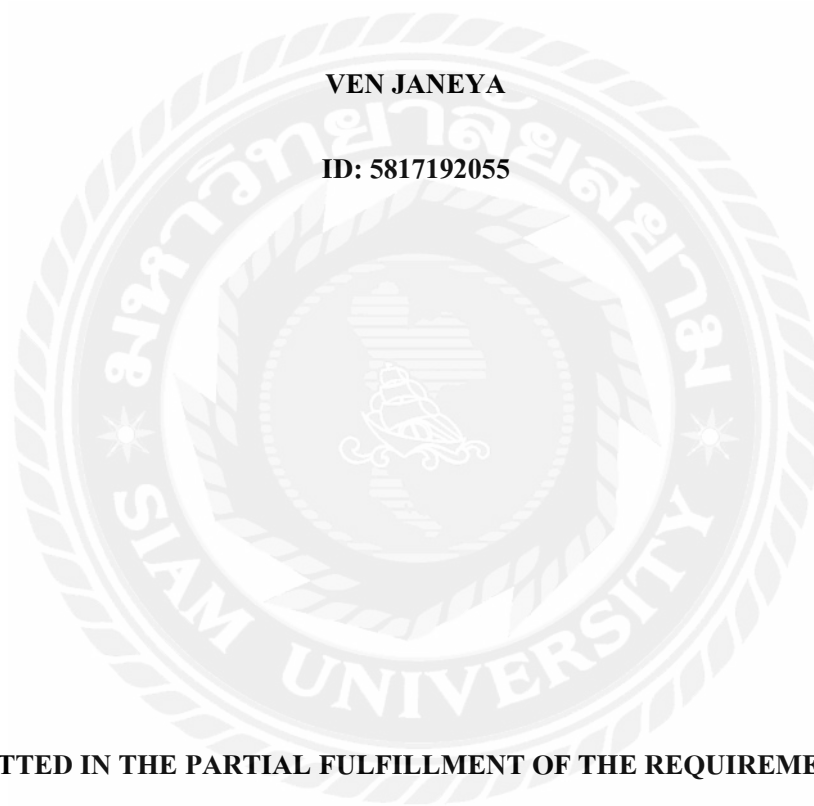




**A STUDY OF DEVELOPMENT OF TOURISM SECTOR IN YANGON, MYANMAR**

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**SUBMITTED IN THE PARTIAL FULFILLMENT OF THE REQUIREMENT FOR**

**THE DEGREE OF MASTERS IN BUSINESS ADMINISTRATION**

**INTERNATIONAL PROGRAM, GRADUATE SCHOOL OF BUSINESS,**

**SIAM UNIVERSITY, BANGKOK, THAILAND**

**2017**



**Title of Research:** A STUDY OF DEVELOPMENT OF TOURISM SECTOR IN  
YANGON, MYANMAR

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**Major:** Hotel and Tourism Management

**Degree:** Master in Business Administration (International Program)

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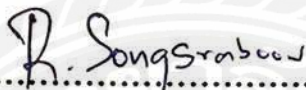
## ABSTRACT

**Research Title:** A study of Development of Tourism Sector in Yangon,  
Myanmar

**Researcher:** Ven Janeya

**Degree:** Master of Business Administration (International Program)

**Major:** Hotel and Tourism Management

**Advisor:**   
.....

(Dr. Rungroje Songsraboon)

Dec / 23 / 2017  
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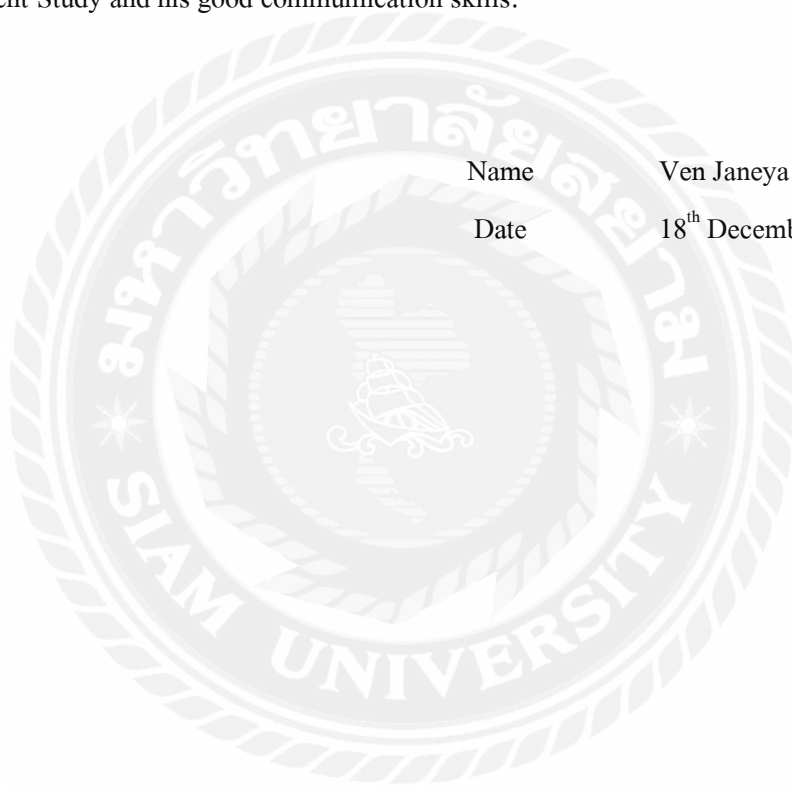
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The purpose of this paper was to indicate and discuss on analysis of tourism sector developments in Yangon City. The report found that current Yangon tourism sector developments had been seen prospect of improving supported by Yangon hoteliers, tour agencies, event planners, MICE and local government. A total of 115 local investments worth over US\$ 686 million (934 billion kyat) were made in the hotel and tourism sector as of the end of November this year, according to the Directorate of Investment and Companies Administration (DICA). Local investors have made 774 investments worth nearly \$2.5 billion in the production sector, 64 investments worth nearly \$2.16 billion in the transportation sector, 67 investments worth nearly \$1.2 billion in the real estate development sector and 68 investments worth over \$491 million in the construction sector. Local investment in the hotel and

### ACKNOWLEDGEMENT

In this section, I would like to express my gratitude to Dr. Rungroje Songsraboorn, advisor and Assoc. Prof. Dr. Jomphong Mongkolvanich, Dean, Graduate School of Business, Siam University, Bangkok, Thailand for their thoughtful and caring supervision by means of his educational excellence. I am most grateful to them especially for their deep understanding of the Independent Study and his good communication skills.

Name Ven Janeya  
Date 18<sup>th</sup> December, 2017



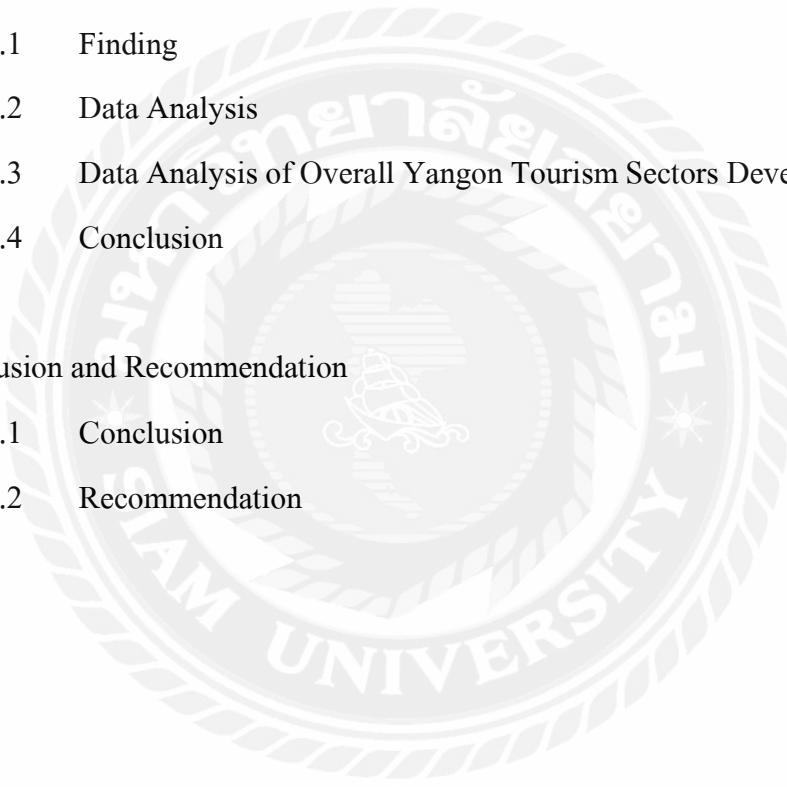
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## CHAPTER 1

### INTRODUCTION

#### 1.1 Introduction

Myanmar (formerly Burma) is a Southeast Asian nation of more than 100 ethnic groups. Bordering Thailand, Laos, India and China. Yangon (formerly Rangoon), the country's largest city, is home to the main gate of foreign visitors, with its busy markets, numerous parks and lakes, and the towering, gilded Shwedagon Pagoda, which contains Buddhist relics and dates to the 6<sup>th</sup> century. Yangon, the commercial city, is the main gateway to Myanmar. Yangon was founded by King Alaungpaya in 1775 on the site of a small settlement called Dagon. The name Yangon means "End of Strife" which was Anglicized to Rangoon after the British annexed Myanmar in 1885. The present day Yangon covers about 350 sq.km with population of over 7 million.

#### 1.2 Background of Study

Yangon, former capital city, is Myanmar's largest city with over seven million populations, and is the most business hub place, although Nay Pyi Taw was relocated the capital in 2006 by former military government. Compared to other major cities in Southeast Asia, Yangon's tourism sectors may still remain the largest number of colonial buildings in the region, receiving regular visitors.

Therefore, Yangon is home to arrival of most of the tourists by flight. Although Myanmar owns great tourist potential and attractions in many fields, much of the industry remains to be developed. Though visitors to Myanmar is small compared to her neighbors, after the junta transferred power to the civilian government, the tourism sector saw an increase in tourism arrivals and in 2012, tourist arrivals surpassed the one million mark for the first time. In 2013, the Tourism Master Plan was created, targeting 7.5 million arrivals by 2020.

This research will explore factors of Yangon Tourism Sectors Development, with the satisfaction level of visitors visiting Yangon. The factors range from Yangon's tourism sectors development, arrivals of Yangon International Airport and most tourist attractions in Yangon. Moreover, visitors' comments on Yangon's tourism sectors will be resulted as how much they satisfied and dissatisfied upon them, and the recommendations given by visitors will be a tool for the future tourism sectors development of Yangon, Myanmar. The aim of this research is to observe to determine how much visitors satisfied with Yangon tourism sectors and what tourism sectors are need to upgrade for 2020 government's master plan.

**Figure: 1** Map of Union of Myanmar



(Source: Wikipedia map of Yangon, Myanmar, 2017)

Myanmar's tourism has been developed mainly by the government, but many private enterprises do exist, bringing a wide range of tourists.

Military government has encouraged Myanmar's tourism sectors since 1992. As of 2010 record, 791,505 foreign visitors visited Myanmar via main entry port of Yangon International Airport. More than one million of foreign visitors visited Myanmar as the figure is expected to rise about 1.5 million in 2013. The number of foreign visitors' arrivals reached more than 2.04 million, by both of overland and airs arrivals.

In 2010, 791,505 foreign tourists visited Myanmar, with 295,174 foreign tourists entering the country via Yangon International Airport.

Tourists arrivals in Myanmar increased to 335646 in May from 333434 in April of 2016. Tourists Arrivals in Myanmar averaged 270534.36 from 2012 until 2016. Reaching an all-time high of 450541 in December of 2015 and a record low of 125085 in December of 201

**Figure: 2**      **Tourist Arrivals Chart**



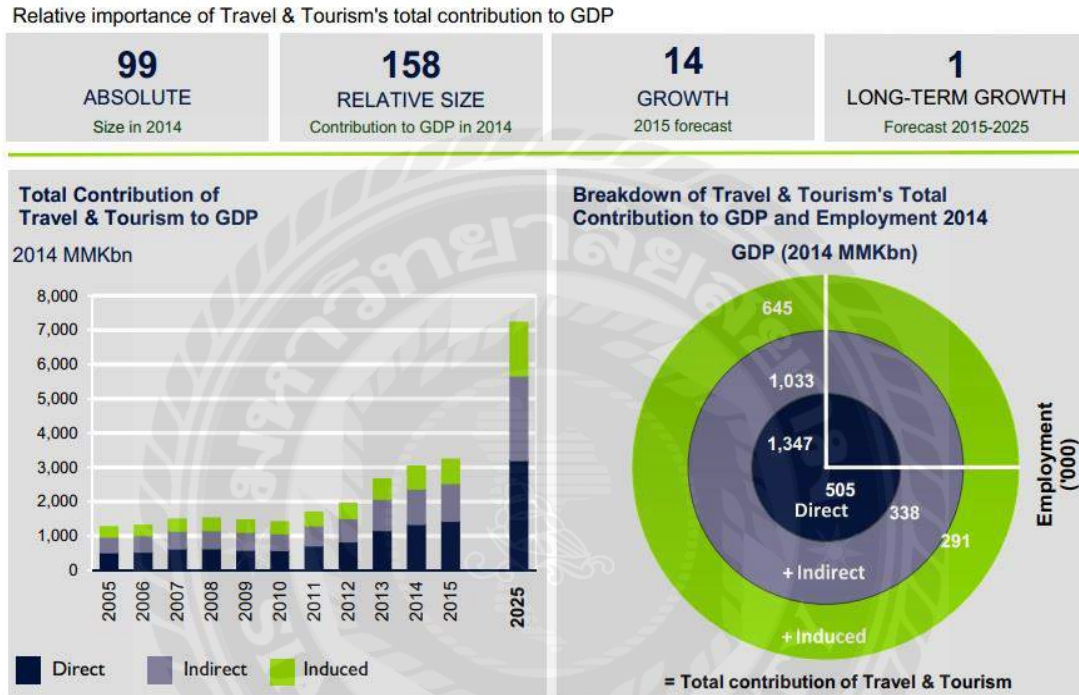
(Source: Ministry of Hotels and Tourism, Myanmar, 2017)

### 1.3 Foreign Tourist Arrivals

Myanmar has recently seen an unprecedented growth in international tourist arrivals. In 2012, visitor numbers increase the one million mark and arrivals reached three million in 2014. However, according to the World Tourism Organization and the Pacific Asia Travel Association, up to two thirds of those three million visitors were day trippers from neighboring countries. The record shows that number of visitors visiting sites such as Swhedagon Pagoda and Inle Lake, which shows that arrivals of visitor increased by between tween and twenty -five percent in 2014. At least 20.4 million of visitors are projected to rise between 2013 and 2020. More than 70 percent

of total arrivals represented of Asian as Thai, Chinese, Japanese and South Korean visitors are on the top of the list. Maximum stay is a week.

**Figure: 3 Myanmar’s Travel and Tourism Total Contribution to GDP**



(Source: World Travel and Tourism Council, 2017)

Myanmar’s tourism industry is becoming one of the fastest growing areas of the its economy, with an income rise 70% in 2013 compared with the previous year 926 million in 2013, 534 million in 2012 and 319 million in 2011. Ministry of Hotels and Tourism’s recently report estimates that the tourism sector will bring in double numbers in coming years although the government has also quoted a figure of three billion US\$ including direct, indirect and induced effects of tourism.

#### **1.4 Research Questions**

1. What are the tourism development sectors in Yangon?
2. What are the significant factors that can develop Myanmar tourism sectors?
3. What are the tourist attractions in Yangon City?

#### **1.5 Significant of Study**

The finding of this study will be the importance of the study to the Myanmar's tourism sectors, government's master plans, the community, the institution and stakeholders concerned with Myanmar tourist development that tourism plays an important role in current rapidly development of Myanmar's economic growth. The rule of tourism industry is the second factor of the Myanmar's economic growth which created umbers of jobs to high job demanded societies.

The greater demand for local peoples with job opportunities justifies the need for more effective, the development of tourism sectors. Thus, the study that apply the recommended approach derived from the results of this study will be able to train the operators better. The study will help Myanmar's tourism sector with a new innovative idea which is based on research.

#### **1.6 Objective of study**

The objective of this study is to indicates that current development of Yangon's tourism sector developments compared with last 2012 to present day of Yangon City, Myanmar. The study also will highlight the Yangon's basic tourist infrastructures, Yangon environment, Tourist arrivals, destinations, attractions, safety, information system and accommodations.

##### **The specific objectives will be as:**

1. To study Yangon tourism sector developments.
2. To analysis the tourist arrivals of Yangon international air-port.
3. To research Yangon's current tourist attractions improvements.



## **1.7 Research Hypothesis**

The hypothesis of this research are based on the expectation disconfirmation theory and three hypotheses for this research are selected of the tourism development sectors of Yangon, Myanmar.

This research is to pay attention on tourism development in Yangon City, Myanmar. Particularly, it focusses on current situation of Yangon's tourism sector development conductions compared by neighboring countries. This study will also cover current government's attempting to promote Yangon's tourism, moreover, the analysis of the development of Yangon's hotel chains and economic growth in Yangon City, based on current tourism development.

**H1:** There is relationship between demographics characteristics and Yangon tourism sector developments.

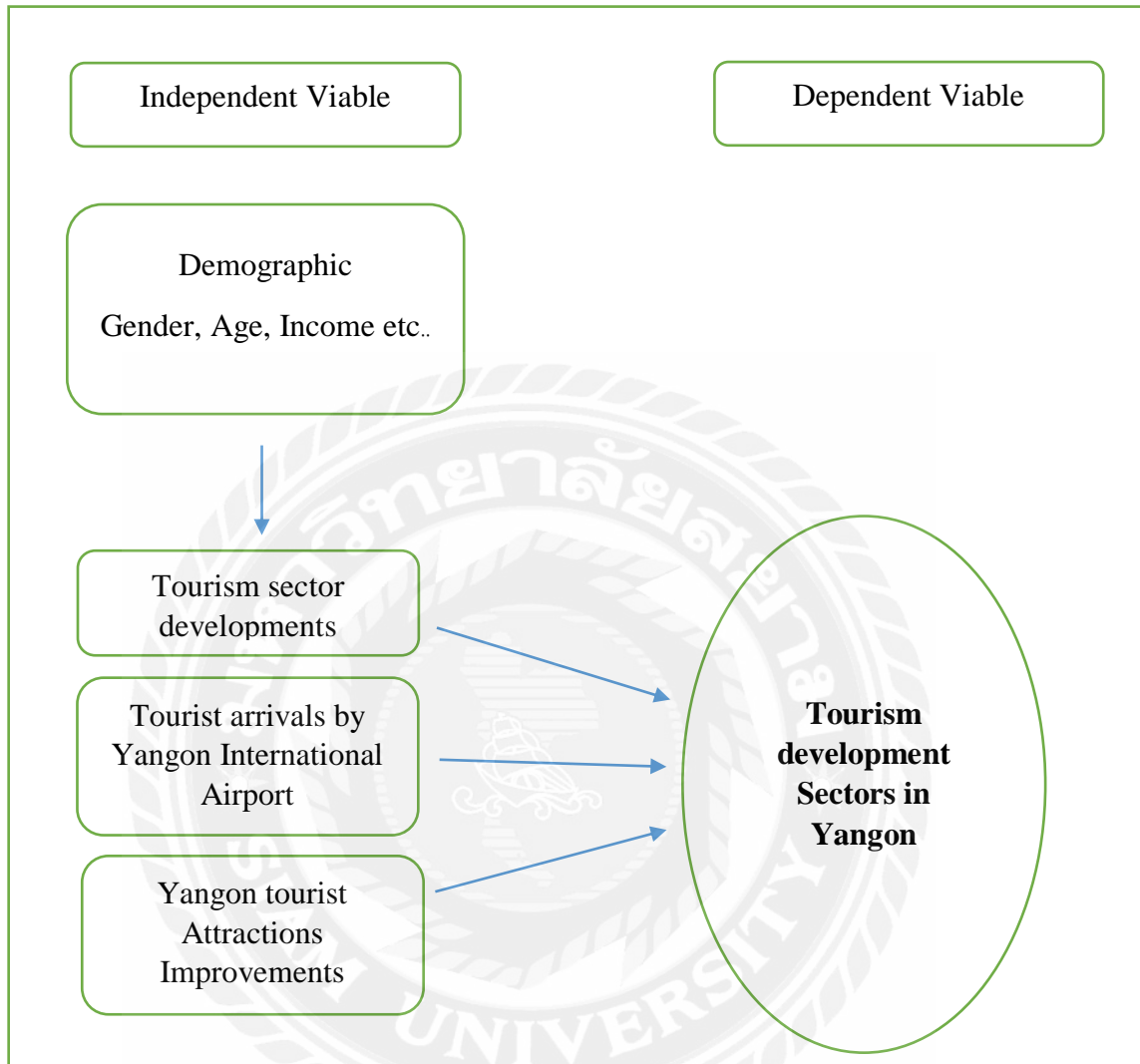
**H2:** There is relationship between arrivals of tourists and Yangon tourism sector developments.

