C9 HOTELWORKS

Greater Pattaya Hotel & Tourism and Hotel Residences

Market Review 2026

Pattaya is the EEC's Primary Tourism Revenue Contributor

THB327 billion

PATTAYA'S TOURISM REVENUE

86%

OF EEC TOURISM REVENUE

Pattaya · 2025 · 97% of Chonburi

TOURISM REVENUE, 2025

PROVINCE	THB BILLION	SHARE
Chonburi	338	89.2%
of which Pattaya	327	86.2%
Rayong	31	8.3%
Chachoengsao	9	2.5%
EEC total	379	100%

EEC PROVINCES



Note: Tourism revenue refers to full-year 2025. EEC comprises Chachoengsao, Chonburi, and Rayong
Source: C9 Hotelworks Market Research & MOTS

Pattaya's Registered Accommodation Guest Arrivals Were Broadly Stable at 18.3M in 2025

77.8%

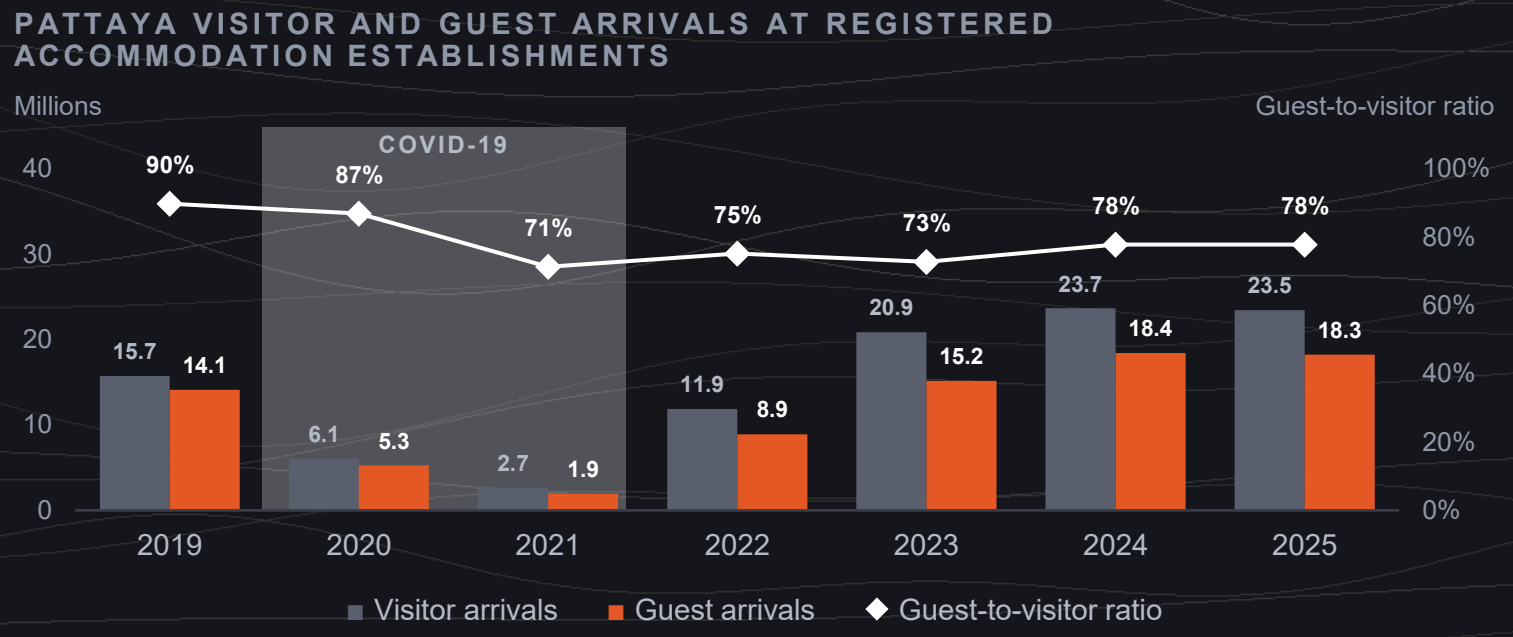
GUEST-TO-VISITOR RATIO

Pattaya · 2025 · 77.8% in 2024

23.5M

VISITOR ARRIVALS

Pattaya · 2025 · ▼ 0.9% Y-O-Y



Note: Visitor arrivals include overnight and same-day visitors. Guest arrivals refer to check-ins at registered accommodation establishments. The guest-to-visitor ratio is calculated as registered accommodation guest arrivals divided by total visitor arrivals. Pattaya is reported as a sub-area of Chonburi by MOTS.
Source: C9 Hotelworks Market Research & MOTS

India Becomes Pattaya's Largest International Source Market in 2025

TOP FIVE INTERNATIONAL SOURCE MARKETS · GUEST ARRIVALS AT REGISTERED ACCOMMODATION ESTABLISHMENTS, 2025

MARKET		GUEST ARRIVALS	SHARE
India	▲ 10.9% Y-O-Y	1,812,585	18.6%
China	▼ 34.9% Y-O-Y	1,682,838	17.3%
Russia	▼ 7.3% Y-O-Y	1,342,611	13.8%
South Korea	▲ 6.7% Y-O-Y	1,309,155	13.5%
United Kingdom	▲ 4.0% Y-O-Y	514,775	5.3%
Total, top five		6,661,964	68.5%

Note: Guest arrivals refer to check-ins at registered accommodation establishments.
Market shares are calculated against total international guest arrivals (9,719,148). YoY changes compare 2025 with 2024.
Source: C9 Hotelworks Market Research & MOTS

