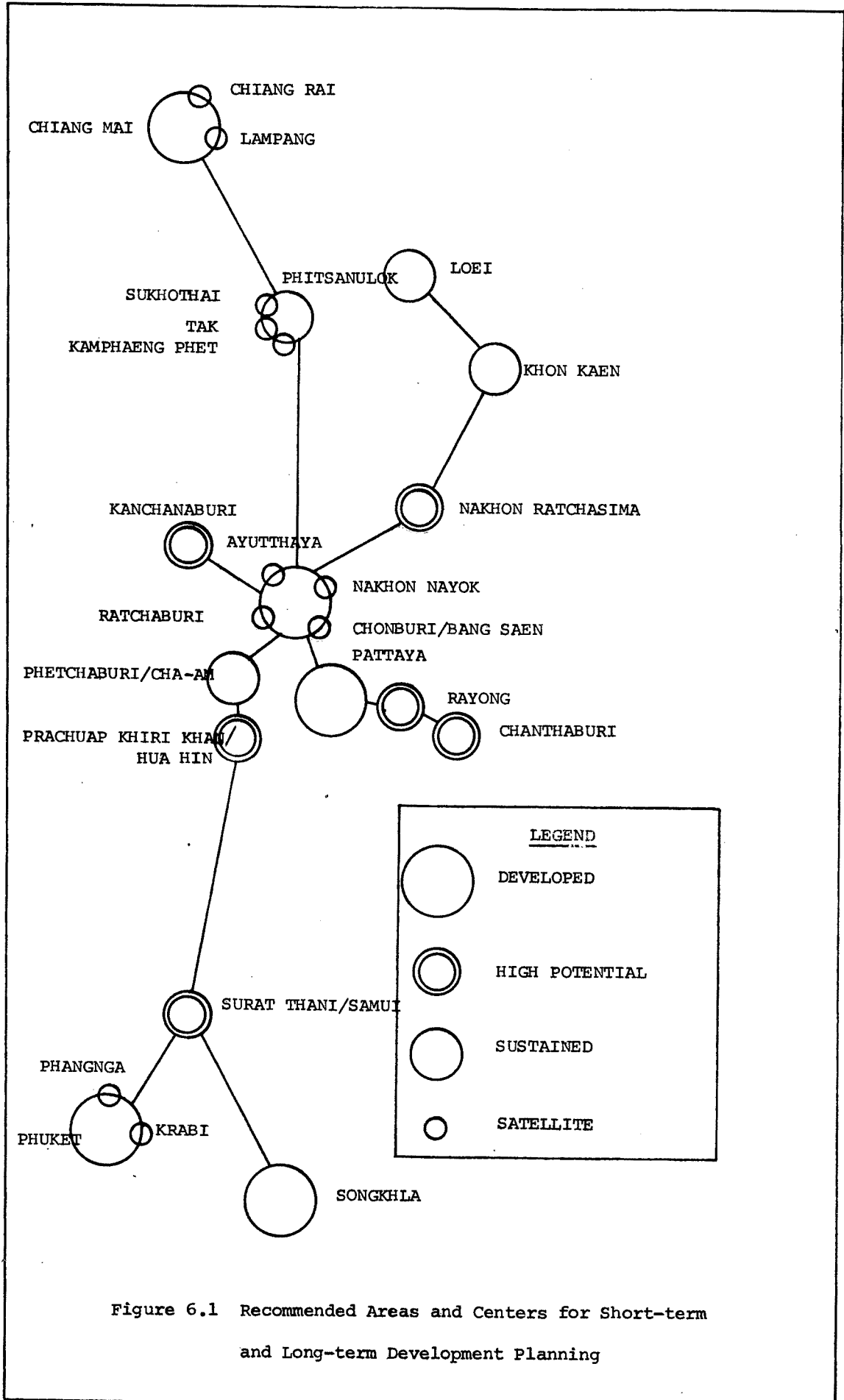


Figure 6.1 Recommended Areas and Centers for Short-term and Long-term Development Planning

