Comparative Analysis of Tourism Policies Among ASEAN Member Countries: A Documentary Research Approach

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Abstract   This research article examines Thailand's tourism rivals, Singapore, and Malaysia's tourism policies. Using a qualitative research approach, this study conducted a documentary analysis of gray literature available in the online public domain from 2020 to 2024. The sources included government white papers, tourism strategic planning documents, government tourism agency websites, online media news releases, and official tourism commercials available on social media platforms. This study employed a comparative policy framework, modifying the OECD's structure in the process. The findings revealed that Thailand, Singapore, and Malaysia have a primary objective of prioritizing sustainable tourism. These three countries have created organizations dedicated to promoting tourism to sell their offerings effectively. Nevertheless, the disparity among these three countries lies in the limitations imposed on tourism resources, which in turn impact the allocation of budgets and implementing tourism plans and programs in each country. The findings and discussion provide valuable strategic insights for the future formulation of tourism policies. This study provides valuable insights from Thailand tourism rivalries' comparative analysis, which serves as a foundation for tourism-related authorities to design tourism policies and promote tourism growth in Thailand.

Introduction

Southeast Asia, comprising Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, the Philippines, Singapore, Thailand, and Vietnam, was one of the regions experiencing an expansion in the volume of tourists. It also generated more than 390 billion US dollars in Gross Domestic Product (GDP) from the tourism sector among the ASEAN member states, accounting for 34% of the world's tourism GDP in 2019, according to the World Travel & Tourism Council, 2020. The ASEAN Secretariat Statistics Division (2024) has reported a consistent increase in tourist arrivals from 2000 to 2020, before COVID-19 (Figure 1). This expansion resulted from the implementation joint tourism policies among ASEAN member countries, the rapid and convenient dissemination of information due to advancements in information technology in tourism, and the relaxation of policies related to international travel visa facilitation, which began in 2010 (UNWTO, 2014).

However, despite Southeast Asia forming a unified economic community and developing a master plan for joint tourism development among its member countries (Wong, et al., 2010), the similarity in tourism patterns among ASEAN member states has resulted in many countries having the potential to be rivals to Thailand in tourism competition. This rivalry stems from the substitutability of tourism products and services, as evidenced by the trend towards a competitive market structure. For this reason, mentioned earlier, it is evident from tourism market concentration, calculated from tourist arrivals, that Singapore and Malaysia seems to be Thailand's main tourism rivalries (Chutiphongdech & Zhao, 2021).
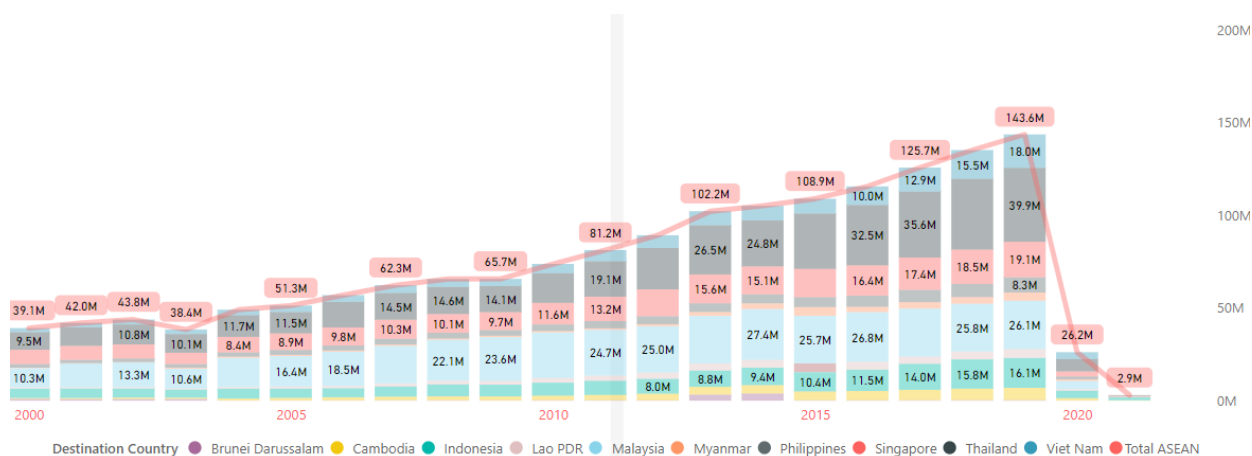

Figure 1 Total visits to ASEAN by selected destination countries
Source: The ASEAN Secretariat Statistics Division (2024)

Therefore, examining the tourism policies and strategies of Thailand's tourism rivalries (TTR) allows Thailand to sustain its tourism marketing position and acknowledge input from policy studies to formulate strategic tourism planning further. However, from the literature review, it was found that even though the development of Thailand's tourism under the framework of the 3rd National Tourism Development Plan BE 2566-2570 and the 13th National Economic and Social Development Plan BE 2566-2570 has set goals to increase spending by quality tourist groups and to elevate tourism revenue to distribute income to communities around tourist sites and foster sustainable development in tourism industry, the set goals and related strategies still lack knowledge supports from the information of policy comparison among TTR.

From an empirical standpoint, comparing the policy responses of various governments to a shared issue has practical significance. It enables policymakers dealing with new problems to learn

from the experiences of other jurisdictions, which can then be applied to develop similar domestic programs (Vogel & Henstra, 2015).

Therefore, to fill the knowledge gap and enrich studies in tourism policy literature, this research article compares tourism policy among Thailand, Singapore, and Malaysia to shed light on how TTR implemented their tourism policies and how Thailand can respond to sustain tourism performance in the future. Researchers performed a document analysis using gray literature available in the online public domain to compare elements of TTR tourism policies. Using comparative analysis as the data analytical method allows scholars to examine how the structural qualities of politico-administrative systems can explain certain phenomena (Bleiklie & Michelsen, 2013).

To achieve the research objective as follows: The next section reviews the literature on the tourism situation in Thailand, the status of Thailand's main tourism rivals, and approaches for comparing tourism policies. The third section describes the research methodology, while the fourth presents the key findings and discussion. The conclusion, policy implications, and future research recommendations are provided in the last section.

Literature review

    Tourism situation in Thailand

Travelers recognize Thailand as an attractive tourist destination globally, known for its unique cultural heritage, beautiful natural landscapes, lively cities, and welcoming hospitality, offering travelers a diverse experience. Consequently, Thailand is one of the most famous destinations for tourists worldwide. Before the COVID-19 epidemic, the tourist sector played a crucial role in driving the Thai economy; the industry continued to grow steadily, with an annual revenue growth of 2.3 percent between 2015 and 2019.

In 2019, international tourists arrived in Thailand, and 39,916,251 tourists contributed significantly to Thailand's economy, accounting for 2 trillion baht which is 11% of total GDP (Bank of Thailand, 2021). In 2021, international tourists arriving in Thailand totaled 427,869 tourists, which accounted for a reduction of 93.62% compared to the year 2020. This resulted in tourism revenues from foreign tourists declining to 2.18 trillion baht in 2020, leading to a 70% contraction of the national economy (Ministry of Tourism and Sports, 2022a).

