

Analysis of the Competitiveness of China-Thailand Tourism Service Trade

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ABSTRACT

This paper aims to conduct an in-depth analysis of the competitiveness of China-Thailand tourism service trade and explore the potential impact of visa exemption policies on the tourism service trade between the two countries. Through quantitative analysis methods, including Revealed Comparative Advantage (RCA), Trade Competitiveness Index (TC), and International Market Share (IMS), the study finds that Thailand has a significant international competitive advantage in the field of tourism service trade, while China is relatively at a competitive disadvantage. The paper further discusses the opportunities and challenges brought by visa exemption policies, pointing out issues such as self-media information dissemination, market openness, environmental sustainability, and service quality, and puts forward corresponding countermeasures and suggestions. Finally, the paper proposes future research directions, emphasizing the necessity of optimizing tourism service trade strategies in the context of globalization.

KEYWORDS

Tourism Service Trade; Competitiveness Analysis; China-Thailand Relations; Visa Exemption Policy

1. INTRODUCTION

With the development of the world's economy and society, trade exchanges are no longer limited to goods or commodities; trade in the tertiary sector has become more common. That is, the concept of trade in services was first proposed by the Organization for Economic Cooperation and Development (OECD) in the "Report by a Group of Experts on Trade and Related Issues" in September 1972. Subsequently, in 1974, the concept of "world trade in services" was used in Section 301 of the United States Trade Act of 1974. Simply put, trade in services is a transaction of services between residents of two different countries, mainly including trade in services realized through foreign affiliates and trade in services between residents and non-residents. Tourism service trade, on the other hand, is a type of international service trade, which refers to the activity of tourism practitioners providing tourism services to consumers and receiving compensation, using controllable resources to provide services to consumers in other countries or regions. Therefore, tourism services are not only a service activity but also a form of trade exchange. According to the current development trend of China-Thailand tourism industry, the total value of Thailand's tourism market is expected to reach 2.52 trillion baht in 2024. The Bangkok Bank also predicts that the Thai government's visa exemption measures from October this year to February next year will help attract about 400,000 Chinese tourists to travel and create an income of about 19 billion baht. However, on the contrary, there is a huge imbalance in tourism trade between China and Thailand at present, which cannot but attract the attention of Chinese scholars to this issue. It can be said that the tourism industry is an important

industry for both China and Thailand. Actively promoting the development of China-Thailand tourism service trade can not only benefit the economic development of both countries but also promote closer cooperation in other projects between China and Thailand. Therefore, research on tourism service trade between China and Thailand has important practical significance and can also provide some reference for research in this field. This study will first conduct empirical analysis, analyze the competitiveness, development status, and existing problems of China-Thailand tourism service trade, and combine current affairs to focus on the effectiveness of visa exemption policy in the development of China-Thailand tourism service trade, predict the impact of implementing a permanent mutual visa exemption policy on the tourism industry of both China and Thailand, as well as the problems that may be caused by visa exemption and related countermeasures and suggestions.

Currently, domestic research on the competitiveness analysis of China-Thailand tourism service trade is mostly focused on the development status, existing problems, and the proposal of corresponding countermeasures and suggestions of the tourism service trade between the two countries. For instance, Manop Warinthon, at the juncture of the "Belt and Road" initiative, used data from 2009 to 2015 and discussed the development status of China-Thailand tourism service trade with four indicators: IMS, TC, RCA, and CA, pointing out that although China has a higher share in the global market for tourism service trade than Thailand, Thailand's international competitive advantage in tourism service trade is stronger from other index perspectives [1]. Cai Chunlin and Luo Haifeng focused on the fact that Thailand is one of the countries with the closest cooperation in the "Belt and Road" initiative, studied the impact of the initiative on its tourism service trade, and believed that the growth of Thailand's tourism service trade export volume is mainly due to the source of tourists from China [2]. In addition, Shen Dengming, Chang Zhen, and Zhong Xianrui also conducted qualitative analysis and quantitative research on the influencing factors of China-Thailand tourism service trade, pointing out that malicious special events have a significant negative impact on the number of Chinese tourists traveling to Thailand [3]. Lu Shuwen also pointed out the problems in China-Thailand tourism service trade from both Chinese and Thai perspectives, involving issues of tourism safety, cultural differences, government tourism resource management, and environmentally sustainable development, and further put forward corresponding countermeasures and suggestions to enhance the close trade exchanges between China and Thailand [4].

