

**1.3.7 TOUR PACKAGE AND TOURISM
PROMOTION**

1. INTERNATIONAL TOURIST DESTINATION

1.1 INTERNATIONAL TOURIST ARRIVALS TO ASEAN COUNTRIES

1) ARRIVALS TO 5 COUNTRIES IN ASEAN AND HONG KONG, 1981 TO 1986

- Hong Kong ranked first, marking the biggest growth of 47.3 percent, followed by Thailand of 39.8 percent and Indonesia of 37.5 percent.

TABLE 1-19 INTERNATIONAL TOURIST ARRIVAL TO ASEAN COUNTRY

(Unit: 1,000 persons)

	1981	1982	1983	1984	1985	1986	88/81
Thailand	2,016	2,218	2,191	2,347	2,438	2,818	+39.8%
Indonesia	800	592	889	701	749	825	+37.5%
Philippines	939	891	861	817	773	782	-16.8%
Malaysia	843	975	980	901	982	890	+ 5.8%
Singapore	2,829	2,956	2,854	2,991	3,031	3,191	+12.8%
ASEAN TTL.	7,227	7,632	7,525	7,757	7,953	8,508	+17.7%
HongKong	2,585	2,609	2,775	3,152	3,443	3,733	+47.3%

*Malaysia - Arrivals from Singapore NOT included.
Source: Annual Statistical Report, PATA

2) SHARE OF MAJOR SOURCE MARKET AREAS, 1981 TO 1986

- Change of shares by four major source market areas, namely, United States, Pacific, Europe and Others is shown in the following Figures 1-33 -1-38.
- Highest pacific share is recorded in Singapore with 74.1 percent, followed by Thailand with 66.5 percentage and Malaysia with 63.7 percent.
- Philippines ranked the lowest with 48.3 percent. Share of the Pacific in the Philippines has been on the decrease since 1981.
- Highest ASEAN share recorded by Malaysia with 44.3 percent, followed by Thailand with 32.1 percent and Singapore with 31.4 percent. Lowest is recorded in the Philippines with 5.8 percent.
- Highest European share in Indonesia with 28.5 percent, followed by Thailand with 19.5 percent.
- Highest USA share in the Philippines with 25.9 percent, followed by Hong Kong with 18.9 percent.

FIG. 1-33 SHARE OF MAJOR SOURCE MARKET (THAILAND)

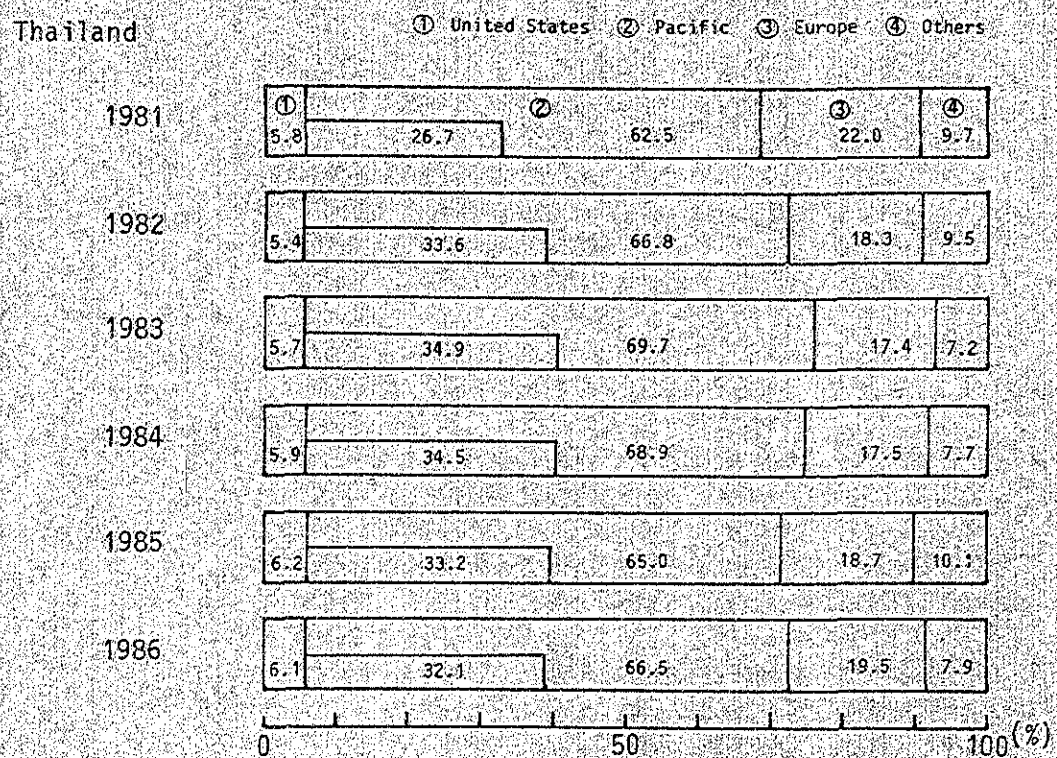


FIG. 1-34 SHARE OF MAJOR SOURCE MARKET (INDONESIA)