CHAPTER 7

IMPACT OF OTHER PROJECTS ON THE TOURIST INDUSTRY

several development projects have been reviewed to study their impact on the tourist industry and to enable the Tourist Authority of Thailand in adjusting its promotion efforts to the requirements of these projects. These development projects are :

1. Development Plan of a Main Industry and a Deep Sea Port on the East Coast

The project covers areas in Chon Buri and Rayong Provinces. The effect on the tourist industry is that more jobs are created, increasing the incomes of the public and thus helping to promote tourism. Facilities to be provided to the main industry will, in general, also benefit tourists. Apart from this, the deep sea port will be able to cope with large cargo vessel and its large crews will then spend their free time as tourists. However, it should not be overlooked that this development plan can have an adverse impact on the environment and increase crime both of which may keep off tourists. In addition, labour for the tourists industry is needed at same time. This may compete with labour required by other industries, likely resulting in a shortage of it.

2. Khao Laem Dam Project

This project is located in Kanchanaburi which, when completed, will include a recreation site to attract holiday makers. The construction of the dam can however disturb the rapids from shooting in River Kwai Noi.

3. Northern Industrial Settlement in Chiang Mai

The project's effect on the tourist industry is that the industrial settlements will create public communities, which in turn will results in the increase of employment, the expansion of business centres and in the increase of incomes. All these will generate recreation as well as sites of entertainment. However crime, pollution and traffic congestion, may occur at the same time and cause obstruction to the tourist inflow. Apart from this, labour shortage may occur as, apart from the industries, labour is also required by the tourist industry, which is expected to expand in the future.

4. No. 117 National Highway Project between Nakhon Sawan and Phitsanulok

The Highway starts at Nakhon Sawan and stretches for 123.3 kilometres to Phitsanulok. This highway helps to facilitate the transportation of tourists from the central area as well as from the southern part of the country to Phitsanulok. There is also a project for the construction of a historical centre at Sukhothai which is now under the responsibility and supervision of the Fine Arts Department. This archeological attraction will soon become another source of income from tourists.

5. Project on Survey and Production of Petroleum in Thailand

This project covers various provinces in the northeast of the country. It is expected to strongly improve the economy of this region. The benefit of this plan to the tourist industry is that it may attract more tourists who during the survey period live as workers

at the concessions, far away from the developed areas. Employees, especially foreigners, may want to spend their leisure time in the towns or in other places nearby. After the successful strike of natural gas and oil wells the national economy will improve, thus benefiting both local and foreign tourism.

6. Deep Sea Port Project at Songkhla

The project is located on the outer coast of Khao Daeng. The deep sea port when constructed be able to cope with large cargo vessels with large crews. This will offer the tourist industry to the extent that a great number of crew members landing there, wish to spend their time in excursions. Apart from this, the projects will result in an expansion of other fields such as more employment, increase of incomes and more interest in tourism by local inhabitants. However, the natural environment around the construction site of the deep sea port may be adversely effected as it is located near the mouth of Songkhla Lagoon.

7. Southern Industrial Settlements Project

The project area is located in Amphoe Muang Songkhla. The settlements, to be built in compliance with the projects, will help to improve income of the local people as well as promote tourism. The facilities to be provided to the industrial project will also promote tourism, i.e. communication and transportation. The establishment of the settlements will create business centers and a need for hotels. Another interesting plan related to this project is the construction of ring road around Samui Island,. This will considerably increase the facilities to the visitors coming to this island.

CHAPTER 8

DEVELOPMENT PLAN FOR THE TOURIST DESTINATIONS

The important objective of the development of tourism is to attract both international and domestic tourists, as well as to increase the duration of their stay at the various tourist destinations all over the country. The development plan for tourist destinations has been divided into 3 periods, according to potential and priority, namely short term (5 years period), medium term (10 years period) and long term plan (20 years period). Measures to be taken are :

High priority beach resorts (short-term plan 5 years period with the year 1982 as the base year)

- Zone off restaurants, souvenir shops, seashore areas, seats, water sports and parking facilities.
- Provide tourist with facilities and services, bring them to accepted standards and create a good impression to the tourists.
- Preserve the natural environment of the beach
- Raise security and increase safety.

