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ADAPTING TO CHANGE: THAILAND'S TOURISM RESPONSE TO THE DECLINE OF CHINESE TOURISTS

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ABSTRACT

Thailand's tourism industry, historically anchored by Chinese visitors, has experienced a decline since 2024, with arrivals decreasing from 6.73 million in 2024 to approximately 4.47 million in 2025, a 34% decline. This downturn is attributed to concerns regarding safety, China's slowing economic growth, currency appreciation, regional competition, and geopolitical challenges. This research examines Thailand's response to this demand shock through a qualitative case study utilizing sources from government agencies, industry stakeholders, and media outlets. It identifies the factors contributing to the decline and evaluates strategies such as visa facilitation, addressing safety issues, market diversification, transitioning from volume-centric to value-oriented destination marketing, and promoting domestic tourism. Diversification initiatives targeting India, Russia, and Europe have partially mitigated revenue losses, with Malaysia overtaking China as the primary source market in 2025, a position it has maintained for over a decade. Nonetheless, the recovery of the Chinese market has been slow, indicating that trust-based tourism markets recover more gradually than those driven mainly by price or accessibility. The study proposes an adaptive resilience framework that links demand shocks to capacity and outcomes (volume, value, image), along with policy recommendations for economies overly dependent on a single market.

Keywords: Tourism resilience, Market diversification, Chinese outbound tourism, Destination image, Thailand, Tourism policy

1. INTRODUCTION

Tourism is among the most significant sectors of the Thai economy; it plays a vital role in economic and social development (Chulaphan & Barahona, 2018). According to Thailand's Ministry of Tourism and Sports, in 2017 the tourism sector contributed at least 18.24% to the nation's economy and supported over 4.3 million jobs, accounting for 11.64% of total employment. For nearly two decades, China has been the primary source market underpinning this sector. In 2019, prior to the onset of the pandemic, Chinese nationals constituted nearly 11.2 million arrivals, representing approximately 28% of Thailand's total inbound tourists, thereby rendering Thailand excessively reliant on a single, geographically concentrated, and demand-elastic source market (Mehera, B., 2025).

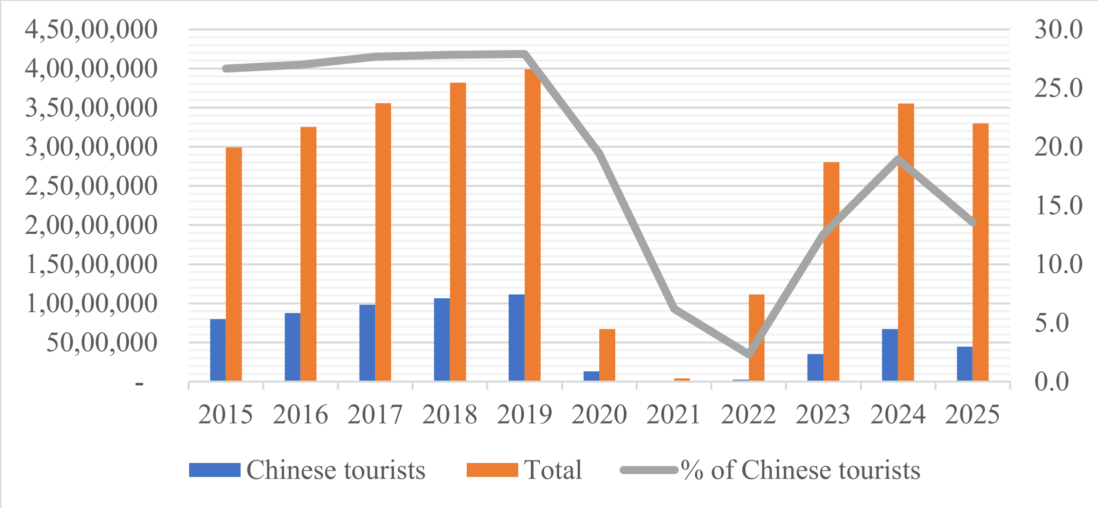

Figure 1-1: Number of international tourists to Thailand

Source: Tourism and Sports Economics Division, Ministry of Tourism and Sports of Thailand

This linkage was completely severed during the COVID-19 pandemic, and its aftermath proved more complicated than just returning to previous trends. Following the issuance of a temporary visa waiver in September 2023 and the signing of a visa-exemption agreement between Thailand and China in January 2024, which took effect in March 2024, the number of Chinese tourists increased and continued to constitute the largest group visiting Thailand until 2024 (Giulia, 2024; Bhutia, P. D., 2024). However, the growth was modest. Beginning in January 2025, several high-profile security threats, including the kidnapping and trafficking of Chinese actor Wang Xing to a cyberfraud camp near Myanmar, significantly diminished Chinese tourists' trust in Thailand. This decline was compounded by ongoing issues, including China's economic downturn, the appreciation of the Thai currency, and rising regional competition (Konishi & Akama, 2026). Consequently, by the end of 2025, the number of Chinese tourists in Thailand decreased to approximately 4.47 million, a 34% decline from the previous year. Thailand also experienced its first year-over-year decline in foreign tourists since the pandemic, with total arrivals falling to 32.97 million, a 7.23% decline.