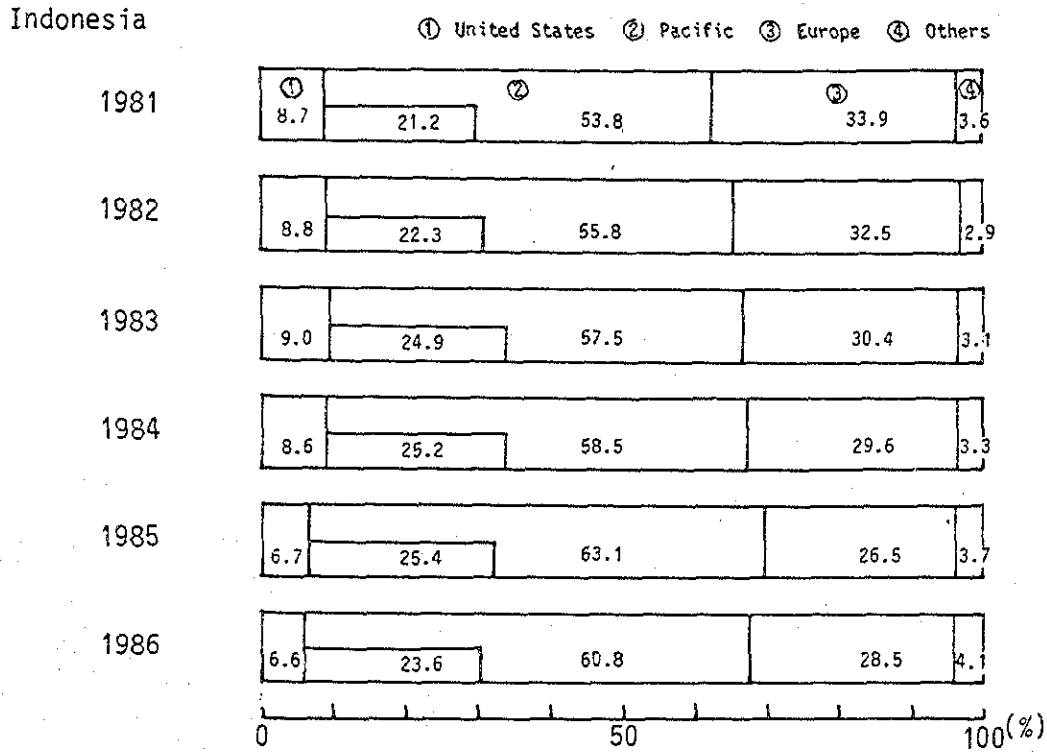


FIG. 1-35 SHARE OF MAJOR SOURCE MARKET (PHILIPPINES)

