


PREPARED FOR:



The Economic Impact of Marriage Equality on Thailand's Tourism Industry

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Executive Summary

Thailand’s planned enactment of the Marriage Equality Act is a significant milestone. The landmark move amends the Civil and Commercial Code and affords equal rights in marriage to all couples regardless of their sexual orientation or gender identity. Once it is published on the Royal Gazette for 120 days, equal rights in critical areas such as child adoption, healthcare, and inheritance will become law in January 2025. But the significance of this legislation goes beyond its immediate impact on the local LGBTQIA+ community, as it sends a strong signal to the rest of the world on Thailand’s commitment to inclusivity.

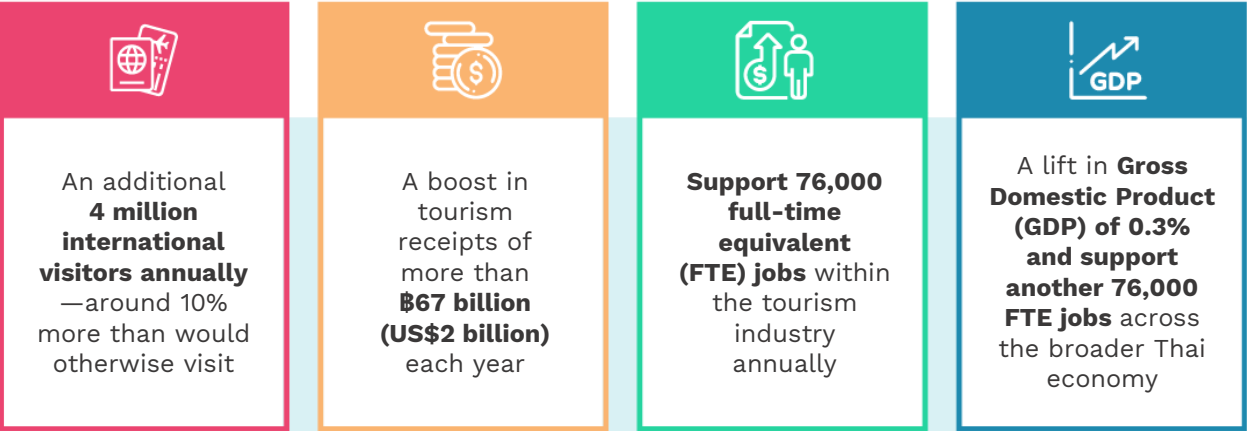
In particular, the enactment of this law is expected to bolster Thailand’s image as a welcoming destination for everyone—creating the rainbow tourism opportunity for the economy.

By opening its doors more widely to the global LGBTQIA+ community, Thailand is set to attract a growing number of travellers and expatriate workers who seek not just a vacation spot but a place where they can feel truly accepted. The tourism industry, a key driver of Thailand’s economy, could see substantial gains in the number of annual visitors and tourist spending from this move, contributing to economic growth and supporting jobs.

This historic step towards greater inclusivity will also place Thailand in pole position to host even more LGBTQIA+ affirming events, solidifying its position as a top destination for diversity-driven tourism, while strengthening its bid to become the first within Asia to host WorldPride, an event coordinated by InterPride that promotes visibility and awareness of LGBTQIA+ rights on an international level. Historically, cities that have hosted WorldPride have reaped substantial economic rewards, fuelled by an influx of international and out-of-state visitors while benefitting from increased spending on food, entertainment, accommodation, and other services. Hosting such events would not only enhance Thailand's global profile as a premier LGBTQIA+ destination but also provide a major boost to its tourism industry and broader domestic economy.

This legislative development is set to cement Thailand’s status as a leading proponent of LGBTQIA+ rights in Asia as well as ensuring it can now better cater to those travelling with pride, creating substantial benefits for its tourism industry.

We estimate that the enactment of marriage equality within Thailand could bring the following benefits, within two years:



The Rainbow

Tourism Opportunity

Enhancing Thailand's status as a champion of inclusivity

Thailand is well-regarded for its welcoming stance toward the LGBTQIA+ community given a widespread spirit of inclusion among the general population, establishing itself as a champion of inclusivity. The introduction of marriage equality through the amendment to Thailand's Civil and Commercial Code is expected to further solidify Thailand's reputation in this area.

68%

of Thais support individuals to be open about their LGBTQIA+ identity, one of the highest acceptance rates globally¹

10%

of Thais identify as being part of the LGBTQIA+ community²

Beyond creating safe and welcoming environments for individuals, there is an additional economic benefit around embracing inclusivity. Cities and economies which are proponents of marriage equality and with high levels of acceptance toward the LGBTQIA+ community will often attract more skilled talent and investment.³ For example, a 4-point increase in the UCLA Williams Institute's Global Acceptance Index—a measure evaluating a country's overall inclusivity towards LGBTQIA+ individuals by scoring them from zero to nine points—leads to a 10% increase in LGBTQIA+ professionals willing to relocate for work assignments.⁴

Thailand's move to extend equal rights to same-sex couples, in critical areas such as child adoption, healthcare, and inheritance, is also set to contribute to a more equitable society. Additionally, it will also enhance Thailand's appeal as a destination for LGBTQIA+ travellers who seek a place that can truly accept their identity.