This decline signifies more than a transient fluctuation. It serves as a pivotal stress test for a tourism sector that, for over ten years, has concentrated its marketing initiatives, accommodations, tourism offerings, retail, and airport capacities on a singular primary market. The inquiry into how a tourism-dependent economy will respond to the downturn of its most significant market, considering policy, marketing, product, and diversification strategies, is of immediate and scholarly relevance, not only for Thailand but also for numerous other Southeast Asian economies. This paper directly addresses this issue. It poses the primary research question: How has Thailand's tourism industry adjusted to the reduction in Chinese visitors, and what has been the efficacy of these adaptation strategies to date?

2. THEORETICAL FRAMEWORKS

2.1 Tourism Dependency and Economic Vulnerability

Economies that depend heavily on tourism for a significant part of their GDP, employment, and foreign exchange earnings face a well-known trade-off: the sector's high growth potential is counterbalanced by increased vulnerability to external shocks (Fan & Ha, 2025). Specifically, within the Association of Southeast Asian Nations (ASEAN) region, research has shown that excessive reliance on tourism, particularly on a small number of source markets, leads to economic fragility, financial leaks, and susceptibility to demand shocks largely beyond the destination's control (HAU et al., 2026). The COVID-19 pandemic clearly exposed this weakness across the region, demonstrating how quickly tourism-dependent livelihoods can be destabilized when international travel stops. Thailand, along with countries such as Singapore and Cambodia, and parts of the Asia-Pacific, is often cited as an example of an economy dependent on a single market, given China's significant role in Thailand's inbound tourism since the mid-2010s.

Importantly, dependency risk goes beyond just the total number of tourists; it is also influenced by the characteristics of the dependent market. Chinese outbound tourism is highly sensitive to domestic economic conditions, government travel advisories, social media sentiment, and perceptions of safety abroad, all of which are largely beyond the control of the destination country (Tai, 2025). This distinguishes reliance on China as a single market from dependence on more mature, stable long-haul markets such as the United Kingdom or Germany.

2.2 Destination Resilience and Crisis Adaptation

The concept of resilience, originating in ecological systems theory (Holling, 1973) and later expanded to socio-ecological systems (Folke, 2016), has become a key perspective for understanding how tourism destinations handle shocks (Mongua et al., 2026). Destination resilience is generally defined as a tourism system's ability to resist, absorb, adapt to, and reorganize around disruptions while maintaining its core functions and identity (Wang et al., 2022). Recent research increasingly views destinations not as fixed entities but as complex adaptive systems in which disturbances spread across interconnected subsystems, such as accommodation, transportation, retail, security, and destination image, and in which resilience develops through sensing, coordination, reconfiguration, and organizational learning (Najafi & Costa, 2026).

A further refinement in the literature distinguishes supply-side resilience, the capacity of destinations, firms, and infrastructure to recover, from demand-side resilience, which involves how travelers themselves adapt their behavior, risk perceptions, and destination choices under conditions of uncertainty (Ketter, 2026). This demand-side perspective is particularly relevant to the Thailand–China case, where the primary challenge is not a disruption of supply (hotels and attractions in Thailand remain fully operational) but a collapse in demand driven by traveler risk perception and trust. Empirical research on tourism resilience also emphasizes institutional and structural factors, including economic diversification, market composition, and adaptive governance, as critical determinants of how well tourism-dependent economies resist and recover from global shocks (Mongua et al., 2026). Additionally, collaborative, multi-stakeholder crisis planning, clear leadership, and structured communication are identified as vital enablers of destination-level resilience (Wang et al., 2022).