Nevertheless, the tourism industry in Thailand, like many other countries, was significantly impacted by the COVID-19 pandemic. Travel restrictions, lockdowns, and safety concerns led to a dramatic decline in international tourist arrivals. Particularly during the lockdown period, which limited travel both domestically and internationally. Thailand's tourism income decreased dramatically due to the harsh conditions caused by the pandemic.

After the COVID-19 pandemic, Thailand officially lifted its lockdown measures and reopened its tourist borders on November 1, 2022. To attract visitors, Thailand implemented comprehensive policies focusing on safety and security to attract visitors, promoting the country as an affordable travel destination. The campaign targeted new tourism markets, including sports tourism, green tourism, and honeymoon and wedding tourism. It also encouraged travel during the low and green seasons (Tourism Authority of Thailand, 2022). Through these strategies, the Tourism Authority of Thailand (TAT) aimed to attract 25-28 million foreign tourists in 2023, with a revenue target of 1.6 trillion baht from international visitors. While the number of tourists reached 28.15 million, the revenue achieved was 1.2 trillion baht. The total tourism revenue for the year amounted to 2.13 trillion baht, falling short of the 2.38 trillion baht target (Ministry of Tourism & Sports, 2024b). In 2024, the target is to attract 35 million tourists and achieve a total revenue of 3 trillion baht (The Government Public Relations Department, 2023). In addition, the Ministry of Tourism and Sports (2022b) projects that Thailand will welcome 40 million international tourists in 2027.

Thailand's main tourism rivals: Situation of Singapore and Malaysia

Singapore is an island country with limited tourism resources but high potential, good logistics and, good accessibility. Therefore, Singapore became a popular destination to visit and to connect flights in and across the region. The pandemic of the COVID-19 impacted various businesses in Singapore especially the tourism business; to recover from the impact of the pandemic on Singapore's tourism sector. Singapore Tourism Board (STB) found the four keys to push to revive businesses which included 1) driving domestic spend 2) support Small and Medium-sized Businesses (SMBs) 3) digitizing Small and Medium-sized Businesses (SMBs) 4) improving the consumer experience (Singapore Tourism Board, 2024a).

In 2019, international tourists in Singapore spent US$20.30 billion on visits, contributing directly to Singapore's GDP of around 4%. The figure dropped to US$5.35 billion and US$4.11 in 2020 and 2021, respectively, reflecting the impact of the pandemic and partly recovered in 2022 tourists spending US$11.79 billion (Road Genius, 2024). Singapore's GDP is forecasted to increase by 4.04% in 2020, gradually rise to 4.09% in 2022, and slightly drop to 4.08% in 2023 and 2024 (Statista, 2024). In 2022, international tourist arrivals were 5.3, a significant increase from 2021 (Road Genius, 2024).

In 2023, there were 13.6 million visitors, and tourism receipts were S$18 to S$21 billion (Singapore dollars), which is than expected (Singapore Tourism Board, 2024a). The average length of stay was approximately 3.8 days which is more than in 2019, compared to 3.4 days (Raguraman, 2024a), and in 2024, tourist arrivals are expected to rise to 16 million with US$26-27.5 billion of tourism receipts (Poo, 2024; Singapore Tourism Board, 2024e).

The visa-free arrangement between China and Singapore has been valid since the beginning of 2024, together with the expansion of the Indian market in Tier 2 cities; in 2024, Singapore welcomed Chinese, Indonesian, Indian, Malaysia and others, but the top three markets filled by Indonesia, China, and Malaysia with 2.3 million, 1.4 million and 1.1 million visitors respectively (Raguraman, 2024b).

However, the government will achieve longer-term economic goals through the four strategies of GUTC, which are growing the economy, unlocking resource potentials; transforming businesses, and connecting to strengthen its business status (Subhani, 2024).

Like Malaysia, the COVID-19 pandemic has profoundly impacted Malaysia's tourism sector, mainly due to its heavy reliance on international, business, and event tourism, resulting in an estimated total loss exceeding RM100 billion. In 2020, tourist arrivals to Malaysia plummeted by 83.4%, totaling 4.3 million visitors compared to 26.1 million in 2019. Excursionist arrivals saw a cumulative decrease of 80.2%, and tourist receipts experienced a substantial drop of 85.3%. The domestic tourism sector in Malaysia also bore the brunt of the pandemic, with a 45.4% decrease in the number of domestic tourists and a 65.9% decline in receipts. The total number of paid accommodation guests witnessed an 83.7% reduction for international guests and a 39.9% decrease for domestic guests. Consequently, in 2019, Malaysia's tourism industry contributed 15.9% to the Gross Domestic Product (GDP), amounting to RM240.2 billion (Ministry of Tourism, n.d.-b).

In 2021, the economic impact of tourism is projected to reach RM4.2 trillion (equivalent to US$1.9 trillion), reflecting an increase from the previous year but still falling significantly short of pre-pandemic levels. The rise stems from the six strategies aimed at addressing this issue. These strategies emphasize enhancing domestic tourism, cultivating strategic partnerships, enhancing tourism promotion through online and offline channels, optimizing strategic communication and media interactions, implementing travel bubble initiatives, and undertaking strategic transformation initiatives. Initially, they prioritized domestic tourism, recognizing its crucial contribution to Malaysia's tourism industry during the pandemic's onset. Additionally, the implementation of RM1.6 billion under the 2022 budget aims to revitalize the tourism sector (Ministry of Tourism, n.d.-b).

Malaysia set targets for international visitors at approximately 6 million in 2022, 16.1 million in 2023, 27.3 million in 2024, 31.4 million in 2015, and 35.6 million in 2026. However, the actual number of international visitors received was 10.07 million in 2022 and 20.14 million in 2023, just 22.8% shy of the pre-pandemic levels in 2019. Focusing on tourism revenue, prior to the COVID-19 pandemic, Malaysia's foreign receipts amounted to RM 86.14 billion. However, as the situation improved, foreign revenue in 2023 reached RM 71.3 billion. The Edge Malaysia (2024), Travel Weekly (2023), and TTG ASIA (2024) anticipate that revenue from foreign visitors will reach RM 102.7 billion in 2024, RM 125.5 billion in 2025, and RM 147.1 billion in 2026.

With a focus on economic growth, the promotion of domestic tourism policy documented an increase to 210.9 million domestic visitors in 2023, marking a 22.9% rise from 2022. Expenditure associated with these visits totaled RM 84.9 billion, showing a 32.5% increase compared to the previous year, yet remaining 11.8% below the 235.79 million visitors recorded in 2019 and down 17.7% from the RM 99.9 billion in 2019. Furthermore, recorded tourism revenue figures that the tourism sector exhibited robust economic growth in 2023, with a 2.5-fold increase from the previous year and, reaching only 17.22% below the RM 86.1 billion recorded in 2019 and is expected to grow annually after that (The Edge Malaysia, 2024).

Tourism policy comparison

To facilitate policy comparisons, it is necessary to possess a conceptual framework that enables the identification of distinct components within the policy process (Rose, 1973). However, according to the review, it is evident that the conceptual framework for comparing tourism policy needs to be more cohesive. This is possible due to the diverse data available in each country. However, most employed document analysis to shed light on research domains.