**H3:** There is relationship between Yangon tourism infrastructures and Yangon tourist attraction improvements.

## **1.8 Research Model and Conceptual framework**

This research design partly to survey the visitors visiting Yangon Region, operators in Yangon, travel agencies and hoteliers. They will be asked to fill out the questionnaires providing the gender, education background and income basically. Some interviews and group discussion also will be added as additional.

**Figure: 5      Conceptual Frame Work**



## 1.9 Variables of study

### Independent Variables

Demographics characteristics are included, such as gender, age, education level, occupation, income and marital status.

**Gender:** most of visitors visiting Yangon of male or female have relationship with Yangon tourism development.

**Age:** Most of visitors aged 21-50 have relationship with Yangon tourism sectors development.

**Nationality:** The international tourists who visit Yangon have relationship with Yangon tourism sectors development.

**Education Level:** Most of visitors visiting Yangon are graduated and have relationship with Yangon tourism sectors development.

**Occupation:** Visitors visiting Yangon are different careers and have relationship with Yangon tourism sectors development.

**Income:** Visitors' income low or high are different and have relationship with Yangon tourism sectors development.

**Marital Status:** Any types of visitors visiting Yangon City has relationship with Yangon tourism sectors development.

Tourism sectors development of Yangon has relationship with Yangon tourism development.

Tourist arrivals by Yangon international airport has relationship with Yangon tourism sectors development.

Yangon tourism improvement has relationship with Yangon tourism sectors development.

### **1.10 Dependent Variables**

It will depend on independent variable when a result of independent variable for Yangon tourism sectors and visitors will be mentioned the Yangon tourism development, Myanmar.

### **1.11 Definition**

#### 1. Tourism development sectors

Basic infrastructures such as presence of tourists spots, levels of security for tourists, accommodations, transportations, banking, information technology, government policies for tourism, development of transport, communication and management of tourist attractions.

#### 2. Arrivals of tourist by Yangon International airport

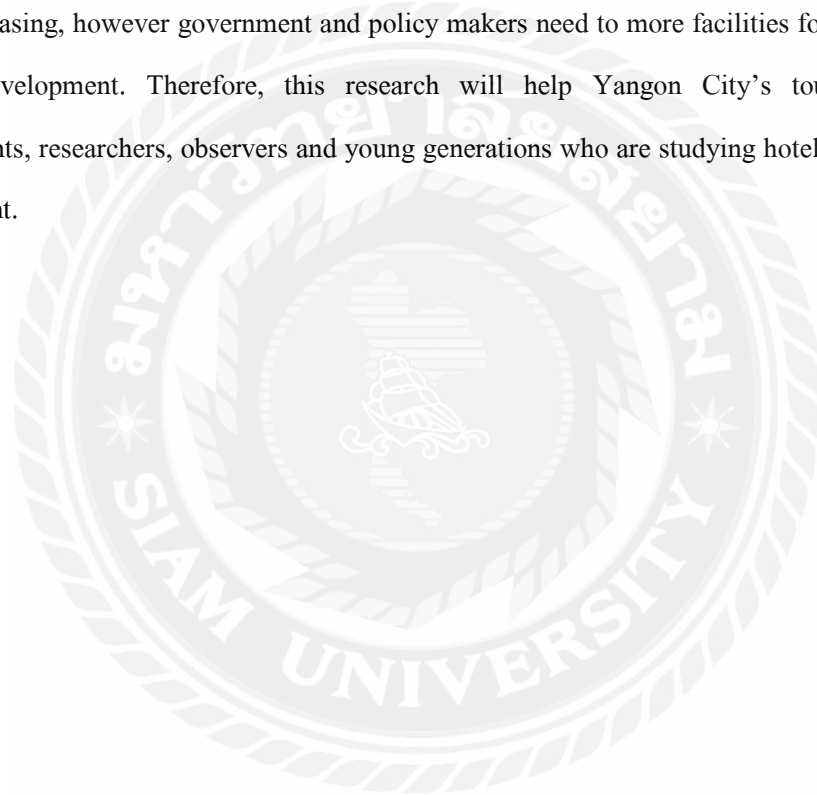
Tourist arrivals by Yangon International airport, in 2009 Yangon entry point show 234417 and 817699 in 2013. Most of visitors enter Myanmar by Yangon International Airport.

#### 3. Yangon tourist attraction Improvements

Yangon's tourist attractions have been developed attempting by Yangon government. Yangon received more visitors, and basically, government of Yangon has developed more tourist attractions and infrastructures. Yangon's basic tourism attractions, such as historical places, parks, amusement are, pagodas, night markets, Yangon sight-seeing sites, exhibitions, busy streets, flower market of Yangon, Church and Yangon's colonial buildings are most visited places international travelers.

### **1.12 Implications of The Study**

Tourism leads recent Myanmar economic growth positively with expect to achieve infrastructure, productivity, technology development, local job creating, receiving foreign investment and helping to local people. The goal of this study is to maximize tourism's contribution to national employment and income generation while ensuring the social and economic benefits of tourism are distributed equitably. Tourism development is much positive effect to Yangon, Myanmar. The current Myanmar economic status also emerge due to tourism sector increasing, however government and policy makers need to more facilities for sustainable tourism development. Therefore, this research will help Yangon City's tourism sector developments, researchers, observers and young generations who are studying hotel and tourism management.



## CHAPTER 2

### LITERATURE REVIEW

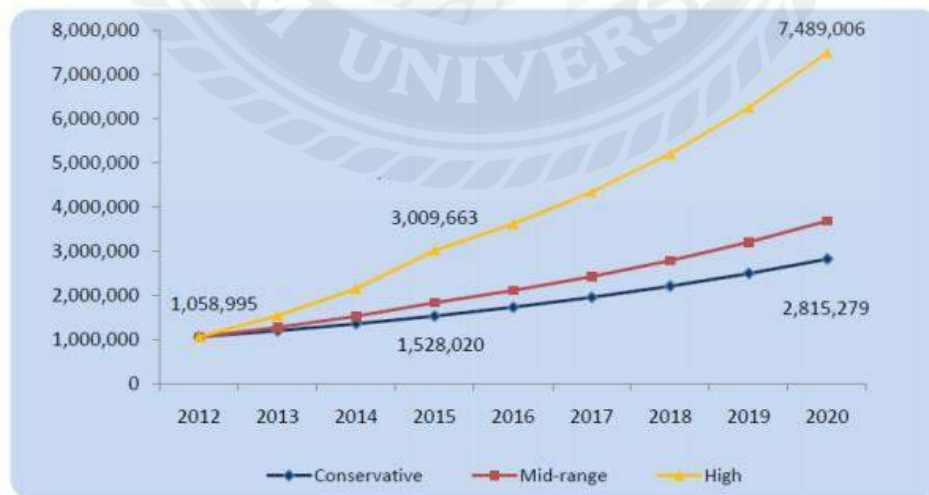
#### 2.1 Country Profile

Region:	East Asia & Pacific (Known as Southeast Asia)
Country:	The Republic of Union of Myanmar
Capital:	Naypyidaw
Largest City:	Yangon (7,355,075 in 2014)
Currency:	Myanmar Kyat
Population:	7 million (2017)
GNI Per	Capital: (US\$) 1,293 (2017)
GDP:	\$94.87 billion (2017)
GDP Growth:	9.0% (2017)
Inflation:	10.8% 2017 (The World Bank, 2016)
Language:	Myanmar, several dialects and English
Religion:	Over 80 percent of Myanmar Theravada Buddhism. There are Christians, Muslims, Hindus, and some animists.
Business Hours:	Banks: 09:30 – 15:00 Mon –Fri Office: 09:30-16:00 Mon-Fri
Airport Tax:	10 US Dollars for departure at international gates
Customs:	Foreign currencies (above USD 10000), jewelry, cameras And electronic goods must be declared to the customs at The airport. Exports of antiques and archaeologically Valuable items are prohibited.

## 2.2 Myanmar Tourism Overview

Myanmar has been recorded as one of Asia's most prosperous economies in the region before World War II and expected to gain rapid industrialization. The country belongs rich natural resources and one of most educated nations in Southeast Asia. However, Myanmar economic was getting worst after military coup in 1962, which transform to be one of the poorest nations in the region. "Then military government centrally planned and inward looking strategies such as nationalization of all major industries and import-substitution polices had long been pursued (Ni Lar, 2012)". These strategies were laydown under General Nay Win leadership theory so called "Burmese Way to Socialism". Since then, the country economic getting into problems such as 'inactive in industrial production, high inflection, resign living cost, and macroeconomic mismanagement'. Therefore, the country economic declined and became worsts situation which caused to rise nationwide revaluation known as "8888 uprising" in 1988. The next military leaders took up economic development status that connects to its neighbor countries like Thailand and Singapore mainly. Especially, the Association of Southeast Asia Nation (ASEAN) regional integration was link with Myanmar market so far.

**Figure: 6** Visitors Forecasts 2013-2020



Sources: Asian Development Bank estimates; Ministry of Hotels and Tourism.

(Source: Asian Development Bank estimates; Ministry of Hotels and Tourism, 2917)

## 2.3 Foreign Tourist Arrivals

Myanmar has recently seen an unprecedented growth in international tourist arrivals. Visitor numbers surpassed the one million mark in 2012 and arrivals reached three million in 2014. However, it is estimated that up to two – thirds of those three million visitors were day-trippers from neighboring countries, who would not be counted as tourists according to the World Tourism Organization and the Pacific Asia Travel Association (PATA).

A good indication is the number of tourists visiting sites such as Shwedagon Pagoda and Inle Lake, which suggest arrivals of tourists increased by between 20 and 25 percent in 2014. The total number of foreign tourists visiting between 2013 and 2020 is projected to be at least 20.4 million, and 29.2 million domestic tourists. Visitors from Asian nations represented more than 70 percent of total arrivals, with Thai, Japanese, South Korean and Chinese visitor leading the list. The average stay is one week.

**Table: 1 Tourism Arrivals and Spend, 2015 - 2020**

Growth Scenario	Conservative		Mid-range		High	
	2015	2020	2015	2020	2015	2020
International arrivals	1,528,020	2,815,279	1,829,943	3,680,669	3,009,663	7,489,006
Average daily spending (USD)	150,00	170,00	150,00	170,00	150,00	170,00
Average length of stay (days)	8,00	8,00	8,00	8,00	8,00	8,00
Total Visitor spending (USD billion)	1,83	3,82	2,19	5,00	3,61	10,18

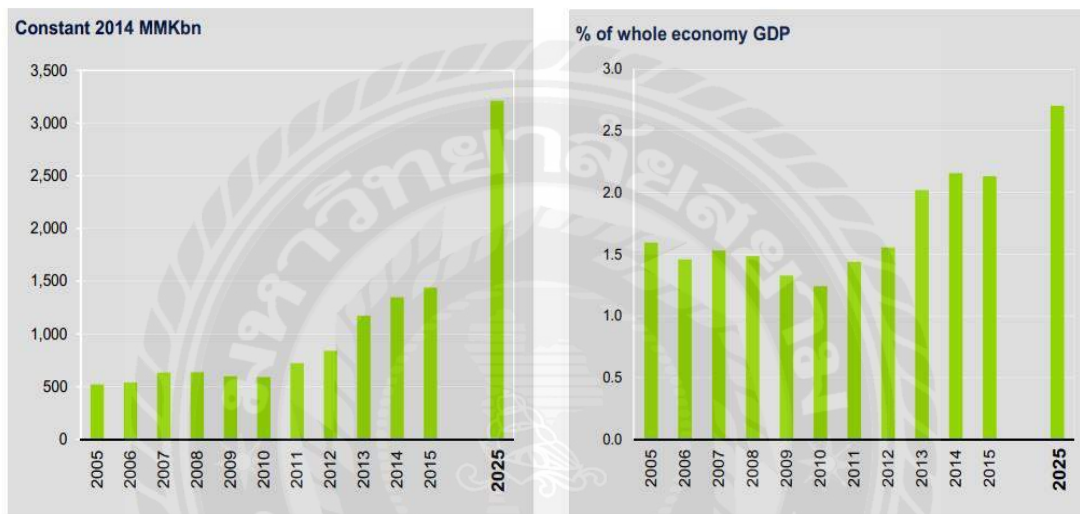
*Source: Asian Development Bank estimates and Ministry of Hotels and Tourism (2013) projections*

(Source: Asian Development Bank estimates and Ministry of Hotels and Tourism, 2017)



The tourism industry is becoming one of the fastest growing areas of the economy, with an income rise in 2013 of more than 70% compared with the previous year (US\$ 926 million in 2013 and US\$ 534 million in 2012 and US\$ 319 million in 2011). A recent report of MOHT estimates that the sector will bring in US\$ 905 million in 2014 although the government has also quoted a figure of US\$ 3 billion including direct, indirect and induced effects of tourism.

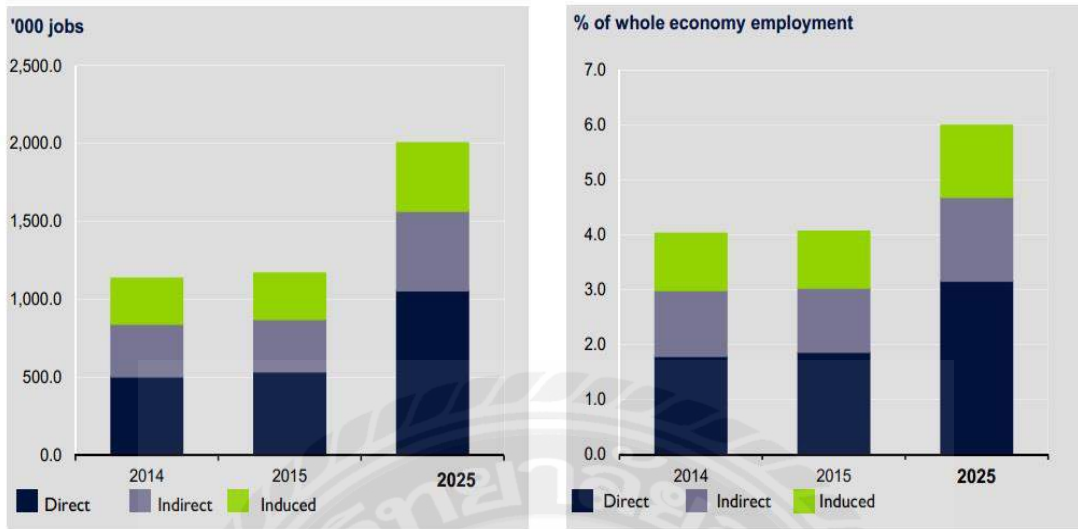
**Figure:7 Direct Contribution of Travel and Tourism to GDP**



(Source: Travel and economic impact, World Travel & Tourism Council, 2017)

The direct contribution of Travel & Tourism to GDP in 2014 was Myanmar Kyat 1,347.4bn (2.2% of GDP). This is forecast to rise by 6.8% to Myanmar Kyat 1,439.7bn in 2015. This primarily reflects the economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). But it also includes, for example, the activities of the restaurant and leisure industries directly supported. (Travel and economic impact 2015, World Travel & Tourism Council)

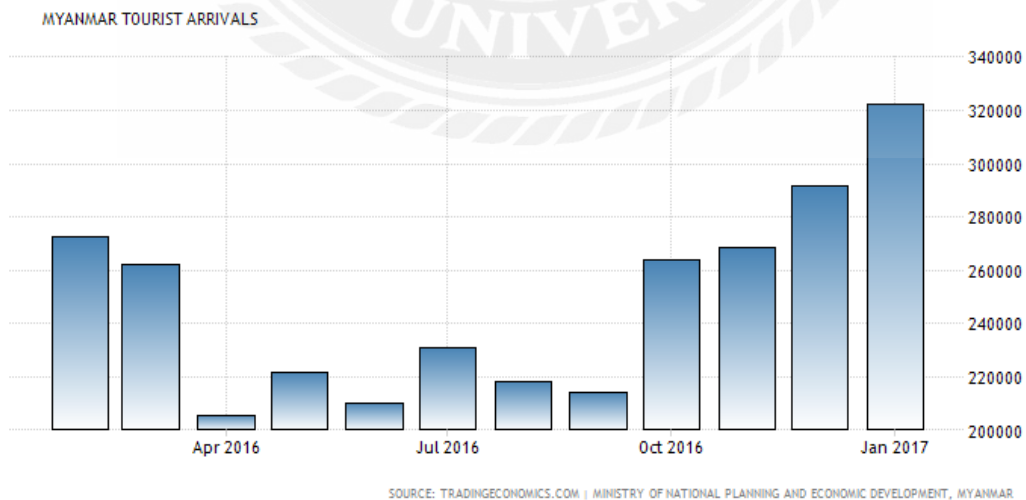
**Figure: 8 Total Contribution of Travel & Tourism to Employment**



(Travel and economic impact, World Travel & Tourism Council, 2017)

The total contribution of Travel & Tourism to employment was 1,134,500 jobs in 2014. This is forecast to rise by 2.9% in 2015 to 1,167,000 jobs. By 2025, Travel & Tourism is forecast to support 2,003,000 jobs, an increase of 5.6% over the period. Travel and economic impact 2015, World Travel & Tourism Council)

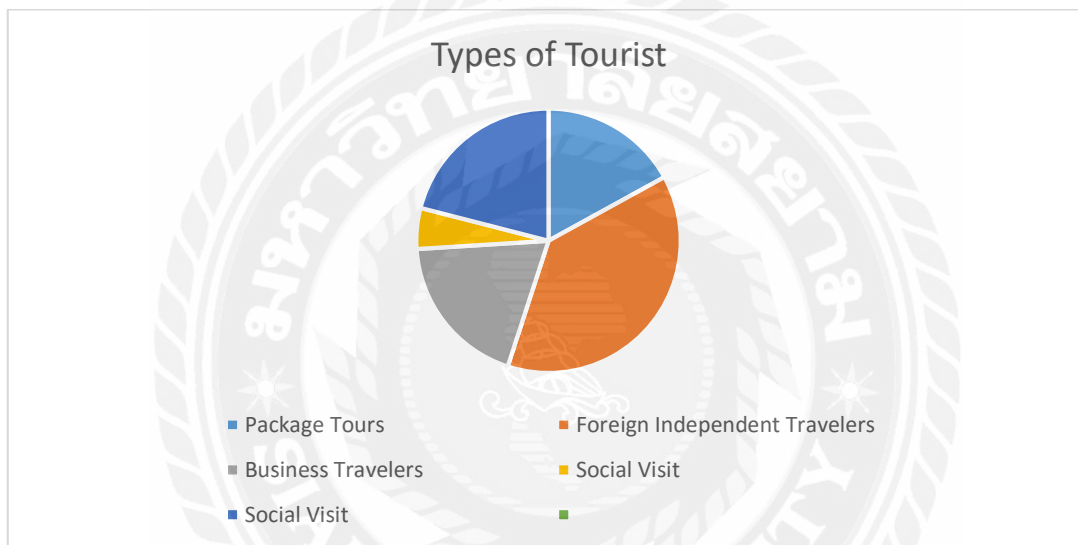
**Table: 2 Myanmar Tourist Arrivals**



(Source: Ministry of National Planning and Economic Development, Myanmar, 2017)

**Figure: 9           Types of Tourist**

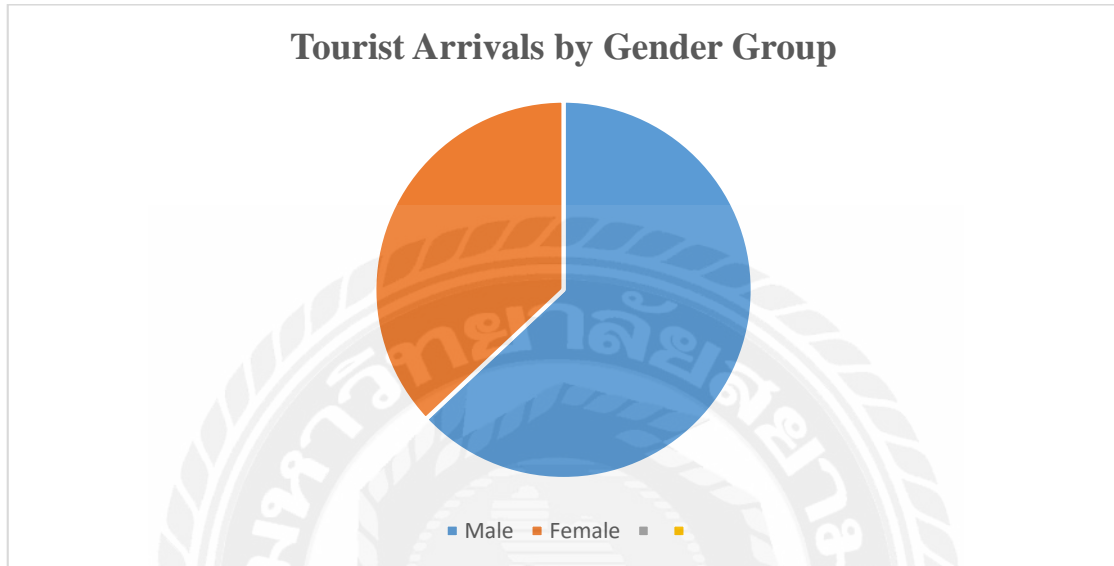
<b>Package Tours</b>	<b>17%</b>
<b>Foreign Independent Travelers</b>	<b>38%</b>
<b>Business Travelers</b>	<b>19%</b>
<b>Social Visit</b>	<b>5%</b>
<b>Others</b>	<b>21%</b>