2.3 Market Diversification as a Strategic Response to Demand Shocks

Market diversification in tourism reduces a destination's vulnerability to demand shocks by spreading risks across multiple source markets with different economic profiles and travel purposes. Dependence on a limited number of markets heightens risks associated with economic downturns, exchange rate fluctuations, geopolitical issues, travel restrictions, and image crises (Prideaux, 2009; Ritchie, 2009). Such diversification stabilizes demand by lessening the impact of shocks in any single market on overall visitor numbers. However, diversification extends beyond just replacing declining markets with new destinations. Various source markets contribute in distinctive ways, influenced by factors such as length of stay, expenditure patterns, travel behaviors, and individual preferences. (Dwyer et al., 2004). For instance, long-haul tourists tend to spend more and stay longer but may be concentrated in specific zones and high-end segments, whereas regional markets often produce higher volumes but with differing spending patterns (Cooper et al., 2008). Consequently, diversification influences not only the volume of arrivals but also the composition, distribution, and economic quality of tourism revenue.

This is vital for destinations experiencing shifts in traditional markets. A varied portfolio can boost resilience by combining mature markets with stable demand and emerging markets with growth potential. Success depends on attracting segments while maintaining competitiveness through accessibility, service quality, infrastructure, and destination image (Pike & Page, 2014). Diversification is more than expanding source markets; it's a strategic reorganization of demand to achieve stability and sustainability.

Southeast Asia exemplifies how diversification enhances resilience. Historically dependent on East Asian markets, especially China, which was a major source pre-pandemic (UNWTO, 2019), countries now see growth in Europe, North America, the Middle East, and intra-ASEAN travel, creating a more balanced demand (UNWTO, 2023). While China remains key, over-reliance poses risks during crises. Therefore, market diversification is vital for regional tourism resilience.

2.4 Chinese Outbound Tourism: Post-Pandemic Behavioral Shifts

Chinese outbound tourism has not simply recovered after COVID-19; it has also experienced a process of restructuring. Regionally, China has re-emerged as one of the top two inbound markets for most Southeast Asian destinations, supported by visa facilitation and the restoration of flight capacity (Antom Knowledge, 2026). However, within this broader recovery, outcomes at the destination level vary significantly, influenced by travelers' risk perceptions, price competitiveness, and the prominence of safety narratives circulating on Chinese social media platforms such as Weibo and Xiaohongshu. Recent commentary on the Thailand case specifically has noted that safety-related social media narratives can cause rapid and measurable shifts in Chinese travel intent, including spikes in flight cancellations following a single high-profile incident (AOL, 2025), a dynamic that is considerably more sudden and volatile than the slower-moving economic and demographic factors typically emphasized in traditional tourism-demand models. This indicates that, particularly for the Chinese outbound segment, destination image and perceived safety are distinct, highly elastic demand drivers, which warrant consideration alongside conventional economic factors (price, income, exchange rates) within resilience frameworks.

2.5 Research Gap and Positioning of the Study

While the overall theoretical connection between market dependency, resilience, and diversification is well known, the literature provides relatively little empirical, case-based analysis of how a major tourism destination adapts in real time to a reputation-driven, rather than solely economic or pandemic-driven, collapse in its main source market. Most existing resilience research is either abstract or conceptual, such as bibliometric reviews and theoretical frameworks, or focuses on the COVID-19 pandemic as the primary example of shock. The Thailand-China case presents a different and currently under-studied shock type: a safety and trust crisis developing within an otherwise open, accessible, and competitively priced destination. This study fills that gap by offering a systematic, evidence-based account of Thailand's adaptive response from 2024 through mid-2026.

3. RESEARCH METHODOLOGY

3.1 Research design

This study employs a qualitative, exploratory, document-based case study design. Since the phenomenon being examined, Thailand's policy and industry response to the decline in Chinese tourists, is an ongoing, rapidly changing process (2024-2026) rather than a completed historical event, a secondary data and document analysis approach was considered the most appropriate and justified method for providing a timely, evidence-based account. This approach aligns with case study methods used in tourism crisis research elsewhere that combine official statistics, policy documents, and media/industry reports to reconstruct destination-level response processes.

3.2 Analytical approach

The data were analyzed through thematic content analysis. Documents were examined to identify (a) quantitative indicators such as arrivals, revenue, and market share by source country and year; (b) causal factors cited for the decline in Chinese arrivals; and (c) specific policy and industry actions taken in response. These actions were then inductively categorized into themes: visa facilitation, safety and confidence restoration, market diversification, value repositioning, and domestic stimulation.

3.3 Data source and collection

Data were collected from three categories of publicly available secondary sources, covering the period from January 2024 to mid-2026.