For example, Pforr (2005) researched three analytical perspectives for examining tourism public policy using a case study from Northern Australia. The study's methodological framework applies a discourse analytical model to three complementary conceptual perspectives, aiming to understand tourism through the lens of public policy.

A document analysis was also used in the study of Wong, Bauer, and Wong (2008). They examined Hong Kong and Singapore with a critical focus on a vision for future tourism development and policies in the private sector. The research utilized secondary data obtained through the review of accessible policy documents and academic journals discussing the vision for future tourism development and policies related to the private sector.

Using a documentary research approach, García (2014) also conducted a study regarding the comparative study of the evolution of tourism policy in Spain and Portugal in the aspects of tourism related to policies and planning; socio-economic, geographic and institutional.

Likewise, Airey (2015) conducted a study focusing on the advancements in understanding tourism policy. The paper aims to evaluate the current status of tourism policy research and highlight key issues that have garnered attention. The methodology involves a comprehensive review of literature spanning 40 years concerning tourism policy, primarily focusing on public policies. This review is selective, drawing primarily from English publications, to identify patterns and themes better to understand the current state of tourism policy research.

Similar to Ismet and Abuhjeeleh (2016), they conducted a study on the assessment of tourism policies implemented by various governments and their potential impact on the economy of North Cyprus. They employed a structured questionnaire and a comparative examination of global examples, which was undertaken through an extensive literature review to gain deeper insights into the context of tourism policies in the country.

Estol et al. (2018) also studied the European Union's tourism policy, employing institutional theory critical discourse analysis. The aim of this research was to critically assess the processes,

content, and effects of EU tourism policy. Utilizing an institutional theory perspective, the study involved an extensive literature review and critical discourse analysis of online documents, focusing on the regulative, normative, and cultural aspects of institutionalization, which enhanced understanding of EU policy in terms of its processes, content, and outcomes.

The nature of policy studies, evident in their documentary forms, clearly necessitates document analysis in previous studies as indicated in Pforr (2005), Wong et al. (2008), García (2014), Airey (2015), Ismet and Abuhjeeleh (2016) and Estol et al. (2018). However, some studies may utilize other methods, such as surveys, to supplement and address their research questions. Therefore, a documentary analysis serves as the foundation for policy comparison research.

Apart from the previous empirical research, some international organizations provided policy comparison frameworks in the across-country policy studies. For example, the Japan International Cooperation Agency (JICA) (2002) compared tourism policies using various complex information related to tourists, international tourist bed nights, domestic tourist generations, domestic tourist bed nights, employment in tourism, products development and spatial setting, and so on.

The Organisation for Economic Co-operation and Development (OECD) (2022) presented an understandable comparison framework using policy focus, which mainly aims at tourism in the economy and outlook for recovery, tourism governance, funding, and tourism policies and programs (Figure 2). It also serves as a global point of reference and standard for assessing how countries promote sustainable and equitable growth in the tourist sector. Thus, this study has modified the policy comparison framework proposed by the Organisation for Economic Co-operation and Development (OECD) (2022) by incorporating a new comparative element: tourism policy and focus. The researchers did this due to the varied understanding of policy comparison and the availability of diverse information related to policies among TTR.
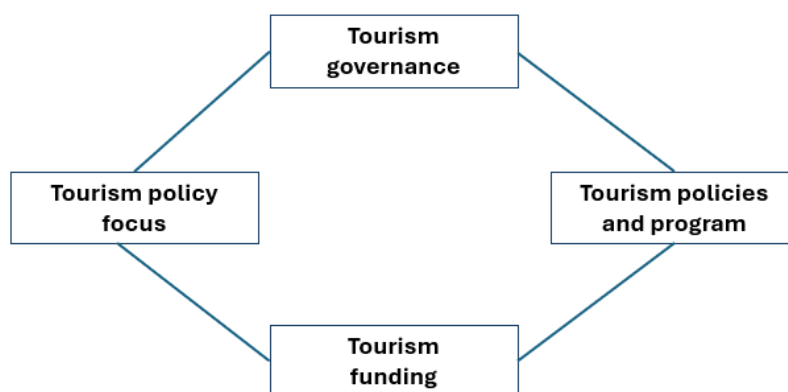

Figure 2 Modification of OECD's tourism policy comparison framework

Research methodology

Research design

This qualitative research project utilizes a documentary approach to gather secondary data from relevant documents. Document research is a methodical procedure used to analyze and assess different types of documents, including both physical and digital materials (Bowen, 2009; Vongsaroj et al., 2022). The records encompass a variety of materials such as advertisements, agendas, attendance registers, meeting minutes, manuals, background papers, books, brochures, diaries, notebooks, and event programs (Mogalakwe, 2006). This approach enables researchers to methodically collect pertinent sources of information about their study inquiries et al., 2023).

Compared to other qualitative data collections, the nature of policy studies, as shown in their documentary forms, necessitates the use of document analysis in prior research. Thus, a documentary analysis is essential for conducting policy comparison research, particularly in tourism comparison among TTR.

While researchers commonly use document analysis for methodological and data triangulation, it is important to recognize that in studies conducted under an interpretive paradigm, documents may be serve as the sole source of essential data (Bowen, 2009). Essentially, documentary research can be used for historical study or to examine past occurrences, especially in policy research (such as in Bloyce & White, 2018; Cardno, 2018; Evans, 2014; Liasidou, 2019; Shaw et al., 2004; Xue et al., 2023).

Data collection

This study acquired gray literature from 2020 to 2024, encompassing various types of documents available in the online public domain. This included a range of gray literature sources related explicitly to tourism policies from Thailand, Singapore, and Malaysia. These comprised documents from the tourism government's agency website, news releases from the online media, tourism strategic plans, and commercials on active social media platforms.

To select and assess gray literature from various sources for data analysis, these documents must meet the document selection criteria outlined by Scott (2014). Specifically, they must embody authenticity, credibility, representativeness, and meaning. Applying these criteria aims to reduce bias in research conducted with documents. Notably, the documents must pertain to tourism policies specified timeframe. Table 1 summarizes the sources of gray literature utilized for data collection.

Table 1 Source of analyzed gray literature

Thailand	Singapore	Malaysia
☐ Office of the National Economic and Social Development Board ☐ Bank of Thailand ☐ Ministry of Tourism and Sports ☐ National Science and Technology Development Agency (NSTDA) ☐ Tourism Authority of Thailand (TAT) ☐ Tourism commercial ads on YouTube (Tourism Authority of Thailand, 2024)	☐ Singapore Tourism Board (STB) ☐ Infocomm Media Development Authority ☐ Singapore Tourism Analytics Network ☐ Organisation for Economic Co-operation and Development ☐ The United States Agency for International Development ☐ Tourism commercial ads on YouTube (Singapore Tourism Broad, 2024; VisitSingapore, 2024)	☐ Minister of Tourism, Arts and Culture Malaysia ☐ Malaysia Tourism Promotion Board (MTPB) ☐ Tourism commercial ads on YouTube (Malaysia Tourism Promotion Board, 2024)

Data analysis

The analytical process involves identifying, selecting, evaluating, and synthesizing data from documents. To assess gray literature from various sources for the data analysis, the authors adhered to the document analysis steps recommended by Bowen (2009).