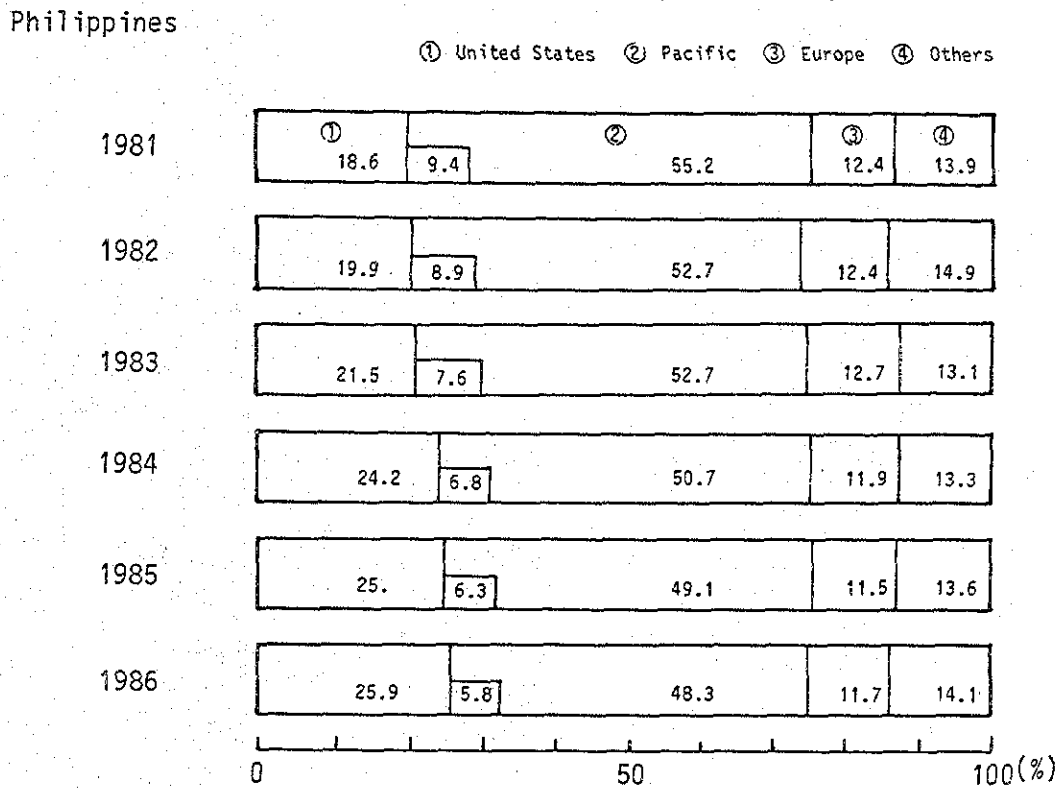


FIG. 1-36 SHARE OF MAJOR SOURCE MARKET (MALAYSIA)

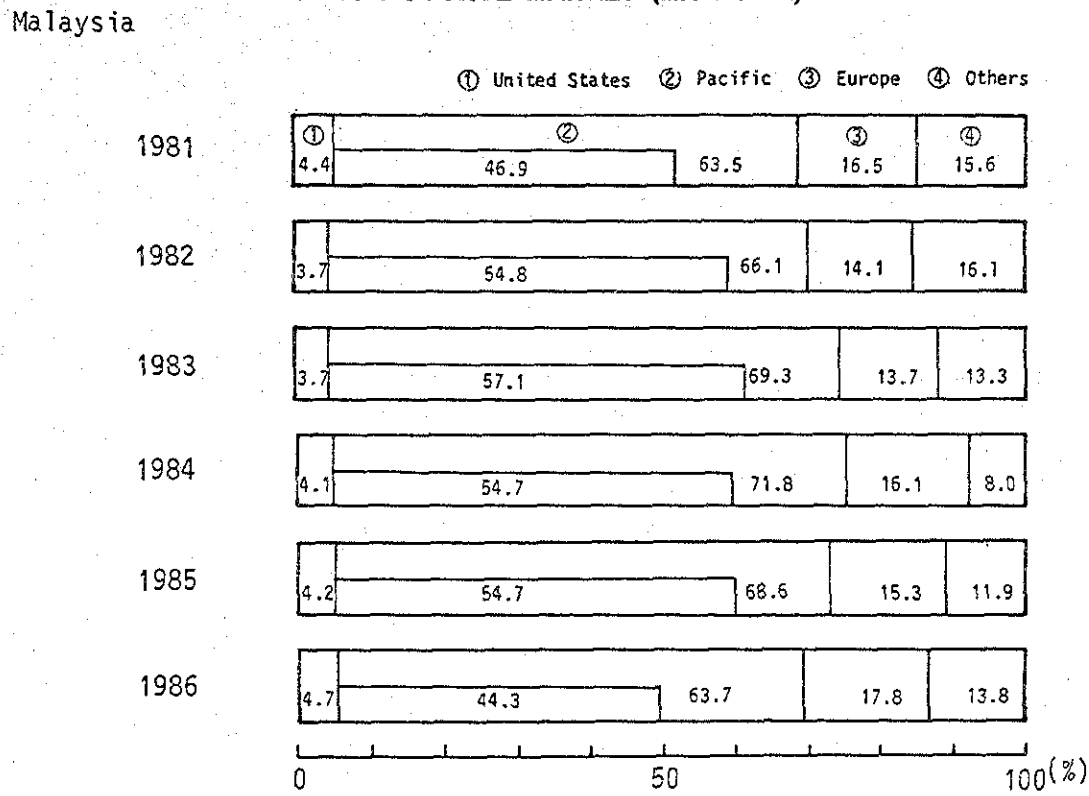


FIG. 1-37 SHARE OF MAJOR SOURCE MARKET (SINGAPORE)