1. Official statistics and policy communications, such as releases from the Tourism Authority of Thailand (TAT) newsroom, data summaries from Thailand's Ministry of Tourism and Sports, and government policy announcements like visa-exemption agreements and launches of the national tourism strategy.
2. Specialist and mainstream news outlets, including Bangkok Post, Nation Thailand, Nikkei Asia, AOL, and trade publications like Travel and Tour World and Jing Daily, were chosen for their direct coverage of arrival stats, policy updates, and industry insights.
3. Academic papers and institutional analyses, such as peer-reviewed tourism-resilience studies and policy commentary from research organizations like ISEAS–Yusof Ishak Institute's Fulcrum and from an international research journal, are used to provide context and develop theories based on empirical data.

4. FINDINGS AND DISCUSSION

4.1 The Magnitude and Trajectory of the Decline

Table 4.1: Thailand's inbound tourist arrivals and the Chinese market's position

Year	**Total tourist arrivals**	**Chinese arrivals**	**Chinese share of total**
2019 *(pre-pandemic peak)*	39.9 million	11.1 million	28%
2020 *(during pandemic)*	6.7 million	1.3 million	19.4%
2021 *(Entry restrictions during the pandemic, Thailand Pass requirement)*	0.4 million	0.02 million	6.2%
2022 *(eases the entry requirement, Lost in Thailand movie.)*	11.1 million	0.2 million	2.3%

2023	28 million	3.5 million *(recovering period, pilot visa waiver program from Sept.)*	12.6%
2024	35.5 million	6.7 *(Visa waiver program continued)*	18.9%
2025	32.9 million	4.4 million *(The Wang Xing Incident: safety concerns, Thailand-Cambodia geopolitical conflicts)*	13.6%
2026 (Q1)	9.3 million	1.4 million *(top source market)*	16%

Source: Compiled from Tourism Authority of Thailand newsroom data (2026); Thailand Ministry of Tourism and Sports (2026).

Two key features define the decline. First, the downturn in 2025 was sharp and occurred mainly in a single year, primarily impacting China. Although total arrivals fell by 7.23%, Chinese arrivals fell by around 34%. This shows that China's decline accounts for most of Thailand's total shortfall in 2025. Second, Malaysia surpassed China to become Thailand's largest source market in 2025 for the first time in years, with approximately 4.50-4.52 million arrivals, compared with China's 4.47 million arrivals (Thaiger, 2026). This shift signifies a symbolically important change, given China's nearly two-decade dominance in Thailand's inbound rankings.

Compared to the pre-pandemic benchmark, the decline is substantial: Chinese arrivals in 2025 were approximately 34% lower than in 2019, in absolute numbers. Additionally, China's share of Thailand's total arrivals nearly halved, decreasing from about 28% in 2019 to approximately 13.6% in 2025. Data from early 2026 indicate a partial and uneven recovery: China reestablished itself as the leading source market in the first quarter of 2026 with 1.49 million arrivals. Nevertheless, reports as recent as mid-2026 still indicate that Chinese arrivals are roughly 30% below the previous year and characterize the market as not yet fully recovered (Thaiger, 2026).

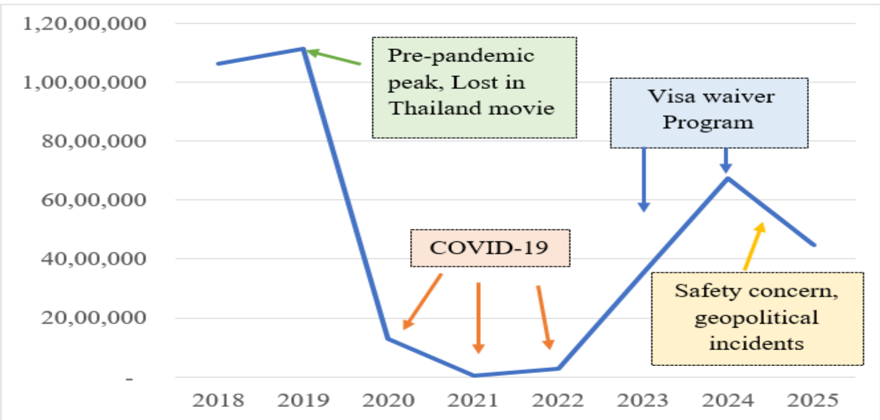

Figure 4-1: Number of Chinese tourists to Thailand, 2018-2025

Source: Tourism and Sports Economics Division, Ministry of Tourism and Sports of Thailand

4.2 Drivers of the Decline: A Multi-Causal Analysis

The drivers of the Decline in Chinese tourists to Thailand are described in Table 4.2 below.