After collecting the data, the authors familiarized themselves with the documents by swiftly examining (skimming), thoroughly reading, and interpreting documentary materials. This iterative technique incorporates elements of content analysis, which is the process of organizing information into categories related to the central questions of the research (Bowen, 2009). The method entails a meticulous and focused re-examination and evaluation of the data.

To ensure content reliability before the analytical process, the data source triangulation from several sources of gray literature was applied (Carter & Blythe, 2014). These sources include government agency documents and publications about managing Thailand's, Singapore's, and Malaysia's policies, and tourism commercial ads on YouTube. Furthermore, because each country's tourism policies are diverse, developing a central framework to conduct a comparative study is critical. As previously mentioned, the OECD's framework was modified to conduct a comparative analysis to show how TTR implemented tourism policies. Each piece of information related to the component of the modified framework was meticulously screened according to the diverse sources of gray literature to ensure the reliability and accuracy of the data used for data analysis. This demonstrates how researchers applied the triangulation method in practice.

Findings
Policy focus
Thailand

Following the COVID-19 outbreak, the Tourism Authority of Thailand (TAT) remains focused on maximizing revenue from international markets. Nevertheless, the Thai cabinet has set a goal to elevate tourism revenue to 3.5 trillion baht by 2024. To achieve this target, the tourism industry aims to derive 2.5 trillion baht from international markets in 2024 while maintaining the target for domestic tourism revenue at 1 trillion baht.

Then, The Tourist Authority of Thailand (TAT) announced its strategic direction for 2024, focusing on improving tourism sustainability and leveraging Thai soft power to attract tourists and generate income. Key initiatives include enhancing tourism security, promoting digital transformation, stimulating tourism in secondary cities and promoting shopping in secondary cities. across the country, making Thailand a year-round travel destination while increasing tourist spending per trip and distributing income more evenly within the industry.

Additionally, Thailand aims to rank among the top 35 countries in the Sustainable Development Goals (SDGs) and has introduced the Bio-Circular-Green Economy (BCG) model to promote sustainability. As part of this, the 3rd Strategy focuses on enhancing the sustainable competitiveness of Thai BCG industries, particularly in tourism. Actions include promoting green tourism, launching new campaigns for secondary cities, and implementing a unified payment system for traveler convenience and data collection (National Science and Technology Development, 2022).

Singapore

Ministry of Trade and Industry injected $300 million into Singapore's tourism industry through the country's Tourism Development Fund to boost the local economy and reinforce global business-hub status since Mar 2024 (Subhani, 2024).

The Singapore Tourism Board (STB) mentioned that "Singapore cannot be a low-cost destination" due to workforce limitations and the expectations of a global destination where visitors are willing to pay for their experiences; therefore, they must set high standards. Besides that, the chief executive of STB stated blueprint zeroes in on "quality tourism", "driving higher yield," and "creating good jobs" (Boey, 2023).

According to Interesse (2023), the model of tourism development comprises three key dimensions of success as follows:

☐ The first dimension of success sees tourism as continuing to be an important economic driver for Singapore;

☐ The second dimension of success is that tourism development will result in productive and innovative industries and firms that create good jobs for Singaporeans;

☐ The third dimension of success sees continuing efforts to nurture public engagement and participation as part of tourism development.

There will be medium-term strategies and approaches in four pathways to secure quality tourism growth.

☐ Pursuing a yield-driven marketing approach

☐ Enhancing destination attractiveness

☐ Supporting industry competitiveness

☐ Building local engagement

However, to achieve the above goals, STB has to collaborate with public agencies and the private sector.

Moreover, Singapore also launched the first Industry Digital Plan (IDP) for the tourism (Attraction) which included accommodations, retail, and dining. Singapore has over 60 attractions, including entertainment and lifestyle, nature and parks, adventure and rides, museums, and heritage sites.

While the focus also paid to sustainability in tourism. Singapore is the first country to be certified as a sustainable destination based on the Global Sustainable Tourism Council (GSTC). Singapore's efforts and commitment in becoming a sustainable urban destination.

Malaysia

The strategic focus of Malaysia's tourism is to draw in tourists; Malaysia's tourism strategic plan for 2020-2026 devised six strategies: boost domestic tourism, foster intelligent partnerships, improve tourism promotion (both online and offline), optimize strategic communication and media engagement, execute travel bubble initiatives, and embark on strategic transformation efforts (Ministry of Tourism, n.d.-b). These policies and strategies address the challenges posed by the global pandemic promptly.

Within the framework of Malaysia's National Tourism Policy for 2020-2030, the goal lies in enhancing competitiveness, sustainability, and inclusivity,; the following six transformation strategies, 22 strategic actions and 32 tactics have been implemented: strengthen governance capacity, create special tourism investment zones, embrace smart tourism, enhance demand sophistication, practice sustainable & responsible tourism, upskill human capital (Ministry of Tourism, n.d.-a)

To market and advertise Malaysia's tourism, the emphasis is placed on four strategies: domestic and event strategies, international promotion strategies, niche/high-yield segment strategies, and integrated communication strategies (Tourism Malaysia, n.d.). Additionally, to attain recognition as a world-class ecotourism destination, the government has proposed 19 strategies accompanied by 86 actions to achieve this objective (Ministry of Tourism and Culture Malaysia, n.d.).

Tourism governance

Thailand

The Tourism Authority of Thailand (TAT) plays a crucial role in promoting domestic and international tourism for the country. Operating as a state enterprise under the Ministry of Tourism and Sports, TAT oversees and drives tourism initiatives within Thailand. Originally established as the "Tourism Promotion Organization" in 1959 under different state enterprise legislation, it was restructured and rebranded as TAT in 1979, marking a significant milestone as Thailand's pioneering entity dedicated to steering the growth and development of its tourism sector.

TAT's primary focus is formulating and implementing strategies to position Thailand as a leading tourist destination, catering to domestic and international markets. Through close collaboration with governmental bodies, regional authorities, industry associations, and private sector stakeholders, TAT actively promotes tourism development, enhances visitor experiences, and promotes the sustainable advancement of Thailand's tourism industry.

TAT operates with a structured organizational framework outlined by its governing act. At the apex of this structure is the Board of Directors, which plays a pivotal role in setting the organization's strategic direction and overseeing its operations. The Board of Directors of the Tourism Authority of Thailand consists of the Prime Minister, Minister of tourism and sports, Under-Secretary of State for Foreign Affairs or representative, Under-Secretary of State for Communications or representative, Under-Secretary of State for Interior or representative, Secretary-General of the Juridical Council or representative, Secretary-General of the National Economic and Social Development Board or representative, Secretary-General of the National Environment Board or representative. The Prime Minister holds the authority to oversee the general operations of the TAT and initiates tourism policy.