Myanmar extends 923 km from east to west and 2,100 km from north to south. The Irrawaddy river runs through the central of the country in south coast to north. To the west are the Rakhine mountains and Chin hills and the Kachin hills to the north where southeast Asia’s highest mountain range, mount Kakaborazi with 5,881 meter high. There are seven administrative states and regions namely, Kachin, Kayah, Kayin, Chin, Mon, Rakhine and Shan states; seven regions are; Sagaing, Tanintharyi, Bago, Magway, Mandalay, Yangon and Irrawaddy regions. (Wikipedia,2016)

**Figure: 10**      **Tourist Arrivals by Gender Group**

<b>Male</b>	<b>63%</b>
<b>Female</b>	<b>37%</b>

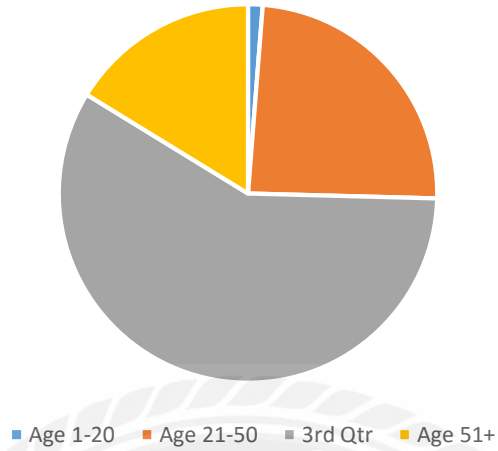


Myanmar has a monsoon climate with three main seasons and the tropical monsoon in the lowlands below 2,000 m, rainy, cloudy, hot and humid summers. The hottest period is between February and May, when there is little or no rain and temperature can rise above 40 C. The rainy season is generally from May to October and cooler weather from October to February. The coast and the mountains see significantly more rainfall than the arid central plains. (World Travel Guide, 2015)

**Figure:11**      **Tourist Arrivals by Age Group**

<b>Age 1-20</b>	<b>3%</b>
<b>Age 21-50</b>	<b>58%</b>
<b>Age 51+</b>	<b>39%</b>

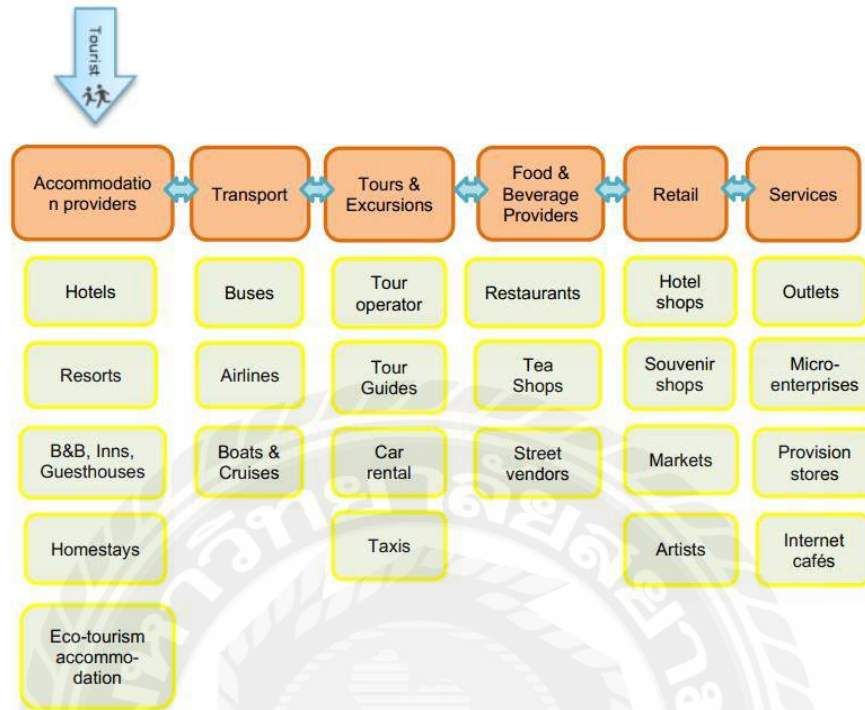
### Tourist Arrivals by Age Group



**Table: 3 Tourism Income**

Year	2010 (U S\$)	2011 (U S\$)	2012 (U S\$)	2013 (U S\$)
Total Earnings	254 M	319 M	534 M	926 M
Average Expenditure Per Person Per Day	102	120	135	145
Average Length of Stay	8	8	7	7

**Figure: 12 The Tourism Value Chain in Yangon, Myanmar**



(Source: Ministry of Hotels & Tourism, 2017)

Tourism industry is a complex industry that is composed of various types of business. The actual tourism value chain is very broad, as graph demonstrates. Tourism Sector Wide Impact Assessment (SWIA) focuses on certain segments of the tourism value chain, based on a mapping of those segments with the highest human rights risks and impacts:

- Hotels, guesthouse, inns, motels
- Airlines
- Tour operators and travel agencies
- Independent tour guides
- Restaurants
- Souvenir shops

**2.4 Accommodations**

Myanmar recently has got 788 hotels, motels and guest houses with 28, 291 rooms. Spread across 48 locations. Eighteen have a four-star rating and five star rated hotels. The majority of accommodation stock is in Yangon, Nay Pyi Taw, and Mandalay. Myanmar Hoteliers Association has requested a review of the current star rating system, which was introduced in 2011, and its members have increased effort to operate according to the ASEAN tourism standards. Some hoteliers have responded to the high demand for accommodations with significant and frequently unannounced price increases, causing considerable frustration for tour operators, and generated media reports of opportunism and poor value for money. To handle his issue, MOHT and MTF are jointly promoting the conversion of existing structures to hotels including restoration and adaptive use of Yangon’s exceptional heritage buildings and development of hotel investment zone.

**Table: 4 Foreign Direct Investment Hotels with the Most Number of Rooms in Myanmar**

Hotel	Investment from	Location	No: of Rooms	Built/ Opened
Summit Parkview	Singapore	Yangon	250	1995
Traders	Singapore	Yangon	496	1996
Sedona Yangon	Singapore	Yangon	450	1996
Park Royal	Singapore	Yangon	359	1997
Chatrium	Thailand	Yangon	315	1998
Sedona Mandalay	Singapore	Mandalay	300	1998
Golden Hill	Japan	Yangon	212	2000
Richy Regina	Thailand	Tachileik	284	2002
Victoria Resort	Singapore	Kawthaung	250	2008

Based on Myanmar...the next investment destination for global hotel chains? SCB EIC | Economic Intelligence Center

(Source: Economic Intelligence Center Based on Myanmar information, 2017)

Accommodation in Yangon fills up as far as a mention in advance, particularly if it is a place listed in a guidebook it’s not impossible to roll up and find a room, but it can be difficult and stressful



and you will likely end up paying more than you want. Most places can be booked online now, so it's worth reserving your room as soon as you can. It's essential to book ahead during high season, November to March. According to the Ministry of Hotels and Tourism, as of October 2014, there were more than 1,100 hotels in Myanmar of which 267 were in Yangon, offering approximately 42,000 rooms.

## **2.5 Hotel Situation in Yangon**

Compared to the neighboring countries like Thailand, India and Cambodia, the hotel rates are still higher. Hotel room rates have been edging down the last 3 years, especially rates for luxury hotels. The luxury hotels in Yangon and Mandalay that tripled their room rates in 2013 have lowered their rates significantly. The capitalist laws of supply and demand are quite valid in Myanmar cities; Yangon has limited room supply and will remain an expensive capital; in some other town, for example in the Shan state, the hotels can be much cheaper. Room prices in Bagan may remain stable, for the reasons mentioned above. For travelers it's worth the effort of planning a holiday are fully stay longer in cheap places and a shorter time in the busy capital Yangon and the popular but expensive Bagan. The outlook for travelers is good; the downward trend in the room prices will likely continue in the next few years. hotels are still being built whereas the increase in tourism is slowing down; supply and demand will make Myanmar cheaper.

## **2.6 Star Rated Hotels in Yangon, Myanmar**



<b>Five Star Hotel</b>	<b>6</b>
<b>Four Star Hotel</b>	<b>17</b>
<b>Three Star Hotel</b>	<b>83</b>
<b>Two Star Hotel</b>	<b>116</b>
<b>One Star Hotel</b>	<b>102</b>
<b>Certificated Hotel</b>	<b>599</b>
-----	
<b>Total</b>	<b>923</b>

**Figure: 13 Foreign investments in Hotels and Commercial Complexes by Countrywide**

<b>Sr</b>	<b>Country</b>	<b>Hotel</b>	<b>Investment</b>
		<b>Apartment</b>	<b>US\$</b>
	Singapore	26	1790.094
	Thailand	11	445.630
	Vietnam	1	440.000
	Hong Kong	5	187.700
	Korea	1	100.000
	Japan	4	73.665
	Malaysia	3	23.136
	U.K	3	14.500
	Luxembourg	1	5.200
	UAE	1	4.500
	<b>Total</b>	<b>56</b>	<b>3084.425</b>

(Sources: Ministry of Hotels and Tourism, 2017)

## **2.7 Policies Related to the Hotel Industry**

## **Strategic Plan for the Development of Accommodations in the Future**

- To renovate and upgrade existing local guest house and small hotels to be able to accommodate foreign tourists.
- To finish all delayed hotel project in 2013
- To welcome new hotel projects and assist for speedy operation.
- To amend the existing contract agreements of hotels for hiring rooms as offices, long stay accommodation.
- To do negotiation between hoteliers and tour operators.
- To invite more foreign direct investment.
- To encourage local entrepreneurs to do hotel business.
- To provide incentives on terms and conditions of the hotel contracts.
- To raise awareness of investment opportunities in hotel and tourism sector.

New hotel zones will be created between Yangon International Airport and Hangthawaddy Airport in Bago Region, which is to be constructed, has been announced. The projected zones lie in Mingalardon, Htauk Kyant and Hlegu areas. The creation of the new hotel zones was prompted to address the increasing number of foreign tourists in the country and the shortage of accommodations.

### **2.8 Government Incentives for Hotel Investments**

- Flat what type tax rate of 30%
- Exemption from income tax for 3 consecutive years
- Exemption or relief from income tax on profit which is reinvested within one year and up to 50% on the profit from exports
- Right to pay income tax of foreign employees (same as Myanmar citizens) and to deduct the same form the assessable income of the enterprise
- Right to deduct research and development expenditure
- Right to accelerate depreciation

- Right to carry forward
- Right to set off losses up to 3 consecutive years, from the year the loss is sustained
- Exemption or relief from customs and other taxes

## **2.9 Transportation Infrastructure**

To compared with ASEAN countries, Myanmar's transportation sector is under developed for a country of its size, population, and potential. There, the Ministry of Transportation intends to prepare a transport master plan to harmonize future transport planning with the new state constitution, integrate plans of different transport subsectors, pursue new opportunities to connect with other countries, promote domestic connectivity and multimodal transport networks, promote greater private sector participation, and identify technical, financial and human resources to implement the plan.

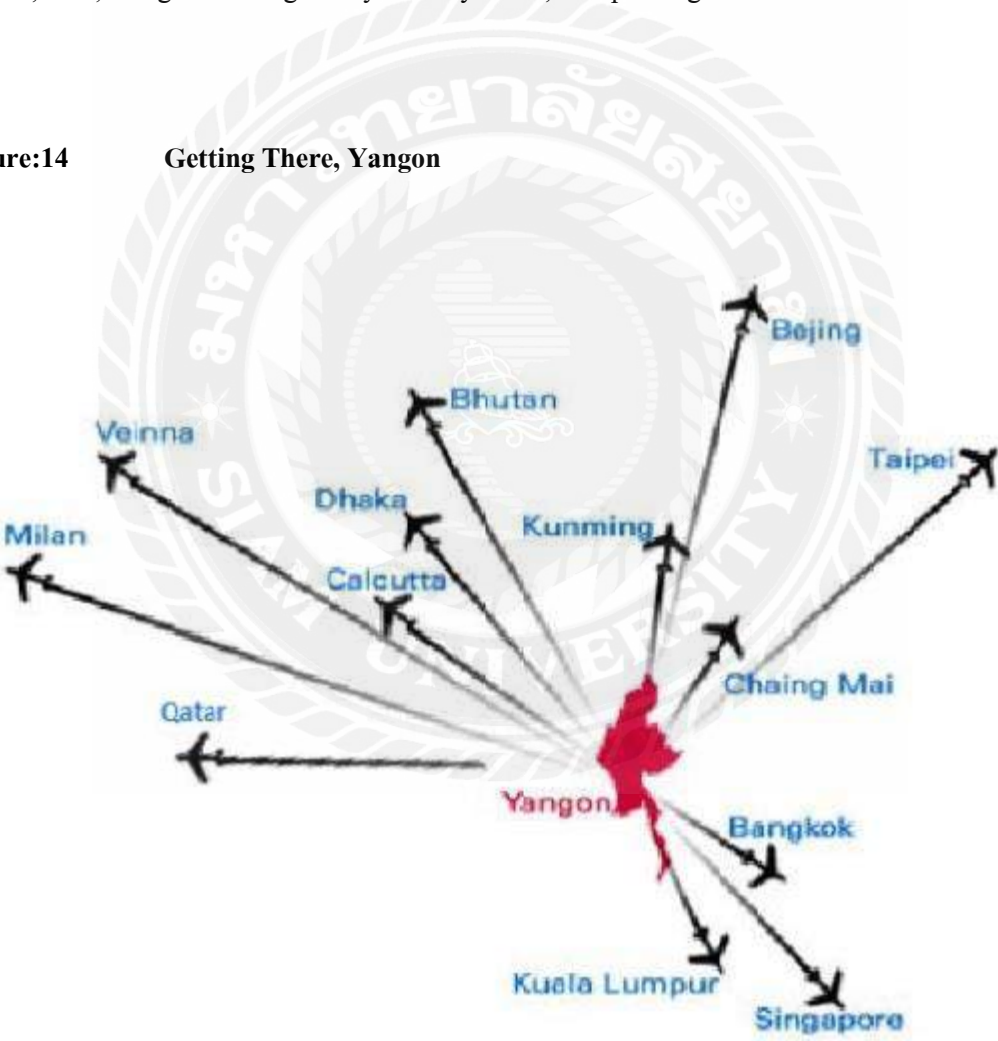
There has been much progress in infrastructure development particularly in the past two years. this would include:

- Upgrading of existing roads and bridges.
- Construction of new roads and bridges.
- Developing new hotel zones in main destinations of Nay Pyi Taw, Yangon, Bagan, Inle and Mandalay. More hotel zoning will be designated such as the ones between the international airports, Yangon and Hanthawaddy.
- The authorities are reviewing the facilitation of Travel, also fort the ease of entry in and about Yangon, Myanmar for visitors.
- To open of more money exchanges around Yangon, and upgrade local banking systems.

## **2.10 Yangon International Airport**

(YIA) Yangon International Airport is strategically located between China and India with two thirds of the world’s great population within six hours flying range including cities such as Dubai, Tokyo, Singapore, Beijing and New Delhi. YIA is the busiest and largest airport in Myanmar recently. In 2015, YIA handled at total of 4.68 million passengers, which grew by 6.5% compared to the previous year. As of 1<sup>st</sup> March 2016, 26 airlines operate to/from 21 international destinations while 10 airlines operate 25 domestic routes. Over the last few years, Myanmar has seen tremendous growth in visitor traffic. As the country is set to experience more exponential growth, YIA, being the main gateway into Myanmar, is expanding tot met future demands.

**Figure:14** Getting There, Yangon



(Source: Ministry of Hotels & Tourism, 2017)

**Table: 5** Tourist Arrivals by Yangon International Airports

The graph below shows Myanmar’s tourist number and arrivals at the international airports Yangon and Mandalay from 2006 until 2016 (left) and the number of hotel rooms in Myanmar (right).

<b>Yangon Entry Point</b>					
<b>(Including tourist arrivals through border entry points to Yangon )</b>					
<b>Type of Tours</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
<b>(1) Tourist</b>	401,608	488,341	563,996	544,480	428,370
<b>(2) Business Travellers</b>	114,456	151,320	186,239	173,004	203,007
<b>(5) Others</b>	43,546	178,038	271,846	463,198	448,767
<b>Total</b>	<b>559,610</b>	<b>817,699</b>	<b>1,022,081</b>	<b>1,180,682</b>	<b>1,080,144</b>

(Source: Ministry of Hotels and Tourism, 2017)

### 2.11 Current Expansion Projects

Yangon International undergoing its biggest expansion to date. The opening of T1 is part of the first phase of YIA’s development to handle greater passenger capacity as Myanmar continues to undergo economic reforms, which is expected to increase demand for aviation services in the country.

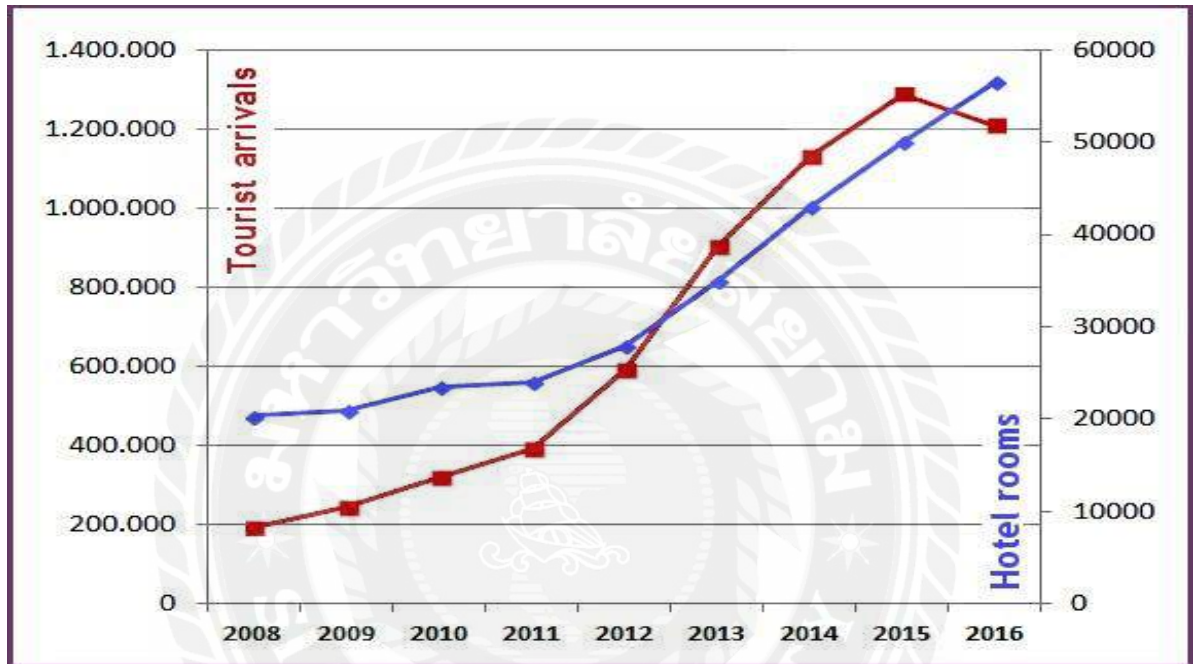
Terminal 1 was officially opened by President U Thein Sein on 12<sup>th</sup> March, 2016. With the expansion in capacity and continued integration of facilities, YIA paves the way for Myanmar to continue welcoming a rapidly growing number of business and leisure travelers to the country.

Yangon International Airport expansion will comprise of:

- Works for a new Domestic Terminal which has already begun;
- Expansion works to the current T1;
- Construction of a VIP and CIP Terminal; and
- Construction of a multi stores car park

on top of that, plans for an airport city are being conceptualized. The future airport city will further boost Myanmar’s attractiveness as a travel destination with facilities and amenities close to the airport. These facilities may include hospitality, commercial and retail developments. (Source: Yangon International Airport desk)

**Figure: 15** Tourist arrivals by the International Airports, Myanmar



(Source: Ministry of Hotel and Tourism, 2017)

## 2.12 Civil Aviation

Myanmar has a network of 41 airports, including 3 international airports that are capable of handling 747 class aircraft. 21 in mid-2013 there are seven national airlines; Air KBZ, Air Mandalay, Asian Wings, Golden Myanmar, Myanmar Airways, Yangon Airways with 32,106 scheduled domestic departures. Air KBZ handles the largest number of scheduled domestic flights 31%, followed by Air Bagan 24%, Yangon Airways 23%, and Air Mandalay 21%. Collectively, Yangon, Mandalay, Heho, Bagan, and Thandwe airports handle 85% of all domestic flights; however, they are frequently overcrowded and require upgrading.