Table 4.2: Major Drivers of the Decline in Chinese Tourist Arrivals to Thailand

Driver	**Key Events / Evidence**	**Mechanism Affecting Chinese Tourism Demand**	**Relative Impact**
1. Safety and Security Concerns *(Trust Collapse)*	Abduction of Chinese actor Wang Xing in January 2025, followed by trafficking to the KK Park scam compound in Myawaddy, Myanmar. The incident received extensive media coverage and sparked viral discussions on Chinese social media. There was also a surge in flight cancellations and growing concerns over transnational scam syndicates operating along the Thailand-Myanmar border *(Gan et al., 2025; AOL, 2025; Ehrlich, R., Crispin, S., 2025; Hong Kong Free Press, 2025; Hunt, 2025).*	The incidents significantly reduced perceived destination safety, undermined traveler confidence, generated negative word of mouth on Chinese social media, and increased risk aversion among potential visitors.	Very High
2. China's Domestic Economic Slowdown	Slower economic growth, weak consumer confidence, and declining household spending decreased discretionary spending on overseas travel. *(Mehera, B., 2025).*	Lower disposable income reduced outbound travel demand and heightened price sensitivity among Chinese tourists.	High
3. Reduced Price Competitiveness	Appreciation of the Thai baht (THB) increased travel costs, leading to ongoing complaints about dual-pricing practices at tourist attractions and services. *(Visit Thailand Today, 2026)*	The increase in travel expenses diminished Thailand's price competitiveness relative to other destinations and negatively impacted visitor satisfaction.	Moderate–High
4. Intensified Regional Competition	Competing destinations like Japan, Vietnam, South Korea, and Malaysia enhanced visa ease, airline links, and tourism campaigns aimed at Chinese travelers. *(Mehera, B., 2025)*	Chinese tourists replaced Thailand with destinations seen as safer, more affordable, or offering better value.	Moderate
5. Regional and Environmental Disruptions	Northern Myanmar earthquake, Thailand–Cambodia border conflict, and severe flooding in southern Thailand during 2025. *(Konishi & Akama, 2026)*.	Reinforced perceptions of regional instability and uncertainty, which further discourage international travel to Thailand, even though it doesn't directly involve Chinese visitors.	Moderate

Source*:* Compiled by the author.

These incidents collectively support the point made in Section 2.4: for the Chinese outbound market, trust and safety perceptions act as a highly responsive, socially influenced demand driver that can change more quickly and sharply than the slower-moving economic factors (currency, income) that typically drive tourism demand.