The organizational chart of the TAT reveals eight departments, each overseen by a Deputy Governor responsible for specific areas crucial to TAT's mission. Deputy Governors supervise key functions and are assisted by with the assistance of an Executive Director. According to the Tourism Authority of Thailand (2023), each Deputy Governor has the following responsibilities:

- ☐ Deputy Governor for Administration: Responsible for managing human resources, finance, organizational regulations, and bylaws to ensure seamless operation. Oversees the General Administration Department, Human Resources Department, Budget and Accounting Department, and Finance Department.
- ☐ Deputy Governor for Policy and Planning: Manages organizational policy, marketing strategy planning, monitoring, evaluation, and crisis management. Oversees the Planning Department and the Monitoring and Risk Department.
- ☐ Deputy Governor for Digital, Research and Development: Responsible for digital initiatives, research, and development. Oversees the Digital and Information Technology Department and the Research and Development Department.
- ☐ Deputy Governor for Tourism Products and Business: Oversees the Event and Tourism Investment Department.
- ☐ Deputy Governor for the Domestic Market: Plans and executes domestic tourism campaigns to promote and boost domestic tourism within Thailand. Oversees North, Central, Northeastern, Southern, and Eastern Thailand.
- ☐ Deputy Governor for International Marketing in Asia and the South Pacific: Manages marketing and promotion in Asia and the South Pacific, collaborating with partners to attract tourists from these regions. Oversees the ASEAN, South Asia, South Pacific, and East Asia.
- ☐ Deputy Governor for International Marketing Europe, America, Middle East, and Africa: Manages marketing and promotion in Europe, America, the Middle East, and Africa. Oversees Europe, Africa Middle East Region, and The Americas Region.
- ☐ Deputy Governor for Marketing Communications: Strategizes and implements advertising and public relations campaigns to maintain a positive image of Thailand as a preferred tourist destination. Oversees the Advertising and Public Relations Department and the Marketing Services Department.

Singapore

The Singapore Tourism Board (STB) administers tourism in Singapore under the Ministry of Trade and Industry (MTI), which is part of the economic development sector. The Ministry of Finance

determines the budget for tourism, and the Ministry of Trade and Industry (MTI) allocates the total budget to the Tourism Board.

According to Ho (n.d.), the Singapore Tourism Board (STB) was formed in the 1960s when the Singapore Tourist Association urged the government to help develop the tourism industry due to limited resources for promotion. The government established the Singapore Tourism Promotion Board (STPB) on January 1, 1964. Operating under the Ministry of Trade and Industry, the STPB develops the country's tourism industry, including promoting and marketing it.

The first tourism masterplan, the Tourism Product Development Plan (1986-1990), was created in 1986 by the Singapore Tourism Promotion Board (STPB). In 1994, Tan Chin Nam served as the chief executive of the STPB. In 1995, four committees comprised top public and private sector executives. The headquarters moved to Tourism Court on Orchard Spring Lane in the same year, where tradition meets modernity. Finally, in 1997, the STPB was renamed the Singapore Tourism Board (STB) (Ho, n.d.).

According to the Singapore Tourism Board (2024b), the Singapore Tourism Board (STB) currently operates under the Ministry of Trade and Industry and is divided into six groups:

- ☐ Marketing Group: This group is responsible for Communications, Industry Marketing, and Marketing Activation. The director positions oversee these areas, while an Executive Director directs Brand and Marketing Partnerships and Planning and Capability Development.
- ☐ Policy and Planning Group: This group handles infrastructure planning management, strategic planning incentive policy, travel agents and tourist guides, hospitality, cruise, tourism human capital and sustainability.
- ☐ Corporate Group: This group includes Finance, Human Resources and Organization Development, Legal and Compliance, and Corporate Services.
- ☐ Experience Development Group: This group is responsible for Attractions Entertainment and Tourism Concept Development, Retail and Dining, Arts and Cultural Precincts, Sports and Wellness, Conventions meetings and Incentive Travel, and Exhibitions and conferences.
- ☐ The International Group divides its operations into International Group HQ and regions such as Oceania, India, Middle East, South Asia and Africa, Americas, Southeast Asia, Europe, Greater China, and North Asia. It also includes the World Expo.
- ☐ Technology Transformation Group: This group includes Industry Technology Transformation, Visitor Experience and User Experience Centre of Excellence, Data Strategy and Governance Office, The Collaboratory, Data Science and Analytics, and Information Services.

Malaysia

The supervision of Malaysia's tourism industry currently falls under the Ministry of Tourism, Arts, and Culture Malaysia (MOTAC), a decision made in 2018. It was renamed the Ministry of Tourism, Arts, and Culture Malaysia in 2018 and remains so today (Ministry of Tourism, Arts, and Culture, 2021a). Ministry of Tourism, Arts, and Culture envisions portraying Malaysia as a "Culturally Rich Sustainable Destination" and is committed to "Empowering the Tourism Industry Ecosystem and Fostering Cultural Inclusiveness." Additionally, it strives to bolster the nation's identity, foster collaboration between the tourism and culture sectors, showcase the distinctiveness of Malaysian arts, culture, and heritage, including tourism offerings, and cultivate knowledgeable, skilled, creative, and innovative talent within the tourism and culture sectors (Ministry of Tourism, Arts, and Culture, 2021b).

Ministry of Tourism, Arts, and Culture (2018) states that it organizes its structure into ten departments and agencies, including:

- ☐ Tourism Malaysia, which is renowned for the Malaysia Tourism Promotion Board (MTPB)
- ☐ Department of National Heritage

□   National Department for Culture & Arts
□   Istana Budaya
□   National Academy of Arts, Culture & Heritage
□   Malaysian Handicraft Development Corporation
□   National Visual Art Development Board
□   Islamic Tourism Centre
□   Malaysia Convention & Exhibition Bureau
□   Rangkaian Hotel Seri Malaysia

Tourism funding
Thailand

The budget for the Tourism Authority of Thailand (TAT) typically comes from various sources, including revenue from TAT's property, an annual budget from the Thai cabinet, and revenue from tourism-related levies or taxes imposed on tourists, such as hotel taxes or entry fees to tourist attractions. These revenues are often explicitly earmarked for tourism promotion and infrastructure development. Public-private partnerships are expected to fund specific projects or initiatives promoting tourism through collaboration with private sector entities.

The Thai Cabinet approves the allocation of the majority of TAT's budget through its annual budgetary process. In 2021, the Thai Cabinet allocated 4,854.554 million baht to the TAT to advance responsible tourism and boost domestic tourist destinations (Tourism Authority of Thailand, 2021).

In 2022, the Thai Cabinet allocated a budget of 2,871.018 million baht for promoting the new tourism concept for 2022. In 2023, authorities designated a budget of 3,258.9 million baht. The emphasis was on advancing experiential tourism to elevate value and ensure long-term sustainability. TAT aimed to achieve an income generation target of 2.38 million baht as part of its objectives for the year.

In 2024, the Thai Cabinet earmarked a budget of 5,201.2 million baht. The government's objectives included generating revenue from tourism through four key initiatives: boosting tourism in secondary cities, promoting year-round tourism in Thailand, establishing channels to engage with tourists, and encouraging individual tourist expenditures (Budget Bureau, 2024).