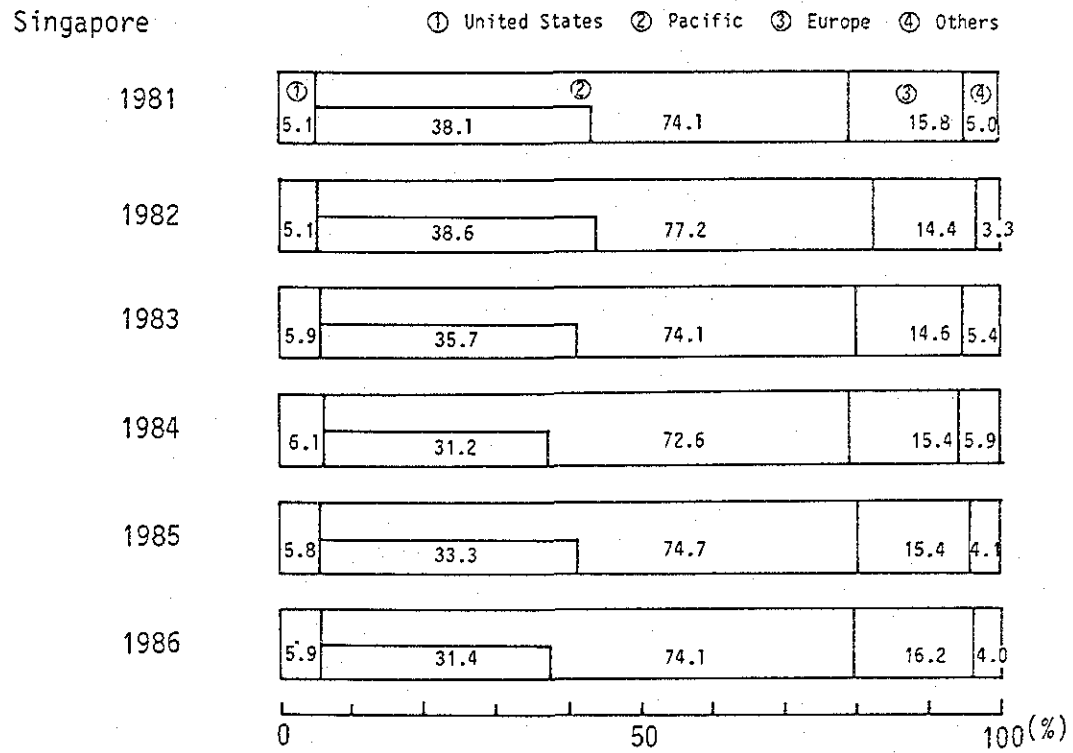
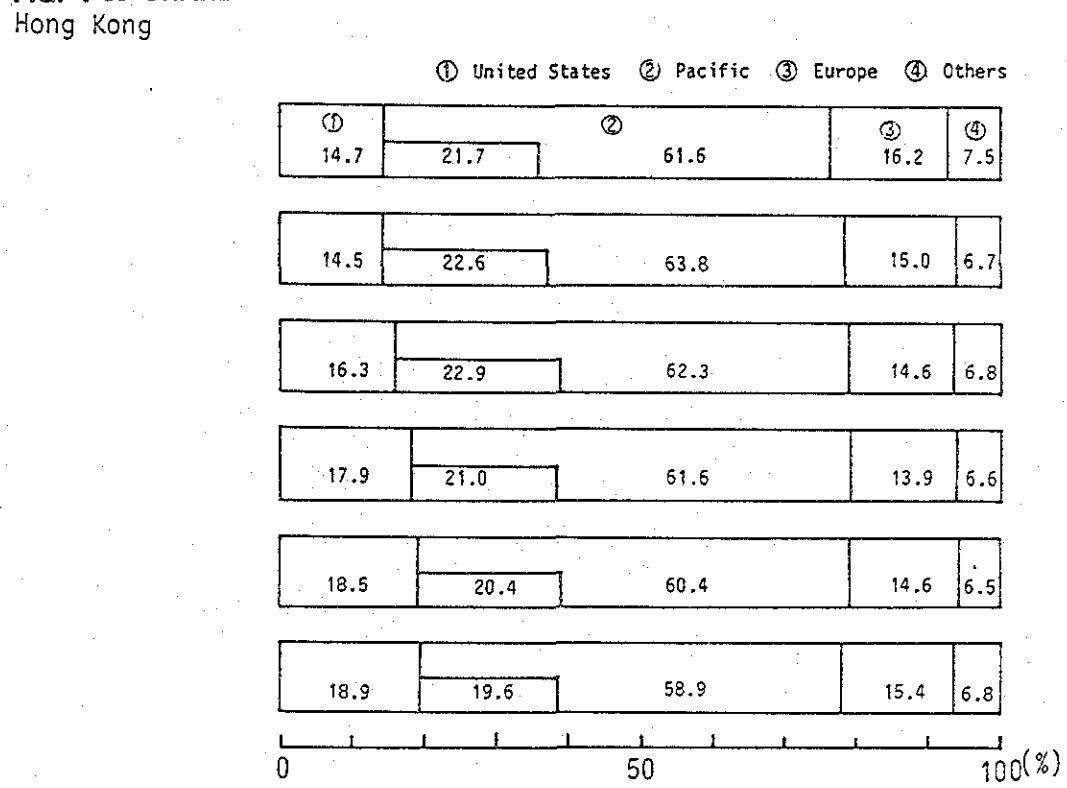