Medium and low priority beach resort (Medium-term and long-term plan - 10 - 20 year period)

- TAT must cooperate with the metropolitan and provincial administrations to determine the problems and failures occurring in the developed beach resorts and use these as a basis for planning the development of medium priority
- Preservation of the beach is required for the low priority beach.

High priority natural attractions (short-term plan).

- TAT must cooperate with government organizations, such as the Forestry Department, Provincial Administrations etc, who own the resources, so as to preserve the places, develop rules and regulations for hotel construction and restaurants and develop routes between the tourism attractions.

Medium and low priority natural attractions (medium and long-term plan).

- Strict control on the preservation of the natural environment and on the conservation of low priority sites before development is started.

High priority historical and cultural attractions (short-term plan).

TAT must cooperate with the Fine Arts Department and Provincial Administration in preserving and restoring historical sites.

- Zone off tourist facilities, raise security measure, improve tourist information and publicity concerning historical and cultural knowledge, provide well trained guides and maintain local traditions, festivals and culture.

Medium and low priority historical and cultural attractions.

TAT should cooperate with the Fine Arts Department. Prior to the development of historical sites, the Provincial authority should prepare a feasibility study as their preservation is required vis-a-vis the low priority attractions. A development plan for each town, taking into account the high, medium and low priority of each type of destination, should be made at the same time.

CONCLUSIONS AND RECOMMENDATIONS

The following conclusions and recommendations can be drawn from the results of the study,

(1) Many provinces in the study area have a high potential for development and will therefore be able to promote the socio-economic development of the country.

(2) At present the majority of tourists, visting various destinations in the study area, are domestic tourists who prefer natural attractions as well as beach resorts above all other types of attraction. They, mainly comes from urban areas and belong to a low age group with a medium to low income level. Students who use to travel because of educational activities are also included in this group. The daily expenditure of domestic tourists is approximately 266 baht per person, indicating that they wish to economize on costs of tourist facilities and services. Foreign tourists prefer towns, historical and cultural attractions and beach resorts. Most of them belong to the young age group with a high income level. The average daily expenditure is 2,223 baht per person, indicating the need for good tourist facilities and services.

Development of tourist areas in the future should take into account the preferences of tourists in relation to respectively age distribution, income level and the level of education. Arrangement of tourism activities should be made in accordance with the objectives and attitudes of each group of tourists.

(3) A development plan for tourist destinations should be undertaken on the basis of separate regions, each with a regional center, provincial center and satellite towns, and divided into three development periods, namely short-term period (within 5 years), medium-term period (within 10 years) and long-term period (from 15 to 20 years).

Provinces which can be developed in a short-term period are :
Chon Buri/Bang Saen, Kanchanaburi, Prachuap Khiri Khan/Hua Hin,
Rayong, Chanthaburi, Nakhon Ratchasima, and Surat Thani/Samui.

Provinces which can be developed in a medium-term period are :
Nakhon Nayok, Ayutthaya, Ratchaburi, Phetchaburi/Cha-am, Lampang,
Chiang Rai, Phitsanulok, Sukhothai, Tak, Surin, Khon Kaen, Ubon Ratchathani,
Nakhon Phanom, Phangnga, and Krabi.

Provinces which can be developed in a long-term period are :
Udon Thani and Phatthalung.

The development plan for tourist destinations mentioned above should lay special emphasize on the development of the infrastructure and the super-structure for integrated use by international and domestic tourists with different levels of income.

(4) In justifying the travel of foreign and domestic tourists to various tourist destinations TAT should take some further steps :

- Provide publicity and tourist information of the tourist destinations with high potentials which are suitable for development.

- - Coordinate with provincial authorities or other concerned authorities and provide them with more status and responsibility for the development of tourism, the conservation and rearrangement of areas suitable for tourism, maintain local traditions, customs and culture and improve various tourist facilities and services to such a standard so as to entertain more tourists in the future.

- Coordinate with travel agencies and tourist associations for the arrangement of sight-seeing tours for different income groups and for various business and industrial firms to the various tourist destination, as well as maintain services as required by accepted standards.

- Improve security and increase safety measures in the major tourist destinations.

(5) As a next step a detailed master plan for high priority tourist destinations should be made.

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