Singapore

Several sources generate Singapore's national budget. One major source is the Net Investment Returns Contribution (NIRC), which refers to the part of the return on Singapore's reserves that the Government can use in the budget. Additionally, the budget includes accumulated taxes from local and foreign companies, including corporate tax and Goods and Services Tax (GST). Taxes from resident taxpayers, including personal tax and others, also contribute to the budget (The Straits Times, 2024).

Due to the impact of the COVID-19 pandemic, the Ministry of Trade and Industry's expenditures were decreased compared to the actual expenditure for the financial year 2022 (Ministry of Trade and Industry, 2024).

In the financial year 2021, the total expenditure budget was US$803.97 million, comprising running costs (operating expenditure) of US$482.96 million and development expenditure of US$321 million. In the financial year 2022, authorities estimated the total expenditure budget at US$586.60 million, primarily for operating expenses. In the financial year 2023, the total budget was US$632.56 million, composed of operating expenditure of US$356.77 million and development expenditure of US$275.80 million.

In the financial year 2024, as part of post-pandemic tourism recovery efforts, Singapore allocated US$552.47 million to develop and market new tourism products and experiences (Ministry

of Finance, 2024). This year, Singapore expects up to 16 million international tourists and anticipates domestic tourism to reach 52%, generating approximately US$27.5 billion in tourism revenues (Singapore Tourism Board, 2023; The Straits Times, 2024).

Malaysia

In Malaysia, the budget for the tourism sector is determined by the finance minister. Annually, the Finance Ministry announces and allocates the total budget for various developmental purposes. Regarding the budget allocated to the Malaysian tourism sector, the Ministry of Finance allocated RM 1.6 billion in 2022 (Ministry of Finance Malaysia, 2021), RM 250 million in 2023 (Ministry of Finance Malaysia, 2023a), and RM 350 million in 2024 (Ministry of Finance Malaysia, 2023b), respectively. This allocation aims to enhance tourism promotion and activities throughout Malaysia.

The Ministry of Finance Malaysia (2021) mentioned that, to foster the development of the tourism sector, the government prioritized and allocated a substantial sum of RM 1.6 billion in 2022 to rejuvenate the industry, which the COVID-19 pandemic had severely impacted. Alongside this significant budget, the government proposed seven key initiatives to revitalize the tourism sector. These include a RM 600 million subsidy under the Wage Subsidy Program, RM 600 million financing for the tourism sector through PENJANA Tourism Financing and the BPMB Rehabilitation Scheme, RM 85 million in special assistance over three months for tour operators registered under the Ministry of Tourism, Arts, and Culture (MOTAC), RM 50 million for the maintenance of tourism infrastructure, RM 30 million in matching grants for budget hotels and homestays, RM 50 million in matching grants for companies organizing programs, and RM 60 million for promotional activities and domestic tourism.

Additionally, a portion of this budget was allocated to the Malaysia Healthcare Travel Council, receiving RM 20 million, and the United Nations Development Program, receiving RM 14 million, to support their efforts in fostering safe tourism and restoring activities related to arts and culture.

Tourism policies and program

Thailand

TAT has developed specific plans to attract both the international and domestic markets. For the international market, Thailand tourism will focus on promoting a sustainable image, targeting new high-quality markets, seeking out new global partners, promoting the high-speed train between the People's Republic of China, Lao PDR, and Thailand for travel, and utilizing digital marketing to attract Generation Z and Y to Thailand.

Thailand's National Tourism Development Plan (2023-2027) promotes sustainable and responsible tourism. Thailand's tourism strategy, "Building Better Tourism for All", prioritizes the benefits for three key stakeholders: people, profits, and the planet.

On the contrary, the domestic market strategy has been promoted through Thailand Soft Power (5F: Food, Festival, Film, Fight, Fashion) across the five regions of Thailand to attract Thai tourists. These regions include the northern, central, northeastern, eastern, and southern regions. The Thailand Soft Power (5F) initiative showcases region's diverse activities, culinary delights, sightseeing opportunities, and cultural offerings, aiming to entice local tourists to explore the richness and diversity of their own country. Furthermore, Thailand's tourist sector prioritizes sustainable tourism, as outlined in the National Tourist Development Plan (2023-2027). The Vision for Thailand's tourism strategy for 2024 aims to rebuild the high-value tourism industry with a focus Rebuilding High Value Tourism Industry with Resilience, Sustainability and Inclusive Growth.

According to the Ministry of Tourism and Sports (2022b), Thailand's tourism strategy for the five years from 2023 to 2027 aims to elevate the country's tourism sector by focusing on the following indicators:

- ☐ The ratio of tourism-generated Gross Domestic Product (GDP) to total GDP should be at least 25 percent.
- ☐ The number of travel service businesses and tourist attractions certified by Thailand Tourism and ASEAN standards should increase by at least 3,000 cases annually.
- ☐ Enhancement of the average period of stay and expenses of Thai and foreign tourists.
- ☐ Experts expect foreign tourists to stay for at least of 10 days on average, with their expenses increasing by 5 percent annually.
- ☐ Thai tourists should have an average stay of at least 3 days, with their expenses increasing by 7 percent annually.
- ☐ The ratio of first-time visitors to repeat visitors should increase to 40:60 percent.
- ☐ Thailand aims to rank within the top 35 countries of the Sustainable Development Goals (SDGs).
- ☐ Thailand's tourism is ranked 1 in 67 on the Travel & Tourism Development Index (TTDI).
- ☐ Transform the country into a tourism hub.

Singapore

In the past, the Singapore Tourism Board (STB) has invested in 2 city tiers. Tier 1 cities like Beijing–and Shanghai Tier 2 cities such as Qingdao and Wuhan and cities with direct flights to Singapore. HQingdao and Wuhan and however, to expand Tier 2 cities for Indian Market, such as Hyderabad and Ahmedabad, because the sizeable target audience fit for Singapore tourism product and destination. India is the fifth largest market in 2023, with 1.1 million visitors.

In 2020, the Singapore Tourism Board (STB) initiated reimagining travel for Singapore and the rest of the world through conversation, stories, and ideas. This program will help to create new possibilities for Singapore visitors. It will begin with "Reimagine Travel- Global Conversations", a series of forums for partners around the world, and "Reimagine Travel in Singapore", a series of engagements with the local community and local tourism partners that encourages locals to rediscover and reconnect with Singapore's the hidden heritage. This program was launched in 2021, to co-create ideas and strategies to improve travel (Singapore Tourism Board, 2020).

The government launched The Singapore Green Plan 2030 in February 2021 as a national agenda for on sustainable development. This plan aims to achieve net zero emissions by 2050. The plan comprises of 5 pillars: City in Nature, Energy Reset, Sustainable Living, Green Economy and Resilient Future. Various tourism destination countries have been impacted by climate change crisis, partly by the tourism industry. That is why tourism destinations, including Singapore, tour operators, and stakeholders are concerned about and take part in the Sustainable Development Program. Furthermore, Singapore is one of the greenest cities in the world. It has a large nature reserve with a third of the island covered by trees (Singapore Green Plan, 2023).