FIG. 1-38 SHARE OF MAJOR SOURCE MARKET (HONG KONG)



3) MAJOR SOURCE MARKET

a. Thailand

- Notable growth recorded by Malaysia, Singapore and China. Share of Malaysia is on the increase, forming a major source market to Thailand.
- Japan ranks the second with 262,000 arrivals. However, her growth ratio for 1981/1986 is 1.06, marking the lowest with Hong Kong.
- USA and China marks a very healthy growth with growth ratio for 1981/1986 of 1.48 and 2.56 respectively.

TABLE 1-20 MAJOR SOURCE MARKET (THAILAND)

	1981	1986	86/81
1) Malaysia	340(16.8%)	663(23.2%)	(1.92)
2) Japan	246(12.2%)	282(9.3%)	(1.06)
3) Hongkong	156(7.7%)	221(7.8%)	(2.03)
4) U. S. A.	117(5.8%)	173(6.1%)	(1.48)
5) SINGAPORE	109(5.4%)	165(5.8%)	(1.08)
6) W. Germany	93(4.8%)	127(4.5%)	(2.56)

b. Indonesia

- Major market is Australia with 135,000 arrivals, forming 16.4 percent of the total.
- Japan ranks the second, followed by Singapore. Japanese arrivals are catching up with Australians.
- Notable increase marked by Malaysia, while USA and UK showed no sign of growth.

TABLE 1-21 MAJOR SOURCE MARKET (INDONESIA)

1 9 8 1		1 9 8 6		86/81
1)Australia	85(15.8%)	1) Australia	185(16.4%)	(1.43)
2)Singapore	70(11.6%)	2) Japan	120(14.6%)	(1.81)
3)Japan	67(11.1%)	3) Singapore	113(13.7%)	(1.63)
4)U. S. A.	52(8.7%)	4) Malaysia	66(8.0%)	(1.50)
5)U. K.	49(8.2%)	5) U. S. A.	55(6.6%)	(1.05)
6)Malaysia	44(7.4%)	6) U. K.	47(5.7%)	(0.96)

c. Philippines

- Arrivals decreased from all source markets, except for USA.
- USA is the only source market from where the arrivals increased (18.6 percent in 1981 to 25.9 percent in 1986), forming the most important source market to the Philippines tourism.

TABLE 1-22 MAJOR SOURCE MARKET (PHILIPPINES)

1 9 8 1		1 9 8 6		86/81
1)Japan	193(20.6%)	1) U. S. A.	203(25.9%)	(1.16)
2)U. S. A.	174(18.8%)	2) Japan	134(17.2%)	(0.70)
3)HongKong	93(9.9%)	3) HongKong	76(9.7%)	(0.82)
4)Australia	64(6.8%)	4) Australia	46(5.8%)	(0.71)
5)China	39(4.1%)	5) China	35(4.4%)	(0.89)
6)Singapore	35(3.7%)	6) W.Germany	25(3.1%)	(0.77)

d. Malaysia

- Singaporean arrivals will be doubt from the major portion of arrivals into Malaysia. However, there are some questions on the statistical data of Singaporean arrivals. When Singaporean arrivals are excluded, Thailand ranks the first with 205,000 arrivals.
- Comparatively low ratio of growth in all source markets for 1981/1986, with exception of Japan (1.51 point).

TABLE 1-23 MAJOR SOURCE MARKET (MALAYSIA)

1 9 8 1		1 9 8 6		86/81
1)Thailand	191(22.6%)	1) Thailand	205(23.0%)	(1.07)
2)Japan	83(9.9%)	2) Japan	128(14.1%)	(1.51)
3)Australia	78(9.2)	3) Australia	81(9.1%)	(1.04)
4)U. K.	54(6.4%)	4) U. K.	67(7.5%)	(1.23)
5)Indonesia	48(5.7%)	5) U. S. A.	42(4.7%)	(1.14)
6)HongKong	44(5.2%)	6) India	35(3.9%)	(0.86)

e. Singapore

- Japan and Australia show a very steady growth.
- High growth recorded by India and USA.

