

FORECASTING HEALTH TOURISM DIRECTION IN THAILAND UNDER THE NEW LIFESTYLE POST COVID-19 CRISIS

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ABSTRACT

The COVID-19 pandemic crisis has significantly impacted both the economy and society, particularly altering consumer behavior, and necessitating corresponding adjustments in business operations. This research aims to study the crisis of the COVID-19 pandemic, consumer behavior concepts, the segmentation of consumers from the COVID-19 crisis, and consumer behavior according to the level of the COVID-19 crisis to forecast the direction of health tourism in Thailand post the COVID-19 situation. Data were collected from Thai and foreign tourists, health and tourism business operators, and relevant public and private sector stakeholders, using participatory action research methodology.

Research findings suggest that policies should be established to enhance the health status of the health tourism industry, while the government should raise public health and safety standards and formulate marketing policies. Distribution channels should be diversified to facilitate easy access to various tourism destinations, restaurants, souvenir shops, etc., such as maintaining customer contact databases and using apps for ordering products. An information system for national tourism integration should be developed, involving all stakeholders in the health tourism industry, to support and promote health tourism through online platforms as a means of connecting with international platforms to market massage and wellness products. Short-term management systems should be implemented to stimulate domestic health tourism and enhance the adaptability of health tourism businesses, ensuring their sustainable operation. Furthermore, national health tourism development should be aligned with the country's overall tourism development policy, and government agencies should be specially established to lead policy and strategic integration to drive sustainable health tourism.

Keywords: Forecast, health, new way of life Controlling the spread of COVID-19

INTRODUCTION

COVID-19, or the novel coronavirus disease 2019, was first detected in December 2019 in Wuhan, Hubei Province, People's Republic of China. It was found to be related to the seafood market and suspected to have originated from the animal-to-human transmission, as the virus was detected in bats and pangolins. This virus, belonging to the same family as the viruses

causing the common cold, Severe Acute Respiratory Syndrome (SARS), and Middle East Respiratory Syndrome (MERS), was initially referred to as SARS-CoV-2, later named COVID-19. It rapidly spread from person to person, becoming a global pandemic, affecting millions and claiming hundreds of thousands of lives.

The widespread global spread of COVID-19 has had extensive economic repercussions, including limitations on travel and increased travel advisories from various countries. Many businesses in the tourism industry have been forced to close, leading to significant losses and even closures. Tourism, being one of the industries hit hardest by the COVID-19 situation, has seen a decline in demand due to decreased international arrivals. The situation has been further compounded by the emergence of new variants of the virus, leading to a continuous increase in new cases.

The current global pandemic situation continues to pose challenges, with many countries, including Thailand, facing new waves of infections. It is anticipated that international tourist arrivals in Thailand will return to levels close to those of 2019 by 2023. However, uncertainties remain regarding the development, production, and distribution of vaccines, as well as the time and resources required to achieve herd immunity. Additionally, public confidence in travel may take time to fully recover, with studies suggesting lingering concerns for at least 3-6 months after the pandemic subsides.

Furthermore, significant reductions in income and purchasing power have dampened the demand for travel, a luxury product that is expected to take time to rebound. The tourism industry, often considered resilient, will require substantial time and effort to recover from the impacts of COVID-19.

PURPOSE

The purpose is to forecast the direction of the health tourism industry and to understand its impacts, problems, and obstacles under the "new normal" lifestyle post-COVID-19.

