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POLICY BRIEF

Tourist Migration from Former Soviet States to Thailand:
Trends, Impacts, and Policy Responses

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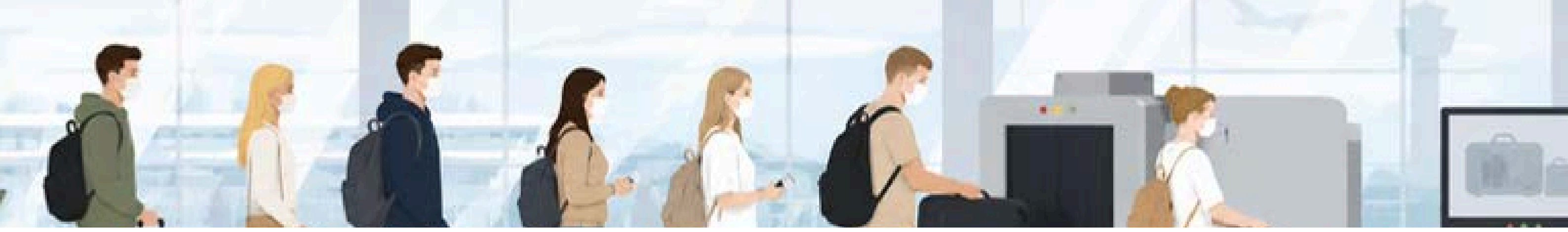
Executive Summary

Tourism from the former Soviet Union (FSU) to Thailand has evolved dramatically over the past decade. After steady growth in the 2010s, these visitor flows collapsed during COVID-19, then rebounded robustly by 2023. Russia remains the dominant source – contributing over 80% of arrivals – while Central Asian markets like Kazakhstan have surged and Ukraine's tourism has been curtailed by conflict.

FSU tourists are mostly young or middle-aged adults, many travelling as families, with a slight female majority. They concentrate heavily in beach destinations such as Phuket and Pattaya, bringing significant economic benefits – Russian tourists alone contributed nearly 0.8% of Thailand's GDP in 2024. However, global shocks and policy choices, including visas and flight links, have profoundly shaped these trends. This brief summarises key findings on FSU tourist migration patterns, socio-demographics, economic impacts, and geographic distribution, and offers evidence-based policy recommendations. Thailand can capitalise on this resilient market by maintaining open access and targeted promotions, while mitigating risks through diversification, sustainable planning, and strategic connectivity.

Context

Thailand treats tourism as a form of temporary migration, welcoming nearly 40 million international travellers in 2019. Visitors from former Soviet states – notably Russia, Kazakhstan, and Ukraine – became an important segment in the 2010s. These tourists bring economic gains and cultural exchange, but their mobility is influenced by global events and policies much like longer-term migrants.



Pre-Pandemic Growth:

From 2014 to 2019, arrivals from FSU countries grew overall, reaching about 1.7 million in 2019. Russians drove this trend, peaking at 1.48 million in 2019 (over 85% of the FSU total). Other countries contributed in smaller numbers, including Ukraine (81,000) and Kazakhstan (58,000). Rising incomes and improved flight connectivity enabled more Eurasian tourists to enjoy Thailand’s beaches and culture.

COVID-19 Disruption:

The pandemic brought an unprecedented collapse. With Thailand’s borders largely closed, FSU tourist arrivals plunged by over 95% in 2020–2021. Travel effectively froze as a form of migration. By 2022, partial reopening saw about 435,000 FSU visitors return, mostly Russians.

Post-Pandemic Recovery:

In 2023, Thailand’s tourism rebounded strongly. About 1.78 million visits from former Soviet states were recorded, essentially restoring pre-pandemic volume. Russia quickly regained its numbers, while Central Asia boomed and Ukraine lagged. Preliminary 2024 data indicate stabilisation with modest growth. This recovery underscores pent-up demand and Thailand’s continued appeal amid global travel rerouting.

Key Findings

Russia Dominates the Market:

Russian tourists remain by far the largest group. In 2019, Russians comprised over 85% of FSU arrivals (1.48 million out of 1.72 million). After the pandemic dip, 1.48 million Russians visited Thailand in 2023, nearly matching 2019 levels. Despite geopolitical turmoil, demand from Russia has proven resilient. However, Thailand’s heavy reliance on this single market poses a concentration risk.