TABLE 1-24 MAJOR SOURCE MARKET (SINGAPORE)

	1 9 8 1		1 9 8 6	86/81
1)Malaysia	478(16.9%)	1) Malaysia	425(14.8%)	(0.89)
2)Indonesia	440(15.15%)	2) Japan	370(12.8%)	(1.04)
3)Japan	355(12.5%)	3) Australia	291(10.1%)	(1.13)
4)Australia	259(9.1%)	4) Indonesia	287(10.0%)	(0.65)
5)U. K.	145(5.1%)	5) India	193(6.7%)	(1.65)
6)U. S. A.	144(5.1%)	6) U. S. A.	177(6.1%)	(1.23)

f. Hong Kong

- High growth from all source markets
- Japan tops the list, followed very closely by USA with 704,000 arrivals in 1986.

TABLE 1-25 MAJOR SOURCE MARKET (HONG KONG)

	1 9 8 1		1 9 8 6	86/81
1)Japan	508(20.0%)	1) Japan	727(19.5%)	(1.43)
2)U. S. A.	372(14.7%)	2) U. S. A.	704(18.9%)	(1.89)
3)Australia	202(8.0%)	3) Australia	276(7.4%)	(1.37)
4)U. K.	167(6.6%)	4) China	221(5.9%)	(1.63)
5)Thailand	138(5.4%)	5) U. K.	215(5.8%)	(1.28)
6)China	136(5.3%)	6) Singapore	193(5.2%)	(1.90)

2. PROFILE OF FOREIGN TOURISTS ARRIVALS INTO THAILAND

2.1 FOREIGN TOURISTS IN GENERAL

- 1) As compared with the foreign tourists arriving into Malaysia, those to Thailand have higher composition of male tourists and of first-time visitors.
- 2) Viewed by age group, tourists to Thailand have higher composition of younger age groups.

2.2 JAPANESE TOURISTS

- 1) As compared with Japanese tourists arriving into Malaysia, those to Thailand have higher composition of male tourists and of first-time visitors.
- 2) Viewed by age group, tourists to Thailand are composed of younger age groups, while those to Malaysia have higher composition of senior age groups.
- 3) 82.4 percent of Japanese tourists to Thailand quote "holiday" as their purpose of visit, which is higher than 69.7 percent in the case of Malaysia.

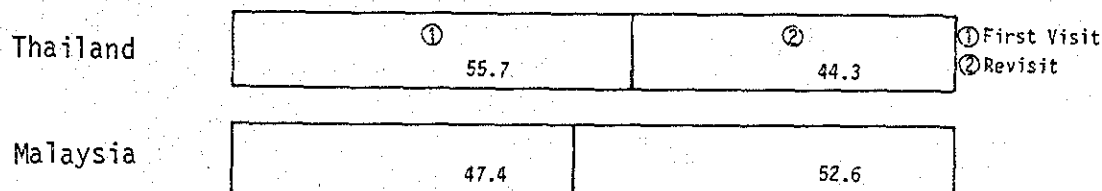
TABLE 1-26 PROFILE OF FOREIGN TOURISTS (1982-1988)

	1982	1983	1984	1985	1986
Frequency of Visit					
First Visit	47.83	43.36	43.75	42.88	46.58
Revisit	52.17	56.64	56.25	57.14	53.42
Sex					
Male	70.51	70.65	71.32	71.66	67.90
Female	29.49	29.35	28.68	28.34	32.10
Age					
Under 15	2.17	2.04	5.04	4.42	4.46
15-24	7.22	6.84	17.01	12.12	12.04
25-34	13.68	12.85	20.32	30.80	30.26
35-44	21.54	20.74	18.91	23.91	23.33
45-54	30.68	29.89	19.27	15.37	15.42
55-64	24.66	27.50	15.42	9.36	9.68
65 and over	0.05	0.14	4.03	4.02	4.83
Purpose of Visit					
Holiday	73.43	76.78	76.87	74.93	81.74
Business	7.14	8.31	6.73	7.31	6.80
Convention	0.63	0.70	0.67	0.66	0.79
Official	1.93	1.69	1.12	1.23	0.98
Others	16.87	12.52	14.61	15.87	9.69
Accommodation					
Hotel	91.31	92.73	95.30	93.85	94.78
Friend's Home	2.29	2.15	0.92	0.65	0.29
Youth Hostel	0.20	0.21	0.09	0.06	0.13
Apartment	0.32	0.32	0.11	0.15	0.15
Guest-house	0.35	0.38	0.29	0.72	0.94
Others	5.53	4.21	3.29	4.57	3.71
Travel Arrangement					
Group Tour	39.74	34.51	84.18	31.93	86.69
Non Group Tour	60.26	65.49	65.82	68.07	63.31

