

# PHUKET

## HOTEL & TOURISM MARKET UPDATE

MARCH 2026

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# PHUKET AIRPORT EXPANSION

## Preparation for Next Growth Phase

With upcoming airport development plans, Phuket is positioned to overcome long-standing capacity constraints and support future tourism growth.

### AIRPORT EXPANSION TIMELINE

2030

#### Phuket International Airport Phase II Expansion

Capacity: **18M** Passengers per year

**44%** Capacity expansion

**45** Aircraft Stands

60% Remote Gate



**25** Flights per Hour

**1** Runway (Extended)

Status: Design stage; completion by 2030.

2032

#### Andaman International Airport

Capacity: **23M** Passengers per year

**44** Aircraft Stands

**2** Runways

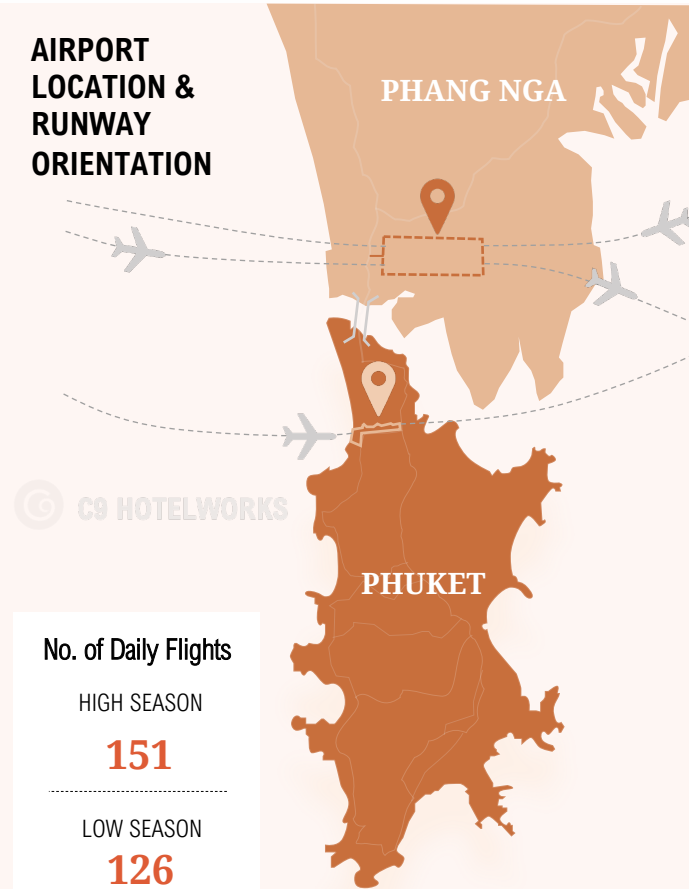


**44** Flights per Hour

Status: Feasibility and cost study underway.