Foreign studies on this issue mostly discuss the characteristics of the two major economies in terms of imports and exports from the perspective of trade in services, or observe the economic exchanges between the two countries within the larger framework of the "Belt and Road" initiative, with few delving into the competitive analysis of tourism service trade from a smaller perspective. Yin Xiaobo and Zhou Xinying focused on the different contributions of trade in services between China and Thailand to their economic growth, pointing out that China has performed prominently in the export of trade in services, especially in transportation and tourism service trade, while Thailand has a higher export elasticity in the import of trade in services [5]. Piyachat Dobbs proposed that the increase in Chinese tourists has significantly promoted the growth and development of Thailand's economy, and revealed the challenges that the Thai market would face if it lost Chinese tourists, and put forward corresponding suggestions for improving and expanding Thailand's tourism industry [6]. Chunmei Meng also explored the current cooperation between China and Thailand under the "Belt and Road" framework, and has achieved significant results in infrastructure construction, alignment of rules and standards, cultural and artistic exchanges, economic and trade exchanges, and the recovery of the tourism industry [7].

2. COMPETITIVENESS ANALYSIS OF CHINA-THAILAND TOURISM SERVICE TRADE (2010-2022)

2.1. Revealed Comparative Advantages Index Analysis (RCA)

The Revealed Comparative Advantages (RCA) index was proposed by the American economist Balassa in 1965 when calculating the trade comparative advantages of some countries, and it has since been widely adopted as one of the most persuasive indicators to measure the international market competitiveness of a country's products or industries. The so-called Revealed Comparative Advantages index refers to the ratio of the export value of a certain commodity or service of a country to the total export value of all commodities or services of that country, compared with the share of the export value of this category of commodities or services in the world to the total export value of all commodities or services in the world. The formula is expressed as:

$$RCA_{ij} = \left(\frac{X_{ij}}{X_{it}} \right) \div \left(\frac{X_{wj}}{X_{wt}} \right)$$

The Revealed Comparative Advantages (RCA) index can reflect the competitive position of a country's trade in services in the world. In the formula, RCA_{ij} represents the Revealed Comparative Advantage index of country i in the service sector j , where X_{ij} denotes the export value of service j from country i , X_{it} denotes the total export value of services from country i ; X_{wj} represents the total export value of service j worldwide, and X_{wt} represents the total export value of services worldwide. If j represents all service sectors, then X_{it} and X_{wt} are the total export values of goods and services for country i and the world, respectively. Subsequently, if $RCA > 2.5$, it indicates that the country's tourism service trade has very strong international competitiveness; if $1.25 \leq RCA \leq 2.5$, it indicates that the country's tourism service trade has strong international competitiveness; if $1 \leq RCA \leq 1.25$, it indicates that the country's tourism service trade has a weak international competitive advantage; if $RCA < 1$, it indicates that the country's tourism service trade is in a competitive disadvantage.

Based on the export values of tourism services and the total export values of services for China and Thailand (as seen in Table 1), and the RCA indices for the tourism service trade of both countries calculated from the aforementioned data for the years 2010-2022 (as seen in Table 3), a comparative analysis can be conducted:

Table 1. Export Value of Tourism Service Trade for China and Thailand
from 2010 to 2022

Unit: Million US Dollars

	China	Thailand	World
2010	45814	20104	966200
2011	48464	27184	1080773
2012	50028	30654	1117272
2013	51664	37807	1205511
2014	44044	34822	1257009
2015	44969	41246	1209374
2016	44426	44786	1238581
2017	38799	52376	1337399
2018	39468	56366	1444659
2019	34458	59810	1486030
2020	17067	13403	563683
2021	11631	5134	638333
2022	9802	15948	1115776

(Note: The data source is organized based on the United Nations Commodity Trade Statistics Database comtradeplus.un.org/data.)