1. Ipsos (2024), *Ipsos LGBTQ+ Pride Report 2024*. Available at: https://www.ipsos.com/sites/default/files/ct/news/documents/2024-06/Pride-Report-2024_2.pdf

2. Ibid.

3. Open for Business (n.d.), *Reports*. Available at: <https://open-for-business.org/reports>

4. Open for Business (2020), *Working Globally: Why LGBT+ Inclusion is Key to Competitiveness*. Available at: <https://open-for-business.org/working-globally-report>

The economic opportunities for tourism from marriage equality

Rainbow tourism, defined as travel that specifically caters to the LGBTQIA+ community and celebrates its diversity, presents a compelling economic opportunity for Thailand.

This opportunity strongly aligns with the Thai government's existing goals to attract tourists and drive growth in its tourism industry, with the enactment of the marriage equality legislation expected to resonate strongly with the LGBTQIA+ community. The Thailand Office of Trade Policy and Strategy (OTPS), under the Ministry of Commerce, predicts that the move can generate increased demand for domestic wedding services among couples of all gender identities, and lend further support to the country's vision of becoming a regional tourism hub.⁵

Rainbow Tourism – A compelling economic opportunity LGBTQIA+ tourists represent...

10%

of tourists globally⁶

16%

of travel spending across
the world⁷



Around US\$200 billion of total annual market value⁸

5. Sources include: Government of Thailand, Trade Policy and Strategy Office (2024), "ภูมิใจธรรม" เผยผลลง Pride Month ดันเศรษฐกิจ เพิ่มเม็ดเงินเข้าประเทศ รัฐบาลพร้อมสนับสนุนสมรสเท่าเทียม" Available at: <https://tpso.go.th/news/2406-0000000023>; Government of Thailand, Trade Policy and Strategy Office (2024), "สมรสเท่าเทียมโลกกาลเดินโตธุรกิจบริการไทย" Available at: <https://tpso.go.th/news/2404-0000000014>

6. Data from World Travel & Tourism Council. Cited by Nation Thailand (2023), "LGBTQ+ tourism likely to continue growing: TAT." Available at: <https://www.nationthailand.com/thailand/tourism/40030071>

7. Ibid.

8. World Travel & Tourism Council (2023), "Travelling with Pride." Available at: <https://travelhub.wttc.org/blog/travelling-with-pride>

In Focus: How marriage equality unlocks economic opportunities in the wedding industry

Marriage equality legislation can have a demonstrable impact on an economy's tourism industry. This impact ranges from an increased number of destination weddings to a more favourable perception of the destination, all of which boosts overall tourist arrivals as illustrated below.



UNITED STATES OF AMERICA

In 2015, the United States Supreme Court's landmark decision in *Obergefell v Hodges* to legally recognise marriage equality nationwide led to a notable increase in same-sex weddings across the country.

As a result, there have been:

4.6 million
out-of-state wedding guest arrivals
within five years⁹

More than
US\$500 million
of additional spending by these
guests on food and lodging between
2015 and 2020¹⁰



NEW ZEALAND & AUSTRALIA

Since enacting marriage equality legislation in 2013, New Zealand has been a sought-after destination for same-sex weddings. In 2016 alone, around 500 foreign same-sex couples tied the knot in the country, outnumbering locals.¹¹

Between 2013 and 2017, most of these couples were from Australia, a trend that only reversed when Australia itself also legalised same-sex unions 2017. Examples such as this highlight the demand for destination weddings among same-sex couples.

58%
of same-sex weddings in New
Zealand were celebrated by
Australians between 2013-17¹²

This figure dropped to
26%
after Australia itself legalised
same-sex unions in 2017

9. University of California, Los Angeles (UCLA) (2020), The Economic Impact of Marriage Equality Five Years after *Obergefell v. Hodges*. Available at: <https://williamsinstitute.law.ucla.edu/wp-content/uploads/Economic-Impact-SS-Marriage-May-2020.pdf>

10. Ibid.

11. Bloomberg (2017), "Australia's Gay Marriage Fail Hands New Zealand a Wedding Windfall." Available at: <https://www.bloomberg.com/news/articles/2017-05-09/australia-s-gay-marriage-fail-hands-new-zealand-a-wedding-windfall>

12. Statistics New Zealand (2023), Over 4,000 same-sex marriages in New Zealand since becoming legal a decade ago. Available at: <https://www.stats.govt.nz/news/over-4000-same-sex-marriages-in-new-zealand-since-becoming-legal-a-decade-ago>

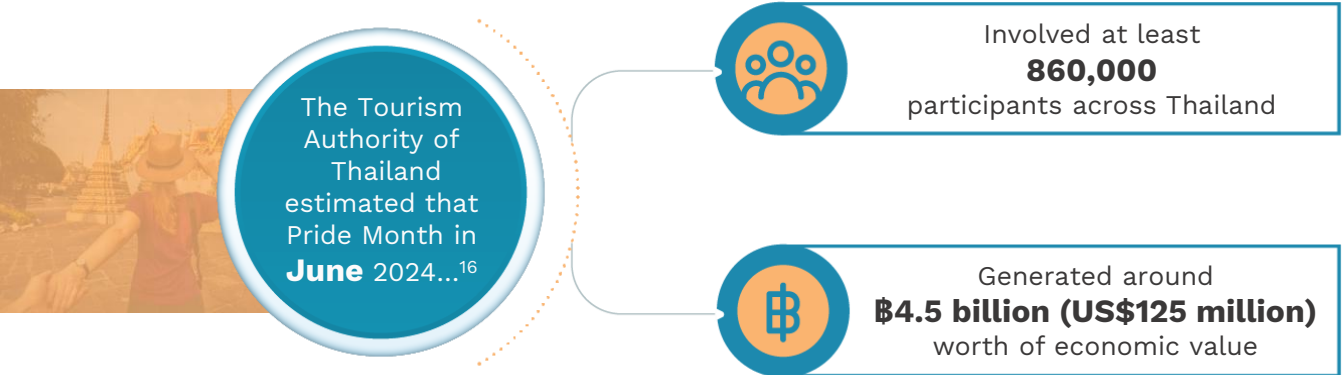
The Economics of Travelling with Pride

A launch pad for further growth in Thailand’s tourism industry

Thailand is already a world-renowned travel destination. With a strong rebound in tourist arrivals following the COVID-19 pandemic, Thailand is currently on course to a strong recovery in traveller numbers. Its rankings are set to improve further as the country has significantly expanded the number of nationals eligible for visa-free entry from 57 to 93 in 2024.¹³