Source: C9 Hotelworks Market Research & AOT

### AIRPORT LOCATION & RUNWAY ORIENTATION



#### No. of Daily Flights

HIGH SEASON

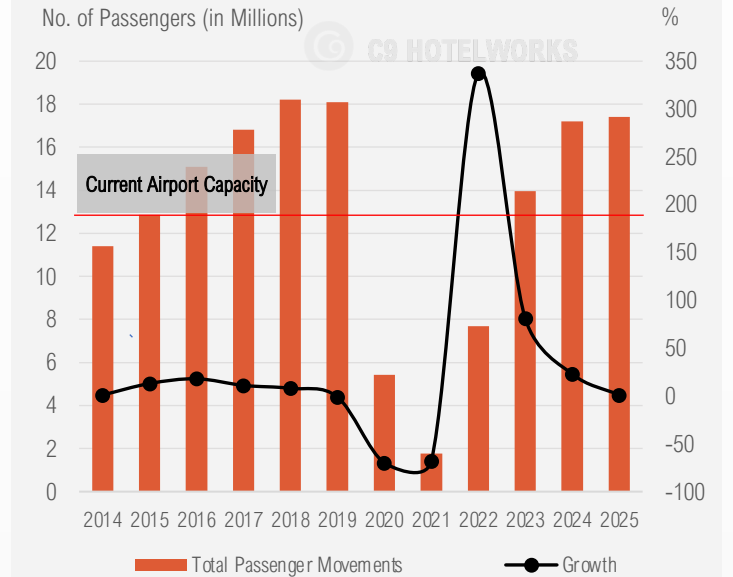
**151**

LOW SEASON

**126**

Source: C9 Hotelworks Market Research & AOT

### PHUKET INTERNATIONAL AIRPORT PASSENGER MOVEMENTS



#### KEY INSIGHT

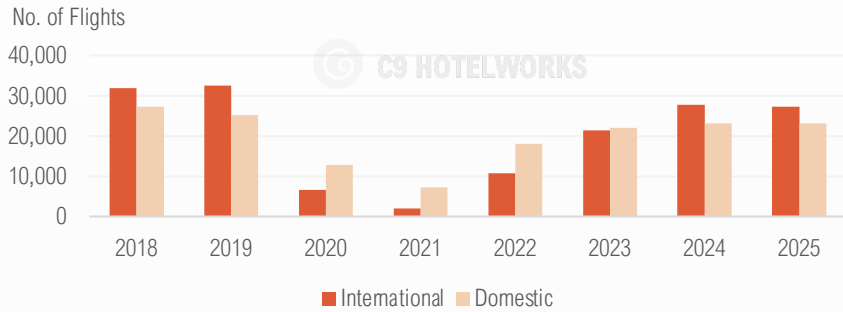
Phuket Airport's designed capacity of 12.5 million passengers per year was exceeded in 2015

Phuket Airport handled approximately 17.4 million passenger movements in 2025, operating at 39% above its designed capacity.

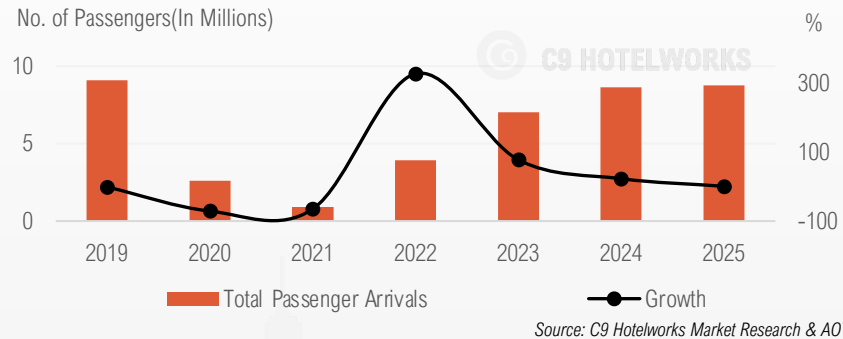
# TOURISM OVERVIEW

Despite a decline in Chinese arrivals, Phuket welcomed 8.8 million passenger arrivals in 2025 driven by growth in diversified source markets. Looking ahead, Chinese tourism is expected to gradually recover alongside continued growth from emerging markets such as India, South Korea, and Israel.