International Visitors Generated 69% of Pattaya's Tourism Revenue in 2025

69%

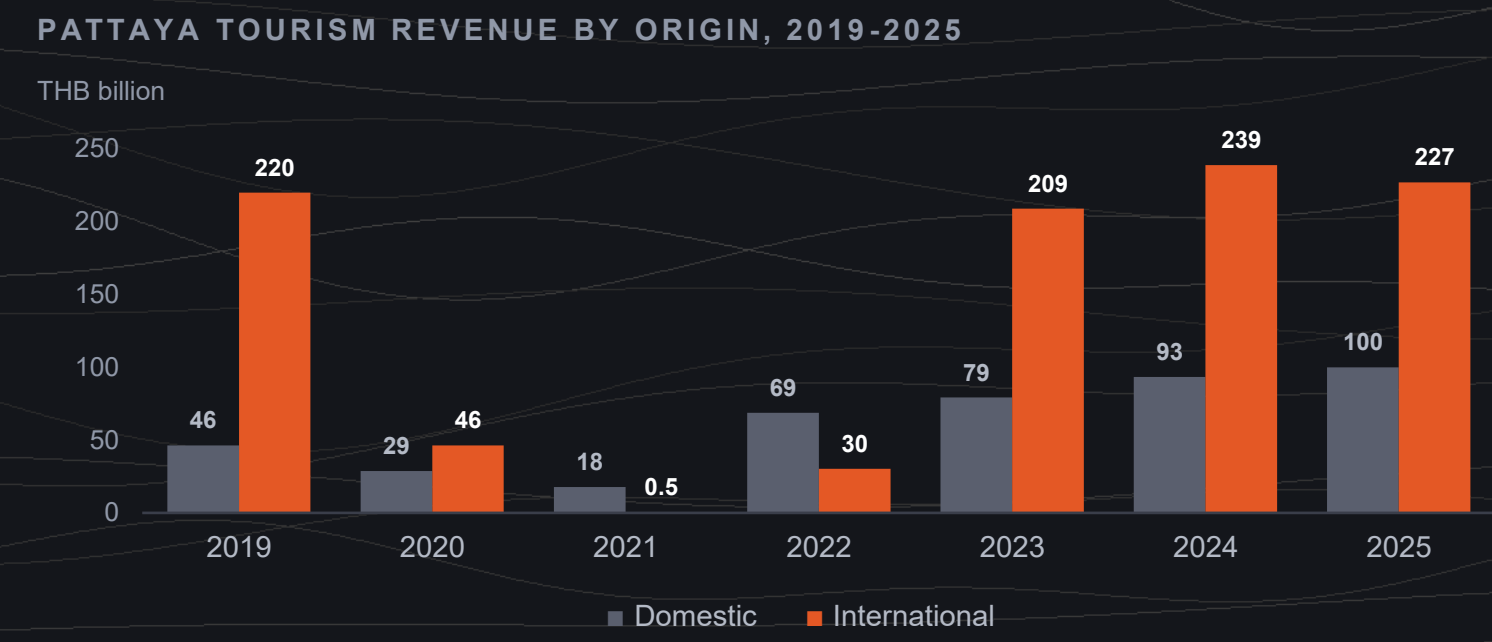
OF TOURISM REVENUE IS FROM INTERNATIONAL VISITORS

Pattaya · 2025 · 72% in 2024

THB327 billion

TOURISM REVENUE

Pattaya · 2025 · ▼ 1.6% Y-O-Y



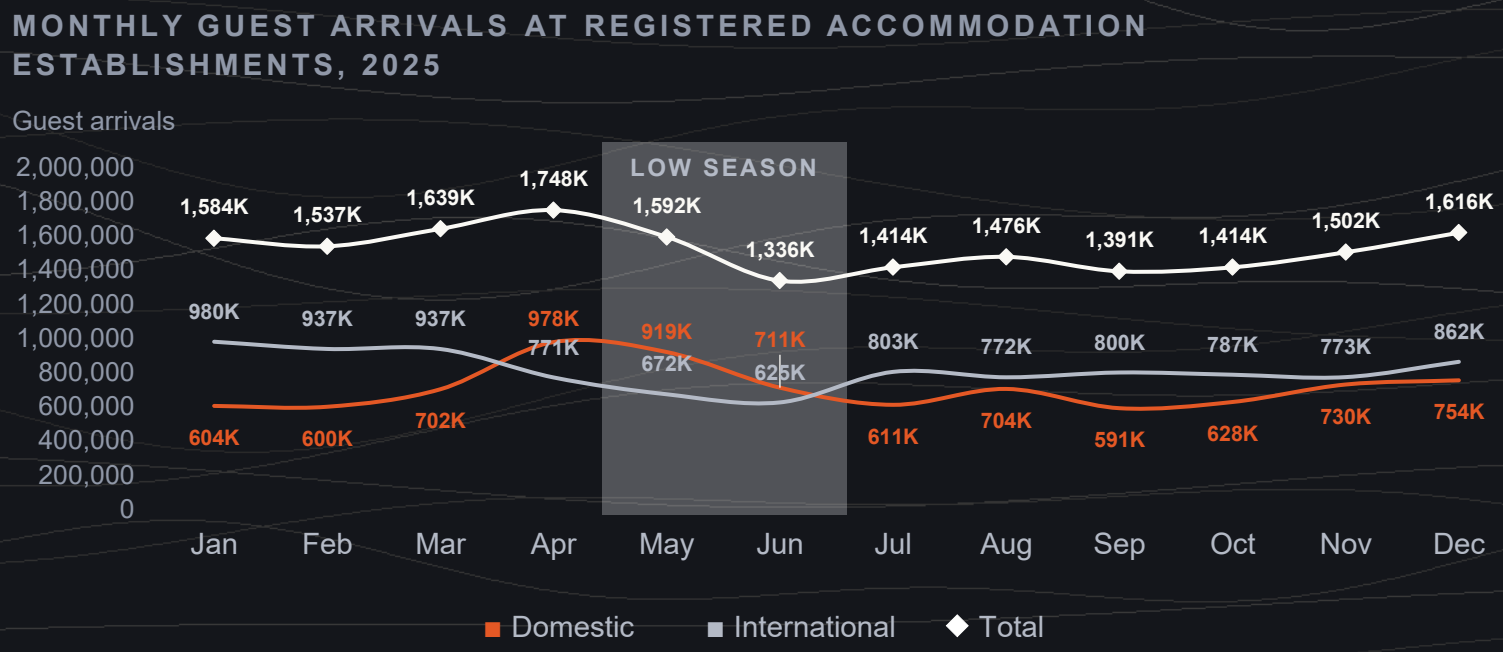
Note: Tourism revenue refers to visitor spending in Pattaya (MOTS sub-area of Chonburi), reported in nominal THB. Figures include both overnight and same-day visitors, classified as domestic or international by nationality.
Source: C9 Hotelworks Market Research & MOTS