RESEARCH SCOPE

The study will explore factors determining the success of health tourism businesses, considering that hotels are not solely determined by location, accommodations, prices, and amenities but also by cooperation with communities and other related businesses. It will focus on the ability to adapt and manage risks. Therefore, it's crucial for entrepreneurs to adjust their business strategies before international travel returns to normal to recover and strengthen the tourism and hotel industry. Additionally, it aims to create sustainable growth for Thailand's tourism industry, which faces unprecedented challenges due to the COVID-19 pandemic. The article will analyze the tourism sector's recovery direction within the changing social and economic context and offer strategies for hotel businesses during transition periods. It will also analyze the future tourism landscape post-COVID-19 to help tourism and hotel operators adapt to the changing industry influenced by global megatrends encompassing social, economic, political, environmental, and technological changes. However, the COVID-19 pandemic has shifted these megatrends' impact on tourism significantly. Before the pandemic, tourism and hotels were driven by trends such as the expanding middle class, exploration of new

destinations, adoption of new technologies, and health-conscious travel. Yet, COVID-19 has accelerated some trends while delaying others. Thus, forecasting the future direction of health tourism in Thailand amid the post-COVID-19 era is crucial for sustainable adaptation.

METHODOLOGY

Arrange a gathering of specialists to devise instruments for gathering data. This entails inquiries about fundamental general data, the nature and objectives of travel, utilization patterns of health tourism, spa, and wellness services, perspectives on motivations behind utilizing spa and wellness tourism services, adjustments made by health, spa, and wellness entrepreneurs post-COVID-19, factors influencing the recuperation of health, spa, and wellness tourism post-COVID-19, significant recommendations for advancing health, spa, and wellness tourism, and general proposals for enhancing spa and wellness tourism. Following the COVID-19 crisis, it will analyze information on projecting the trajectory of the health tourism industry, its impacts, issues, and challenges under the new circumstances post-COVID-19, categorized into three formats.

1. Questionnaire for tourists.

2. In-depth interview form for provincial governors and provincial chamber of commerce representatives.

3. Interview form for entrepreneurs.

Distribute the tools to experts and entrepreneurs in health tourism. Five individuals were assessed and refined by experts whose traits aligned with the content intended for review, which includes: predicting the trajectory of the medical tourism sector, devising a strategy for revitalizing the health tourism industry, developing tactics, measures, and action plans for the resurgence of health tourism, and coordinating efforts among relevant agencies to rejuvenate the health tourism sector in the post-COVID-19 new normal.

Meeting to gather expert opinions, involving relevant government agencies, associations related to health tourism, spa and wellness, and business operators in the industry, totaling 20 people. Representatives include the Provincial Tourism Office, Provincial Chamber of Commerce, Ministry of Tourism and Sports, Department of Business Development, Department of Health Service Support, Tourism Authority of Thailand, Thai Hotels Association, Thai Spa Association, Thai Spa and Thai Massage Business Association, Food and Drug Administration, Department of Thai Traditional and Alternative Medicine, Thai Traditional Medicine Association, Provincial and Local Administration Department, etc. They participated in the development of strategies, measures, action plans, and contingency plans, relying on stakeholder needs and business needs to enhance the effectiveness of various plans.

FINDINGS

In the health tourism industry amidst the COVID-19 pandemic situation, researchers found a continuous decline in demand due to various factors such as fear of the COVID-19 outbreak. This fear led to cancellations of health tourism services, particularly spa and massage services, which involve close contact between service providers and users, posing a risk of COVID-19 transmission. Consequently, tourists' health tourism behaviors changed, leading to

a decrease in tourist numbers, duration of stays, and tourism-related spending. There were constraints on selecting tourist destinations and accommodations due to increased self-care precautions. However, amidst the COVID-19 situation, the use of information communication technology, and access to and perception of tourism-related information media, influenced decision-making and generated motivation for tourism if there were opportunities or safety in current tourism destinations. Regarding demographic backgrounds or preferences for tourism, tourists' behaviors remained unchanged. The analysis of the above data revealed that the COVID-19 pandemic situation affected all aspects of health tourism demand.