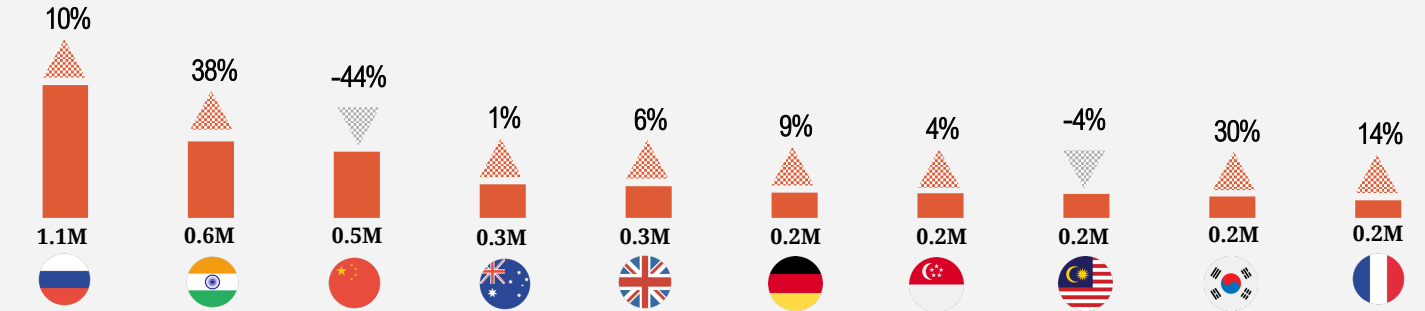
## PHUKET INTERNATIONAL AIRPORT – FLIGHT ARRIVALS



## PHUKET INTERNATIONAL AIRPORT – PASSENGER ARRIVALS



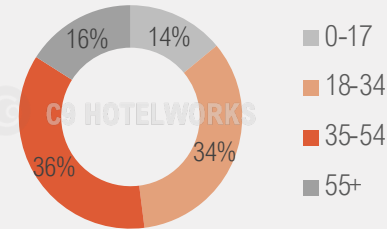
## TOP 10 INTERNATIONAL SOURCE MARKETS



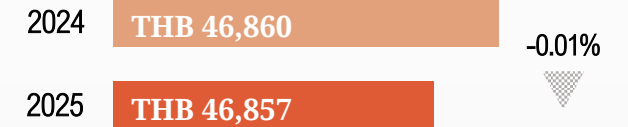
- Russia remained the largest source market (1.1M visitors).
- India (+38%) and South Korea (+30%) recorded the highest growth.
- Chinese arrivals declined 44% YoY, falling from second to third place.

Note: No. of Passenger Arrivals (% Growth from 2024)  
Source: C9 Hotelworks Market Research & Phuket Immigration Office

## INTERNATIONAL ARRIVALS BY AGE GROUP



## AVERAGE EXPENDITURE OF INTERNATIONAL VISITORS



### KEY INSIGHT

Phuket International Airport handled approximately 50,431 flight arrivals in 2025, with international flights accounting for 54% of total aircraft movements, despite a slight 2% decline from 2024.

Ongoing geopolitical tensions have positioned Thailand as a safe and neutral destination, while also strengthening its role as a regional transit hub connecting Australia and New Zealand with Europe and other global markets. This shift is expected to drive additional passenger arrivals and increase transit passenger traffic through Thailand.

# HOTEL MARKET PERFORMANCE

ADR rose 5% despite a 6% decline in occupancy. As additional hotel supply enters the market and regional competition intensifies, ADR growth is expected to moderate toward more sustainable levels.

## MARKET CHARACTERISTICS

### Luxury Markets

**Surin** commands the highest ADR and lowest occupancy rate in Phuket, with 21% growth in ADR but 9% drop in occupancy. **Mai Khao** ranks second in ADR, both driven by luxury resorts and its secluded beachfront setting.

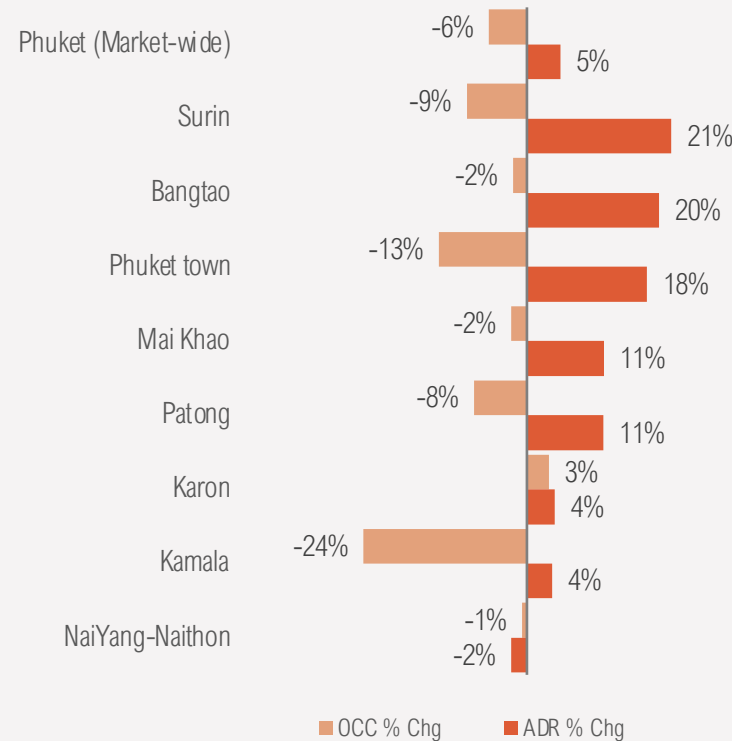
### Integrated & Upscale Resorts

**Bangtao** recorded a 2% decline in occupancy rate while achieving a 20% increase in ADR. Meanwhile, **Kamala**, known for its upscale family-oriented resorts, continues to command 40% higher ADR than Bangtao despite slower growth and 24% decrease in occupancy rate.