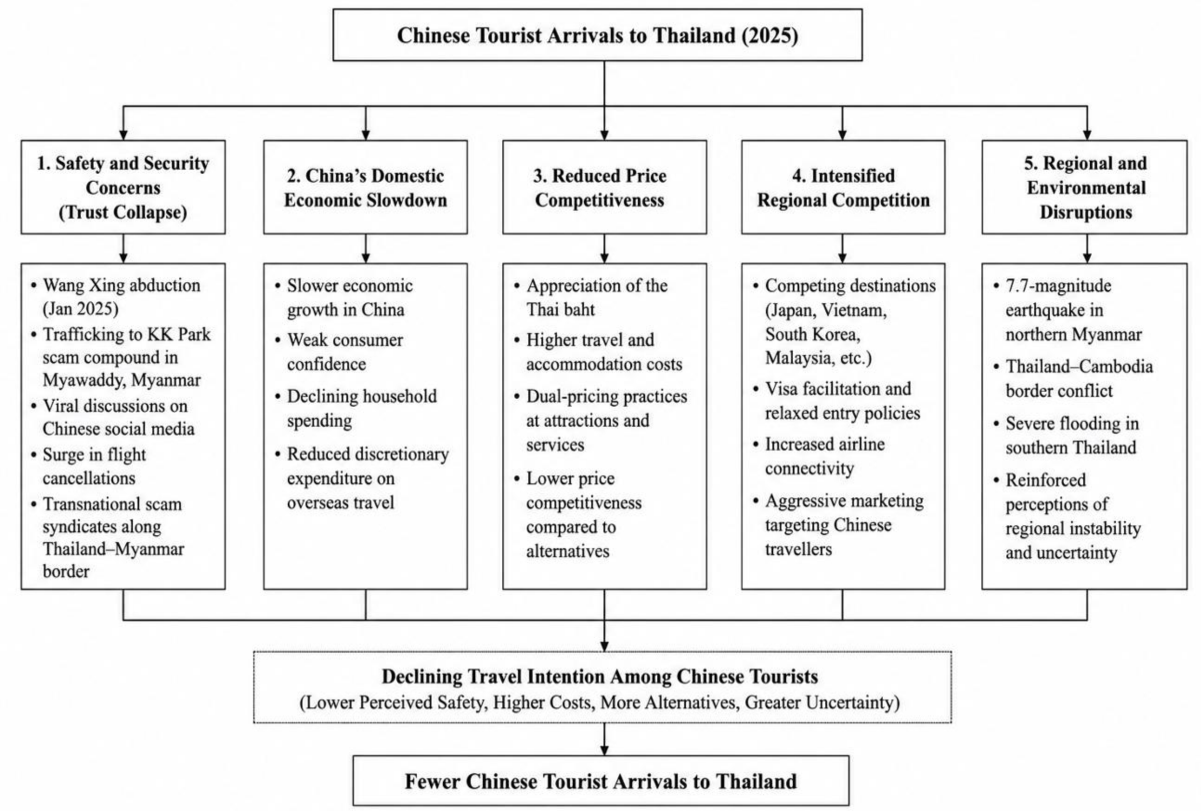

Figure 4-2: Causal framework: Decline in Chinese tourism
Source: Compiled by the author

4.3 Thailand's Adaptive Strategies

Aligning with the adaptive response stage of the destination resilience framework, Thailand enacted a series of policy measures to stabilize tourism demand, rebuild visitor trust, and reduce dependence on the Chinese market. Rather than implementing these strategies sequentially, they were launched simultaneously, showcasing a comprehensive approach to an unfolding crisis. These primary policy responses can be categorized into five key areas (Table 4.3).

Table 4.3: Thailand's Adaptive Strategies in Response to the Decline of Chinese Tourists

Strategic Response	Key Measures	Primary Objective	Expected Impact
1. Visa Facilitation	Permanent reciprocal visa exemption for Chinese citizens starting March 2024; visa-free stay extended from 30 to 60 days in July 2024.	Reduce travel barriers and maintain accessibility to the Chinese market.	Maintain tourism demand by confirming that the market decline wasn't driven by visa restrictions.
2. Safety and Confidence Restoration	Enhanced tourist security, arrests connected to the Wang Xing incident, launch of safety certification for	Rebuild trust in destinations and enhance safety perceptions among international	Restore confidence and alleviate travel-related safety concerns.

	tourism businesses, and the *"Trusted Thailand"* initiative.	visitors, especially Chinese tourists.	
3. Source Market Diversification	Expansion into India, Japan, Europe, North America, the Middle East, and Australia through targeted marketing campaigns, visa exemption, and increased international flight connectivity, while maintaining charter flights from China.	Diversify Thailand's international visitor base and decrease reliance on the Chinese market.	Increase tourism resilience by diversifying the portfolio of source markets.
4. Transition from "Volume" to "Value" Tourism	Adopting the *"Value is the New Volume"* strategy and the *"Amazing 5Fs*[1] *Soft power"* framework, focusing on wellness, medical tourism, sports tourism, film production, cruise tourism, and the night economy.	Boost tourism income by attracting higher-value visitors rather than focusing on total arrivals.	Enhance tourism revenue and minimize the risks associated with mass tourism.
5. Domestic Tourism Promotion	Amazing Thailand Grand Tourism and Sports Year 2025, UNESCO Creative Cities initiatives, and local destination campaigns.	Address weaker international arrivals by boosting domestic tourism demand.	Stabilize tourism revenues and support local tourism businesses as international markets recover, especially the Chinese market.

Source: China Briefing, Travel and Tour World, TAT Newsroom, Nation Thailand.

Thailand's initial strategy was to keep markets open by liberalizing visa requirements. The reciprocal visa exemption between Thailand and China, initiated in March 2024 and expanded in July 2024, remained in place during the 2025 downturn (Giulia, 2024; Tungkeunkunt, 2024). Since most visa barriers had been lifted before the decline, the ongoing decrease in Chinese visitors indicates that the crisis was primarily demand-driven, stemming from deteriorating perceptions of safety and trust rather than travel restrictions.

The second policy focus was to restore confidence in the destination. After Wang Xing's kidnapping, the Thai government strengthened security, arrested suspects from the trafficking network, and launched new tourist safety initiatives (Saha, H. 2025). The TAT then introduced a safety certification program for hotels, restaurants, and shopping centers, which later expanded into the broader Trusted Thailand initiative as part of the 2026 tourism strategy (TAT Newsroom, 2026). These actions were aimed directly at repairing the reputational damage from the safety crisis and rebuilding trust among Chinese travelers.