Studies indicate that tourists are more likely to visit countries that support LGBTQIA+ rights. For example, 43% of LGBTQIA+ travellers cancel trips when they perceive a destination as unsupportive of the LGBTQIA+ community.¹⁵ Thailand’s enactment of this legislation signals to tourists worldwide that it is an inclusive and accepting destination for all, regardless of gender or sexual orientation, potentially increasing its appeal to millions of new visitors.

Marriage equality legislation can also contribute towards the development of more events and activities, such as destination weddings of same-sex couples and Pride events. These events also drive tourism and additional spending, especially in sectors such as accommodation, food, and entertainment, while also providing visibility and support for local businesses and fostering an inclusive and vibrant economy.



13. Bloomberg (2024), "Thailand Expands Visa-Free Status to 93 Nations to Boost Tourism." Available at: <https://www.bloomberg.com/news/articles/2024-07-12/thailand-expands-visa-free-status-to-93-territories-to-attract-more-tourists>
14. Statista (2023), "Countries with the highest number of international tourist arrivals worldwide from 2019 to 2023." Available at: <https://www.statista.com/statistics/261726/countries-ranked-by-number-of-international-tourist-arrivals/>
15. Booking.com (2024), "From Planning to Personas: Booking.com Research Reveals How LGBTQ+ Travelers Are Taking Control of Their Trips." Available at: <https://news.booking.com/from-planning-to-personas-bookingcom-research-reveals-how-lgbtq-travelers-are-taking-control-of-their-trips/>
16. Government of Thailand, Trade Policy and Strategy Office (2024), "ภูมิใจธรรม" เผยผลจาง Pride Month ต้นเศรษฐกิจ เพิ่มเม็ดเงินเข้าประเทศ รัฐบาลพร้อมสนับสนุนเสริมสร้างเที่ยว" Available at: <https://tpso.go.th/news/2406-0000000023>

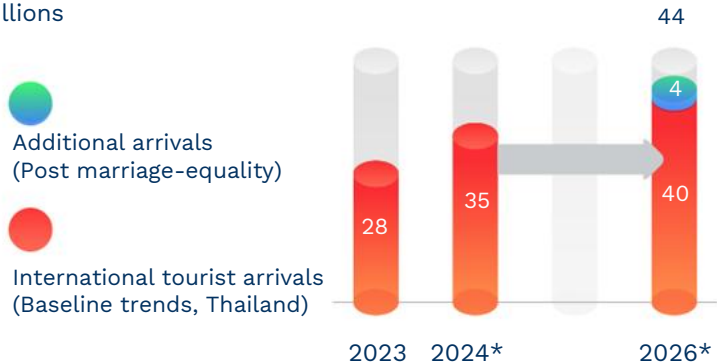
How Thailand’s tourism industry is set to benefit from the enactment of marriage equality within two years:



An additional **4 million international visitors annually**—around 10% more than would otherwise visit

Impact of marriage equality legislation

Total international tourist arrivals in Thailand, millions



Sources: Bank of Thailand; Access Partnership analysis.

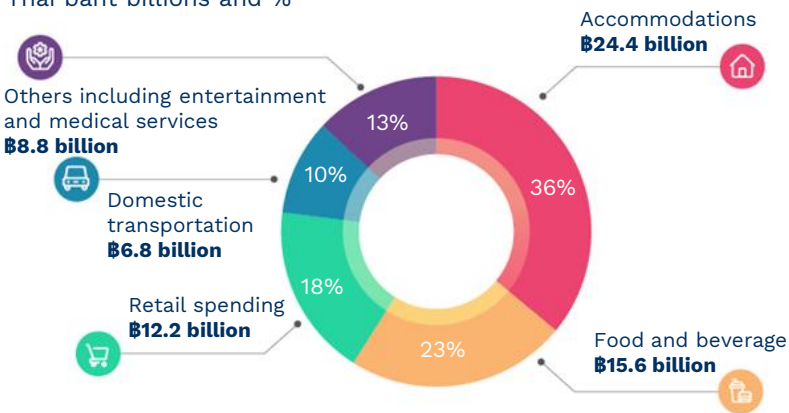
*Forecasted figures, based on a conservative assumption that Thailand achieves pre-COVID-19 levels of arrivals by 2026.