### Mass & Tourism Clusters

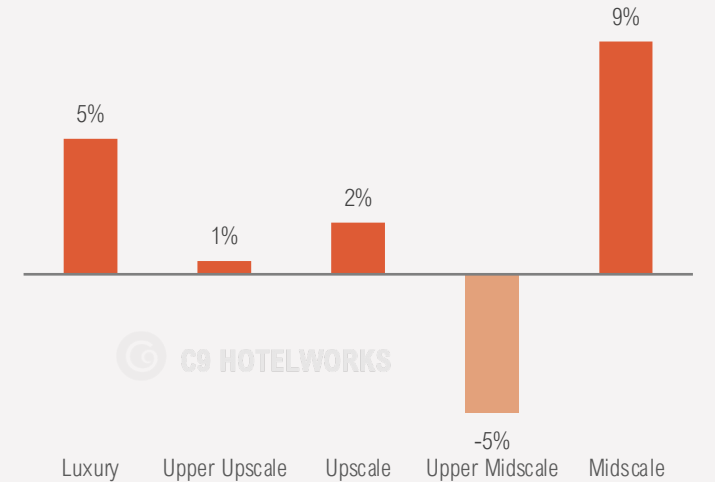
**Patong**, a tourism hotspot for budget travelers, records the highest occupancy in Phuket despite an 8% decline this year. **Karon** and **Phuket Old Town** cater to similar demand segments with economy and midscale accommodations.

## ADR AND OCCUPANCY CHANGE BY LOCATION (2024-2025)



Source: C9 Hotelworks Market Research and STR

## ADR CHANGE BY CHAIN SCALE (2024-2025)



Source: C9 Hotelworks Market Research and STR

### KEY INSIGHT

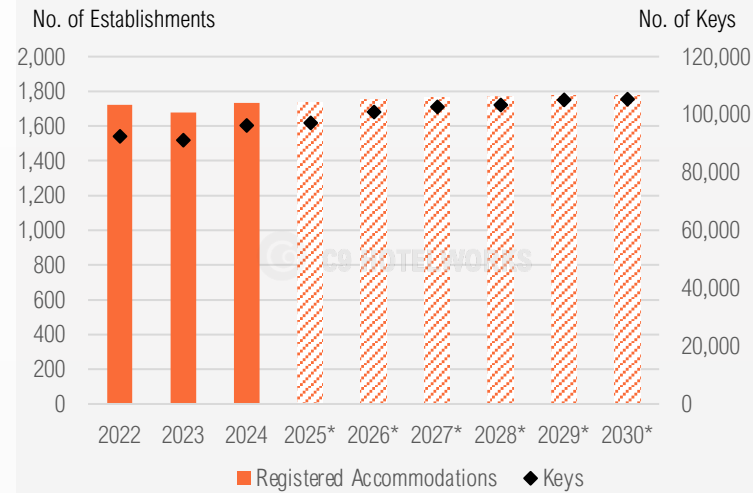
Midscale segment recorded the highest ADR growth at 9%

ADR growth in Phuket was driven by the midscale segment, followed by the luxury segment. Upper-midscale hotels were the only segment to record a 5% decline, reflecting shifts in demand patterns across source markets.

# HOTEL PIPELINE

Phuket's hotel pipeline from 2026 to 2030 includes 41 projects, with total market supply expected to surpass 100,000 keys by 2026.