Thailand took proactive steps to diversify its source markets, aware of the risks of overdependence on a single market. The TAT boosted promotional campaigns targeting India, Japan, Europe, North America, the Middle East, and Australia. It also improved international air links by establishing new and resuming long-haul routes. Additionally, charter flight programs from secondary Chinese

[1] Thailand's "5Fs" soft power strategy is a national campaign aimed at boosting the creative economy and increasing global cultural influence. The framework emphasizes five main pillars: Food (Thai cuisine), Film (cinema and media), Fashion (Thai textiles and crafts), Fighting (Muay Thai), and Festival (traditional events like Songkran).

cities continued, indicating that diversification was intended to complement rather than replace the Chinese market (Vinaisatienm T., 2026). This strategy aligns with the widely recommended portfolio diversification approach in tourism resilience research.

Thailand has transitioned its approach to tourism from emphasizing visitor numbers to emphasizing economic value through the 2025 initiative titled "Value is the New Volume." This policy shift seeks to enhance visitor expenditure and prolong stays, moving away from solely augmenting arrival figures (TAT Newsroom, 2026). The strategy, implemented via the Amazing 5Fs soft power model, aims to attract high-end segments including wellness and medical tourism, sports, film production, cruises, yachts, and the nighttime economy (Krisanaraj, J., 2026). Success is now evaluated based on economic impact and sustainability metrics rather than entirely on visitor volume.

Finally, recognizing that international tourism recovery would be slow, Thailand stepped up its efforts to promote domestic travel. National campaigns, including the Amazing Thailand Grand Tourism and Sports Year 2025 and UNESCO Creative Cities initiatives, motivated local travel and supported regional tourism economies. These programs led to noticeable growth in domestic trips and revenue throughout 2025, helping partially offset weaker international demand (Krisanaraj, J., 2026).

Thailand's diversification did not signify abandoning China. In the early months of 2026, the TAT initiated the “Amazing Thailand Chinese New Year 2026” campaign to commemorate the 51st anniversary of Thailand-China diplomatic relations and to enhance Chinese tourism (TAT, 2026). This exemplifies Thailand's dual strategy: decreasing dependence on China while implementing targeted measures to restore Chinese visitors' confidence. From a destination resilience perspective, these strategies are complementary, balancing market diversification with focused recovery efforts to rebuild a vital segment of Thailand's tourism industry.

4.4 Assessing Effectiveness: Early Outcomes

The effectiveness of Thailand's adaptive strategies can be assessed using the three outcome dimensions of the destination resilience framework: tourism volume, tourism value, and destination image/trust. The evidence suggests a mixed pattern of recovery, indicating that policy interventions have produced uneven outcomes across these dimensions.

Tourism Volume. Regarding visitor arrivals, the recovery has stayed limited. Despite efforts to diversify source markets, Thailand did not reach its tourism goals. Official forecasts for international arrivals were repeatedly lowered, from an initial goal of 40 million visitors in 2025 to about 33.4 million, yet the final total was only 32.97 million. Likewise, the 2026 forecast was reduced from 36.7 million to 30–34 million by mid-2026 (Mehera, B., 2025; Krisanaraj, J., 2026). These results show that growth from other markets has not yet been enough to offset the drop in Chinese visitors.

Tourism Value. Performance was notably stronger when evaluating tourism revenue rather than visitor numbers. Despite a 7.23% drop in international arrivals in 2025, total tourism revenue (including international and domestic) only fell by 1.26%, totaling 2.70 trillion baht (Krisanaraj, J., 2026). This modest decline highlights two main points: first, domestic tourism revenue increased by 3.69%, partially offsetting weaker international demand; second, long-haul markets with higher spending grew significantly, with arrivals reaching a record 10.8 million (+10.64%), led by the United Kingdom and the United States. India and Russia also saw strong growth of 16.8% and 8.8%, respectively, highlighting their emerging roles as growth markets (Vinaisatien, T., 2026). Nevertheless, international tourism revenue still decreased by 4.71% (Vinaisatien, T., 2026), indicating that market diversification helped mitigate the economic impact of declining Chinese visitor arrivals.

Destination image and trust. Recovery has been the slowest regarding destination image and traveler confidence. Despite China regaining its status as Thailand's largest source market in the first half of 2026 (TAT Newsroom, 2026), industry reports still indicate that Chinese arrivals are approximately 30% below pre-crisis levels (Konishi & Akama, 2026; Thaiger, 2026). This apparent contradiction underscores that, although China remains Thailand's leading individual source market, its actual visitor numbers are considerably lower than previous figures, with no other market approaching that scale. The ongoing recovery gap suggests that reputational damage related to safety concerns is more resilient to policy measures than barriers associated with market access or destination marketing. This observation aligns with the theory presented in Section 2.3, which posits that demand shocks driven by trust recover more slowly than those stemming from economic or policy modifications.