There's also a demand for sales of goods and services related to health tourism to meet the needs of tourists and service users in the health tourism industry. In the COVID-19 pandemic situation, the supply side continuously decreased due to government policies and regulations governing the health tourism industry, resulting in the inability to provide services to tourists. Natural, cultural, and agricultural tourist destinations were closed, affecting health tourism activities. Accommodations were ordered to close, and health services such as spas and health massage services couldn't operate, even in tourist destinations. Travel agencies couldn't operate tourist trips, leading to a halt in tourism activities in various tourist destinations. However, restaurants, beverage establishments, and souvenir shops could operate through takeout or delivery services, though with significant decreases in supply due to the drastically reduced number of tourists.

Based on the aforementioned data, researchers can forecast the direction of the health tourism industry (projected revenue from Thai and foreign tourists) by dividing it into 3 scenarios as follows:

1. Best Case Scenario - Rapid Recovery: Opening up health tourism to both Thai and foreign tourists from the year 2021 onwards will generate significant tourism revenue, up to 21,150 million Baht.
2. Base Case Scenario - Moderate Recovery: Allowing Thai tourists to engage in health tourism domestically from the year 2021 onwards and opening up to foreign tourists in the latter half of the year will yield tourism revenue of 8,360 million Baht.
3. Worst Case Scenario - Slow Recovery: If the opening up to foreign tourists is conditional, such as requiring vaccination, quarantine, or limiting the number of visitors to 2-4 thousand per day throughout the year, tourism revenue will only reach 16,750 million Baht.

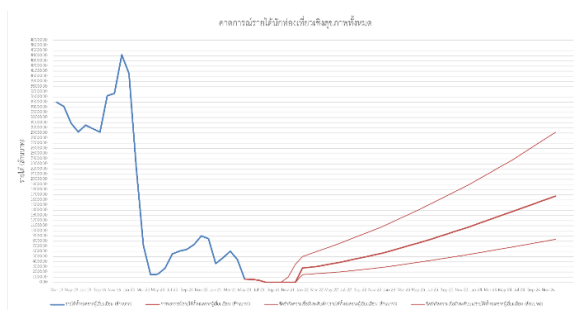


Image 1 : Forecasted Revenue from Thai and Foreign Tourists, Years 2019-2021.

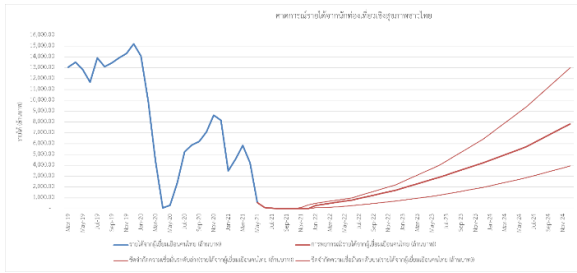


Image 2 : Forecasted Revenue from Thai Tourists, Years 2019-2021.

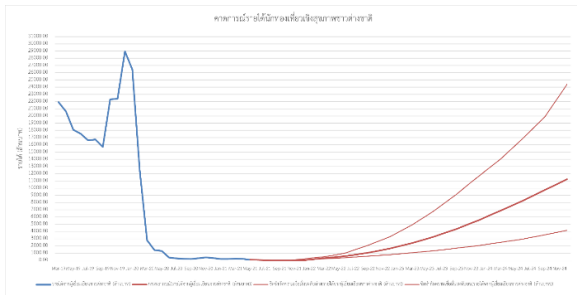


Image 3 : Forecasted Revenue from Foreign Tourists, Years 2019-2021.

It is advisable to establish policies aimed at elevating the health standards of the health tourism industry. This includes enhancing public infrastructure and state safety standards. Policy guidelines should be set regarding marketing strategies and distribution channels. There should be diverse channels for accessing tourism, restaurants, and souvenir shops, such as customer contact databases and mobile applications for ordering products, to promote marketing of spa and wellness products. In the short term, Thailand should prioritize stimulating domestic health tourism and enhancing the resilience of health tourism businesses. This will ensure the continuity of these businesses. The development of health tourism should be a national agenda, aligning with the country's overall tourism development policies. This may involve establishing government agencies as main hosts or creating specialized units for policy integration and strategic planning to drive health tourism. Information systems should be established for national health tourism, integrating contributions from all stakeholders in the industry and supporting health tourism through online platforms connecting with international platforms. Private sector involvement should be promoted and supported to genuinely accelerate the development of Thailand's health tourism to meet standards in all aspects. This may include creating a database on Thai health tourism aligned with tourist behavior trends, along with promoting unique and popular tourism plans that represent Thailand comprehensively.