## HOTEL SUPPLY



Note: \*Forecasted Supply  
Source: C9 Hotelworks Market Research & MOT

### KEY INSIGHT

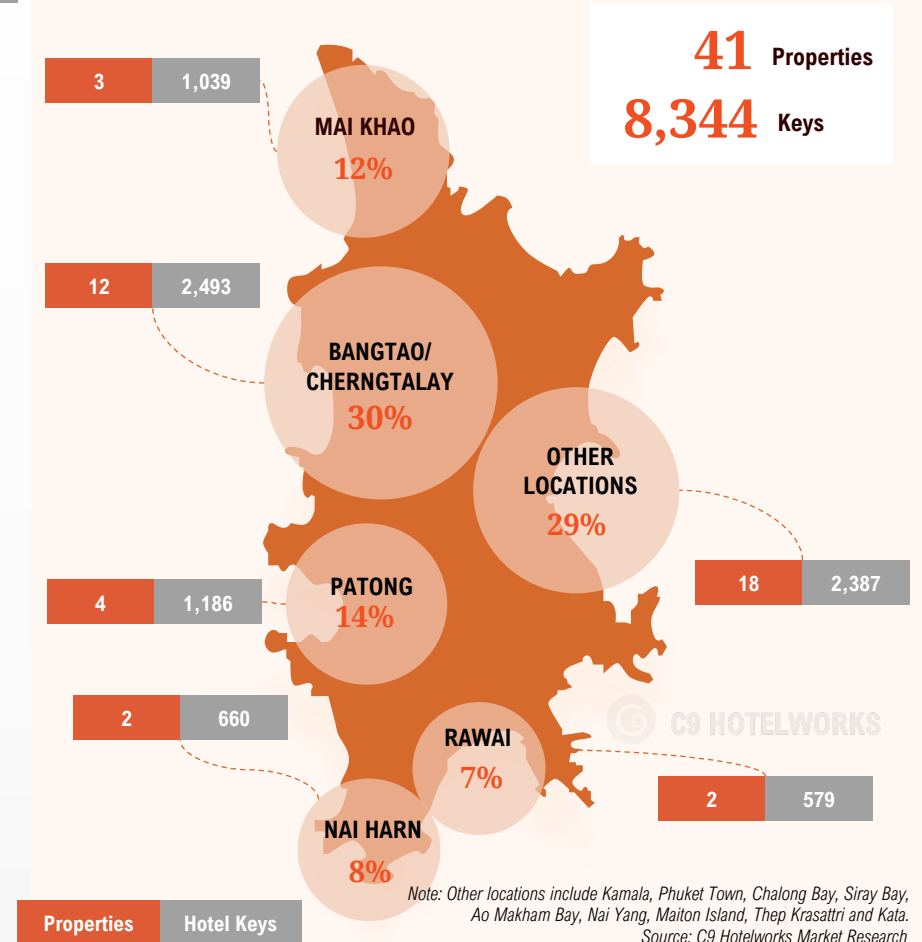
The hotel supply is dominated by upper upscale segment, accounting for 36%

In 2026, approximately 3,872 keys are scheduled to open across 18 developments. Bangtao/Cherngtalay accounts for the largest share of the 2026–2030 pipeline (30%), with most projects positioned in the upper-upscale segment.

## PIPELINE BY YEAR (2026 - 2030)

Hotels	Keys	Opening Year
Makham Bay Marina Hotel	70	2026
Radisson Blu Resort, Layan Phuket	312	2026
Ibis Styles Phuket Bangtao	140	2026
Wyndham Grand Phuket Surin Beach	425	2026
Twinpalms Treehouses Phuket	25	2026
Radisson Resort Layan Phuket	500	2026
Peri Hotel Bangtao	TBA	2026
Staybridge Suites Phuket Bangtao	344	2026
JW Marriott Phuket Resort & Spa Chalong Bay	189	2026
MontAzure Resort Phuket - MGallery Collection	166	2026
Navera Phuket - MGallery Collection	19	2026
Riu Palace Phuket	500	2026
The Forest by YO02 Hotel	432	2026
One Origin Phuket Chaofah (Formerly Beehive Boutique Hotel Phuket)	249	2026
Moxy Phuket Chaofa	TBA	2026
Chatrium Resort Rawai	304	2026
Health Resort by Clinique La Prairie at Tri Vananda	TBA	2026
Movenpick Phuket Kamala	197	2026
Tiva Ao Makham Resort Phuket, Centara Boutique Collection	68	2027
The Ozone Signature, A Registry Collection	118	2027
Ramada Encore by Wyndham Nebu Bangtao	89	2027
The StandardX	215	2027
voco Phuket Bangtao	175	2027
Maitria Kata	29	2027
Chatrium Grand Mai Khao	320	2027
Hyatt Regency Phuket, Mai Khao Beach	219	2027
W Phuket - Nai Harn Beach	60	2027
Ascott Abov Patong Phuket Resort	254	2027
Hampton by Hilton Phuket Town	112	2027
Mercure Phuket Bangtao	150	2028
Phuket Nai Yang Beach, Vignette Collection	115	2028
EQ Phuket	180	2028
The Ritz-Carlton Phuket (Former Westin Siray Bay)	182	2028
Sheraton Nai Harn Beach	600	2029
Hyatt Centric Patong Phuket	245	2029
Hyatt Place Phuket Patong	255	2029
The Rawai Phuket, LXR Hotels & Resorts (Former Evason Rawai Phuket)	275	2029
TRYP by Wyndham Phuket Ta-iad	566	2029
Hotel Indigo Phuket Nai Yang Beach	170	2030
Ibis Styles Phuket Kamala Zenkiri	TBA	TBA
Alila Villas Maiton Island	75	TBA
<b>Total</b>	<b>8,344</b>	