Overall, Thailand's adaptive strategies have fostered resilience. By diversifying markets, the country has reduced economic risks through expanding high-value source markets and boosting domestic tourism. However, this has not fully offset the lack of Chinese visitors. The main challenge remains restoring traveler confidence, as the destination's reputation recovers more slowly than visitor numbers or tourism revenue.

4.5 Theoretical Discussion

Examined through the Adaptive Market Resilience Framework, Thailand's case provides three significant theoretical insights.

First, the case shows that tourism value can recover faster than tourism volume. Although visitor arrivals remained below target, Thailand's strong institutional capacity, which includes effective tourism governance, market flexibility, and domestic demand stimulation, helped limit revenue losses by attracting higher-spending visitors and strengthening domestic tourism. This supports the view that institutional adaptive capacity can generate meaningful value-dimension resilience even when volume-dimension recovery lags.

Second, the findings indicate that market diversification and recovery complement each other rather than compete. Thailand, for example, expanded into new source markets such as India, Russia, and Europe, while continuing to invest in the Chinese market through targeted campaigns and charter flights. This implies that resilient destinations should focus on diversifying while simultaneously strengthening their core markets.

Third, the case highlights the significance of destination trust as an independent facet of resilience. Even though China regained its status as Thailand's top source market in 2026, visitor numbers remained well below pre-crisis levels, indicating that traveler confidence lagged behind the recovery in visitor numbers and tourism income. This underscores the need for resilience models to assess not just tourism metrics and economic outcomes but also the restoration of destination reputation and trust, particularly after reputation-related crises.

5. CONCLUSION AND POLICY IMPLICATIONS

5.1 Summary of Key Findings

This study examined how Thailand's tourism industry has adapted to the sharp decline in Chinese tourists since 2024-2025. It finds that the decline, a roughly 34% year-on-year fall in Chinese arrivals in 2025, reducing China's share of Thailand's total arrivals from about 28% in 2019 to approximately 13.6% in 2025, was driven mainly by a safety and trust crisis triggered by high-profile trafficking and scam incidents, worsened by China's economic slowdown, currency effects, and regional competition. In response, Thailand implemented a multi-faceted strategy that included continued visa facilitation, safety certification, confidence-building measures, deliberate diversification toward India, Russia, and long-haul European markets, a formal shift from "volume" to "value," and efforts to boost domestic tourism. Early evidence indicates this approach has significantly mitigated revenue losses and reshaped Thailand's source market profile, most notably through Malaysia's rise to the top source market in 2025. However, it has not yet restored the Chinese market to its previous scale or fully regained Chinese travelers' trust, which seems to be recovering more slowly and unevenly than arrival numbers alone suggest.

5.2 Policy implications

The key findings have several practical implications for Thai tourism authorities and industry stakeholders.

First, the shift from a volume-focused to a value-oriented tourism approach should be formalized with clear, publicly available performance metrics like tourism revenue per visitor, average stay duration, and repeat visit rates. Assessing policy effectiveness based on these indicators, rather than just total international arrivals, will offer a more precise measure of the industry's success, especially since visitor numbers might stay below pre-2019 levels for some time.

Second, policymakers should continue pursuing a dual-market strategy by increasing tourism demand from emerging and diverse source markets, including India, Russia, Europe, and the Middle East, while also rebuilding confidence among Chinese travelers. These goals should be viewed as complementary rather than competing priorities for tourism investment and marketing.

Third, building traveler confidence demands continuous support for independently verified safety and quality assurance systems. Programs such as Trusted Thailand and hotel and restaurant safety certifications should be enhanced with regular, transparent, and publicly accessible reports. Evidence indicates that Chinese travelers are more influenced by credible, consistently demonstrated safety improvements than by short-term promotional efforts.

Fourth, enhance strategic destination communication in China by utilizing trusted digital platforms, social media, and key public figures. Safety should be consistently highlighted alongside positive destination stories, as visa facilitation and marketing campaigns don't fully restore traveler confidence. Communication efforts need to proactively address safety concerns, dispel misinformation, and deliver timely, credible updates through channels popular among Chinese travelers. Partnering with reputable media outlets, online travel services, and influential personalities can strengthen Thailand's image as a safe, welcoming, and high-quality destination, helping build long-term trust and boost tourism demand.

Finally, cross-border scam operations should be treated as a strategic tourism policy issue, not just a law-enforcement concern. Given the strong link between cross-border crime and heightened safety concerns among Chinese visitors, enhancing border security and public safety is crucial to rebuilding confidence in the destination and supporting long-term tourism recovery.

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