Malaysia

Malaysia has formulated its tourism policy with a focus on competitiveness, sustainability, and inclusivity. The goal is positioning Malaysia's tourism among the top ten global destinations by leveraging collaborations between the public and private sectors. The strategy involves embracing digitalization to foster innovation and enhance competitiveness, all while promoting sustainable and inclusive development in alignment with the Sustainable Development Goals (SDGs) (Ministry of Tourism, n.d.-a).

In light of the global pandemic, the government introduced seven crucial policy priorities. These encompass rebuilding confidence among travelers, assisting tourism businesses in adapting and enduring, encouraging domestic tourism, facilitating the secure return of international tourism, delivering transparent information to both travelers and businesses, adapting response measures to uphold sector capacity and address shortcomings, fostering collaboration within and between

countries, and cultivating a more resilient and sustainable tourism industry (Ministry of Tourism, n.d.-b).

Tourism marketing policy primarily targets the domestic market, international recovery, health and safety measures, and digitalization and innovation (Tourism Malaysia, n.d.). Additionally, to evolve into an ecotourism hotspot, the policy concentrated on establishing partnerships to implement an integrated approach to conservation and development. It aimed to promote local and international investment in ecotourism and explore innovative concession approaches within Malaysia (Ministry of Tourism and Culture Malaysia, n.d.).

Discussion
Policy focus
It is worth noting that despite the proximity of these three countries, the variations and constraints in their resources result in the formulation of distinct policies, while they do have some shared policy objectives. Thailand prioritizes various cultural tourist resources, which drives the development of initiatives related to soft power. These projects encompass several second-tier areas in Thailand. Thailand's tourism policy after the COVID-19 epidemic prioritized generating maximum revenue from international markets, as indicated by many economic measures outlined in the tourism plans. Although Thailand has implemented a comprehensive development strategy aimed at attracting more affluent and discerning tourists while ensuring that the economic benefits are shared with locals, it still faces the challenge of establishing a unique and recognizable brand image.

Singapore prioritizes the development of its tourism sector and the creation of job opportunities. This is a result of the limitation on accessible resources. Thus, policies aimed at promoting high-quality tourism and maximizing tourism revenue are currently in place. Furthermore, Singapore has indicated that it cannot be considered a low-cost destination, which helps to increase its brand's recognition among tourists and residents due to its favorable location and other measures aimed at improving the quality of service its workforce provides. This enhances the competitiveness of its nation's tourism industry. Malaysia prioritizes competitiveness with other nations in the region due to the similarity of its tourism offerings to those of other nations.

Malaysia prioritizes the development of its resources to establish itself as the top choice for tourists. In particular, Malaysia has established explicit objectives to become a globally renowned ecotourism destination. Its primary objective is to attract tourists and enhance both domestic and international tourism. Furthermore, Malaysia has implemented inclusive measures to address societal diversity challenges, mainly through its tourist policy.

While their tourism policies may differ in focus, the emphasis on sustainability in tourism is evident in THR's policy focus. Thailand, Malaysia, and Singapore are strongly dedicated to advancing sustainable tourism. Thailand aims to achieve a position within the top 35 nations in the Sustainable Development Goals (SDGs) by adopting the Bio-Circular-Green Economy (BCG) model. This model emphasizes sustainability, with a particular focus on the tourism sector. Unlike other countries, Singapore has become the first country to receive certification as a sustainable destination from the Global Sustainable Tourism Council (GSTC). In addition, Malaysia has established national SDG indicator targets and is now completing strategies to increase its SDG successes.

Tourism governance
Each county has its own tourism promotion body to support tourism development. The government established the Tourism Authority of Thailand (TAT) in 1959, and it operates as a state enterprise under the Ministry of Tourism and Sports. This configuration clearly emphasizes the integration of tourism with sports and recreational activities. Nevertheless, TAT has a total of eight governors who oversee all aspects of tourism, both local and international. Conversely, the Singapore

This alignment emphasizes Singapore's strategic approach to positioning tourism as a significant driver of economic growth and commerce.

The Ministry of Tourism, Arts, and Culture (MOTAC) is responsible for overseeing Malaysia's tourism sector. This framework combines tourism with cultural and artistic advancement, enhancing the tourism experience by promoting cultural heritage. The sluggish of tourism growth in Malaysia highlights the relative insignificance of its tourist policy compared to Thailand and Singapore.

Funding

The economic growth indicates the government's allocation of funds to the tourism sector. Figure 3 demonstrates that Singapore allocates the highest proportion of its budget to tourism, surpassing both Thailand and Malaysia. Singapore's tourism spending is derived from a greater variety of sources compared to Thailand and Singapore. Singapore obtains its national budget from multiple sources, with the Net Investment Returns Contribution (NIRC) serving as a significant source of funds for the government's budget. It represents a portion of the returns generated by Singapore's reserves that the government can utilize. In addition, the budget includes the accumulated taxes collected from both local and foreign enterprises, which encompass corporate tax and Goods and Services Tax (GST). Resident taxpayers, including individuals and others, also contribute to the budget through taxes, such as personal tax.
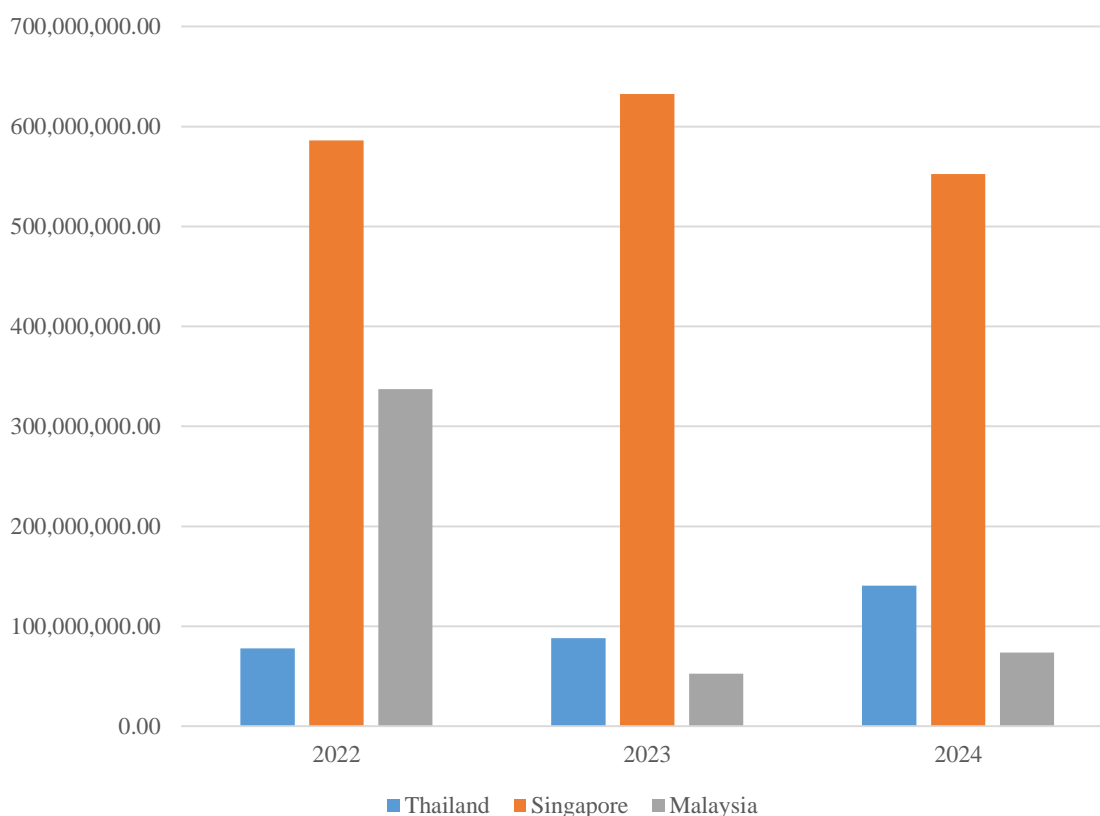