Regarding Supply Side factors mentioned above, operators in the health tourism industry have employed mixed marketing concepts to maximize their business situations. For instance, setting prices for services considers the appropriateness of attracting service users to ensure the sustainability of their business. They strive to increase distribution channels, utilizing online media to sell their products beyond traditional brick-and-mortar stores. They have also adjusted the delivery format of products and services directly to consumers to facilitate convenience. Furthermore, they have implemented aggressive sales promotions, discounts, giveaways, and incentives to attract consumers. The nature of tourism products also adopts these formats to reach consumers quickly. This is a necessity for selling products and services

in the context of the COVID-19 pandemic. As for secondary factors, government health management systems affect consumer confidence in using health tourism services. Ensuring safety in life and property, as well as the health security of service users, will enable the industry to recover to normalcy.

CONCLUSION AND DISCUSSION

From this research study, it is found that the overall operations of agencies involved in recovery were analyzed. Researchers were able to analyze and synthesize the roles of tourism-related agencies in supervising, overseeing, and promoting tourism entrepreneurs. These agencies need to collaborate to enhance cooperation among themselves. It was observed that various state agencies still operate in parallel, lacking integration to promote entrepreneurs effectively. However, if these state agencies can join hands and integrate their operations to promote entrepreneurs' recovery post-COVID-19 crisis, it will benefit entrepreneurs from the effective collaboration of these state agencies. This includes roles in supervision, promotion, support, and adjusting regulations that hinder recovery plans. Improving operational models with health tourism entrepreneurs, spas, and wellness centers to be more cohesive, flexible, proactive, and responsive to changes will instill confidence in entrepreneurs regarding government processes to assist them effectively.

In terms of organizations and associations that play a role in promoting entrepreneurs, such as chambers of commerce, tourism associations, or support agencies, they should prioritize implementing recovery plans. They should utilize strategic points from the plans to promote efficient support for entrepreneurs, bridging gaps left by state agencies and helping entrepreneurs in health tourism access recovery strategies comprehensively. This is consistent with the research of Supattra Pranee that must be development of products and services to meet the standards accepted by consumers to meet the needs of consumers in healthcare. Create a community identity in order to generate sustainable income for the community (Supattra Pranee,2023).

Thailand will succeed in controlling domestic outbreaks, thanks to the dedicated efforts of the country's public health personnel, nearly restoring the domestic economy (Prateep, 2020). However, strict restrictions on foreign entry have impacted Thailand's income from foreign tourism, which plays a significant role, contributing over 12% to the Thai economy in 2019. This absence resembles a significant pitfall in Thailand's economy, revealing vulnerabilities in various dimensions of its economic structure and labor market due to its reliance on external growth drivers, such as tourism and exports. The impact has been severe, with tourism coming to a halt and international trade shrinking drastically, heavily affecting vulnerable groups, especially low-skilled, low-income workers burdened with debts and lacking savings, technology readiness, and adaptation to crisis situations. These groups face more challenges in coping with crises and adapting to changes than other groups.

ACKNOWLEDGMENT

Thank you to everyone who contributed to this research. To individuals and organizations who provided valuable data for the research, thank you to the dedicated teachers of College of Allied Health Sciences, Suan Sunandha Rajabhat University, Thailand and all researchers Team involved. Thanks for the collaboration and cooperation that made this research successful according to its objectives.

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