A boost in tourism receipts of more than **\$67 billion (US\$2 billion) each year**

Additional tourist spending in Thailand

Total international tourist spending in Thailand, Thai baht billions and %



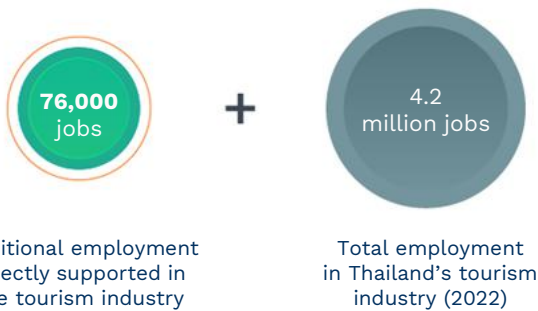
Sources: Access Partnership analysis



76,000 full-time equivalent (FTE) jobs within the tourism industry

Additional jobs supported in Thailand's tourism industry

Total jobs supported, Number

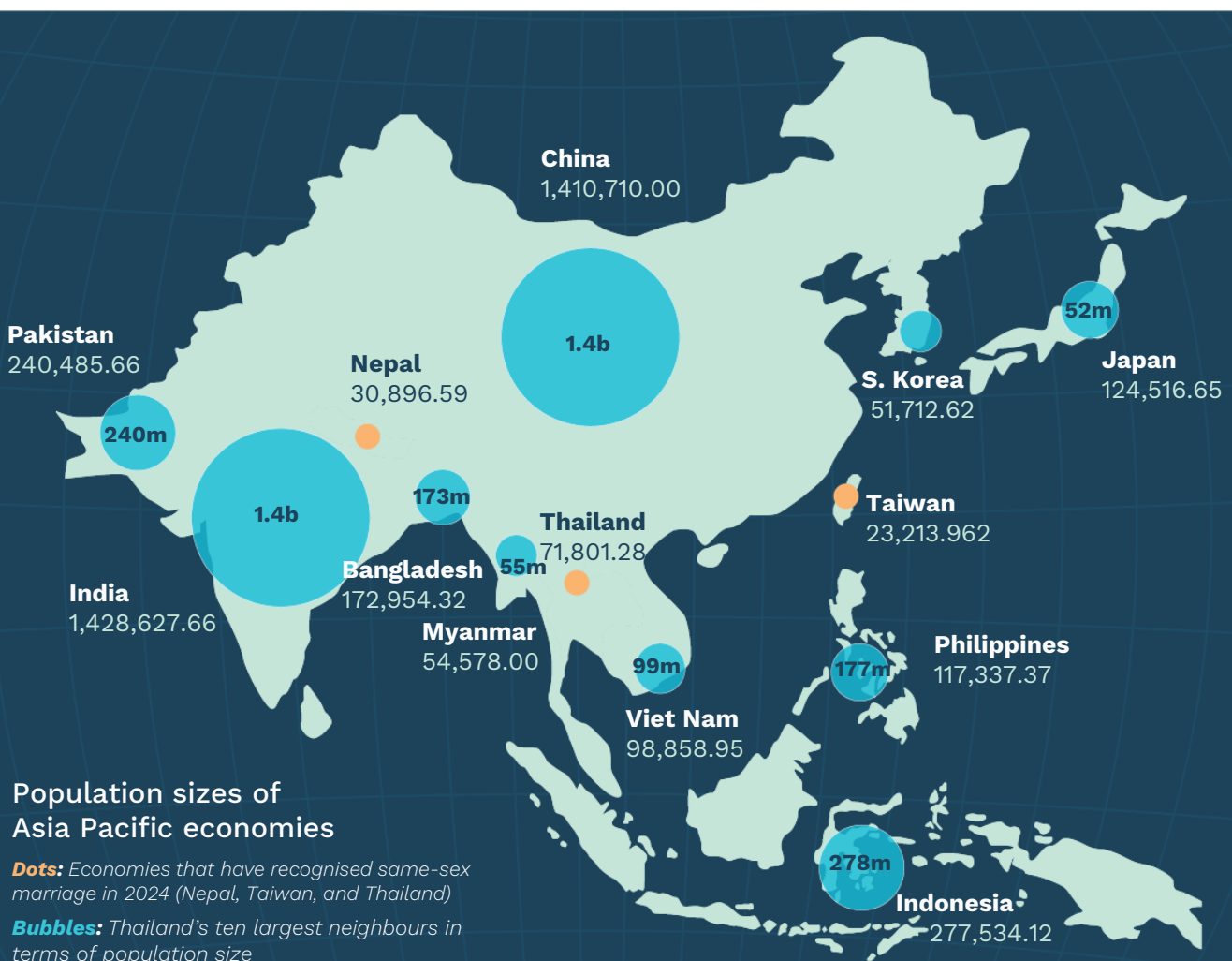


Sources: Ministry of Tourism & Sports, Thailand; Access Partnership analysis

A hub for LGBTQIA+ tourists and inclusive travel

The limited number of jurisdictions that recognise marriage equality in Asia—only Taiwan and Nepal as of 2024—presents a unique strategic opportunity for Thailand. By being among these few markets, Thailand is likely to have even more opportunity to attract same-sex couples from across the globe who seek to celebrate their marriages in an exotic location. Capitalising on this unique position could also allow Thailand to set itself on strong footing as a premier destination for LGBTQIA+ couples seeking an inclusive experience within the entire region, boosting its appeal and economic prospects.