Myanmar also offered 23 foreign carriers, accounting for about 80% of total capacity to and from the country. The main tourist gateway, Yangon International Airport, handles 94% of international air traffic. More than 10 international carriers launched flights to Myanmar between 2012 – 2013, including three of direct flights to Mandalay. Majority of additional flights are into Yangon, with Southeast and Northeast Asia delivering 64.6% and 31% of the additional capacity, respectively. Average seat occupancy in 2012 was 73.1%, compared to 62.7% in 2011. To relieve congestion in Yangon, MTF recently began promoting tours that enter and exit the country via Nay Pyi Taw and Mandalay.

In anticipation of continued growth, DCA is also evaluating proposals to expand the operating capacity of Yangon International Airport, from about 3 million to 5.5 million passengers per year. A fourth international airport is scheduled to open in 2016 at Hanthawaddy, 80 km from Yangon, with an operating capacity of at least 10 million passengers per year. Thus, by 2017, Myanmar's international airports are expected to have a total operating capacity of at least 20 million passengers per year, which will be sufficient to meet expected demand.

The study shows that after two years of rapid expansion, the growth of the aviation sector has started to slow. Reason for this include the overburdening of Yangon's airport terminal, air traffic control and baggage handling. These are discouraging investors from expanding existing airlines or starting up new ones. Another challenge is the safety record of Myanmar's aviation sector. In 2012, four of the domestic air carriers were involved in serious accidents with one accident causing a fatality at Heho airport. Myanmar government is working with private firms as well as thorough technical assistance from the Japanese International Cooperation agency (JICA) to upgrade airports' safety equipment.

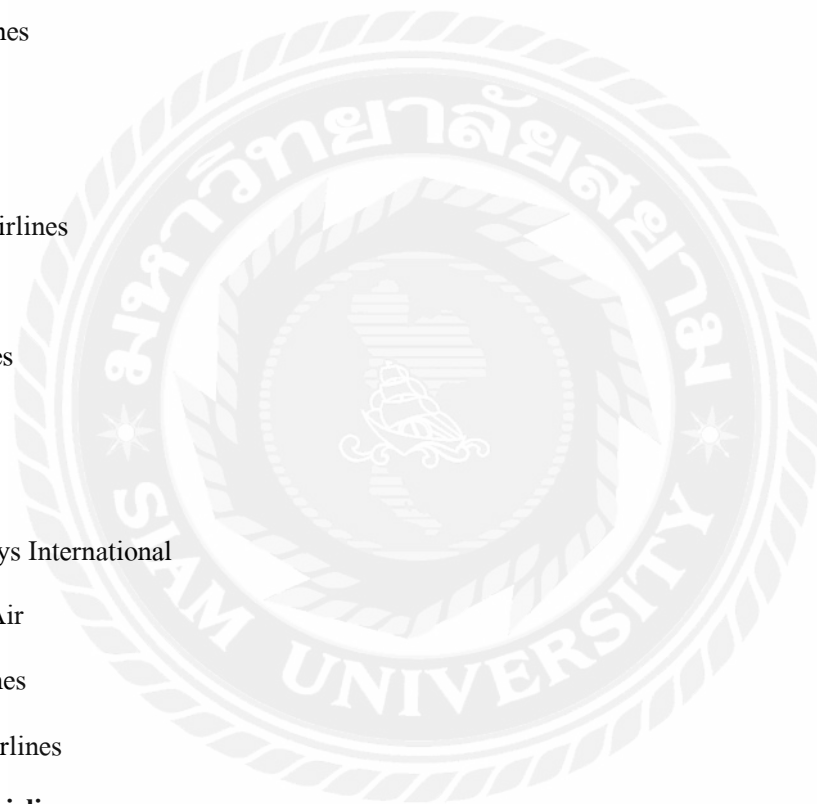
### **2.13 International Airlines**

- Air Asia
- Air China
- Air India

- All Nippon Airways (ANA)
- Asiana Airlines
- Cathay Dragon
- China Airlines
- China Southern Airlines
- Condor
- EVA Air
- Japan Airlines
- Jetstar
- Korean Air
- Malaysia Airlines
- MAI
- Nok Airlines
- Qatar
- Silk Air
- Thai Airways International
- Thai Lion Air
- Tiger Airlines
- Vietnam Airlines

**Domestic Airline**

- Air Bagan
- Air KBZ
- Air Mandalay
- Apex Airlines
- Asian Wings Airways
- FMI Air Charter





- Golden Myanmar Airlines
- Mann Yadanarphone Airliens
- Myanmar National Airlines
- Yangon Airways

Yangon International Airport, recently the country’s main entry point, handling 20 million passengers a year and to be extended to receive another 6 million. Myanmar has three international airports currently and Hantharwady International Airport will be the biggest International Airport of Myanmar, which began in 2014 led by the Incheon International Airport Corp (IIAC).

Currently, more than 26 International Airlines are operating from Yangon International Airport to other international destinations daily, and more than 25 domestic airlines operate domestic routes.

**Table: 6 Visitor Arrivals Numbers by Yangon Entry Port**

Name of Entry Points	2012	2014	2015	2016
Yangon	559,610	1,022,081	1,180,682	1,080,144

(Source: Ministry of Hotels and Tourism, 2017)

For many years Myanmar had between 200.000 tourists arriving at Yangon airport every year, and the total number including border tourists used to be between 600.000 and 800.000. border tourists are the visitors who cross land borders and stay mostly less than one day; day trippers, local traders and tourists doing a visa run. Until 2013 Yangon airport was the only entry point to Myanmar, but from August 2013 four land border crossings with Thailand have been opened for tourism entry. From 2011 onwards, visitor numbers started to rise dramatically and during high season there was a hotel room shortage. The year 2013 turned out to be the high point

in room prices. The hotel situation in Myanmar has since then improved because many new hotels have been built, the number of rooms in Yangon and Mandalay has almost doubled in 2016.

In 2015, There were 4.68 million tourists, and in March 2016 the ministry of Hotels and Tourism predicted that at least six million tourists would travel to Myanmar in 2016. It turned out that the actual number of foreign visitors to Myanmar in 2016 dropped to below three million. The drop in arrival numbers is misleading because it is caused by the change in one-day visitors crossing the land border in the Northern Shan state with China, and not real tourists who visit for a few days or weeks.

#### **2.14 Road**

Currently Myanmar has about 130,000 km of roads of all types about 2 km of road per 1,000 people, of which less than 21% are paved to all weather standards. In comparison, road density ASEAN wide is more than five times higher. This shortfall has two consequences for tourism activity. First, road travel between destinations is time consuming and some are essentially cut off from tourism due to inaccessibility. Second, road quality in and around destinations is inadequate, restricting visitor movement and spending. Myanmar has extensive biodiversity and abundant natural resources. Approximately one third of Myanmar's 62 million population lives in townships and cities.

Tourists use ground transport, mainly hired cars and minivans, coaches, and train. Cleanliness of transport options rated the second most unsatisfactory issue in the Tourism Master Plan survey 25%, and choice of transport options the fourth 21%. Road safety is a major problem throughout the country. Road accidents cause ten deaths a day in Myanmar and fatalities are rising. Accidents involve both international visitor and domestic tourists.

#### **2.15 Railways**

Myanmar rail network covers about 3,500 km with routes connecting primary, secondary and emerging tourist destinations. Although more expensive than travel by public bus,

trains are affordable, but not commonly used by tourists because of frequent delays and long travel times. Railway modernization will help support a lower carbon tourism economy and increase competitiveness by reducing freight cost.

## **2.16 River Cruise**

Yangon received 9 cruise liners carrying almost 3,000 passengers by 2012. Recently Yangon extended Water Bus ferry to solve heavy traffic jam matters with daily Yangon commuters. Three imported boats from Australia which can carry each 180-230 passengers, three boats from Thailand which can carry 60 passengers and seven locally constructed boats which can carry 150 passengers will run between 6:30 am to 6:30 pm every day. The initiative falls under the regional government's plans to upgrade public transport services to relieve worsening traffic jams in the former capital and commercial hub, following the new bus system that launched in January. It takes about two hours to drive from Insein to Botahtaung, downtown area usually, but by the water buses, it will only take around 45 minutes to main destinations. Insufficient infrastructure, facilities, and service capacity also restrict the number of international yachts that visit Myanmar. A stringy for developing cruise tourism and yachting in Myanmar's inland and coastal waterways is needed to assess the potential of these markets, guide infrastructure investment, and set out a program to build management capabilities.

A diverse way to experience the beauty of Yangon is to take a river cruise, particularly in the early morning as the sun warms the air or the final hours of a sultry day. Departing either at Botataung Jetty or Maw Tin jetty, you can discover the spectacular scenery of Yangon's waterways, observe the little known lighthouse of the Twante Canel, see Shwedagon Pagoda from a different perspective and enjoy the glow of the lights along the river banks as night falls.

## **2.17 Safety**

In places open to visitors, Myanmar is relatively safe, with very little crime. Still, you should take the usual precautions of using hotel lockers or safes for your valuables. Female travelers should not experience any harassment or different treatment.

## 2.18 Licensed Tourist Transportation

(a) Coach (26-50 Seater)	264
(b) Motor Boat	1194
(c) Hiace/ Townace (5-12 Seater)	322
(d) Mini Bus (13-25 Seater)	104
(e) Boat	33
(f) Yacht	16
(g) Saloon/ Van (Seater)	163
(h) Hot Air Balloon	3

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**Total** **2099**

## 2.19 Tour Operators

Since the Myanmar has opened up the number of tour operators and travel agents has increased due to a high demand of organized tours. Five types of tourism are being promoted by Myanmar tour operators and travel agencies as;

- Cultural and creative tourism
- Nature based tourism
- Adventure and experiential tourism
- Cruise and yachting tourism
- MICE – Meeting, incentive conference and exhibitions tourism.

## 2.20 Licensed Tour Companies

● a: Foreign Company	1
● b: J.V Company	25
● c: Local Company	1324
● -----	
<b>Total</b>	<b>1350</b>

Travel agencies, tour operators and other ravel related businesses are brought together by the Union of Myanmar Travel Association (UMTA), which was created in 2002. UMTA was formed to organize registered travel agencies and tour companies to systematically develop the industry; to represent the tour and travel industry at the national and international level; to promote Myanmar as premier travel destination; to promote relations and opportunities between national and international travel and tour companies; and to help develop the human resources capacity of the tourism industry. recently UMTA represents 711 of the 1,366 registered tour and companies in the country. In June 2014, 80 of Myanmar tour operators participated in three 2-day training courses in Yangon to learn how to integrate sustainability and CSR principles in their businesses. The training was organized by UMTA and the Myanmar Hoteliers Association MHA in cooperation with Travelife, the Pacific Asian Travel Association PATA and the British Travel Association ABTA, supported by CBI, the Netherlands agency for the promotion of imports from developing countries. Out of the 188 participants, 20 belong to the tourism sector, of which 12 are travel and tour operators 6 are hotels and guesthouses.

## **2.21 Tour Guides**

Myanmar has 2453 licensed tour companies, which included 2410 local companies, 42 J.V company group and one foreign company, following by 17 joint ventures that has three capacities to arrange classic tours. However, most firms are unable to organize customized programs. Among 4010 of licensed tour guides, 2,060 speak English and several hundred speak Japanese, Thai Chinese, French and German. The high season typically experiences a shortage of

trained guides, especially those who speak English, Japanese, and the European languages.

Vehicles are also limited during the high season.

**Table: 7 Myanmar Tour Guide Training: Fast Facts**

Government Tour Guide Training School	
Year of operation	1992
Total students trained by the school	8326
Licensed guides (2014)	3776
Batches (number of courses)	46
Duration of training course	2 months
Cost of training course	100,000 kyats
Cost of first license, valid for two years.	100,000 kyats
Cost of license renewal	100,000 kyats
Estimated total cost of course to students (including additional materials, accommodation and food)	1,000 USD
Trainers fee (30 minutes)	10,000 kyats
Regional tour guide course fee	50,000 kyats
MTGA	
MTGA members	1281
MTGA registration fee (License holders can only apply)	10,000 kyat
MTGA annual membership fee	15,000 kyat
Regional guides registration fee	5,000 kyat
Regional guide annual membership fee	7,500 kyat
Tour guide earnings	
Throughout tour guide fee	Ranging from 35 to 60 USD a day
MTGA suggested our guide daily fee.	35 USD per day
Chinese speaking tour guides	60 to 90 USD a day. (Often used for business interpretation)
Good English speaker	40 to 60 USD a day
Local tour conductor fee (no set rate)	10 to 20 USD a day/ tour
Low season guiding rates at Inle	20 USD a day
High season guiding rates at Inle	70 to 80 USD a day
High Season	November to April
Low Season	June to September

(Source: BIF Myanmar Tourism, September 2017)

Tourist guide training is controlled by the central government and conducted in Yangon by the Tourism Training School under the Ministry of Hotels and Tourism. The 10-week accreditation training costs 1000 US\$, not easily affordable. Regional tour guide trainings are conducted at the State or Regional level, producing guides who can provide local services. Many

remote destinations have a low number of tour guides. Since communication channels between local tour guides and tour operators from Yangon and other major cities are weak, they often do not have enough business and move to Yangon to work there as tour guides.

**2.22 Licensed Tour Guides by languages**

(a) English	2586
(b) Japanese	335
(c) French	272
(d) German	261
(e) Thai	163
(f) Chinese	124
(g) Spanish	106
(h) Russian	70
(i) Italian	63
(j) Korean	30
<hr/>	<hr/>
	<b>4010</b>
<b>Regional Guides</b>	<b>2939</b>
<b>Total</b>	<b>6949</b>

**Figure: 16 Tourism Related Employment Potential**



Subsector	2012	Conservative		High	
		2015	2020	2015	2020
Accommodation	44,055	63,668	84,458	125,403	224,670
Food and beverage	146,850	212,225	281,528	418,009	748,901
Recreation and entertainment	29,370	42,445	56,306	83,602	149,780
Transportation services	58,740	84,890	112,611	167,204	299,560
Travel services	14,685	21,223	28,153	41,801	74,890
<b>Total</b>	<b>293,700</b>	<b>424,450</b>	<b>563,056</b>	<b>836,018</b>	<b>1,497,801</b>

Sources: World Travel and Tourism Council and Myanmar Tourism Master Plan Report (TA-8136).

(Source: World Travel and Tourism Council and Myanmar Tourism Plan Report, 2017)

**Figure: 17** Tourist Arrivals by Special Tours

Tourist Arrivals by Special Tours		
Special Charter Flight Tours		
Year	No. of Charter Flight	No. of Pax
2012	23	2760
2013	30	4081
2014	28	3453
2015	51	2635
2016	4	287
Tourist Arrivals By Oceania Cruises		
Year	No. of Cruises	No. of Pax
2012	9	2932
2013	8	6408
2014	18	18611
2015	26	26776
2016	22	10769
Yachting Tours		
Year	No. of Pax	Income (US\$)
2012	1158	155392
2013	2157	257051
2014	2562	387462
2015	3248	468239
2016	3844	610640
Riverine Cruises		
Year	No. of Pax	Income (US\$)
2012	14635	2341315
2013	15809	4906305
2014	18077	8416289
2015	20816	8751254
2016	19810	10506074
Ballooning		
Year	No. of Pax	Income (US\$)
2012	8024	1979014
2013	11362	3109856
2014	17802	4231342
2015	23719	6436866
2016	28403	7417771

(Source: Ministry of Hotels and Tourism, 2017)

## 2.23 Myanmar Visa



Visa requirements: A tourist visa for Myanmar can be obtained from any Myanmar embassy or consulate worldwide. Visa are valid for 28 days, which can be extended by a further 14 days.

Free Visa: Normal passports holders' passports issued by the following 8 countries do not require a visa to enter Myanmar for tourism and business visits for up to 14 days or longer in some cases.

- Cambodia
- Brunei
- Indonesia
- Laos
- Philippines
- Singapore
- Thailand
- Vietnam

#### **2.24 Myanmar E-Visa**

Now, Myanmar has an online e-visa system. It's issued online for tourism and business purposes only. An e-visa is issued 28 days or 70 days. The free for a business E-visa is US\$70, while a tourist E-visa costs US\$50. E-visa holders must enter from one of the following ports of entry:

- Yangon International Airport
- Naypyidaw Airport
- Mandalay International Airport
- Tachileik Land Border Checkpoint
- Myawaddy Land Border Checkpoint
- Kawthaung Land Border Checkpoint

**Table: 8 Visitor Arrivals by Visa Type (Yangon)**

Year	Package	F.I.T.	Total Tourist Visa	Business Visa	Entry Visa	Others	TOTAL
2000	77,646	46,690	124,336	37,032	8,043	37,367	206,778
2001	72,503	48,740	121,243	36,608	7,756	37,593	203,200
2002	78,723	55,017	133,740	37,084	9,505	32,139	212,468
2003	55,469	66,772	122,241	44,151	13,140	18,903	198,435
2004	48,191	109,934	158,125	40,521	16,505	21,219	236,370
2005	54,989	96,075	151,064	36,170	20,528	19,538	227,300
2006	74,389	106,140	180,529	35,629	22,592	18,844	257,594
2007	88,941	78,619	167,560	35,440	21,340	18,195	242,535
2008	48,656	61,884	110,540	36,392	21,827	19,007	187,766
2009	66,552	79,074	145,626	42,553	26,217	20,021	234,417
2010	87,932	109,222	197,154	48,549	28,240	23,303	297,246
2011	103,590	134,956	238,546	69,943	33,273	22,981	364,743
2012 Jan-Jul	61,661	118,493	180,154	60,979	20,323	19,457	280,913

\* Package + F.I.T.

Source: Myanmar Tourism Statistics 2012

(Source: Myanmar Tourism Statistics, 2017)

## 2.25 Banks and ATMs

Over the last few years, ATMs that takes international cards have started appearing throughout Myanmar, meaning that travelers no longer have to carry hundreds or thousands of dollars in cash around with them. ATMs can be found everywhere, even in relatively remoted destinations like Hsipaw and Mrauk U. KBZ and CB Bank have the most reliable ATMs they accept both Visa and Mastercard, and charge a fee of 5000 kyat- equal to US\$ 4 per transaction. It's also possible to receive international cash transfers via Western Union today. Master Card/ Visa card –AEC (American Express Card) can be used at the international hotels in Yangon, Myanmar.

## 2.26 Food and Beverage Providers

The number of F&B establishments in Myanmar, most of which are unlikely ever to be visited by tourists. The vast majority of restaurants are locally owned but international chains are starting to enter the country. Myanmar Restaurant MRA formed in 2011, brings together those at high end to work together to develop the equality and service of the restaurants in Myanmar and promote the regional food and cuisine to the local and city customers as well as to expatriates, international visitors and foreign tourists. Visitors generally expect access to edible, safe and hygienic food, underpinned by government regulation and enforcement. The MRA has acknowledged that food hygiene is an issue of national concern, and has started a project to educate street vendors about the importance and the process of preparing hygienic food.

**Table 9 Estimated Direct Tourism Employment in Myanmar, 2012-2020**

Subsector	Conservative			High	
	2012	2015	2020	2015	2020
Accommodation	44,055	63,668	84,485	125,403	224,670
Food and beverage	146,850	212,225	281,528	418,009	748,901
Recreation and entertainment	29,370	42,445	56,306	83,602	149,780
Transportation services	58,740	84,890	112,611	167,204	299,560
Travel services	14,685	21,223	28,153	41,801	74,890
<b>Total</b>	<b>293,700</b>	<b>424,450</b>	<b>563,056</b>	<b>836,018</b>	<b>1,497,801</b>

*Source: Myanmar Tourism Master Plan, 2013*

(Source: Myanmar Tourism Master Plan, 2017)

## **2.27 Development Activities in the Tourism Sector**

Tourism market in Myanmar is attracting a high level of interest from other donor programs. The majority of these the donor programs are operating in Yangon, Naypyitaw, Bagan and Mandalay, with some others also working in Karan, Shan and Kachin states.

Their focus varies and the common areas can be identified as below:

- Hospitality Training
- Capacity Development of the Ministry of Hotels and Tourism
- Responsible Tourism Development
- Destination Management
- 

## **2.28 Tourist Attractions in Yangon.**

### **Shwedagon Pagoda**

One of highly Buddhism's most sacred sites, the 325ft Zedi here is adorned with 27 metric tons of gold leaf, along with thousands of diamonds and other gems, and is believed to enshrine eight hairs of the Lord Buddha.

### **Kyaukhtatgyi Pagoda**

Housed in a large metal roofed shed, this beautiful 215ft long reclining Buddha is hardly publicized at all, even though it's larger than a similar well known image in Bago.

### **Melamu Pagoda**

Situated next to the Nga Moe Yeik creek, this Disneyland pagoda is a hoot. Large than life 3D studio depictions of the Buddha's life and practice litter the compound.

### **Ngahtagyi Pagoda**

One of Yangon's most gorgeous Buddha images is this 46ft tall seated one at the Ngahtatgyi Pagoda, sitting in calm gold and white repose and adorned with a healthy splash of precious stones.