## PIPELINE BY LOCATION



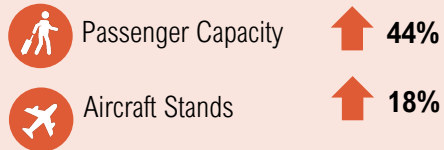
# FUTURE OUTLOOK

Phuket is entering a next phase of tourism growth supported by infrastructure expansion, urban development policies, and regulation enforcement.

## INFRASTRUCTURE EXPANSION PLANS

2030

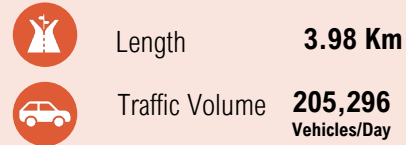
Phuket International Airport  
Phase II Expansion



Note: Compared with the Phuket International Airport Phase I  
Source: C9 Hotelworks Market Research & AOT

2030

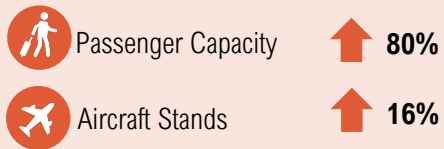
Kathu – Patong Tunnel  
(Phase I)



Source: C9 Hotelworks Market Research & EXAT

2032

Andaman International Airport



Note: Compared with the Phuket International Airport Phase I  
Source: C9 Hotelworks Market Research & AOT

2032

Phuket Light Rail Transit



Source: C9 Hotelworks Market Research & MRTA

## POLICY & REGULATORY ENFORCEMENT

### UNLICENSED ACCOMMODATIONS

Government tightening enforcement on unregistered short-term rentals

- Many short-term rentals operate outside the Hotel Act B.E. 2547, which requires a license for stays under 30 days
- Unlike registered hotels, unlicensed rentals often bypass fire safety compliance, insurance requirements, and TM.30 security reporting
- Expected 2026 enforcement measures aim to require OTA license verification to curb tax leakage and improve safety compliance

### REMOVAL OF THE 80-METER HEIGHT RESTRICTIONS

Higher building limits enabling vertical development

- Zone 6 height limit increased to 140 meters above sea level following the removal of the previous 80-meter restriction
- Policy change supports higher-density hillside developments across key west-coast areas
- Environmental Impact Assessments (EIA) require 70% green space retention and landslide risk mitigation



### DRAFT PHUKET TOWN PLAN

Zoning reforms encouraging high-density mixed-use development

- Bangtao designated as a high-density “Red Zone” supporting larger urban clusters
- Introduction of Floor Area Ratio (FAR) and Building Coverage Ratio (BCR) controls to guide development design

*Note: The Phuket Town Plan is currently in draft stage and subject to revision*

# ABOUT

## C9 HOTELWORKS

Founded in 2003, C9 Hotelworks is a hospitality consulting group specializing in hotels, branded residences, real estate, and mixed-use developments. Headquartered in Thailand, the firm is recognized for its expertise in market research, feasibility studies, and development strategy for hospitality real estate projects across the Asia Pacific, Indian Ocean, and African regions.

C9 Hotelworks has delivered a diverse portfolio of over 1,000 projects in 110 locations, supporting a wide range of clients and partners—from global hotel brands to leading regional and independent developers.



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