Kazakhstan’s Rapid Growth:

Kazakhstan has emerged as a fast-growing source. Kazakh tourists increased from 57,000 in 2019 to 172,000 in 2023, making Kazakhstan the second-largest FSU market, surpassing Ukraine. This surge is attributed to rising incomes, new direct flights, and visa facilitation for Kazakh travelers. Uzbekistan and Kyrgyzstan have also shown growth, though from smaller bases.

Ukraine’s Suppressed Outbound Travel:
Ukraine had been a growing source market, but outbound tourism plunged due to the ongoing conflict. Only 36,000 Ukrainians visited Thailand in 2023, less than half of 2019 levels. Conflict, displacement, and travel limitations have curtailed leisure travel from Ukraine.

Concentration in Coastal Resorts:
FSU tourists overwhelmingly favour Thailand’s beach destinations. Over 86% stay in Phuket and Chonburi (Pattaya). Phuket alone accounted for 42% of all ex-Soviet tourists before COVID-19, while many route through Bangkok before travelling onward to coastal areas. Secondary destinations such as Krabi and Koh Samui receive some spillover, whereas northern and cultural provinces attract relatively few FSU tourists. This clustering brings economic benefits to Phuket and Pattaya but also creates risks of overdependence and overcrowding.

Young, Mid-Age, and Family-Oriented Demographics:
Tourists from former Soviet states are predominantly young and middle-aged adults, often travelling as couples or families. Over half are estimated to be aged 25–44, while relatively few are seniors due to the long travel distance. There is also a slight female majority among these tourists. Around 57% of Russian tourists were female in recent years, suggesting many women either lead family holidays or travel independently. This demographic profile implies strong interest in shopping, spas, family-oriented entertainment, and beach leisure.

Significant Economic Contribution:
Visitors from former Soviet states make a substantial contribution to Thailand’s economy through tourism spending. Russian tourists are especially impactful: in 2023, roughly 1.48 million Russians spent an estimated USD 3.64 billion on accommodation, food, transport, and activities, equivalent to around 0.7% of Thailand’s GDP. With nearly 1.75 million Russians in 2024, this contribution rose to approximately USD 4.4 billion. Kazakh tourists, while smaller in number, tend to spend more per person because of longer stays and higher daily expenditures, generating around USD 295 million in 2023. Ukrainian visitors contributed USD 71 million in 2023, reflecting their reduced numbers. Overall, FSU tourism remains an important pillar for sectors such as hotels, restaurants, and excursion services.

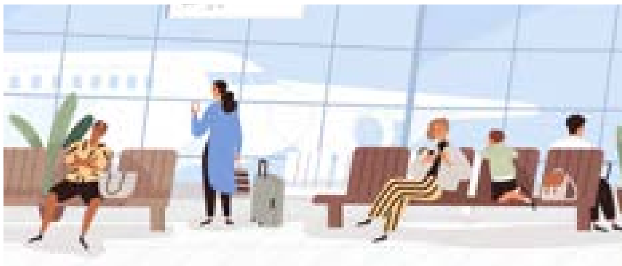
Policy Implications

Geopolitical Shocks and Shifting Flows

COVID-19 and the Russia-Ukraine conflict reshaped tourist flows to Thailand. Russia rapidly became a dominant recovery market, increasing Thailand's exposure to future geopolitical and economic shocks.

Visa Regimes and Entry Policies

Visa exemptions and simplified entry policies have supported growth from Russia and Central Asia, particularly Kazakhstan. Continued low-friction entry policies remain important for attracting emerging markets.



Flight Connectivity and Accessibility

Direct flights strongly influence tourist arrivals. Expanding routes and charter connections from Central Asia and secondary FSU cities could further increase demand.

Market Concentration and Sustainability

FSU tourists remain heavily concentrated in Phuket and Pattaya, creating risks of overdependence and overcrowding. Promoting destinations such as Chiang Mai, Krabi, and Koh Samui could distribute tourism benefits more evenly.

Payment Channels and Sanctions

Sanctions on Russia's banking system limited Russian travellers' use of Visa/MasterCard abroad. Thailand's acceptance of Russia's MIR payment network, alongside mobile payment and currency exchange services, helped reduce financial friction and sustain tourism flows despite external constraints.

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