### **Botataung Pagoda**

Botataung's spacious riverfront location and lack of crowds give it a more down to earth apiritual feeling than Shwedagon or Sule Pagoda. It's most original feature is the dazzling zigzag corridor, gilded from floor to ceiling, that nakes its way around the hollow interior of 131ft golden stupa.

### **Sule Pagoda**

It's not every city where a primary traffic circle is occupied by a 2000-year-old golden temple. This 46m zedi, said to be older than Shwedagon Pagoda.

### **People's Park**

Notable for its splendid views of the western side of Shwedagon Pagoda, this well-tended park offers plenty of pleasant features, such as flower gardens and ponds; fountains, including one made of concentric rings of white elephants; and treetop observation platforms linked by fun swinging bridges.

### **Minister Office**

Although recently closed to the public, it's worth making a circuit of this spectacular red brick complex, which takes up a 16-acre block. Built in stages between 1889 and 1905, the secretariat was the British seat of government of Myanmar. General Aung San and six of his colleagues were assassinated here in 1947.

### **U Thant House**

One of Myanmar's most respected international politicians, U Thant was UN secretary general from 1961 to 1971. When his grandson, That Myint U, discovered his house in the old Windermere estate area in 2012, the place was wreck.

### **Strand Hotel**

Opened in 1901, and run by the famed Sarkies brothers, they also owned the Raffles in Singapore and the Eastern and Oriental in Penang, this historic hotel in its early years hosted the likes of Rudyard Kipling, George Orwell and W Somerest Maugham.

### **Kandawgyi Lake**

Also known as Royal Lake, this artificial lake, built by the British as a reservoir, is most attractive at sunset, when the glittering Shwedagon Pagoda is reflected in its clam waters.

### **Yangon National Museum**

Even though the museum's collection is appallingly labelled and often badly lit, the treasures that lie within this cavernous building deserve a viewing.

### **Inya Lake**

Inya Lake, created by the British as a reservoir in 1883, is roughly five times larger than Kandawgyi. The best spots from which to view the lake are the parks running along part of Pyay road and Kaba Aye Pagoda road.

### **Martyrs' Mausoleum**

This striking mausoleum houses the remains of General Aung San and the six comrades who were assassinated on 19 July 1947. The Soviet style, red painted concrete complex, surrounded by beautifully manicured grounds, was fully renovated in 2016 in time for Martyrs' Day, the first to be celebrated by a government led by Aung San's daughter.

### **Taukkyan War Cemetery**

Eleven miles north of Yangon's airport is this huge, immensely sad but beautifully maintained cemetery. It contains the graves of 6347 Allied soldiers who died in the Myanmar and Assam campaigns of Second World war.

#### **491- 591 Merchant Street**

Around 250 workers were trained in new skills for the sensitive restoration of this two story colonial era building housing 80 residents from 12 families spanning the city's multi ethnic and religious population.

#### **Holy Trinity Cathedral**

Yangon's principal Anglican Church was designed by India based architect Robert Fellowes Chisholm. The red brick painted neo Gothic structure took nine years to construct, opening in 1895.

#### **Kheng Hock Keong**

Supported by a Hokkien association, Yangon's largest Chinese temple is most lively from around 6 am to 9 am, when it's thronged with worshippers offering candles flowers and incense to the Buddhist and Taoist altars within.

#### **Former Ministry of Hotels and Tourism**

Also known as the old Tourism Myanmar building, this stately 1905 vintage construction has been empty since its former ministerial tenants decamped to Pya Pyi Taw in 2006.

#### **City Hall**

This colossal lilac and purple painted colonial building, constructed between 1925 and 1940, is adorned with traditional Myanmar decorative detail such as peacock, dragon and tiered pyatthat turrets.

#### **High Court**

Lording it over the east side of Mahabandoola Garden, the 1911 Queen Anne style former High Court with its bell clock tower and rooftop statues was designed by James Ransome.

### **Independence Monument**

This 165ft white obelisk inside Mahbandoola Garden is surrounded by two concentric circles of lions.

### **Yangon Stock Exchange**

Looking like a giant vault, this monumental neoclassical structure was originally built in 1937 to house the Reserve Bank of India.

### **Myanmar Post and Telecommunications**

This is one of colonial architect John Begg's grand designs. During the 1950s almost 200,00 international cables a year passed through this building.

### **Myanmar Gems Museum and Gems Market**

The glitter has dimmed at this small museum since the government carted off the biggest Gems to another repository in Nya Pyi Taw.

### **Bogyoke Aung San Market**

This shop-house is a fantastic prewar structure in Yangon known as Scott market before, one of famous shopping place for visitors. Myanmar arts and handicrafts are best souvenirs available there at reasonable prices.

### **Aung San Suu Kyi's House**

When she's not in Nya Pyi Taw, Aung San Suu Kyi lives in this lakeside house, the former home of her mother and where she spent 15 years under house arrest. It's not open to the public yet.

## **2.29 Finance and Investment**



Public and private investment in infrastructure and services is critically needed to support the expansion of Myanmar's tourism industry. While government is increasing budget allocations to develop tourism infrastructure sectors, it's need significant levels of private finance. Myanmar's government setting a financial master plan to facilitate private access to loans, credit, and financial series, intended to help national investors overcome challenges to obtaining affordable finance for tourism and other projects. Government has liberalized the bank deposit and lending rates within a fixed corridor, lifted additional capital requirements for branch expansion, raised allowable loan ceilings, expanded eligible collateral, and eliminated the deposit to capital ratio requirement.

Myanmar has a total of 36 foreign investments in hotels and commercial complexes valued at 1.41 US\$ billion. Thirty projects have been complete and six are in the development stage, including a 414 rooms 300 US\$ million build operate transfer BOT project that was approved in 2012. Once completed, the projects will add 1,559 rooms to Myanmar's accommodation stock.

### **2.30 Foreign Investment Laws**

Myanmar's new investment laws, rules and procedures have sparked widespread interest as they introduce reforms to boost investor confidence, increase efficiency, ease the doing of business and attract more foreign investments into the country. The MIL, from its start date, applies to existing or new investments in Myanmar except for matters coming under the old foreign investment law 2012 such as investment disputes or prior permit investments previously suspended from business operations before the start date or investment projects suspended by governmental measures under general and national security exemptions. With the merging and consolidation of the foreign investment law 2012 and the citizens' investment law 2013 into the new MIL, the government will not treat foreign and local investment projects equally in terms of expansion, management, operation and sale of direct investments.

### **2.31 ASEAN Clean Tourist City Standard**

The purpose of the ASEAN Clean Tourist City Standard (ACTCS) is to provide ASEAN member countries with a tool that will improve that quality of tourism in their cities, increase their marketing competitiveness but also improve the situation of local residents and their livelihood by alleviating poverty. It's also designed to protect the environment thus responding to the impacts of climate change and contributing to the sustainable development of ASEAN cities. Yangon's governor trying to meet this standard to Yangon and promote hygiene public restrooms, parks and tourist spots around Yangon City.

the standard focuses on tourist cities where is flow of visitors and where cultural, natural and man-made attractions exist.

### **2.32 Potential Sector Wide Impacts of Tourism**

This sector consider how the sector can drive positive and negative impacts on human rights, in particular economic, social and cultural rights, in three areas: economic, governance, and environmental and social.

These sector wider impacts can either result from government action, policies, laws, actions by government institutions that require or at least support responsible business approaches or activities that undermine or even prohibit them.

### **2.33 Sector wide Economic Impacts**

than 100 million workers are employed in the tourism sector worldwide, and tourism revenues account for more currency flow to developing countries than all aid flows from foreign donors. According to the Ministry of Hotels and Tourism, the tourism sector is expected to bring in US\$ 905 million in the year 2014. Further, the World Tourism and Travel Council estimates that every dollar spent on travel and tourism generates over three dollars of economic output.

### **2.34 Benefit Sharing**

Where the benefits of the tourism sector are shared equitably with local populations, the sector has the potential to benefit the poor. However, studies elsewhere demonstrate that a majority of tourist revenue is lost through payments of goods and services purchased outside of the host country.

The development of logistics and infrastructure for the tourism sector such as roads, transport, electricity supply and information and communication technology ICT can benefit the Myanmar economy and the local population, if it takes into consideration their needs as well as those of tourist and is carried out in a sustainable manner.

### **2.35 Electricity**

Nationwide power shortages due to insufficient electricity have been a long standing issue in Myanmar. Shortages of electricity are common in small towns as well as big cities like Yangon. Due to frequent power cuts, hotels and other industry players use expensive diesel driven generators as alternative supply in many areas. This shortage of electricity has caused delays in investment in new hotels in less well known destinations. To solve this issue, the Myanmar Tourism Master Plan includes as a key action the provision of a reliable electricity supply in all main tourist destinations.

### **2.36 Information and Communication Technology ICT**

Telecommunications sector in Myanmar is significantly underserved but the situation is rapidly changing. As of June 2014 prior to the launch of Ooredoo and Telenor and a fall in the price of SIM cards., there were thought to be 9.36 million users 18% of the population. There were thought to be 2.6 million people using the internet 5% of the population as of May 2014, up from 60,000 users in 2012.

### **2.37 Foreign Exchange and Tax Revenues**

Through levying of income taxes on tourism business, licensing fees, and user fees on tourists, the tourism industry contribute to the tax base needed to support reforms and finance investments in sectors such as health, education and infrastructure.

**Table: 10 Regional Markets for Myanmar Tourism**

Country	2005	2006	2007	2008	2010	2011	2012 (JAN- JUL)
<b>Africa</b>	488	502	432	539	816	993	776
<b>Middle East</b>	1,920	2,177	2,281	1,379	2,208	2,607	2,129
<b>ASIA</b>	133,894	149,631	145,512	128,279	212,454	259,692	197,128
<b>Hong Kong</b>	2,593	3,159	3,048	2,410	3,081	3,820	2,642
<b>Japan</b>	19,584	18,945	15,623	10,881	16,186	21,321	23,277
<b>Malaysia</b>	9,858	9,588	8,693	8,268	16,186	23,287	15,921
<b>Singapore</b>	9,674	10,952	9,310	8,599	12,114	15,391	12,697
<b>Thailand</b>	27,199	30,400	35,002	27,311	59,692	61,696	48,100
<b>China</b>	19,596	24,893	29,551	30,792	46,141	62,018	38,684
<b>Taiwan</b>	17,600	15,827	13,707	11,472	14,170	15,542	11,662
<b>Korea</b>	10,934	18,265	13,821	12,369	18,930	22,524	17,805
<b>Bangladesh</b>	1,506	1,342	1,046	1,001	1,441	1,988	1,114
<b>India</b>	7,679	7,540	7,675	7,173	9,849	12,318	8,949
<b>Others</b>	7,671	8,720	8,036	8,003	14,664	19,787	16,277

Source: Tourism Statistics 2011 Ministry of Hotels and Tourism

(Source: Ministry of Hotels & Tourism, 2017)

As the table shows, Thailand and China tops the list of the visitors entering Myanmar.

Asian visitors, including Thailand and China, make up 66% of the market in 23011. Thailand tops the list of foreign visitors into Myanmar, and has held that position for the last decade, followed by Chain. Both have borders share with Myanmar and visitors from these 2 countries enter Myanmar via their respective border as well as by air.

In the year 2011-2012, there were a total of 61,696 Thai visitors or 16% of all tourists entering Myanmar. Flights operate between Bangkok and Yangon 8 times daily and Bangkok acts as the main point of embarkation for visitors coming into Myanmar by air.

China, the second largest group of visitors has recently caught up with Thailand this year, contributing an equivalent 16%. Currently, there are a total of 9 flights per week from the cities of Guangzhou and Kunming, but the number of flights, as well as number of Chinese cities that will have flights to Myanmar, are growing.

**Table: 11 Visitor Arrivals by Continent/ Regional Groupings**

**Table 3.1d Visitor Arrivals by Continent/ Regional Groupings**

Continent	Asia-Pacific	Column1	Europe	Column2	Americas	Column3	Africa & Middle East	Column4
Year	Asia	Oceania	West EU	East EU	North America	Latin America	Middle East	Africa
1998	125,232	5,305	50,950	709	12,698	606	1,909	317
1999	128,483	4,205	50,877	750	12,149	599	1,416	316
2000	131,165	4,716	53,739	1,166	14,691	621	1,263	314
2001	123,904	5,069	55,948	1,542	15,864	807	1,416	312
2002	125,547	5,912	63,400	2,077	16,953	871	2,022	430
2003	121,392	7,076	58,161	2,203	15,775	799	1,148	390
2004	146,774	7,076	62,901	2,510	19,260	1,191	1,831	395
2005	133,894	7,181	64,531	3,402	19,509	1,192	1,920	488
2006	149,631	7,533	76,767	4,024	21,350	1,530	2,177	502
2007	145,515	7,693	68,532	4,295	17,854	1,477	2,281	432
2008	128,279	6,079	37,156	3,729	15,229	929	1,379	539
2009	-	-	-	-	-	-	-	539
2010	212,454	8,695	59,817	6,118	18,911	1,669	2,208	816
2011	259,692	9,126	61,812	4,816	21,825	1,927	2,129	776

From: Myanmar Tourism Statistics (2012)

(Source: Myanmar Tourism Statistics, 2017)

## Theory

## 2.38 Customer Satisfaction

Kotler and Keller mentioned that satisfaction is a person's feelings of pleasure or dissatisfaction that result from comparing a product's perspective performance or outcome to expectations. If the performance not meet the expectations, the client is dissatisfied. If it matches expectations the customer is satisfied. If it exceeds expectations; the customer is highly satisfied or much delighted. Customer level of product performance depends on many factors, especially the type of loyalty relationship and brand psychology. Consumers often form more favorable perceptions of a product with a brand they already feel like before. Buttle stated that customer satisfaction is a pleasurable fulfillment response to a client experience or some part of them. Customer satisfaction is the customer's fulfillment response and dissatisfaction is fulfillment response differently.

The experience of component of the definition suggests that the satisfaction evaluation can be directed at any or all elements of the customer's experience. It's included product, services, process and any other components of the customer experience. Accordance with Lucas's explanation, keeping customers can be difficult in a competitive, global marketplace because so many organizations have joined the race for customers. By supporting a personal, professional strategy, that can help ensure that customers return. Building a good relationship in order to increase customer satisfaction is valuable.

The global service marketplace continues to be very competitive. Lodging business have been challenged to increase their levels of quality and service, improve their product design, and decrease their product development cycle times. Significant progress has been made in these areas, but one of the most important objectives in the hotel marketplace today is providing total customer satisfaction (Skogland a. Siguaw, 2004).

Customer satisfaction is considered to be one of the most important outcomes of all marketing activities in a market oriented firm. The obvious need for satisfying the firm's customer

is to expand the business, to gain a higher market share, and to acquire repeat and referral business all of which lead to improved profitability (Barsky 1992).

### **2.39 Service Quality Management**

American society of Quality (ASQ) defines quality as the totality of features and characteristics of a product or service that bears on its ability to satisfy given needs. (Hakserver et al)

Park, Robertson and Wu 2004 define service quality and service value as: service quality can be defined as a customer's overall impression of the relative efficiency of the organization and its services. Whereas service value can be defined as customer's overall assessment of the utility of a product based on perceptions of what is received and what is given. (Wirtz and Johnston 2003) stated that delivering excellent service is both inconspicuous and elusive. Customers know when they have received it and when they have not. Service, both poor and excellent has a strong emotional impact on clients, creation profound feelings about the organization, its employees and its services, and affection their loyalty to it.

Service excellence requires a total approach. Excellent customer service results from all the appropriate components being situated properly, from the correct strategic focus and service culture to a clear understand of service, good people, training, systematic and processes.

Organizations that want to perform service quality excellence should:

- Have strategic focus on clients or in other be customer centric.
- Value staff and take care of them.
- Take every opportunity of continually develop staff and systems.
- Re-create the service offered by predicting potential customer needs.
- Emphasize the surprise effect.

- Listen to feedback from all areas of the company and clients.
- Carefully consider clients complains and compliments seriously.
- Invest in training, particularly for front line staffs.
- Introduce learning orientation based on continuous improvement.
- Reward and recognize staff for contributions to service excellence.
- Focus on cost and profits.

#### **2.40 Tourist Satisfaction**

Tourist satisfaction is an important part to successful destination marketing because it has an influence on the choice of destination, the consumption of products and services, and the decision to return (Kozak and Rimmington, 2000) several researchers have studied customer satisfaction and provided theories about tourism (Brammwell, 1998, Bowen 2001). As Parasuraman, Zeitham, and Berry's (1985) expectation perception gap model, Oliver's expectancy disconfirmation theory (Pizam and Milman, 1993), Sirgy's congruity model (Sirgy, 1994; Chon and Olsen, 1991), and the performance only model. (Pizan, Neumann, and Reichel, 1978) have been used to measure tourist satisfaction with specific tourism destinations. In particular, expectancy disconfirmation has received the widest acceptance among these theories because it is broadly applicable. Pizan and Milan (1993) utilized Oliver's (1980) expectancy disconfirmation model to improve the predictive power of travelers' satisfaction. They introduced the basic dynamic nature of the disconfirmation model into hospitality research, while testing part of the original model in a modified form. In order to assess the casual relationship between two different disconfirmation methods, they employed a regression model with a single expectation met measure as the dependent variable, and 21 difference score measures as the independent variables. Some studies on customer satisfaction are also notable in tourism behavior research. Pizan, Neumann and Reichel (1978) investigated the factors structure of tourists' satisfaction with their destination areas. The authors showed eight distinguishable dimensions of tourist satisfaction.



## **2.41 Related Research**

### **Tourism in Myanmar in the 1970s and 80**

The history of Myanmar tourism can be divided into three periods as: the parliamentary democracy (1948-1962), the socialist period (1962-1988) and that of the opening up of the tourist market (since 1990).

During the period of parliamentary democracy, Myanmar economic policy was oriented towards capitalism. Despite a relatively low number of tourists, a few private travel agencies were opened. (SIT) the Tourist Information Service later called Tourist Burma was charged with informing and guiding tourists. During that period, tourist visas were valid for a month.

In 1962, the visas validity was reduced to just 24 hours. In conformity with the Socialist Regime's Nationalization Law, Tourist Myanmar and the Hotels became State owned. The tourist sector became smaller quickly, in order to protect the traditional norms and customs from foreign influence, according to the authorities. At the beginning of 1990s the new military government that taken power by a coup feat, consider to use a new strategy to open foreign investment market. The military government decided to make development of tourism as one of their economic priorities. In 1992, the Ministry of Tourism and Hotels was set up and it was the time of basic infrastructures of tourism were started. Although it had started, "Visit Myanmar Year 1996" was launched in 1996 as opened the doors to tourists.

### **2.42 The Promotional Campaign Based on Two Major Objectives:**

Economic necessity: foreign currencies can be earned through the tourists to supply arms, needed by military dictatorships in order to stay in power longer, on the other hand, money laundry of the drug trade by recycling it into a legal economic sectors.

To regain prestige: following the cancellation of 1990 election results, won by National League of Democracy, the opposition leader Aung had been maintained under the house arrest,

the Generals wanted to show the international community as another face of Myanmar for the relief of political and human rights views on military government.

Myanmar is a beautiful country with lots of offers which travelers seeking an exotic destination. It has long unseen of underdeveloped beaches, interesting ethnic groups, warm, friendly people, golden temples, deserted islands, deserted islands, cultural sites still damaged by development, and many unusual things. “Myanmar is the last of the truly magical destinations of the orient,” Philip Sehnnon wrote in the New Your Times. It’s the most devoutly Buddhist nation on earth, a land of glistening pagodas and hand-carved sandstone temples tended by hushed, saffron robed monks. “Rudyard Kipling praised the “mist on the rice-fields”, “the old pagoda looking lazy at the sea”, and “a neater, sweeter maiden in a cleaner, greener land” on the Road to Mandalay.

Since 1992, the Myanmar government has encouraged tourism. However, some of 750,00 visitors enter the country annually. To boost tourism industry, the new Myanmar government is in the process of making “immediate adjustments,” such as having looser visa rules, modeled on those of successful holiday destinations such as Thailand. (source: Reuter, January 20, 2013)

In 2006, Joshua Kurlantzick wrote in the washigton Post, “In the late ‘90s, it seemd possible that Burma, one of Asia’s most culturally rich nations, would enjoy a tourism mini-boom. The temples of Pagan, dotted across a plain, have survived for nearly a millennium. The region outside Mandalay contains ruins of ancient capitals of Burmese kingdoms and hill stations that resemble British resorts. Even chaotic Yangon boasts a wealth of crumbling but still magisterial colonial architecture. However, the country gets fewer than a million visitors per year. The gleaming Mandalay airport sits empty, a lone staffer wandering its cavernous halls. (Source: Joshua Kurlantzick, Washington Post, April 23, 2006)

Tourism remains a growing sector of the Myanmar economy. It is served internationally by number of airlines via direct flights. Also domestic and foreign airlines operate flights within the country. Cruise shops dock at Yangon and neighbor. Across land entry via border is permitted

at several border checkpoints. A valid passport with an entry visa for all tourists and business people is required.