Table 2. Total Service Exports for China and Thailand from 2010 to 2022

Unit: Million US Dollars

	China	Thailand	World
2010	178339	34340	3989556
2011	201047	41545	4485007
2012	201576	46521	4614543
2013	207006	54804	4896846
2014	219141	51940	5254502
2015	218634	58082	5021227
2016	209529	63786	5097664
2017	228090	70964	5554089
2018	271451	77474	6122529
2019	283192	81178	6314659
2020	280629	30997	5228310
2021	392198	25438	6209934
2022	424056	40578	7127056

(Note: The data source is organized based on the United Nations Commodity Trade Statistics Database comtradeplus.un.org/data.)

Table 3. Revealed Comparative Advantages (RCA) Index of Tourism Service Trade for China and Thailand from 2010 to 2022

	China	Thailand
2010	1.061	2.419
2011	1.001	2.716
2012	1.025	2.722
2013	1.014	2.802
2014	0.840	2.804
2015	0.854	2.947
2016	0.873	2.891
2017	0.706	3.065
2018	0.616	3.084
2019	0.517	3.131
2020	0.564	4.010
2021	0.289	1.963
2022	0.148	2.510
Average	0.731	2.851

From Table 3, it can be observed that Thailand's RCA index for tourism service trade has been greater than 2.5 from 2011 to 2020 and in 2022, with an average RCA index of 2.851. This indicates that its tourism service trade has consistently strong and stable international competitiveness. Despite the impact of COVID-19 in 2021, which caused the RCA index to drop to 1.963, it did not affect the recovery of its international competitiveness in tourism service trade in 2022. On the contrary, China's RCA index for tourism service trade fluctuated between 1.014 and 1.061 during 2010-2013, indicating a weak international competitive advantage. From 2016 to 2022, China's RCA index for tourism service trade has been continuously declining, from 0.873 in 2016 to 0.148 in 2022. However,

there was a brief rise in China's RCA index for tourism service trade from 2014 to 2016, suggesting that although China's tourism service trade was in a competitively weak position, it did experience a period of recovery and growth. Overall, China's tourism service trade has remained in a position of competitive disadvantage on the international stage throughout these years.

From a comparative perspective of the two countries, during the period from 2010 to 2022, Thailand's RCA index for tourism service trade has always been greater than that of China, indicating that Thailand has stronger international competitiveness in the field of tourism service trade than China. Moreover, the difference in RCA indices between the two countries has been increasing year by year from 2010 to 2020, reaching a maximum value of 3.446, showing that the pace at which Thailand's tourism service competitiveness has been strengthening has outpaced the speed at which China has been improving its competitiveness in tourism service trade. As a result, even when faced with the challenge of the COVID-19 pandemic, Thailand's RCA index for tourism service trade only fell by about 0.5, and then rose again the following year. In contrast, China's RCA index for tourism service trade "collapsed" to 0.289 when encountering this global challenge, and continued to decline to a low of 0.148 the following year, showing a clear competitive disadvantage.

2.2. Trade Competitiveness Index Analysis

The Trade Competitiveness Index (TC) refers to the proportion of the trade balance of a country's products or industries in the total import and export trade. The larger the coefficient, the greater the advantage. The TC index is commonly used in the field of macro industry international competitiveness because it is an effective tool for analyzing the international competitiveness of industry structure, reflecting the state of trade competitive advantage. The formula is expressed as:

$$TC_i = \frac{X_i - M_i}{X_i + M_i}$$

In the formula, TC_i represents the Trade Competitiveness Index of industry i ; X_i denotes the export value of industry i ; M_i indicates the import value of industry i . The value of TC_i ranges between $[-1, 1]$. To more carefully analyze the international competitiveness of tourism service trade, the TC index can be divided into the following six intervals: if $0.6 \leq TC \leq 1$, it indicates that the country's tourism service trade has a strong international competitive advantage; if $0.3 \leq TC \leq 0.6$, it suggests that the country's tourism service trade has a moderate international competitive advantage; if $0 \leq TC \leq 0.3$, it implies that the country's tourism service trade has a weak international competitive advantage; if $-0.3 \leq TC \leq 0$, it indicates that the country's tourism service trade has a slight competitive disadvantage; if $-0.6 \leq TC \leq -0.3$, it suggests that the country's tourism service trade has a significant competitive disadvantage; if $-1 \leq TC \leq -0.6$, it implies that the country's tourism service trade has a very significant competitive disadvantage.