With many cities in Thailand already touted as prominent destination wedding venues, such as Koh Samui and Phuket, the enactment of marriage equality could also potentially boost Thailand's wedding industry. Jurisdictions recognising marriage equality have seen significant increases in tourism revenue from weddings and honeymoons, along with positive spillover effects into related sectors like hotel, catering, and entertainment.¹⁷ This is further evidenced by the case studies in Chapter 1 above, where research by the Williams Institute at the University of California, Los Angeles (UCLA) shows that out-of-state guests attending weddings of the LGBTQIA+ community have contributed over US\$500 million in spending across the USA between 2015 to 2020.¹⁸



17. Ho, Lee, Lo, Ng, and Yu (2024), "The Cross-Regional Impact of Taiwan's Same-Sex Marriage Legalisation: The Queer Economy of Welfare Mix. Social Policy and Society." Published online 2024:1-16. doi:10.1017/S1474746424000083

18. University of California, Los Angeles (UCLA) (2020), The Economic Impact of Marriage Equality Five Years after Obergefell v. Hodges. Available at: <https://williamsinstitute.law.ucla.edu/wp-content/uploads/Economic-Impact-SS-Marriage-May-2020.pdf>

In Focus: Bangkok Pride on how supporting LGBTQIA+ events can contribute to Thailand's tourism industry

Bangkok Pride is recognised as a pivotal force of the LGBTQIA+ rights movement in Thailand, serving as a platform for celebrating diversity, promoting equality, and advocating for LGBTQIA+ rights.

By capitalising on support from politicians and the wider public, the team was able to successfully hold the inaugural Bangkok Pride Parade in 2022 under the name of “Bangkok Naruemit Pride 2022”, igniting a movement of acceptance and inclusion across the country.

The annual Bangkok Pride Parade now garners strong support from broader society, with the number of attendees now rivalling that of major Thai events like New Year's Eve. It has since grown from a humble few thousand spectators in 2022 to a massive 200,000 attendees participating in its signature parade that spans from Supachalasai National Stadium to CentralwOrld in 2024. Today, the event draws tourists from across Southeast Asia and the Pacific, with LGBTQIA+ tourists particularly drawn to the appeal of experiencing a grand Pride parade that is conveniently accessible within the region. Increased visitor numbers have also brought positive benefits to the local economy, with restaurants and hotels experiencing peak occupancy during Bangkok Pride Parades, and local businesses experiencing increased visibility and popularity.

The Bangkok Pride team harbours aspirations of hosting the global WorldPride event in 2030 as a symbol of Thailand's commitment to fostering inclusivity and equality, a goal shared by the Thai government as well.¹⁹ The enactment of the marriage equality legislation is expected to drive even more support for the LGBTQIA+ community, with Bangkok Pride hoping to remain at the forefront of the movement to champion non-discrimination, gender recognition, and greater inclusivity overall in the years to come.



Bangkok Pride has brought more visibility to the LGBTQIA+ community, with its effects rippling across the nation. Today, pride parades and events are held in 35 other provinces across Thailand. Pride Nation Samui International Festival, Chiang Mai Pride Festival, and Phuket Pride are some examples which have seen increasing participation from domestic and international visitors – contributing more revenue to the local communities while also encouraging Thais to be more accepting and supportive of the movement.

– **Waaddao Ann Chumaporn, Charlotte Ratanon Kuiyoksuy, and Plaifah Kyoka Shodladd (Bangkok Pride Team)**

19. The Government Public Relations Department, Government of Thailand (2024), “Phuket proposed as host of InterPride World Conference in 2025.” Available at: <https://thailand.prd.go.th/en/content/category/detail/id/2078/iid/315670>

In Focus: The economic boost of hosting WorldPride as seen in other markets

The legal recognition of marriage equality could afford greater credibility for Thailand in any upcoming bid to host WorldPride—a goal that the Thai government has set.²⁰ Case studies from other cities, such as Tel Aviv, where LGBTQIA+ tourists attending Pride Week increased significantly compared to non-Pride periods, and Taiwan's Pride march, which saw a record turnout of 200,000 during the year marriage equality legislation was passed, demonstrates the impact such legislation can have on attracting visitors.²¹

As one of the largest and most influential LGBTQIA+ events globally, the economic impact of hosting WorldPride can be substantial, as demonstrated by Toronto's experience in 2014. At that time, the city hosted a spectacular WorldPride festival, drawing a significant number of international and out-of-state visitors, contributing to increased spending on accommodation, food, entertainment, and other services, underscoring the financial returns that can result from hosting large-scale LGBTQIA+ events.



Toronto WorldPride
brought
CA\$791 million
worth of economic impact
to the local economy²²

Sydney's experience in 2023 further highlights the economic potential of hosting WorldPride. The city welcomed approximately 21,000 international visitors and 84,000 out-of-state visitors, surpassing pre-event expectations.²³ These visitors not only outnumbered those attending average city events, such as the local Sydney Mardi Gras, but they also stayed longer and spent more. Overall, the 2023 Sydney WorldPride contributed significant benefits to the New South Wales economy and supported around 1,699 FTE jobs.²⁴ These economic benefits stemmed from a combination of operational activities, visitor spending, and artist participation, demonstrating the wide-reaching impact of such an event.



Sydney WorldPride
contributed
AU\$185.6 million
worth of economic impact
to New South Wales²⁵

20. Sources include: The Government Public Relations Department, Government of Thailand (2024), "Phuket proposed as host of InterPride World Conference in 2025." Available at: <https://thailand.prd.go.th/en/content/category/detail/id/2078/iid/315670>; The Nation (2024), "Paetongtarn hopes for success of equal marriage bill." Available at: <https://www.nationthailand.com/news/policy/40038020>; Thavisin, Srethta. Posted on X, 1 June 2024. Available at: <https://x.com/Thavisin/status/1796865578042614076?lang=en&mx=2>

21. SCMP (2019), "200,000 join Taiwan's pride march five months after island legalises same-sex marriage". Available at: <https://www.scmp.com/news/china/society/article/3034705/200000-join-taiwans-pride-march-five-months-after-island>