Tourism was introduced to Myanmar in the time of colonialism of Southeast Asia (1870 – 1940). In 1865, the British government shut downed a fleet of four stammers and three cargo boats, which had been in service on the Irrawaddy since the annexation of lower Myanmar to British India in the early 1850s.

A young entrepreneur Glaswegian bought a fleet and set up the water ferry transportation business called (IFC) The Irrawaddy Flotilla Company Limited. Burma's last King Thibaw and royal family were, on board the Irrawaddy Flotilla Company Limited (IFC) steamer, into their exile in India after the fall of Mandalay in 1885. During the second World War, IFC was the main supporter among Japanese and Burmese nationalist military forces. When Burma gained independence in 1948, the IFC was offered to the government Inland Water Transport Board of the 'Union of Burma.'

Paul Theroux wrote in "The Great Railway Bazaar". "Tourists are welcome, treated with huge courtesy, invited to Myanmar homes, taking photo, and squired around and given special privileges". It's how Myanmar people are kind and polite to their guests. Most of accommodations were not well facilitated yet, and the cost of accommodations were high at that time. Shortage of everything in the hotels, such as electrical parts, room furniture, bedsheets were not very good.

### **2.43 Foreign Travelers to Myanmar**

According to official data, 2010- 2011, 424, 000 visitors visited Myanmar, and 570 hotels and 160 of guest house had a total capacity of 24,692 rooms were quickly filled. Compared to neighboring country Thailand, where the same climate and landscape to Myanmar, has more than 4,000 hotels attracted 19 million visitors the same year of 2010-2011, the fiscal years. overall tourist's arrivals in Myanmar during the year 2009- 2010 stood at 300,000 up from 255, 288 in the earlier year.

In 2007, about 150,000 visitors visited Myanmar, and 500,000 foreign visitors visited in 2002 show the figure of highly suspect. According to the World Tourism Organization, the actual number was more likely 200,000 including diplomats and businessmen, with 12,000 from the United States. This was up from 160,000 foreign visitors in 2000 and only 20,000 in 1994.

In 2003, about 600,000 foreign visitors came to Myanmar makes 20 percent up from 2002, according to government resources. These travelers made \$116 million in revenues, compared to \$99 million the year before. Visitor from neighboring countries such as Thailand, Singapore and Malaysia accounted for 44 percent of the increase and made up more than half of all visitors. This made up 10.8 percent of all visitors to Thailand in 2003. They were the largest group, followed by citizens of Taiwan, Japan and China. Germany was the sources of the largest number of Western tourists followed by United States, France, Britain and Italy. (Source: World Tourism Organization)

Every foreign visitor had to apply a visa on the arrival of Yangon and Mandalay international airports without having to make any prior arrangements with travel agencies in 2010, and an estimate show 1 million of Chinese visit Myanmar every year. Many of them visit on arrival visa and hit the border towns patronized mainly bet them to gamble and to sexual pleasure.

In the 1990s and 2000s, the number of European and North American travelers fell off at various times. Asian travelers from Japan, South Korea and China was increasing as the same time happening. They have not been so inclined to follow or had even heard about the tourism boycotts of Myanmar. During the time of unrest in Myanmar, during the peak season for tourism, many hotels in popular spots, such as those surrounding the ancient Buddhist temple of Bagan, were virtually empty. When that happened cooks and chambermaids at hotels and restaurants as well as curio hawkers, tour company workers and craftsmen lost their jobs or sources of income.

Hotel employees and tour guides in Myanmar have been given instructions not to discuss local politics with foreigners. There will be punishment if they are found guilty. Hotel guest list is required to give to the military intelligence office. Although military show low profile in tourist

area and helping to the tourist, there have been cases of visitors being detained in locked rooms. In September 2011, a Japanese tourist was killed by military troopers and Chiharu Shiramastu, 31 was murdered near the Bagan tourist site, said government official.

#### **2.44 Tourism Campaigns Development by Military Junta**

Through the 1990s and 2000s the military government see tourism as a way of foreign money earning, and started a campaign to attract foreign visitors with filling clean bathrooms, comfortable seats and entrance gates of train stations, hotel and other accommodations. During the 1996 was designated as “Visit Myanmar Year”, 34 of local hotels were still under the constructions, financed with foreign investors and opium lords, and new roads were built with forced labor. “Visit Myanmar Year” was not success.

Myanmar’s underdevelopment is one of its charms that visiting in Myanmar like going back to the time of stone age, no electricity, no televisions, less factories and busy people. 7-Elevens and McDonald’s were not arriving in 2000s. the only one way of Myanmar Junta’s hands on foreign currency was by requiring tourists to change 300 USD into Myanmar foreign exchange coupons when they entered the country and required them to pay for train tickets, hotel accommodation and transportation fees. Foreign travelers arriving at the airport were also encouraged to sign up for 500 USD, every earned foreign currency go to the Myanmar Junta. In 2001, new international airport was opened in Mandalay and most hotels built by foreigners are required to have a Myanmar partner.

#### **2.45 Tourism and Politics in Myanmar**

According to the United Nations, Tourism is an important source of jobs and foreign currency for Myanmar. Over many years its fortune has been affected by politics in Myanmar. Myanmar’s leader Aung San Suu Kyi asked visitors to avoid her country until democracy prevailed. Human rights also urged tourists to avoid the country. Lonely Planet disagreed, arguing

that tourism's benefits to ordinary Myanmar outweighed the impact of the money that ended up in the hands of the military regime. In 2007, tourism was hit hard by images seen around the world of soldiers beating up monk and shooting protesters.

Military junta's forced labor projects were focused around tourist destinations which have been heavily criticized for their human rights records. Even disregarding the obviously governmental fees, Minister of Hotels and Tourism Major General Saw Lwin recently admitted that the government receives a significant percentage of the income of private sector tourism operations. There are not any relevant to ordinary people to receive money from tourists and military tightly controls the interaction between foreigners and the people of Myanmar.

In the early 2000s, traveling to Myanmar became a politically correct issue as it was claimed that much of the tourism money spent in Myanmar ended up in the hands of the military regime and thus supporting the regime's repression and forced labor. Among those who opposed a boycott on tourism to Myanmar was Lonely Planet Guides. They argued that 1. such a boycott deprived thousands of ordinary people of desperately needed money, 2. Exchanges between foreign tourists, and Myanmar helped open the eyes of the Myanmar to the outside world, 3. And the same exchanges educated foreigners about Myanmar's problems and needs. In its guide for Myanmar, lonely Plant offers suggestions on ways to minimize support of the junta but concludes that travel is the type of communication that in the long term can change lives and unseat undemocratic governments.

Travel agencies who dealt with Myanmar suggested travelers to Myanmar to avoid hotels and airlines which supporting the regime. Boycott opposites argued by travelling independently tourists could regime liked businesses and can maximize the good they brought to ordinary Myanmar. Supporters of the boycott were most against large scale mass tourism. To have a very big cruise ship with hundreds of tourists coming in that's a lot of money for the regime, and so we don't like such huge business, Win Tin told the Times.

Myanmar's leader Aung San Suu Kyi said, "Myanmar will be here for many years, so tell your friends to visit us later. Visiting now is tantamount to condoning the regime." Some member of her own party even disagree with her views on this issue. One member of NLD told the New York Times, "if there are no visitors, factory worker women will lose their jobs. They are the ones who suffer, not the generals." One souvenir shop owner told the Washington Post. "if no tourist come I cannot feed my family."

Kira Salak wrote in National Geographic, "Since 1996 the Myanmar military government has sponsored a campaign to encourage tourism, but there's been much debate in the West about traveling to this country. Aung San Suu Kyi advises against it, arguing that tourism funds the government's oppression; other Myanmar exiles believe tourism creates many job opportunities for local people.

#### **2.46 Myanmar Opposition Drops Tourism Boycott and Myanmar Visa Before the Election**

In November 2010, Kenneth Denby wrote in Time Times, "The 15-year-old, opposition inspired tourism boycott of Myanmar has been declared over after the party of democracy leader Aung San Suu Kyi said it would now welcome foreign travelers. Win Tin, a senior leader of the National League for Democracy, told the Times that foreigners should visit Myanmar and see for themselves the suffering of the people under one of the world's stubbornness and repressive military dictatorships. "we want people to come to Myanmar, not to help junta, but to help the people by understanding the situation; political, economic, moral everything," said U Win Tin, a cofounder of the NLD and close friend of Aung San Suu Kyi. "for the outside world to see, to know our situation, that can help our cause a lot, we think. (sources: Kenneth Denby, The Times, Nov 4, 2010)

U Win Tin said that the new policy had not received that explicit approval of Aung San Suu Kyi but he said that her silence on the matter, in messages brought out by the few visitors

permitted to visit her, suggested that she supported the new policy. “the matter is not so very easy for us, so we haven’t decided yet whether we reverse Aung San Suu Kyi’s request. But our view is that we should allow people to come, to see how people are suffering under the regime; there’s no response from Aung San Suu Kyi.

In August 2010, Reuters: “Army ruled Myanmar has suspended visas on arrival for tourists from September ahead of its first elections in two decades, official said. Potentially restricting access to the country for foreign observers. The reclusive country began offering visas to arriving tourists in Mya to lift tourism. But the scheme will be suspended. “we think the real motive for this measure could be to prevent outside reporters and monitors from entering the country ahead of the Nov 7 elections, “a private tour operator said. Many foreign journalists traveled to the country on tourist visas during September saffron revolution in 2007 and Cyclone Nargis hit in 2018. The regime offers few opportunities for foreign observers to visit the country. Journalists and observers granted official visas are accompanied by minders. (sources: Aung Hla Tun, Reuters, August 23, 2010)

#### **2.47 Hotel Chains Eye Myanmar as It Opens Up**

“Visitors hopping to catch a glimpse of glittering Shwedagon Pagoda and hear the “Tinkly temple bells” of Kipling’s “Road to Mandalay might one day be able to book into a Westin or Marriott, thanks to Myanmar’s emergence from political isolation. Starwood Hotels and Resorts which runs chains such as Westin, Sheraton and La Meridien and Marriott International both said they wanted to start running hotels in Myanmar s one of the most isolated countries in Asia, is being welcome back into the international fold after two decades of sanctions, thanks to democratic reforms. “Marriott would love to be there if conditions are right, “said Arne Sorenson, president of Marriott International. “Myanmar has captured people’s imagination for decades.” (Souces: Paritosh Bansal and Ploy Ten Kate, Reuters, January 26, 2012)

Hotel chains in Myanmar are Asian based companies such as Shangri-La Hotel and Resorts, Singapore’s Sedona Hotels International, and GHM Luxury Hotels, a Myanmar company



that owns the Strand in the commercial capital. The few five-star hotels outside of Rangoon are mostly in beach resorts or tourist centers such as Mandalay and Bagan. However, as tourists grow visiting Myanmar rapidly, the government admits the shortage of accommodation.

Westin chains sees an opportunity as Vasant Prabhu, Chief financial officer of Starwood Hotels and Resorts said “I think it’s right time for people like us to look at Myanmar. “I think Myanmar is the interesting new opportunity a little bit like Vietnam might have been 20 years ago. We have a decent presence in Vietnam right now. Jail Mekouar, managing director for the Middle East and Africa for Jones Lang LaSelle Hotels, a hotel investment services firm, said Myanmar’s potential for tourism and hotels was huge given its landscape, islands and rich history. Executive vice president of development for Carlson Hotels, Nancy Johnson suggested her company also interested in going into Myanmar. “It’s a beautiful country,” Nancy said. “if there’s an opportunity to go there, we’ll be there.”

The operating hotel chains in Thailand see huge potential in Myanmar, but are not rush to set up there. They also aware of the risks attached to investing in a country with a long history of corruption and unclear rules and regulations. “We are looking for ways to expand in Myanmar. Our desire is get in there by managing local hotels, “said Ronnachit Mahattanapreut, a senior vice president at Central Plaza Hotel. “I don’t think we need to hurry because rules and restrictions are not really settled. “Prakit Chinamourphong, head of the Thai Hotels Association, which represents about 800 hotels, including the mandarin Oriental, the Four Seasons, owned by Minor International Pcl, and Dusit Thani, said it would be at least two years before Thai chains made a move. Myanmar is opening up but nobody is talking to open un there, it’s bit early for us to get in now. “they told Reuters. “There are still high risks to make a move there. Politics, especially, is not much clear yet. Having said that, we see a very good opportunity.”

#### **2.48 Tourism rush to Myanmar as the Reforms and Release of Aung San Suu Kyi**

Tourism in Myanmar is still a small slice of the economy, but it's a fast-growing part of Myanmar's basis service sector. Amanda Jones wrote in the Los Angeles Times: Times are changing in Myanmar, and it's happening with 21<sup>st</sup> century speed. The military Junta, As Aung San Suu Kyi was released from house arrest in 2010, and waiting tourists have rushed into the country. This onslaught of visitors 820,00 in 2011, 1 million in 2012 and 1.5 million estimated in 2013 means no enough accommodations were prepared, as the travelers need to book in advanced before they coming. It also means feverish hotel construction, and not always with the best planning. (Sources: Amenda Jones, Los Angels Times, December13, 2013)

#### **2.49 Thailand's pretests hit tourism to Neighboring Myanmar**

In January 2014, Chrisina Larson of Blommgerg wrote: "Thousands of antigovernment protesters have filled the streets of Bangkok, clogging intersections and calling for PM Yingluck Shinawatra to step down. The country's tourism industry is expected to take a major hit, with visitors from China projected to decline 70 percent in January and during the crucial Chinese New Year holiday. (Sources: Christina Larson, Bloomberg, January 15, 2014)

It's not only Thailand's tourism suffering. Myanmar is also feeling the chill. "Usually this time of year is a popular tourist season, "Aye Mra Tha, an official at state run Myanmar Airways International, told the Democratic voice of Myanmar media group. She said that passengers were down 40 percent on flights between Bangkok and Yangon (Many international flights to Myanmar's capital are routed through Bangkok). Travel agencies based in Rangoon reported that few visitors arrived in Rangoon and business booking Bangkok was lesser.

## 2.50 Definition of Terms

World Tourism Organization has standardized tourism terminology and classification some extent to world tourism. The standards are also imitated by the United Nations Statistical commission (Frechtling, 1996)

**Tourism** is consisted of the actives of person travelling to another place and staying outside their usual environment for not more than once consecutive year leisure, business and other purposes.

Weave and Lawtwon, (2012) mentioned the tourism as the sum of the phenomena and relationships arising from the interaction of tourists, business suppliers, host government, and host communities in the process of attracting and hosing these tourist and other visitors.

**Tourism** is composed the following categories in general by WTO

1. Domestic Tourism: residents of a country visiting destination in the own country.
2. Inbound Tourism: visit to a country by non-resident.
3. Outbound Tourism: residents of a country visiting destinations in other countries.
4. Internal Tourism: the combination of domestic tourism and inbound tourism.
5. National Tourism: the combination domestic and outbound tourism.
6. International Tourism: the combination of inbound and outbound tourism.

**Tourist Satisfaction** is the result of the relationship between tourists' expectations about destination based on their previous images of the destination and their evaluation of the outcome of their experience at the destination area.

**Tourism Industry** is the set of enterprises, establishments and other organizations one of whose principal activities is to provide goods and services to tourists.

**Tourist Destination** is a city, town or other area the economy of which is dependent on a significant extent on the revenues accruing from tourism. It may contain one or more tourist attractions.

**Tourist Attraction** are natural and artificial such as nature parks, beaches, marine areas, archaeological sites and historic places, cultural features such as arts and entertainment crafts, traditional architectural styles, economic activities, traditional customs and ceremonies and theme parks and casinos and special events such as fairs, festivals and sports competitions.

**Safety** is a freedom from danger or risks and feeling of safety in the visiting areas, in this point, Encyclopedia Americana Volume 24, (1986) stated the concept of “safety” as the condition of being free from the danger of harm and freedom. As a legal concept, it implies a state of relative security from accidental injury or death due to measures designed to guard against accidents, laws that encourage the maintenance of safety standards are often called safety.

**Service** means that tour and travel services which are necessary to make travel arrangements for tourists and provide guide services. Providing tourist information services in the area are very important. Other services include restaurants and other types of eating and drinking establishments, postal services, medical services for tourists who experience medical problems while travelling, banking and money exchange, retail shops that handle convenience items, crafts and souvenirs, art galleries and antique shops and often special items such as designer clothes, personal services like a hair dressing and other types. (WTO 1998)

**Tourist Expenditure** is the total consumption expenditure made by a visitor during his or her visit and stay at a destination. (Bian Yan 2011)

**Tourist Receipt** is the receipt in the form of direct or indirect currency payments made by tourists from abroad to cover the cost of goods and services excluding expense of international transportation. The calculation of tourist or tourism receipts is used by multiplying the total number of international tourists by the average length of stay and by the average expenditure per person per day (Bian Yan 2011)

## **CHAPTER 3**

### **RESEARCH METHODOLOGY**

#### **3.1 Type of Research Methodology**

This research is quantitative research that will be done by the survey of Yangon tourism development in Yangon region, Myanmar. In order to obtain data collection for the calculation of explicit and implicit importance, as well as the level of tourism sectors development, this study is done using questionnaires to collect data from visitors. The questionnaires were asked to the visitors who are visiting Shwedagon Pagoda, Yangon and to rate the level of satisfaction of tourism sectors in Yangon by choosing multiple items.

#### **3.2 Research Design**

The researcher used the descriptive or quantitative design with Pearson's correlation method. The samples are 222 visitors visiting Shwedagon Pagoda, Yangon, Myanmar. Therefore, about 222 of randomly questions were asked as sample of this research.

#### **3.3 Data Collection**

The questionnaires were distributed to the tourists at Shwedagon Pagoda, one of the highly tourist attractions in Yangon region. The questionnaires comprised three parts as demographic characteristics, guest satisfaction on Yangon tourism infrastructures and suggestions on Yangon's tourism infrastructures and things to see in the future. The procedure of data collection was carried out by the researcher to test the sample. The 222 questionnaires, comprising of demographic, attraction, infrastructure, accommodation, safety, services, transportation, arrivals of tourist by Yangon International Airport and satisfaction level were collected from 6<sup>th</sup> November to 3<sup>rd</sup> December, 2017 in Shwedagon Pagoda, most tourist attraction, Yangon, Myanmar.

## Measurement

**Demographic Characteristics:** for this part, gender, age, education background, occupation, income, income and marital status are involved.

**Yangon Tourism Infrastructures:** for this part, Yangon's basic tourism infrastructures were asked such as multiple questions on Yangon's accommodation price, transportation, security, attraction, destinations, services, banking system, visa status, flight status and satisfaction respectively.

**Tourist arrivals by Yangon International Airport:** for this part, tourist arrivals by Yangon International Airport data collections were calculating yearly and rating for airport services.

The 5-point rating scale ranges from "strongly satisfied to strongly dissatisfied" analyzing at the average of mean:  $\bar{x}$  and standard deviation S.D.

**Table: 12**      **Satisfaction Measurement**

Average	Meaning
1.0 – 1.49	Strongly Satisfied
1.50 – 2.49	Satisfied
2.50 – 3.49	General
3.50 – 4.49	Dissatisfied
4.50 – 5.00	Strongly Dissatisfied

### 3.4      Formula Used in Analysis

The instrument used in data analysis was the statistical package for social science (SPSS version 20) with the satisfactory scale: strong satisfied, satisfied, general, dissatisfied, and strongly dissatisfied. The results were analyzed by using descriptive statistic with frequency, percentage, mean and standard deviation and relationship correlation methods, two tailed.

The sections of the questionnaire, the descriptive statistic including frequency, percentage, mean and standard deviation were used to explain the demographic data of the responders. In second section, the Likert scale was utilized in measuring the level of satisfaction in relation to tourist destination with Pearson correlation and the other comments were stated.

The sample of this research is calculated by using Taro Yamane (1973) formula with 95% confidence level according with statistic of 1,272,596 international tourist arrivals as an example from the data collection by Yangon International Airport, Ministry of Hotel and Tourism 2016 report.

**Table: 13**                      **Design of the Study Table**

<b>Research Objectives</b>	<b>Sources of data</b>	<b>Research Instrument</b>	<b>Data analysis and Methods</b>
1.To study Yangon tourism sectors development.  2.To analysis the tourist arrivals of Yangon international airport.	The sample size is 222 tourists, visiting Yangon, former capital city of Myanmar.	Questionnaire Started Dated: 6 <sup>th</sup> November to 3 <sup>rd</sup> December, 2017 at Shwedagon Pagoda, most tourist visiting place, Yangon, Myanmar.  <b>Part 1.</b> Demographic characteristic	Descriptive statistic method and Person correlation method.  Two tailed.