Based on the import values of tourism services for China and Thailand (as seen in Table 4) and in conjunction with the data from Table 1, the Trade Competitiveness (TC) indices for the tourism service trade of both countries from 2010 to 2022 can be calculated (as seen in Table 5), and a comparative analysis can be conducted:

Table 4. Import Value of Tourism Service Trade for China and Thailand
from 2010 to 2022

Unit: Million US Dollars

	China	Thailand
2010	54880	5627
2011	72585	5717
2012	101977	6248
2013	128576	6481
2014	227344	7071
2015	249831	7718
2016	261129	9072
2017	254789	10504
2018	276900	12083
2019	250740	12355
2020	131228	4391
2021	111044	3459
2022	117683	6726

(Note: The data source is organized based on the United Nations Commodity Trade Statistics Database comtradeplus.un.org/data.)

Table 5. Trade Competitiveness (TC) Index of Tourism Service Trade for China and Thailand from 2010 to 2022

	China	Thailand
2010	-0.0901	0.5627
2011	-0.1993	0.6525
2012	-0.3439	0.6612
2013	-0.4267	0.7075
2014	-0.6756	0.6625
2015	-0.6948	0.6828
2016	-0.7093	0.6631
2017	-0.7354	0.6661
2018	-0.7505	0.6469
2019	-0.7582	0.6577
2020	-0.7696	0.5064
2021	-0.8095	0.1950
2022	-0.8463	0.4066

Table 5 includes the TC indices for the tourism service trade of China and Thailand from 2010 to 2022. Thailand's TC index is greater than 0, indicating a trade surplus in its tourism service trade, and it is mostly stable between 0.6 and 0.7, suggesting that Thailand's tourism service trade has a strong competitive advantage. In contrast, China's TC index is less than 0 throughout the twelve years, indicating a trade deficit in its tourism service trade. China's TC index for tourism service trade fluctuated between -0.09 and -0.4 from 2010 to 2013, still having a relatively small competitive disadvantage. However, starting from 2014, its TC index plummeted, from -0.6754 to -0.8463 in 2022, indicating that China's competitiveness in international tourism service trade has been declining year by year, even resulting in a significant competitive disadvantage. In summary, Thailand's international competitiveness in tourism service trade is evident and far exceeds that of China.

2.3. International Market Share Analysis (IMS)

International Market Share (IMS) refers to the proportion of a country's export total of a certain type of product or industry in the global export total. The International Market Share of a certain type of product or industry is directly proportional to its international competitiveness; the higher the market share, the stronger the international competitiveness of that product or industry. The formula is expressed as:

$$MS_{ij} = \frac{X_{ij}}{X_{wj}}$$

In the formula, MS_{ij} represents the market share index of product j in country i ; X_{ij} denotes the total export value of product j in country i ; X_{wj} indicates the total export value of product j worldwide. A higher value of MS_{ij} indicates that the industry of the product has stronger international competitiveness, and vice versa.

Based on the data from Table 1, the International Market Share (IMS) for the tourism service trade of China and Thailand from 2010 to 2022 can be calculated (as seen in Table 6), and a comparative analysis can be conducted:

Table 6. Comparison of International Market Share (IMS) for Tourism Service Trade of China and Thailand from 2010 to 2022

Unit: Percentage

	China	Thailand
2010	4.74%	2.08%
2011	4.49%	2.52%
2012	4.48%	2.74%
2013	4.29%	3.14%
2014	3.50%	2.77%
2015	3.72%	3.41%
2016	3.59%	3.62%
2017	2.90%	3.92%
2018	2.73%	3.90%
2019	2.32%	4.02%
2020	3.03%	2.38%
2021	1.82%	0.80%
2022	0.88%	1.43%
Average	3.27%	2.98%