22. Xtra magazine (2014), "WorldPride brought big dividends to Toronto, Pride says". Available at: <https://xtramagazine.com/culture/worldpride-brought-big-dividends-to-toronto-pride-says-64809>

23. Deloitte (2023), The economic and social impact of Sydney WorldPride 2023. Available at: <https://www.deloitte.com/au/en/about/people/economic-social-impact-sydney-worldpride-2023.html>

24. Ibid.

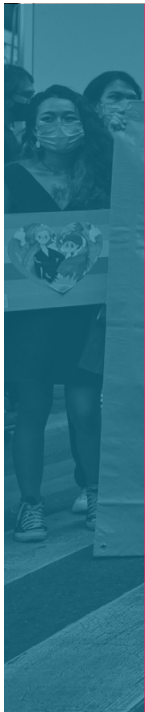
25. Ibid.

In Focus: ILGA Asia on why supporting LGBTQIA+ inclusivity can benefit the Thai economy

The International Lesbian, Gay, Bisexual, Trans and Intersex Association (ILGA) Asia²⁶, a prominent advocate for LGBTQIA+ rights, views Thailand's marriage equality law as a pivotal step towards greater inclusivity. The legislation underscores Thailand's commitment to justice and equality and reinforces its reputation as a welcoming destination for the LGBTQIA+ community—especially to those from jurisdictions where their rights are not recognised.

As the first Southeast Asian country to take this step, Thailand is expected to attract even more LGBTQIA+ travellers who prioritise destinations that embrace diversity and inclusion, creating a positive impact on Thailand's tourism industry. Prominent events like Bangkok Pride, where ILGA Asia participates²⁷, as well as G-Circuit Songkran and White Party Bangkok already attract large international audiences from the LGBTQIA+ community, supporting local businesses involved in hospitality and entertainment, and contributing to the broader Thai economy.

Achieving full inclusivity is an ongoing journey, requiring continuous efforts by organisations such as ILGA Asia to ensure all LGBTQIA+ individuals, regardless of their socio-economic background, can fully enjoy equal rights. By legalising marriage equality, Thailand is taking a monumental step forward in creating an inclusive environment and enhancing its appeal as a leading travel destination for LGBTQIA+ travellers worldwide.



As one of the leading global travel destinations, Thailand could see a rise in LGBTQIA+ visitors celebrating their marriages or seeking to enjoy a more inclusive travel experience. Looking ahead, the hope for Thailand is that the country continues to build on its reputation as a welcoming and inclusive destination and ensure that all LGBTQIA+ individuals feel safe and valued.

– **Henry Koh,**
Executive Director, ILGA Asia

26. ILGA Asia (n.d.), "Who are we?". Available at: <https://www.ilgaasia.org/about>

27. ILGA Asia (2024), Instagram post. Available at: https://www.instagram.com/ilgaasia/p/C7yXskUJdc1/?img_index=1

How we calculated the economic impact of marriage equality

Our analysis of jurisdictions that have enacted marriage equality laws reveals that they experienced an average increase of approximately 10% in international visitor arrivals two years after the legislation came into force.²⁸ For Thailand, this translates to the potential of an additional 4 million international visitors annually.

Explained: Key methodological considerations within our analysis

This analysis controls for other key factors that may influence tourist arrivals across economies, including: the size of their respective economies; level of perceived safety; relative affordability; accessibility to other tourism destinations; number of visa-free agreements; as well as the availability of substitute LGBTQIA+ friendly destinations within proximity. This estimated effect is in line with other studies that report a positive increase in tourist arrivals following the enactment of marriage equality laws.²⁹ Additionally, the time taken for marriage equality legislation to take effect is supported by impact studies of marriage equality legislation on LGBTQIA+ migration in the USA, where some states saw an impact on migration as much as 7 years after marriage equality legislation.³⁰ For more details, please refer to the Appendix of this report.

The influx of international visitors is also set to boost overall tourism receipts in Thailand. It is worth noting that these new international visitors will also have different spending power and preferences. Our analysis finds that on average, these visitors may individually have less spending power than the average tourist, possibly reflecting a relatively younger demographic profile or groups that have different preferences in service offerings. For example, a McKinsey & Co study found that Gen Z travellers often prioritise experiences over possessions, with most looking for ways to save money on flights transportation, shopping and food.³¹ Instead, determinants of average spending relate more closely to factors such as duration of stay as well as visitors' origin—both factors that could be markedly different among the projected tourist demographics.³² The Thailand tourism industry should then focus on new offerings that are more closely aligned to these types of tourists to make the most of the Rainbow Tourism Opportunity.

At the same time, beyond promoting visiting and boosting overall tourism receipts, the enactment of the marriage equality legislation is expected to support additional jobs within the local tourism industry. As more tourists come in to explore and spend in Thailand, local businesses are likely to see upticks in revenue which could in turn support more employment and more entrepreneurship.



28. Note: The estimated percentage figure is derived based on an assessment of a specific set of economies that have enacted marriage equality laws between 2000 and 2018 - mostly within North America and Europe. While the analysis has controlled for macroeconomic and social conditions specific to each economy of our sample, it should be noted that other factors can dilute or magnify this effect which can affect the applicability of this estimate in other economies. Additionally, this study's projected tourist volumes assumes that currency exchange rates and prices hold constant over time, and does not account for potential future fluctuations. For more details on the methodology, please refer to the Appendix of this report.