<p>3.To research Yangon's current tourism improvement.</p>		<p><b>Part 2.</b> Education background, purpose of visit, satisfaction, accommodation price, transportation, visa status of multiple choice questions.</p> <p><b>Part 3.</b> Suggestion, things to seen next time, and recommendation to Yangon's tourism development.</p>	
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## CHAPTER 1

### INTRODUCTION

#### 1.1 Introduction

Myanmar (formerly Burma) is a Southeast Asian nation of more than 100 ethnic groups. Bordering Thailand, Laos, India and China. Yangon (formerly Rangoon), the country's largest city, is home to the main gate of foreign visitors, with its busy markets, numerous parks and lakes, and the towering, gilded Shwedagon Pagoda, which contains Buddhist relics and dates to the 6<sup>th</sup> century. Yangon, the commercial city, is the main gateway to Myanmar. Yangon was founded by King Alaungpaya in 1775 on the site of a small settlement called Dagon. The name Yangon means "End of Strife" which was Anglicized to Rangoon after the British annexed Myanmar in 1885. The present day Yangon covers about 350 sq.km with population of over 7 million.

#### 1.2 Background of Study

Yangon, former capital city, is Myanmar's largest city with over seven million populations, and is the most business hub place, although Nay Pyi Taw was relocated the capital in 2006 by former military government. Compared to other major cities in Southeast Asia, Yangon's tourism sectors may still remain the largest number of colonial buildings in the region, receiving regular visitors.

Therefore, Yangon is home to arrival of most of the tourists by flight. Although Myanmar owns great tourist potential and attractions in many fields, much of the industry remains to be developed. Though visitors to Myanmar is small compared to her neighbors, after the junta transferred power to the civilian government, the tourism sector saw an increase in tourism arrivals and in 2012, tourist arrivals surpassed the one million mark for the first time. In 2013, the Tourism Master Plan was created, targeting 7.5 million arrivals by 2020.

This research will explore factors of Yangon Tourism Sectors Development, with the satisfaction level of visitors visiting Yangon. The factors range from Yangon's tourism sectors development, arrivals of Yangon International Airport and most tourist attractions in Yangon. Moreover, visitors' comments on Yangon's tourism sectors will be resulted as how much they satisfied and dissatisfied upon them, and the recommendations given by visitors will be a tool for the future tourism sectors development of Yangon, Myanmar. The aim of this research is to observe to determine how much visitors satisfied with Yangon tourism sectors and what tourism sectors are need to upgrade for 2020 government's master plan.

**Figure: 1** Map of Union of Myanmar



(Source: Wikipedia map of Yangon, Myanmar, 2017)

Myanmar's tourism has been developed mainly by the government, but many private enterprises do exist, bringing a wide range of tourists.

Military government has encouraged Myanmar's tourism sectors since 1992. As of 2010 record, 791,505 foreign visitors visited Myanmar via main entry port of Yangon International Airport. More than one million of foreign visitors visited Myanmar as the figure is expected to rise about 1.5 million in 2013. The number of foreign visitors' arrivals reached more than 2.04 million, by both of overland and airs arrivals.

In 2010, 791,505 foreign tourists visited Myanmar, with 295,174 foreign tourists entering the country via Yangon International Airport.

Tourists arrivals in Myanmar increased to 335646 in May from 333434 in April of 2016. Tourists Arrivals in Myanmar averaged 270534.36 from 2012 until 2016. Reaching an all-time high of 450541 in December of 2015 and a record low of 125085 in December of 201

**Figure: 2**      **Tourist Arrivals Chart**



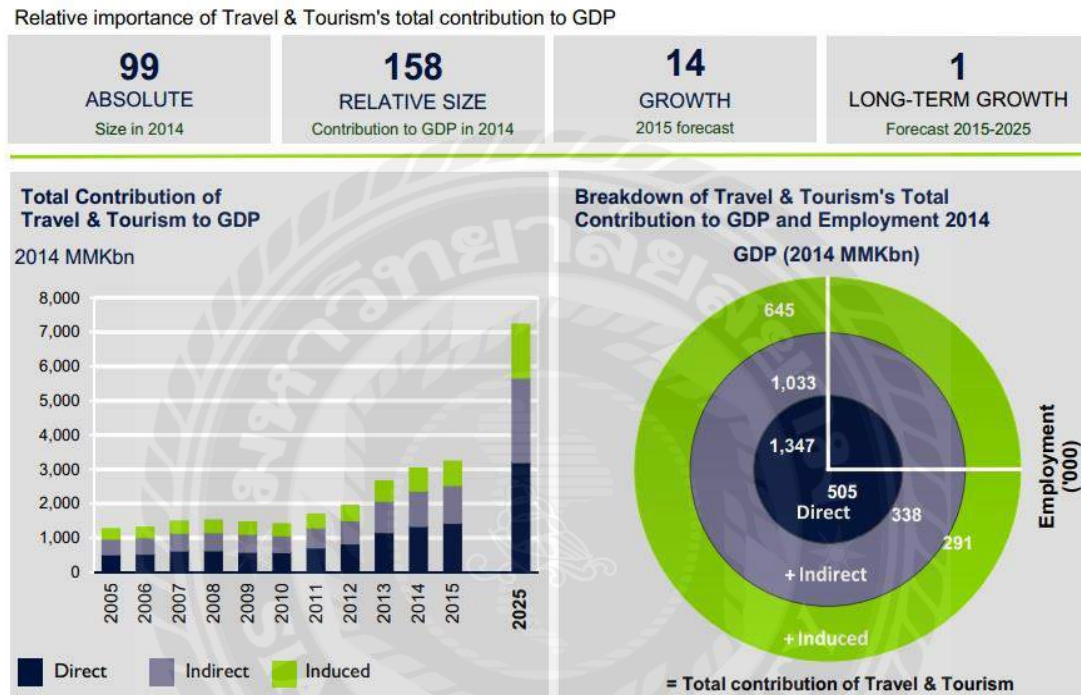
(Source: Ministry of Hotels and Tourism, Myanmar, 2017)

### 1.3 Foreign Tourist Arrivals

Myanmar has recently seen an unprecedented growth in international tourist arrivals. In 2012, visitor numbers increase the one million mark and arrivals reached three million in 2014. However, according to the World Tourism Organization and the Pacific Asia Travel Association, up to two thirds of those three million visitors were day trippers from neighboring countries. The record shows that number of visitors visiting sites such as Swhedagon Pagoda and Inle Lake, which shows that arrivals of visitor increased by between tween and twenty -five percent in 2014. At least 20.4 million of visitors are projected to rise between 2013 and 2020. More than 70 percent

of total arrivals represented of Asian as Thai, Chinese, Japanese and South Korean visitors are on the top of the list. Maximum stay is a week.

**Figure: 3 Myanmar's Travel and Tourism Total Contribution to GDP**



(Source: World Travel and Tourism Council, 2017)

Myanmar's tourism industry is becoming one of the fastest growing areas of its economy, with an income rise 70% in 2013 compared with the previous year 926 million in 2013, 534 million in 2012 and 319 million in 2011. Ministry of Hotels and Tourism's recently report estimates that the tourism sector will bring in double numbers in coming years although the government has also quoted a figure of three billion US\$ including direct, indirect and induced effects of tourism.

#### **1.4 Research Questions**

1. What are the tourism development sectors in Yangon?
2. What are the significant factors that can develop Myanmar tourism sectors?
3. What are the tourist attractions in Yangon City?

#### **1.5 Significant of Study**

The finding of this study will be the importance of the study to the Myanmar's tourism sectors, government's master plans, the community, the institution and stakeholders concerned with Myanmar tourist development that tourism plays an important role in current rapidly development of Myanmar's economic growth. The rule of tourism industry is the second factor of the Myanmar's economic growth which created umbers of jobs to high job demanded societies.

The greater demand for local peoples with job opportunities justifies the need for more effective, the development of tourism sectors. Thus, the study that apply the recommended approach derived from the results of this study will be able to train the operators better. The study will help Myanmar's tourism sector with a new innovative idea which is based on research.

#### **1.6 Objective of study**

The objective of this study is to indicates that current development of Yangon's tourism sector developments compared with last 2012 to present day of Yangon City, Myanmar. The study also will highlight the Yangon's basic tourist infrastructures, Yangon environment, Tourist arrivals, destinations, attractions, safety, information system and accommodations.

##### **The specific objectives will be as:**

1. To study Yangon tourism sector developments.
2. To analysis the tourist arrivals of Yangon international air-port.
3. To research Yangon's current tourist attractions improvements.

## **1.7 Research Hypothesis**

The hypothesis of this research are based on the expectation disconfirmation theory and three hypotheses for this research are selected of the tourism development sectors of Yangon, Myanmar.

This research is to pay attention on tourism development in Yangon City, Myanmar. Particularly, it focusses on current situation of Yangon's tourism sector development conductions compared by neighboring countries. This study will also cover current government's attempting to promote Yangon's tourism, moreover, the analysis of the development of Yangon's hotel chains and economic growth in Yangon City, based on current tourism development.

**H1:** There is relationship between demographics characteristics and Yangon tourism sector developments.

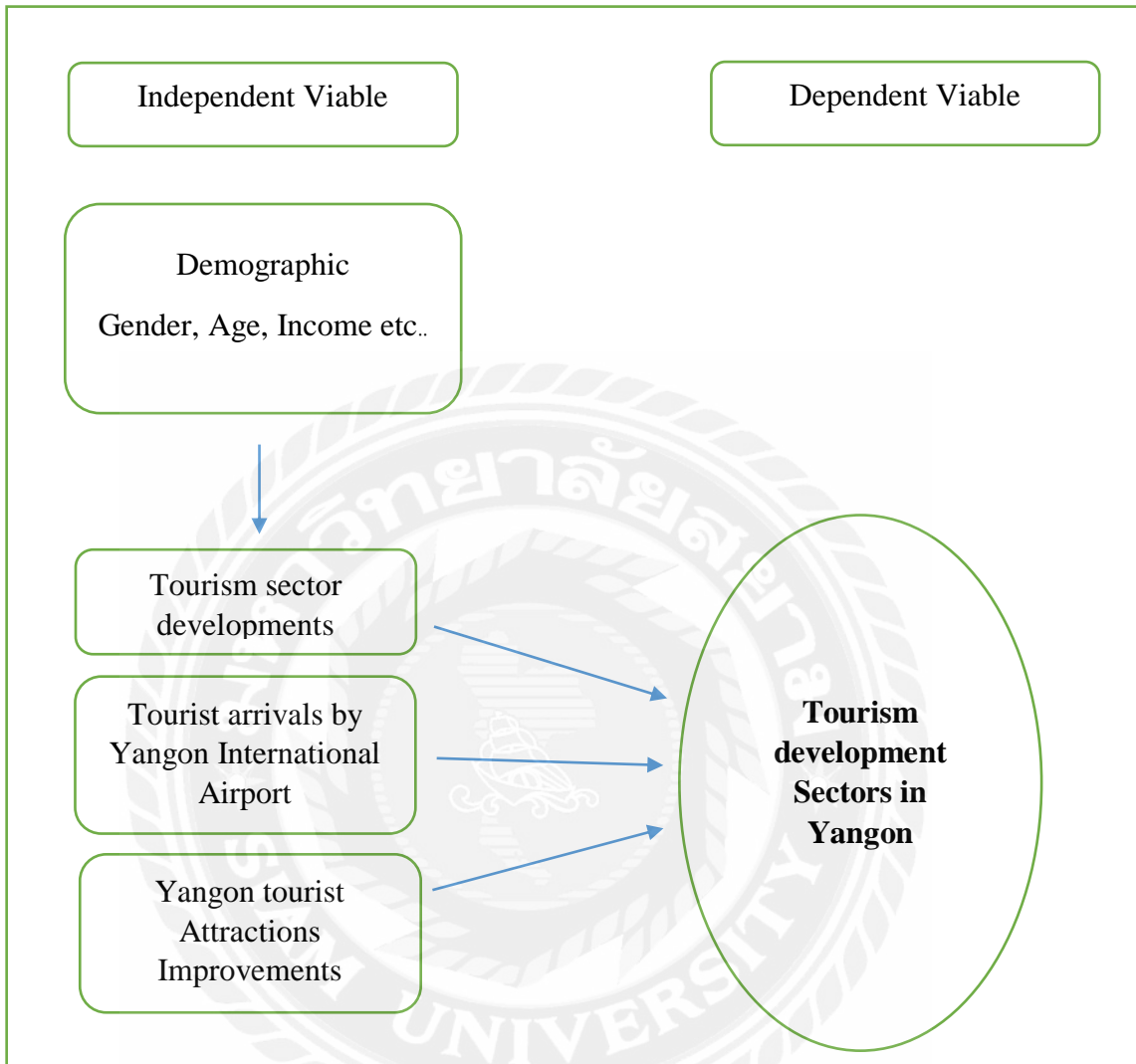
**H2:** There is relationship between arrivals of tourists and Yangon tourism sector developments.

**H3:** There is relationship between Yangon tourism infrastructures and Yangon tourist attraction improvements.

## **1.8 Research Model and Conceptual framework**

This research design partly to survey the visitors visiting Yangon Region, operators in Yangon, travel agencies and hoteliers. They will be asked to fill out the questionnaires providing the gender, education background and income basically. Some interviews and group discussion also will be added as additional.

**Figure: 5      Conceptual Frame Work**



## 1.9 Variables of study

### Independent Variables

Demographics characteristics are included, such as gender, age, education level, occupation, income and marital status.

**Gender:** most of visitors visiting Yangon of male or female have relationship with Yangon tourism development.

**Age:** Most of visitors aged 21-50 have relationship with Yangon tourism sectors development.

**Nationality:** The international tourists who visit Yangon have relationship with Yangon tourism sectors development.

**Education Level:** Most of visitors visiting Yangon are graduated and have relationship with Yangon tourism sectors development.

**Occupation:** Visitors visiting Yangon are different careers and have relationship with Yangon tourism sectors development.

**Income:** Visitors' income low or high are different and have relationship with Yangon tourism sectors development.

**Marital Status:** Any types of visitors visiting Yangon City has relationship with Yangon tourism sectors development.

Tourism sectors development of Yangon has relationship with Yangon tourism development.

Tourist arrivals by Yangon international airport has relationship with Yangon tourism sectors development.

Yangon tourism improvement has relationship with Yangon tourism sectors development.



### 1.10 Dependent Variables

It will depend on independent variable when a result of independent variable for Yangon tourism sectors and visitors will be mentioned the Yangon tourism development, Myanmar.

### 1.11 Definition

#### 1. Tourism development sectors

Basic infrastructures such as presence of tourists spots, levels of security for tourists, accommodations, transportations, banking, information technology, government policies for tourism, development of transport, communication and management of tourist attractions.

#### 2. Arrivals of tourist by Yangon International airport

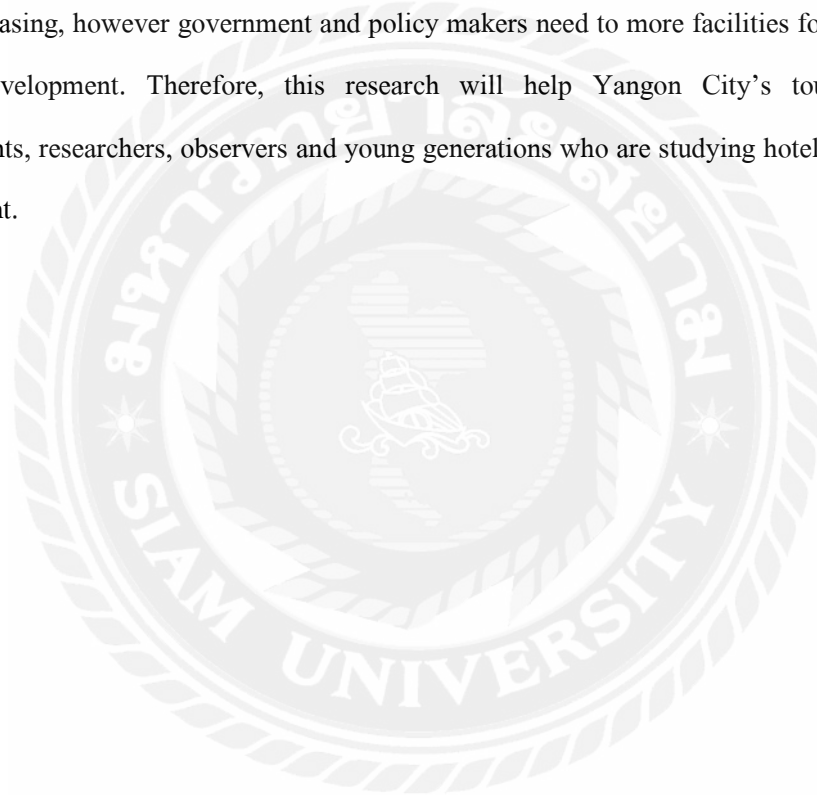
Tourist arrivals by Yangon International airport, in 2009 Yangon entry point show 234417 and 817699 in 2013. Most of visitors enter Myanmar by Yangon International Airport.

#### 3. Yangon tourist attraction Improvements

Yangon's tourist attractions have been developed attempting by Yangon government. Yangon received more visitors, and basically, government of Yangon has developed more tourist attractions and infrastructures. Yangon's basic tourism attractions, such as historical places, parks, amusement are, pagodas, night markets, Yangon sight-seeing sites, exhibitions, busy streets, flower market of Yangon, Church and Yangon's colonial buildings are most visited places international travelers.

### **1.12 Implications of The Study**

Tourism leads recent Myanmar economic growth positively with expect to achieve infrastructure, productivity, technology development, local job creating, receiving foreign investment and helping to local people. The goal of this study is to maximize tourism's contribution to national employment and income generation while ensuring the social and economic benefits of tourism are distributed equitably. Tourism development is much positive effect to Yangon, Myanmar. The current Myanmar economic status also emerge due to tourism sector increasing, however government and policy makers need to more facilities for sustainable tourism development. Therefore, this research will help Yangon City's tourism sector developments, researchers, observers and young generations who are studying hotel and tourism management.



## CHAPTER 2

### LITERATURE REVIEW

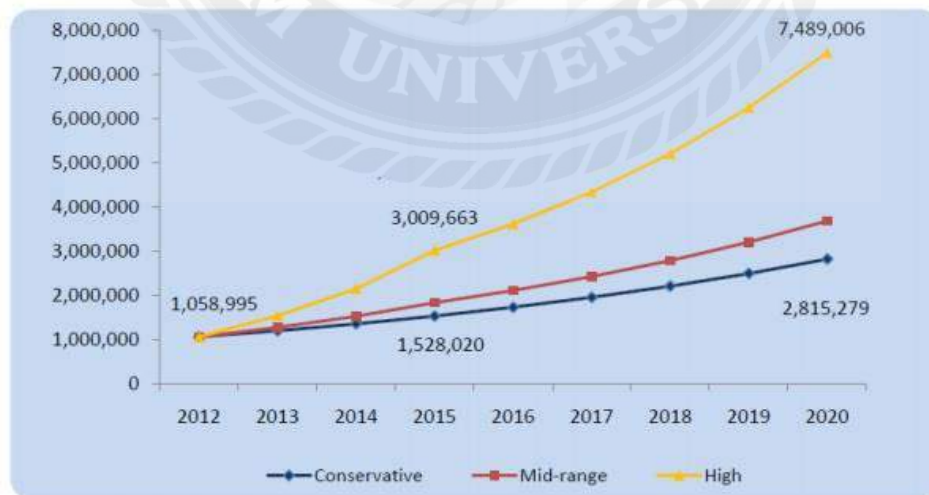
#### 2.1 Country Profile

Region:	East Asia & Pacific (Known as Southeast Asia)
Country:	The Republic of Union of Myanmar
Capital:	Naypyidaw
Largest City:	Yangon (7,355,075 in 2014)
Currency:	Myanmar Kyat
Population:	7 million (2017)
GNI Per	Capital: (US\$) 1,293 (2017)
GDP:	\$94.87 billion (2017)
GDP Growth:	9.0% (2017)
Inflation:	10.8% 2017 (The World Bank, 2016)
Language:	Myanmar, several dialects and English
Religion:	Over 80 percent of Myanmar Theravada Buddhism. There are Christians, Muslims, Hindus, and some animists.
Business Hours:	Banks: 09:30 – 15:00 Mon –Fri Office: 09:30-16:00 Mon-Fri
Airport Tax:	10 US Dollars for departure at international gates
Customs:	Foreign currencies (above USD 10000), jewelry, cameras And electronic goods must be declared to the customs at The airport. Exports of antiques and archaeologically Valuable items are prohibited.

## 2.2 Myanmar Tourism Overview

Myanmar has been recorded as one of Asia's most prosperous economies in the region before World War II and expected to gain rapid industrialization. The country belongs rich natural resources and one of most educated nations in Southeast Asia. However, Myanmar economic was getting worst after military coup in 1962, which transform to be one of the poorest nations in the region. "Then military government centrally planned and inward looking strategies such as nationalization of all major industries and import-substitution polices had long been pursued (Ni Lar, 2012)". These strategies were laydown under General Nay Win leadership theory so called "Burmese Way to Socialism". Since then, the country economic getting into problems such as 'inactive in industrial production, high inflection, resign living cost, and macroeconomic mismanagement'. Therefore, the country economic declined and became worsts situation which caused to rise nationwide revaluation known as "8888 uprising" in 1988. The next military leaders took up economic development status that connects to its neighbor countries like Thailand and Singapore mainly. Especially, the Association of Southeast Asia Nation (ASEAN) regional integration was link with Myanmar market so far.