Comparing the International Market Share (IMS) of tourism service trade between China and Thailand from 2010 to 2022, China's average market share was 3.27%. The market share peaked in 2010 at 4.74% and then declined year by year, reaching a low of 0.88% in 2022, with only a slight increase in 2020 before falling again. On the other hand, Thailand's average market share for tourism service trade was 2.98%, rising steadily from 2.08% in 2010. By 2016, Thailand surpassed China by a slim margin (0.03%) and reached its highest share of 4.02% in 2019 during the 12-year period. However, due to the impact of COVID-19 and domestic outbreaks that led to unrest, Thailand's attractiveness for overseas tourists to experience Southeast Asian charm diminished, resulting in a lower market share that fluctuated between 1.43% and 2.38%.

Overall, despite the continuous decline in China's tourism service trade from 2010 to 2022, its average market share was higher, and it occupied a larger proportion of the global market share in the Asian region compared to Thailand. This indicates that China's tourism service trade still has stronger international competitiveness in the international tourism market. It can be said that although it has

been declining year by year, it only fluctuated between 3.59% and 4.74%, still holding a high market share ratio. However, since 2017, China's share of tourism service trade in the international market has experienced a cliff-like decline. Perhaps due to the international reputation of China's epidemic prevention and control in 2020 and 2021, attracting overseas tourists, the market share of its tourism service trade increased, and even surpassed Thailand in those two years, but in other years, it was less competitive than Thailand.

3. THE UTILITY OF VISA EXEMPTION POLICY IN THE DEVELOPMENT OF CHINA-THAILAND TOURISM SERVICE TRADE

Over the past few decades, the Thai government and various tourism associations have meticulously arranged visa-on-arrival for Chinese tourists, greatly facilitating their travel to Thailand and leading to a sharp increase in the scale of Chinese tourism to Thailand. According to data released by the Tourism Authority of Thailand on the overall situation of Chinese tourism to Thailand, the number of visits has risen steadily from 937,400 in 2008 to 10,625,200 in 2018, with the most significant increase in 2013, reaching the highest difference of 1,848,500 visits [8]. This surge was due to the unilateral visa exemption implemented by Thailand for China in 2013. The uncertainty associated with visa-on-arrival, which has a certain probability of rejection, involves issues such as non-standard photos and insufficient cash, affecting the determination of some Chinese tourists to visit Thailand. Therefore, once Thailand opens up to visa exemption, these visitors will go to Thailand without hesitation to experience the local customs and culture.

On March 1, 2024, the "Visa Exemption Agreement between the Government of the People's Republic of China and the Government of the Kingdom of Thailand for Holders of Ordinary Passports" officially came into effect, ushering the tourism service trade between China and Thailand into a new phase of visa exemption. Taking the visa exemption between China and Singapore, which started on February 9 this year, as a reference, data recently released by the Singapore Tourism Board shows that the number of Chinese tourists arriving in Singapore in February reached 327,000, an increase of more than 8 times compared to 35,300 during the same period in 2023. In addition, the data also shows that Chinese tourists tend to stay in Singapore for a longer period compared to tourists from other countries, with an average stay of 3.46 days for foreign visitors and 4.22 days for Chinese visitors—behind the data's exponential growth, visa exemption is undoubtedly a significant driving factor. From this, we can predict that the mutual visa exemption between China and Thailand can also facilitate bilateral exchanges of people, promote economic development and closeness between the peoples, and greatly enhance the international competitiveness of the tourism service trade for both China and Thailand.

It is worth noting that while the implementation of the China-Thailand mutual visa exemption policy has provided new opportunities for the prosperity of tourism service trade between the two countries, it also comes with a series of potential challenges. Security issues are particularly crucial, as historical security incidents in Thailand may negatively affect tourists' sense of safety, requiring both countries to strengthen security cooperation and improve safety management standards at tourist destinations. The uncertainty of the pandemic also poses a threat to the recovery of the tourism market; although China has reopened, fluctuations in the pandemic may have an immeasurable impact on tourist traffic. In addition, the volatility of the global economy, rising energy costs, tight labor markets, and environmental protection challenges are all issues that the two countries need to face together. To promote the sustainable development of China-Thailand tourism service trade, policy support at the government level is particularly important, including strengthening tourism promotion and infrastructure construction. At the same time, enhancing the competitiveness of tourism service trade between the two countries can be achieved by enriching cultural exchanges, using technology to improve service efficiency, achieving market diversification, and promoting the sustainable development of the tourism industry.