29. World Bank (2020), "What are the empirical determinants of International Tourist Arrivals and Expenditures? An Empirical Application to the Case of São Tomé and Príncipe." Available at: https://documents1.worldbank.org/curated/en/312691584467066838/pdf/What-are-the-Empirical-Determinants-of-International-Tourist-Arrivals-and-Expenditures-An-Empirical-Application-to-the-Case-of-Sao-Tome-and-Principe.pdf?_gl=1*1p56oiy*_gcl_au*NjYzNjg1NzMwLjE3MjQyNjIwNjU

30. Marcén, M., & Morales, M. (2022). "The effect of same-sex marriage legalization on interstate migration in the USA." Published online 2021:5-04. doi:10.1007/S00148021008425

31. McKinsey (2024) "The way we travel now." Available at: <https://www.mckinsey.com/industries/travel-logistics-and-infrastructure/our-insights/the-way-we-travel-now>

32. Balli, F., Do, H., and Uqaili, H. (2024) The decomposition of tourism demand and tourism receipts. Published online 2023:9-19. doi:10.1177/S13548166231202358

Boosting economic growth and jobs economy-wide

Given the importance of tourism to the Thailand economy, the economic benefits of the enactment of the marriage equality law could also generate spillover impacts in the broader economy. From the agricultural sector that serves the food and beverage industry; to the construction sector that lays the foundation for the establishment of tourism attractions and amenities, businesses that are indirectly part of the tourism industry stand to also gain from more visitors coming in. Alongside businesses, the government also benefits from these additional activities across the economy as they generate more taxable sales and income.

Our analysis estimates that, within two years of enacting marriage equality, the growth in tourism activity could benefit the broader economy by:



Delivering an uplift in Thailand's Gross Domestic Product (GDP) by

0.3%



Indirectly support around

76,000 FTE jobs

in the broader Thai economy,
in addition to the 76,000
within the tourism industry

Note: The total amount of jobs supported in the broader economy refers to jobs outside of the tourism industry. It includes jobs supported among companies that provide services to the tourism industry as well as jobs supported across the wider economy due to the additional spending by workers who earn wages by being part of the supply chain.

Source: Access Partnership analysis. For more information, please refer to the Appendix of this report.

Closing:

Acceptance can bring growth

As Thailand continues to embrace inclusivity by enshrining marriage equality into law, the nation is poised to enhance its global profile as a welcoming destination. This progressive move promises substantial economic benefits by attracting more international visitors, fostering vibrant cultural exchanges, and solidifying Thailand's commitment to equality and acceptance. By leading the way in LGBTQIA+ rights, Thailand is shaping its future as a top tourist destination while also reinforcing its status as a leader in inclusivity and diversity.



Appendix:

Methodology

This section outlines the approach undertaken to analyse the economic impact of marriage equality legislation on the Thai economy.

Step 1: Identifying the relationship between tourism and marriage equality legislation

To estimate how the introduction of marriage equality legislation can impact tourism, this analysis relies on two key quantitative metrics to describe the state of Thailand's tourism industry:

- (a) **Total inbound international tourist arrivals:** This measures the total number of international visitors arriving in the country, accounting for both overnight stays and same-day visits.
- (b) **Total international tourist receipts:** This measures the total expenditure of international visitors in the destination country in areas such as accommodation, food and beverage services, entertainment, and transportation.

This study specifically focuses on international tourism in Thailand due to its significant contribution to the industry. While international visitors comprise approximately 40% of overall travellers in Thailand, they disproportionately contribute almost 60% of tourism expenditure,³³ and make up a significant 13.0% of Thailand's GDP.³⁴

In addition to examining the direct effects of the marriage equality legislation, it is crucial to identify and account for other factors that might influence both international visitor arrivals and expenditure. As visitors choose their destinations based on a multitude of factors, this analysis considers other variables outlined below along four dimensions:

- (a) **Attractiveness:** This dimension represents the overall appeal of a destination. It is based on measures relating to GDP per capita – which reflects *the size of economic activity* and value-added generated, where a larger GDP is usually followed by a larger tourism industry; as well as the *level of perceived safety* as more reports of crime, corruption or threats to safety would deter tourists.
- (b) **Accessibility:** This dimension indicates the ease of access in entering a country for travel, and is represented by the number of *visa-free agreements* the country has; and the *level of perceived openness toward LGBTQIA+ residents and visitors*, which could determine how tourists decide their travel destinations, especially those who are seeking acceptance and ability to express their individual identities.
- (c) **Affordability:** This dimension indicates the *relative affordability of a destination* both across the years and between countries, proxied by real effective exchange rates as well as domestic inflation rates.

33. McKinsey & Co (2021), "Reimagining travel: Thailand tourism after the COVID-19 pandemic." Available at: <https://www.mckinsey.com/industries/travel-logistics-and-infrastructure/our-insights/reimagining-travel-thailand-tourism-after-the-covid-19-pandemic>

34. This figure is derived from Access Partnership's calculation. Inbound Tourism Receipts data is obtained from <https://www.nationthailand.com/thailand/tourism/40034800>, while data on Thailand's GDP is obtained from the Statistical Yearbook Thailand 2023.

- (d) **Availability of substitutes:** The proximity of other viable alternative destinations for LGBTQIA+ travellers could also influence the level of impact that marriage equality legislation could bring, as having more available travel destinations nearby could dilute such impacts.