Figure 3 Comparison of tourism budget allocation in USD currency

Thailand consistently enhances its budget allocation for the growth of tourism. In contrast to Malaysia, there has been a substantial decline in the allocation of funds for tourism since 2022. The allocation of funds in Malaysia is determined every year by the finance minister. The budget for the

Tourism Authority of Thailand (TAT) is derived from multiple sources, which include revenue generated from TAT's property, an annual budget allocated by the Thai cabinet, and income from tourism-related levies or taxes imposed on tourists, such as hotel taxes or entry fees to tourist attractions.

Tourism policies and program

The Tourism Authority of Thailand (TAT) spearheads the "Amazing Thailand" campaign to showcase Thailand's diverse attractions and unique cultural encounters. This marketing effort aims to attract international and domestic tourists by highlighting the country's rich cultural heritage, breathtaking scenery, and vibrant lifestyle. The Singapore Tourism Board (STB) has initiated the "SingapoReimagine" campaign to reimagine tourism experiences in the post-pandemic age. The aim is to inspire travelers by presenting Singapore as a safe, innovative, and forward-thinking destination. Managed by Tourism Malaysia, the "Malaysia Truly Asia" campaign presents Malaysia as a heterogeneous society, offering a wide range of possibilities representing the nation's multicultural heritage. The campaign highlights the country's unspoiled natural scenery, diverse cultural heritage, and modern attractions.

The findings depict the primary program of TTR and showcase each country's tourism strategies and priorities. Amazing Thailand emphasizes a blend of culture, wellness, and eco-tourism. The organization prioritizes digital marketing and strives to offer visitors engaging and immersive experiences. SingapoReimagine aims to transform the travel industry by introducing innovative, secure, and eco-friendly tourism practices, leveraging Singapore's well-established technology and expertise in safety measures. Malaysia Truly Asia highlights the country's diverse culture, beautiful scenery, and delightful cuisine, presenting Malaysia as a complex and inclusive destination for visitors.

The statement "Know your opponent, know yourself (Sun Tzu) depicts the study's research domain". The comparative findings of TTR policies provided detailed and precise information that offers valuable strategic insights for future tourism planning. Table 2 summarizes how each country prioritizes similar objectives but employs different strategies based on their resources. Thus, Thailand's tourism industry should prioritize offering a diverse range of tourism products and resources through soft initiatives and establishing a professional tourist management system, similar to how Singapore and Malaysia manage their tourism brand image. Moreover, Thailand should prioritize aligning its policy focus with how it manages tourists to maintain a positive tourism brand image. This pertains to how tourists reside and travel in the country, adopting a quality and high-spending lifestyle as stated in the policy. Strong collaboration and synergies among government entities would shape Thailand's global perception.

For instance, Singapore imposes restrictions on tourism resources and enforces stringent service requirements. Although there are some limits, they have effectively built their tourism infrastructure, particularly by prioritizing the development of a transportation system that enables convenient movement for residents and visitors. Thailand's public transportation system needs more full integration and connectivity in numerous regions, resulting in a less convenient experience than Singapore's public transportation. Consequently, the future direction of Thailand's tourism, which aims to develop the nation's world-class tourist attractions and increase the quantity of high-quality tourists, must be further discussed.

Conclusion

With Southeast Asia working towards creating a cohesive economic community and devising a comprehensive strategy for collaborative tourism development among its member nations, the resemblance in tourism trends among ASEAN member states has led to several countries having the capacity to compete with Thailand in the tourism industry. This rivalry arises from substituting tourism

products and services, as demonstrated by the shift towards a competitive structure in the tourism market.

This study article analyzes Singapore and Malaysia's tourism policies, Thailand's tourism industry competitors. The research employed a qualitative method to analyze gray literature found in the online public domain between 2020 and 2024. The sources were government white papers, tourist strategic planning documents, government tourism agency websites, online media news releases, and official tourism commercials accessible on social media platforms. This study utilized a comparative policy framework, adjusting the structure of the OECD.

Table 2 Comparison of the overall execution of tourism policies among Thailand, Singapore, and Malaysia

Comparative framework	Compared countries		
	Thailand	**Singapore**	**Malaysia**
Policy focus	☐ International tourism revenue maximization ☐ High-class destination	Quality tourism	☐ Boosting number of tourists ☐ More adaptable, experiential, and personalized journeys
Tourism governance	Tourism Authority of Thailand	Singapore Tourism Board	Tourism Malaysia
Funding	☐ Government budgeting ☐ Revenue from tourism-related levies or taxes	☐ Government budgeting ☐ Net Investment Returns Contribution (NIRC)	☐ Government budgeting
Tourism policies and program	Amazing Thailand	SingapoReimagine	Malaysia Truly Asia

The findings and discussion offer valuable insights that can inform the development of future tourism-related policies. Thailand, Singapore, and Malaysia aim to focus on sustainable tourism. Those three countries specially established tourism- promoting bodies to market their tourism products comprehensively. However, the difference between those three countries is the restrictions on tourism resources, which affect how each country allocates budgets and manages tourism policies and programs.

Given the informative inputs from the comparative analysis among TTR, this study lays the groundwork for tourism-related agencies to formulate tourism policy further, thereby fostering tourism in Thailand. The study focuses on examining the policies of Thailand's tourism rivals rather than generalizing the findings to other settings. As a result, it sheds light on how comparative policy analysis further enhances the tourism literature.

Given the varied nature of tourism policy in different countries, it is evident that the findings revealed slight fragmentation due to the application of the central framework. However, the nature of comparative research was considered a minor flaw of the method regarding the outcomes derived from the analysis. Moreover, the online accessibility of gray literature restricted the scope of the documentary analysis.

Future studies may benefit from collaborating with scholars from the relevant countries to enhance access to gray literature. Additionally, empirical research within similar domains or future studies related to each modified framework in policy focus, tourism governance, funding, tourism policies, and programs, using qualitative data collection methods such as interviews with stakeholders, would enrich the literature on comparative policy analysis.

Acknowledgement

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