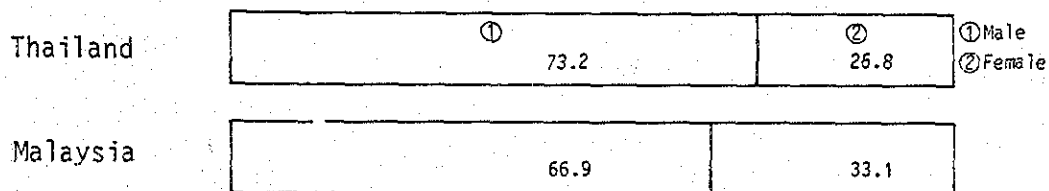
Source: TAT Annual Statistical Report

FIG. 1-39 JAPANESE TOURISTS

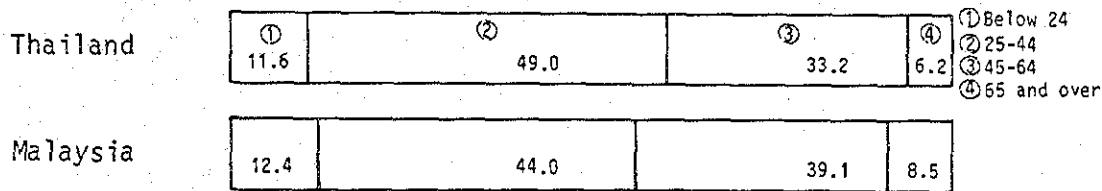
(1) Frequency of Visit



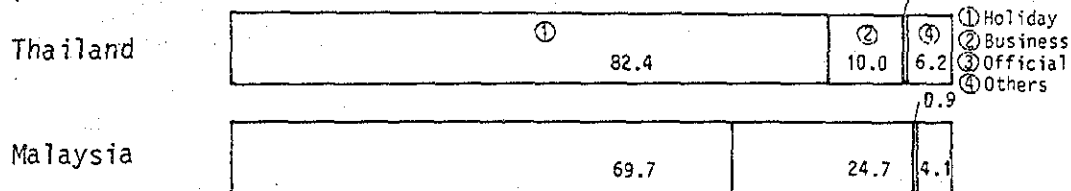
(2) Sex



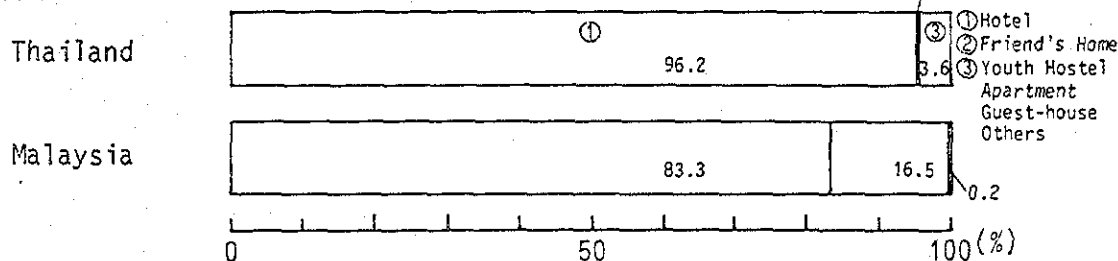
(3) Age



(4) Purpose of Visit



(5) Accommodation



0 50 100 (%)

3. TOURIST VISITING SOUTHERN REGION

TABLE 1-27 NUMBER OF OVERNIGHT TOURIST VISITING SOUTHERN REGION

Province	Nationality	Jan.	Feb.	Mar.	Apr.	May.	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Total
1983 Krabi	Thai	5,483	5,698	5,795	6,049	5,229	4,615	4,886	5,192	4,437	5,275	5,587	6,176	64,422
	Foreigners	24	15	17	11	3	6	-	-	-	8	12	18	114
	Total	5,507	5,713	5,812	6,060	5,232	4,621	4,886	5,192	4,437	5,283	5,599	6,194	64,536
Phuket	Thai	11,593	10,301	11,118	12,866	12,426	9,917	12,734	12,504	11,309	13,791	13,865	18,080	150,504
	Foreigners	11,107	9,277	7,739	6,023	3,082	5,236	5,756	5,494	4,264	3,500	6,704	11,546	80,528
	Total	22,700	19,578	18,857	18,889	16,308	15,153	18,490	17,998	15,573	17,291	20,569	29,626	231,032
1984 Krabi	Thai	5,950	5,497	5,944	5,605	4,904	4,321	-	-	-	-	-	-	32,221
	Foreigners	12	10	6	8	-	-	-	-	-	-	-	-	36
	Total	5,962	5,507	5,950	5,613	4,904	4,321	-	-	-	-	-	-	32,257
Phuket	Thai	15,986	14,074	15,934	17,526	16,377	13,369	-	-	-	-	-	-	93,266
	Foreigners	13,144	13,101	13,060	12,606	11,679	12,856	-	-	-	-	-	-	76,416
	Total	29,100	27,175	28,994	30,132	28,056	26,225	-	-	-	-	-	-	169,682