Data for each factor mentioned above, alongside inbound international tourist arrivals and international tourist receipts, is obtained from the World Bank, International Monetary Fund (IMF), UN Tourism, and Transparency International.³⁵ In addition, to assess the country's openness and viability as an LGBTQIA+ destination, this study uses the Global Index on Legal Recognition of Homosexual Orientation (GILRHO) scores of each country as a proxy for the level of LGBTQIA+ inclusion that can be anticipated by travellers.³⁶ GILRHO measures the presence of eight categories of laws that protect the welfare of LGBTQIA+ individuals, including decriminalisation of sex between sexually diverse adults, anti-discrimination legislation, and couple recognition.

Step 2: Estimate the impact of marriage equality legislation on tourism

To estimate the impact of marriage equality legislation on tourism activity, this study uses a fixed-effects linear regression estimation, which enables an analysis of the average effect of the introduction of marriage equality legislation on the tourism industry across countries that have enacted marriage equality legislation between the years of 2000–2018.

The econometric specification is outlined below:

$$Y_{i,t} = \beta_1 X_{i,t} + \beta_2 X_{i,t+1} + \beta_3 X_{i,t+2} + \delta_{i,j,t} + \lambda_i + \epsilon_t$$

In this econometric specification, $Y_{i,t}$ represents our variable of interest (inbound international tourist arrivals and international tourist receipts) in country i at time period t . $X_{i,t}$ represents a dummy variable reflecting the legalisation status of sexual diversity unions in country i at time period t , while $X_{i,t+1}$, $X_{i,t+2}$ respectively indicate the legalisation status of sexual diversity unions 1 and 2 years later. β_1 thus represents the average effect of the marriage equality legislation on inbound international tourist arrivals and average tourist expenditure in the same year while β_2 and β_3 represents the average effect of marriage equality legislation 1 and 2 years later. To account for other confounding factors, we include control variables to account for other factors that may influence tourist arrivals and spending across countries and over time. λ_i controls for time-invariant factors specific to each country, such as a country's geographical landscape that may appeal to certain forms of tourism. We also include a vector of time and country-varying control variables, $\delta_{i,j,t}$ that have been outlined in Step 1. Exhaustively, the list of control variables used for each regression are listed below:

(a) Tourist Arrivals:

- Number of visa free agreements
- Corruption Perception Index
- Real GDP per capita
- Real effective exchange rate
- Inflation rate
- Average GILRHO score in countries within 5,000km of the destination market
- Population in countries within 5,000 km of the destination market

35. Sources include: United Nations World Tourism Organization (UN Tourism) (2024), UN Tourism Data Dashboard: Global and regional tourism performance. Available at: <https://www.unwto.org/tourism-data/global-and-regional-tourism-performance>; World Bank (2024), Tourism Watch. Available at: <https://www.worldbank.org/en/topic/competitiveness/brief/tourism-watch>

36. Waaldijk, K. Leiden University (2019), "Global Index on Legal Recognition of Homosexual Orientation (GILRHO) - provisional data 1966–2011." Available at: <https://scholarlypublications.universiteitleiden.nl/handle/1887/3214353>

- (b) **Average tourist expenditure:** The controls used in the econometric model for tourist receipts expenditure include those used in the model for tourist arrivals, with the addition of “Average tourist stay (in nights)”, a variable that has been a strong predictor of overall tourist receipts expenditures in according to literature.³⁷

Step 3: Estimate the impact of marriage equality on tourism in Thailand

The study uses the estimated relationship between the introduction of marriage equality legislation and tourism activity metrics from Step 2 to estimate the potential impact on tourism activity for Thailand, under a future scenario where the marriage equality legislation comes into force. As estimates from analysis in Step 2 point to the effects of marriage equality legislation being statistically significant for two years after it has been enacted, this involves estimating the change in total inbound international tourist arrivals and total international tourist receipts after two years, accounting for the lagged effects the legislation has on Thailand's overall international visitor arrivals and receipts.

Step 4: Estimate the spillover impacts across the broader Thai economy

The induced increase in total inbound international tourist arrivals due to the legal recognition of marriage equality would impact the tourism industry as well as generate spillover effects across the broader Thai economy. To estimate this total economic contribution, the study utilises Thailand's Input-Output Tables.³⁸ This table provides a detailed and standardised framework for capturing the direct, indirect, and induced effects of additional tourism spending across the economy, ensuring comparability over time. This approach provides a comprehensive estimate of the total economic contribution resulting from the legislative change.

This economic contribution is captured at three successive levels for each year:

- **Direct impact:** Contribution attributed to the additional production activities by businesses in the tourism industry due to the increased spending by tourists, post-marriage equality legislation.
- **Indirect impact:** Contribution attributed to the production activities of businesses along the tourism industry supply chain, e.g., construction, agriculture, and infrastructural sectors that support the delivery of goods and services in the tourism industry.
- **Induced impact:** Contribution from the consumption activity of workers who earned an income by participating in the production activities of the directly and indirectly involved businesses.

This approach estimates multipliers for every dollar of additional tourist spending—that is, how much additional Gross Output and Value Added are generated across the economy. The gross output result is then used to estimate the number of jobs supported by this economic activity based on the historical relationship between economy-wide Gross Output and FTE employment. The Value Added result represents the contribution to GDP.

37. Khemthong, S., Luenam, P., Frank, T. D., & Ingsrisawang, L. (2024), "Identifying the determinants of tourism receipts of Thailand and relevant determinant-determinant interactions." Available at: <https://journals.plos.org/plosone/article?id=10.1371/journal.pone.0308153>

38. Asian Development Bank (n.d.), "Thailand: Input-Output Economic Indicators". Available at: <https://data.adb.org/dataset/thailand-input-output-economic-indicators>

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