4. EXISTING ISSUES AND POLICY RECOMMENDATIONS FOR CHINA-THAILAND TOURISM SERVICE TRADE

In the context of China-Thailand tourism service trade, the rise of self-media has brought a double-edged sword effect on information dissemination. On one hand, self-media provides a new platform for promoting tourist destinations. On the other hand, the lack of regulation may lead to the spread of negative information, which can affect the image and reputation of the tourism industry in both countries. Therefore, China and Thailand need to strengthen cooperation in mainstream media, establish joint promotion mechanisms, and jointly shape a positive and proactive image of tourism. At the same time, an information verification and feedback system should be established to ensure the authenticity of tourism information, preventing the adverse impact of misleading information on the bilateral tourism market.

China's openness in the tourism service industry is also an issue that cannot be overlooked. Market access restrictions and service trade barriers may hinder the inflow of Thai tourists and limit the development potential of the country's tourism service trade. China can further relax market access, simplify the tourism service process, to promote the liberalization and facilitation of tourism service trade. In addition, the issue of environmentally sustainable development should also be taken seriously. The economic growth of the tourism industry should not come at the expense of the environment. Both China and Thailand should jointly promote the development of green tourism, by enacting strict environmental protection regulations and promoting sustainable tourism practices, to ensure the long-term healthy development of the tourism industry.

Improving the level and quality of services is also key to enhancing the international competitiveness of China-Thailand tourism service trade. Enhancing the professional quality and service skills of tourism practitioners, through systematic vocational training and lifelong learning mechanisms, can significantly improve service quality and effectiveness. Moreover, the two countries can promote the exchange and integration of tourism service concepts and practices through academic exchanges, mutual visits of personnel, and joint research projects, thereby jointly improving the overall level of tourism services. Through these comprehensive measures, the tourism service trade of China and Thailand is expected to achieve more robust and sustainable development.

5. CONCLUSION AND FUTURE PROSPECTS

This paper has conducted an in-depth empirical study on the competitiveness of China-Thailand tourism service trade by comprehensively applying quantitative analysis tools such as the Revealed Comparative Advantages (RCA) index, Trade Competitiveness (TC) index, and International Market Share (IMS). The analysis reveals that Thailand has a significant international competitive advantage in the field of tourism service trade, while China, despite showing an upward trend in competitiveness in some years, still has an overall competitive disadvantage. The implementation of the visa exemption policy has brought new growth opportunities for the development of China-Thailand tourism service trade, but it also comes with multiple challenges such as security, pandemic, and economic fluctuations.

Given the positive incentives and potential risks that the implementation of the visa exemption policy brings to the tourism service trade of both countries, future research should focus on the following dimensions: First, strengthen the coordination and optimization of cross-national policies to build a more robust framework for the development of the tourism market; second, promote further opening of market access mechanisms, reduce trade barriers, and facilitate the liberalization of trade in services; third, advocate for innovation in tourism services, enhance the added value of services, and strengthen the global competitiveness of China-Thailand tourism services; in addition, pay attention to environmental sustainability, develop green tourism models, and ensure the long-term ecological friendliness of the tourism industry; at the same time, increase investment in the professional

development of tourism practitioners to meet the international market's demand for high-standard services; finally, build a comprehensive risk management and assessment system to effectively respond to various uncertainties, including security and pandemics. Through the implementation of these comprehensive strategies, China-Thailand tourism service trade will play a more active role in promoting regional economic integration and cultural exchange, contributing to the prosperity of global tourism service trade. Future academic research should further explore the long-term effects of visa exemption policies on tourism service trade, as well as the necessity and pathways for optimizing tourism service trade strategies in the context of globalization.

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