Province	Nationality	Jan.	Feb.	Mar.	Apr.	May.	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Total
1983 Surat Thani	Thai	37,627	39,136	43,135	47,816	14,113	39,615	98,908	41,747	37,397	43,163	43,388	46,209	499,254
	Foreigners	709	466	545	456	307	389	288	372	406	507	673	530	6,000
	Total	38,336	39,602	43,680	48,292	14,420	40,004	99,196	42,074	37,800	43,670	44,061	46,739	505,254
1984 Surat Thani	Thai	42,798	43,192	48,274	49,176	42,595	41,045	-	-	-	-	-	-	267,080
	Foreigners	475	499	328	419	394	464	-	-	-	-	-	-	2,579
	Total	43,273	43,691	48,602	49,595	42,989	41,509	-	-	-	-	-	-	269,659

Province	Nationality	Jan.	Feb.	Mar.	Apr.	May.	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Total
Narathiwat	Thai	3,663	3,448	3,467	3,527	3,421	3,291	3,425	3,399	3,333	3,916	3,970	3,972	42,772
	Foreigners	21	24	14	21	12	13	11	15	12	9	29	22	203
	Total	3,684	3,472	3,481	3,548	3,433	3,304	3,436	3,354	3,345	3,925	3,999	3,994	42,975
Yala	Thai	13,076	15,107	14,868	14,053	13,201	12,198	12,935	12,716	11,911	13,975	14,974	15,739	166,753
	Foreigners	7,712	7,624	7,511	8,034	7,935	7,088	7,248	6,716	6,845	7,129	7,309	8,577	89,728
	Total	20,788	22,731	22,379	22,087	21,136	19,286	20,183	19,432	18,756	21,104	22,283	24,316	256,481
Hat Yai	Thai	36,768	41,331	47,211	51,583	44,640	41,313	43,116	43,830	40,002	38,843	36,772	38,991	504,500
	Foreigners	47,347	43,868	40,257	38,184	39,337	32,194	34,054	32,665	27,861	36,573	42,556	49,820	464,726
	Total	84,115	85,199	87,468	89,767	83,977	73,507	77,170	76,495	67,863	75,016	79,338	88,811	969,226
Sungai Kolok	Thai	8,856	7,308	8,958	7,221	7,697	6,217	7,465	7,266	6,912	6,861	6,346	7,537	88,629
	Foreigners	14,148	15,750	16,635	17,771	17,060	16,750	12,589	11,778	9,620	13,487	14,258	12,823	172,667
	Total	23,004	23,058	25,593	24,992	24,757	22,967	20,054	19,044	16,532	20,348	20,607	20,360	261,296

4. SPECIAL TOUR PROGRAMS

4.1 CRUISE

SHIP	SHIP OPERATOR	CRUISE OPERATOR	CAPACITY	CRUISE DATE	CRUISE ITINERARY
EUROPA	Hapag Lloyd (W.Germany)		600	88/01/09-26 for 17 days	FRA - air - Madras, Port Blair, PHUKET, Penang, Belawan, Sibolga, Nias, Jakarta, Singapore - air - FRA
GOLDEN ODYSSEY	Royal Cruise Line (Greece)		460	88/01/24 02/02 13 02/17 days 02/26	SIN, Penang, PHUKET, Port Blair, Madras, Colombo, Goa, Bombay
SHOLOKHOV			200	85/12/ 16 days	FRA - Air - SIN, Surabaya, JKT, Padang, Nias, Sibolga, Belawan, PHUKET, Penang, Molucca, SIN - Air - FRA

Comment of local ground operator

Mr. Kiat Lohan, Inbound Manager of SEA Tours, a major ground handler for cruise lines, said that one reason cruise ships don't stop off in Phuket is because of the shortage of buses there (PATA TRAVEL NEWS June 87)

4.2 RAIL

ACROSS MALAY PENINSULA TRAIN TRIP

"ASEAN EXPRESS"

- project planned by SEA CONTAINERS Ltd. in UK
- they have contacted TAT, Malaysian Railways, Singapore Tourism promotion board (STPB) and obtained favorable response from every authorities.
- Use existing rail facilities BKK - Butterworth (gateway rail terminal to Penang) - Kuala Lumpur - Singapore
- This project additionally include BKK - Chiang Mai sector.
- 1992 designated as ASEAN TOURISM YEAR by ASEAN Summit held in Manila in Dec. 1987
- NTOs (National Tourist Office, TAT, TDC - Tourism Development Corporation of Malaysia, STPB) all keen on this project, especially with ASEAN Tourism Year 1992
- Expected investment by SEA CONTAINERS Ltd.