Pattaya Maintains Year-Round Guest Arrivals, with Minimal Monthly Seasonality

56%

DOMESTIC SHARE OF GUEST ARRIVALS IN MAY-JUN

2025 · vs 42% in the Dec-Mar high season



Note: Data refer to full-year 2025. Guest arrivals represent check-ins at registered accommodation establishments, not unique visitors. The international guest arrival low season is defined as May–June (below 700,000 monthly arrivals), while the high season covers December–March (above 850,000 monthly arrivals).
Source: C9 Hotelworks Market Research & MOTS

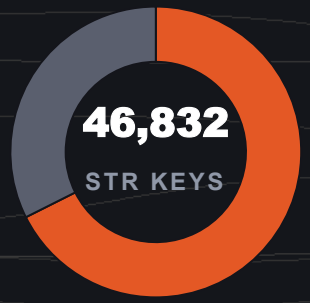
Two-Thirds of Hotel Keys are Independent

68%

OF HOTEL KEYS TRACKED BY STR ARE INDEPENDENT

31,656 of 46,832 keys · Oct 2026

STR KEYS BY AFFILIATION, OCT 2026



- **Independent**
  68% · 31,656 keys
- **Branded**
  32% · 15,176 keys

STR HOTEL KEYS BY ZONE, OCT 2026



Four zones hold 90% of hotel keys

1. **North Pattaya**
   14,692 keys · 31%
2. **Central Pattaya**
   9,909 keys · 21%
3. **Na Jomtien / Bang Saray**
   9,340 keys · 20%
4. **South Pattaya & Pratumnak**
   8,210 keys · 18%
5. **Jomtien**
   3,456 keys · 7%
6. **East Pattaya & other**
   1,225 keys · 3%

Note: Data as of October 2026. The STR/CoStar sample comprises 238 hotels (46,832 keys). Branded hotels include chain-affiliated properties (11,776 keys) and budget network brands under Prism (OYO, Sunday, Palette and Townhouse; 3,400 keys).
Source: C9 Hotelworks Market Research & STR

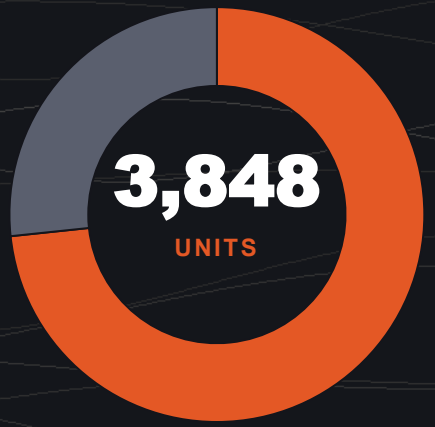
Branded Residences Account for 73% of Hotel Residences Pipeline Units

5

HOTEL RESIDENCES PROJECTS ON PRIMARY MARKET

3,848 units in total · Oct 2026

UNIT INVENTORY BY AFFILIATION



- **Branded** 73% · 2,822 units
- **Non-branded** 27% · 1,026 units

Note: Data as of October 2026. Hotel residences refer to condominium developments affiliated with a hotel brand or offering a hotel-style rental program. The primary market includes developer-offered units, including off-plan projects, and excludes completed projects with no confirmed developer inventory. Unit counts represent total project inventory, including sold units
Source: C9 Hotelworks Market Research

Only 545 of 3,195 Pipeline Hotel Keys are Scheduled Before 2031

HOTELS · 11 PROJECTS · 3,195 KEYS · OCT 2026

PROJECT	LOCATION	KEYS	YEAR	CLASS
MAXX Huay Yai Villa	Huay Yai	**108**	2026	Midscale
Hilton Garden Inn Pattaya City	North Pattaya	**300**	2027	Upscale
NOOE Bangsaray	Bang Saray	**100**	2027	Upscale
U Khao Chi Chan (Lakeside Phase)	Bang Saray	**161***	2027	Upper Upscale
Paradisus Jomtien Resort	Jomtien	**698**	2031	Luxury
Ritz-Carlton Pattaya (Aquatique)	Central Pattaya	**224**	2031 onwards	Luxury
Aquatique Pattaya, Autograph Collection	Central Pattaya	**306**	2031 onwards	Upper Upscale
JW Marriott Pattaya (Aquatique)	Central Pattaya	**398**	2031 onwards	Luxury
Moxy Pattaya The Aquatique	Central Pattaya	**400**	2033	Upper Midscale
DreamWorks Animation (Aquatique)	Central Pattaya	**300**	2033	Upscale
Best Western Jomtien Beach Pattaya	Jomtien	**200**	TBA	Midscale
Total		**3,195**		

HOTEL RESIDENCES · 5 PROJECTS · 3,848 UNITS

PROJECT	LOCATION	UNITS	YEAR	TYPE
Nebu Resort Residences	Na Jomtien	**950**	2027	Branded
Wyndham Grand Residences	North Pattaya	**385**	2027	Branded
Skypark Lucean Jomtien	Jomtien	**1,487**	2028	Branded
Zenith Pattaya II	Pratumnak	**900**	2028	Non-branded
Celine Wongamat	Wongamat	**126**	2029	Non-branded
Total		**3,848**		

HOTEL PIPELINE OUTLOOK

545 **Keys scheduled before 2031 (17.1% of pipeline)**

1.2% **Near-term pipeline as a share of existing STR keys**

Note: Data as of October 2026. The active hotel pipeline includes signed or announced projects with no identified cancellations; an additional 1,526 keys tracked by STR remain unconfirmed and are excluded. Opening years are based on developer and operator announcements; projects categorized as 2031 onwards have no confirmed opening date. U Khao Chi Chan is scheduled to commence operations in 2027 with 37 units (24 rooms, 4 villas and 9 tents). The remaining units are planned for phased development, with opening dates yet to be confirmed. Hotel residences pipeline figures are indicative, based on developer sources.

Source: C9 Hotelworks Market Research & STR

Pattaya Remains Road-Reliant, with U-Tapao Offering Longer-Term International Connectivity Potential

82%

OF VISITOR ARRIVALS BY PRIVATE VEHICLE

19.2M of 23.5M · Pattaya · 2025

Approx. 2 hours

BY ROAD FROM BANGKOK

PLANNED INFRASTRUCTURE DEVELOPMENTS		POTENTIAL IMPACT
2028	**U-Tapao Airport** Second runway (3,505 m) and taxiways	Supports higher flight frequencies and future route expansion
2031	**U-Tapao Airport** New terminal, Phase 1 (3-4M passengers a year)	Increases capacity to accommodate future passenger growth
Under Review	**High-speed rail** Planned airport rail link with Pattaya station	Potentially reduces Bangkok–Pattaya travel time to ~45 minutes

ACCESS CORRIDOR



Note: Mode of arrival: full-year 2025; MOTS survey allocation of all visitor arrivals (overnight and day-trippers). Access projects: official completion targets and stated capacities as of Oct 2026. Map: Motorway 7 south of Si Racha and the high-speed rail line are indicative

Source: C9 Hotelworks Market Research, MOTS, AOT, Department of Highways & EEC Office

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.

Our Core Capabilities in Hospitality & Real Estate Advisory

(Hotels, Resorts, Branded Residences, Mixed-Use, Wellness)

- **Feasibility Studies & Market Analysis**
- **Land Use Planning & Design Briefs**
- **Concept Positioning & Development Strategy**
- **Hospitality Real Estate Financial & Investment Analysis**
- **Operator Selection**
- **Due Diligence & Valuation**

C9 HOTELWORKS

Hospitality Real Estate Advisory

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