**Figure: 6** Visitors Forecasts 2013-2020



Sources: Asian Development Bank estimates; Ministry of Hotels and Tourism.

(Source: Asian Development Bank estimates; Ministry of Hotels and Tourism, 2917)

### 2.3 Foreign Tourist Arrivals

Myanmar has recently seen an unprecedented growth in international tourist arrivals. Visitor numbers surpassed the one million mark in 2012 and arrivals reached three million in 2014. However, it is estimated that up to two – thirds of those three million visitors were day-trippers from neighboring countries, who would not be counted as tourists according to the World Tourism Organization and the Pacific Asia Travel Association (PATA).

A good indication is the number of tourists visiting sites such as Shwedagon Pagoda and Inle Lake, which suggest arrivals of tourists increased by between 20 and 25 percent in 2014. The total number of foreign tourists visiting between 2013 and 2020 is projected to be at least 20.4 million, and 29.2 million domestic tourists. Visitors from Asian nations represented more than 70 percent of total arrivals, with Thai, Japanese, South Korean and Chinese visitor leading the list. The average stay is one week.

**Table: 1 Tourism Arrivals and Spend, 2015 - 2020**

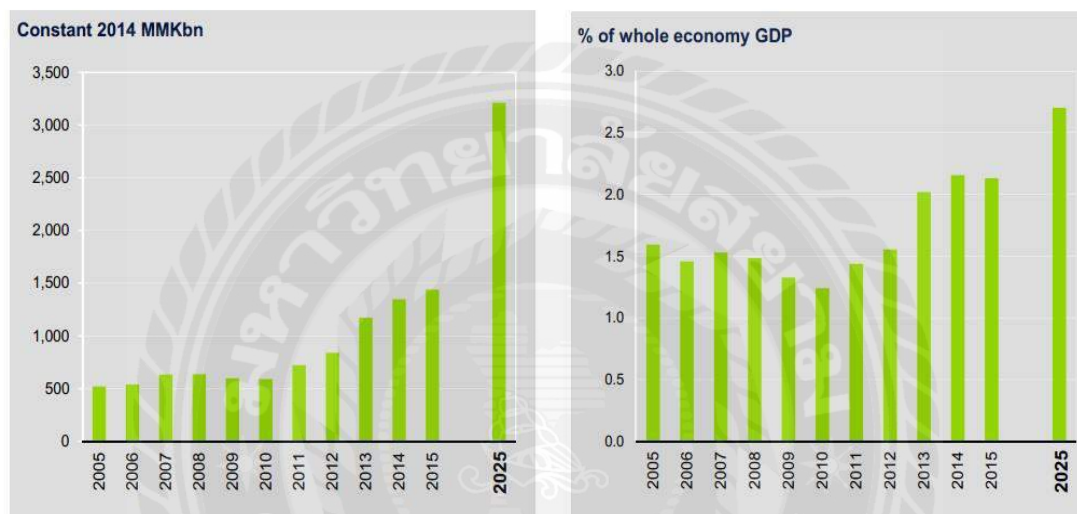
Growth Scenario	Conservative		Mid-range		High	
	2015	2020	2015	2020	2015	2020
International arrivals	1,528,020	2,815,279	1,829,943	3,680,669	3,009,663	7,489,006
Average daily spending (USD)	150,00	170,00	150,00	170,00	150,00	170,00
Average length of stay (days)	8,00	8,00	8,00	8,00	8,00	8,00
Total Visitor spending (USD billion)	1,83	3,82	2,19	5,00	3,61	10,18

*Source: Asian Development Bank estimates and Ministry of Hotels and Tourism (2013) projections*

(Source: Asian Development Bank estimates and Ministry of Hotels and Tourism, 2017)

The tourism industry is becoming one of the fastest growing areas of the economy, with an income rise in 2013 of more than 70% compared with the previous year (US\$ 926 million in 2013 and US\$ 534 million in 2012 and US\$ 319 million in 2011). A recent report of MOHT estimates that the sector will bring in US\$ 905 million in 2014 although the government has also quoted a figure of US\$ 3 billion including direct, indirect and induced effects of tourism.

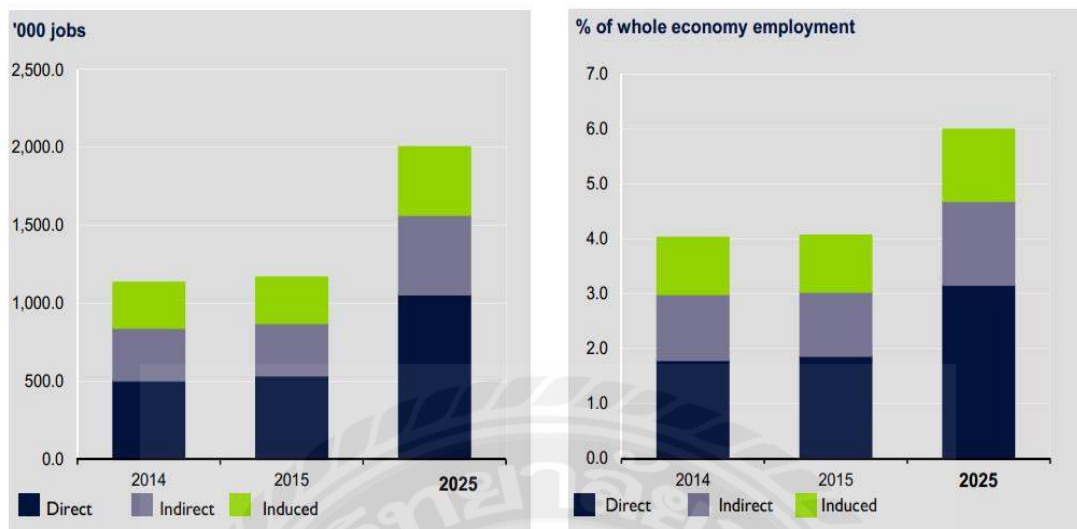
**Figure:7 Direct Contribution of Travel and Tourism to GDP**



(Source: Travel and economic impact, World Travel & Tourism Council, 2017)

The direct contribution of Travel & Tourism to GDP in 2014 was Myanmar Kyat 1,347.4bn (2.2% of GDP). This is forecast to rise by 6.8% to Myanmar Kyat 1,439.7bn in 2015. This primarily reflects the economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). But it also includes, for example, the activities of the restaurant and leisure industries directly supported. (Travel and economic impact 2015, World Travel & Tourism Council)

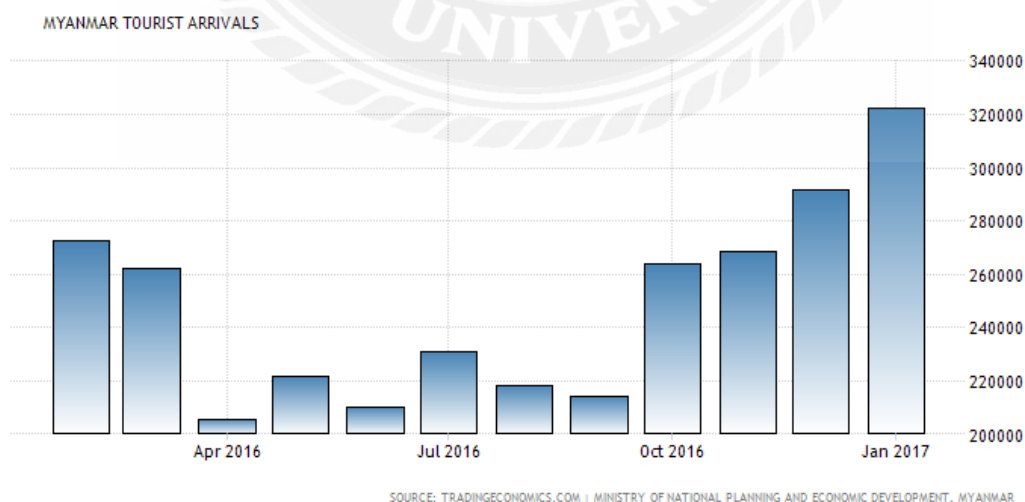
**Figure: 8 Total Contribution of Travel & Tourism to Employment**



(Travel and economic impact, World Travel & Tourism Council, 2017)

The total contribution of Travel & Tourism to employment was 1,134,500 jobs in 2014. This is forecast to rise by 2.9% in 2015 to 1,167,000 jobs. By 2025, Travel & Tourism is forecast to support 2,003,000 jobs, an increase of 5.6% over the period. Travel and economic impact 2015, World Travel & Tourism Council)

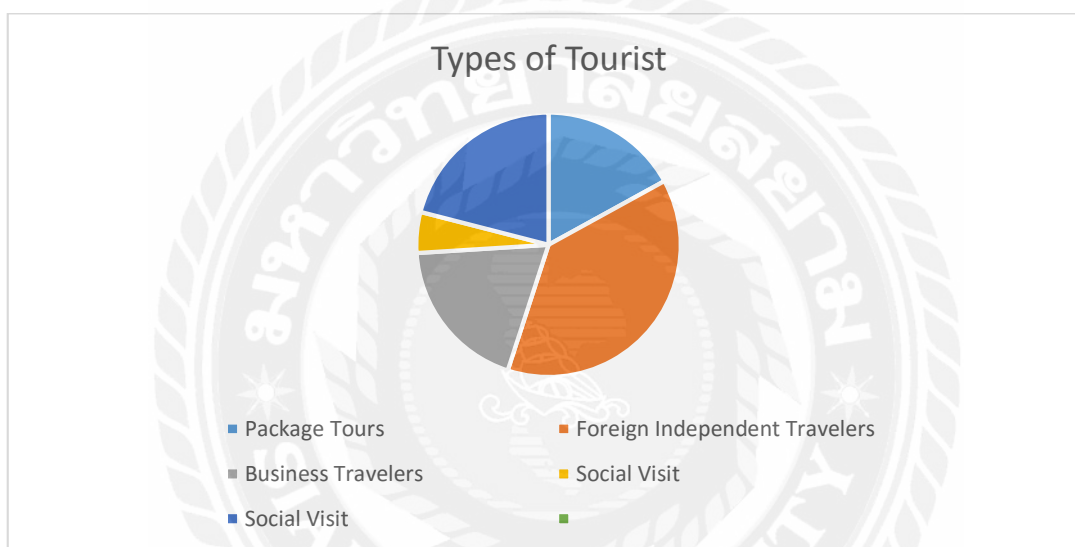
**Table: 2 Myanmar Tourist Arrivals**



(Source: Ministry of National Planning and Economic Development, Myanmar, 2017)

**Figure: 9        Types of Tourist**

<b>Package Tours</b>	<b>17%</b>
<b>Foreign Independent Travelers</b>	<b>38%</b>
<b>Business Travelers</b>	<b>19%</b>
<b>Social Visit</b>	<b>5%</b>
<b>Others</b>	<b>21%</b>

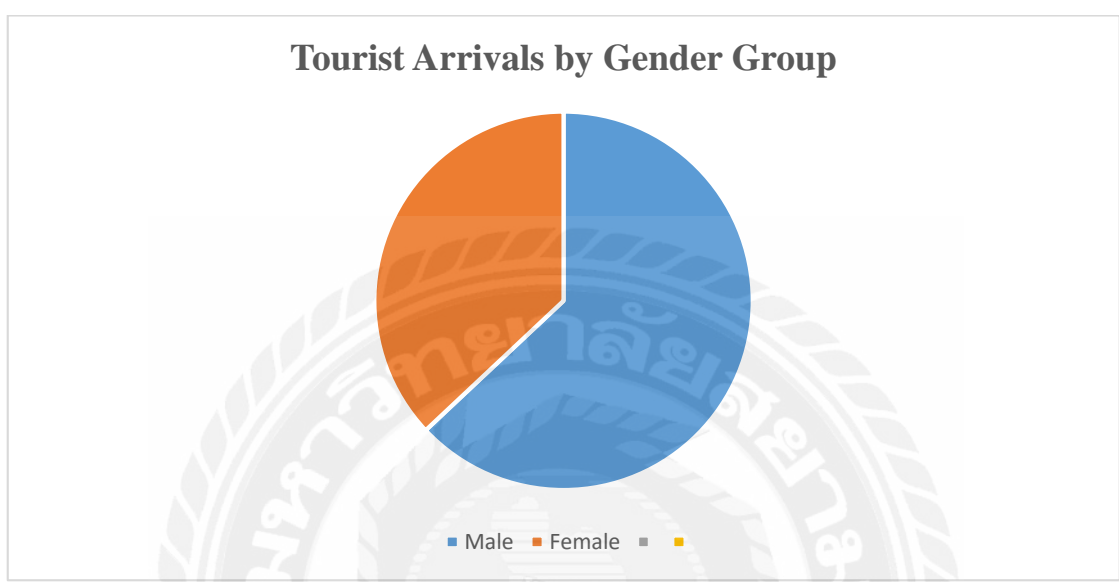


Myanmar extends 923 km from east to west and 2,100 km from north to south. The Irrawaddy river runs through the central of the country in south coast to north. To the west are the Rakhine mountains and Chin hills and the Kachin hills to the north where southeast Asia's highest mountain range, mount Kakaborazi with 5,881 meter high. There are seven administrative states and regions namely, Kachin, Kayah, Kayin, Chin, Mon, Rakhine and Shan states; seven regions are; Sagaing, Tanintharyi, Bago, Magway, Mandalay, Yangon and Irrawaddy regions. (Wikipedia,2016)



**Figure: 10**      **Tourist Arrivals by Gender Group**

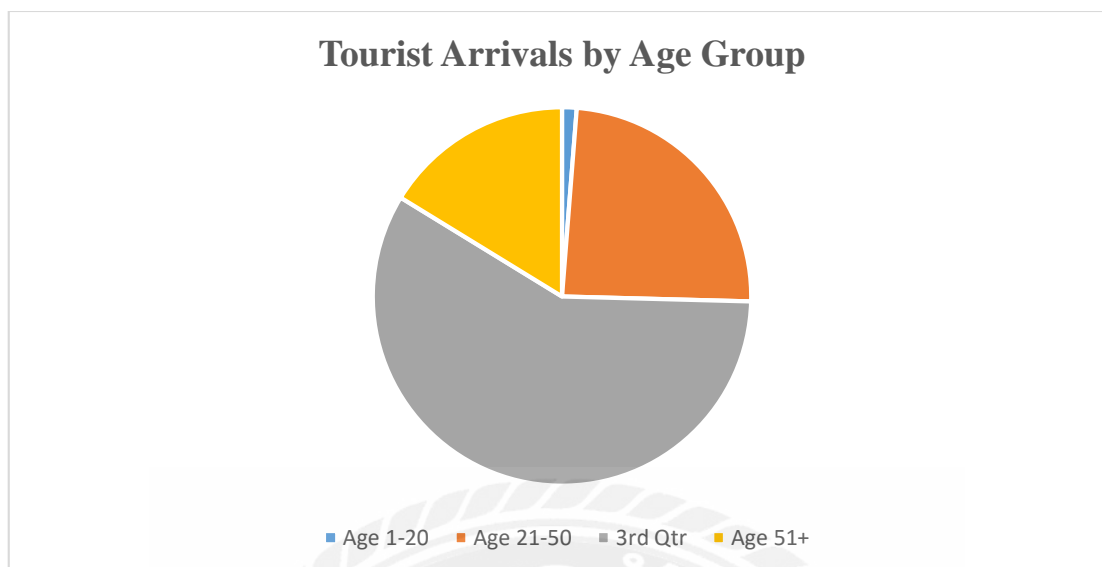
<b>Male</b>	<b>63%</b>
<b>Female</b>	<b>37%</b>



Myanmar has a monsoon climate with three main seasons and the tropical monsoon in the lowlands below 2,000 m, rainy, cloudy, hot and humid summers. The hottest period is between February and May, when there is little or no rain and temperature can rise above 40 C. The rainy season is generally from May to October and cooler weather from October to February. The coast and the mountains see significantly more rainfall than the arid central plains. (World Travel Gide, 2015)

**Figure:11**      **Tourist Arrivals by Age Group**

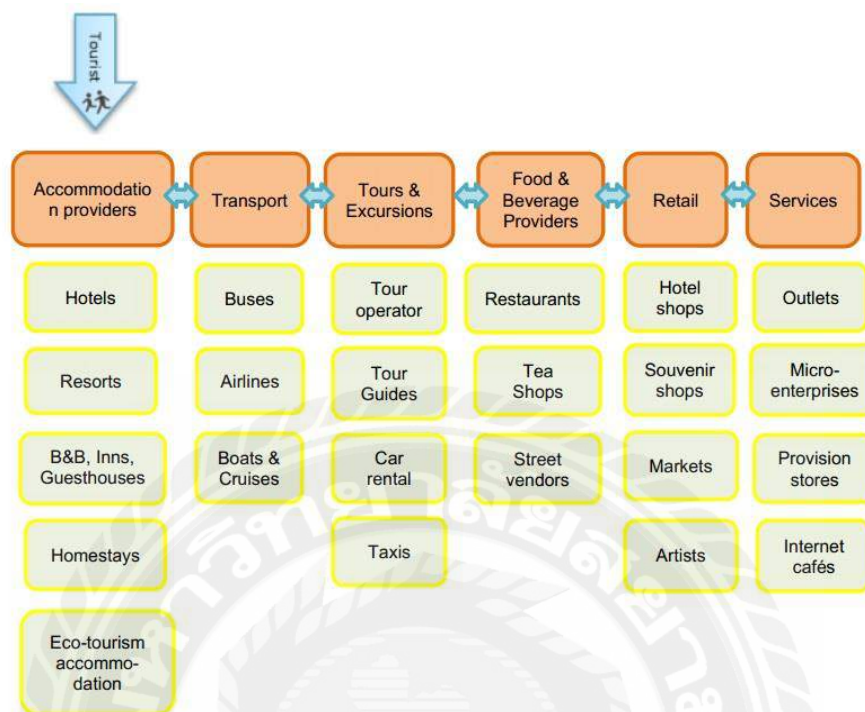
<b>Age 1-20</b>	<b>3%</b>
<b>Age 21-50</b>	<b>58%</b>
<b>Age 51+</b>	<b>39%</b>



**Table: 3      Tourism Income**

Year	2010 (U S\$)	2011 (U S\$)	2012 (U S\$)	2013 (U S\$)
Total Earnings	254 M	319 M	534 M	926 M
Average Expenditure Per Person Per Day	102	120	135	145
Average Length of Stay	8	8	7	7

**Figure: 12 The Tourism Value Chain in Yangon, Myanmar**



(Source: Ministry of Hotels & Tourism, 2017)

Tourism industry is a complex industry that is composed of various types of business. The actual tourism value chain is very broad, as graph demonstrates. Tourism Sector Wide Impact Assessment (SWIA) focuses on certain segments of the tourism value chain, based on a mapping of those segments with the highest human rights risks and impacts:

- Hotels, guesthouse, inns, motels
- Airlines
- Tour operators and travel agencies
- Independent tour guides
- Restaurants
- Souvenir shops

## 2.4 Accommodations

Myanmar recently has got 788 hotels, motels and guest houses with 28, 291 rooms. Spread across 48 locations. Eighteen have a four-star rating and five star rated hotels. The majority of accommodation stock is in Yangon, Nay Pyi Taw, and Mandalay. Myanmar Hoteliers Association has requested a review of the current star rating system, which was introduced in 2011, and its members have increased effort to operate according to the ASEAN tourism standards. Some hoteliers have responded to the high demand for accommodations with significant and frequently unannounced price increases, causing considerable frustration for tour operators, and generated media reports of opportunism and poor value for money. To handle his issue, MOHT and MTF are jointly promoting the conversion of existing structures to hotels including restoration and adaptive use of Yangon's exceptional heritage buildings and development of hotel investment zone.

**Table: 4 Foreign Direct Investment Hotels with the Most Number of Rooms in Myanmar**

Hotel	Investment from	Location	No: of Rooms	Built/Opened
Summit Parkview	Singapore	Yangon	250	1995
Traders	Singapore	Yangon	496	1996
Sedona Yangon	Singapore	Yangon	450	1996
Park Royal	Singapore	Yangon	359	1997
Chatrium	Thailand	Yangon	315	1998
Sedona Mandalay	Singapore	Mandalay	300	1998
Golden Hill	Japan	Yangon	212	2000
Richy Regina	Thailand	Tachileik	284	2002
Victoria Resort	Singapore	Kawthaung	250	2008

Based on *Myanmar...the next investment destination for global hotel chains?* SCB EIC | Economic Intelligence Center

(Source: Economic Intelligence Center Based on Myanmar information, 2017)

Accommodation in Yangon fills up as far as a mention in advance, particularly if it is a place listed in a guidebook it's not impossible to roll up and find a room, but it can be difficult and stressful and you will likely end up paying more than you want. Most places can be booked online now, so it's worth reserving your room as soon as you can. It's essential to book ahead during high season, November to March. According to the Ministry of Hotels and Tourism, as of October 2014, there were more than 1,100 hotels in Myanmar of which 267 were in Yangon, offering approximately 42,000 rooms.

## **2.5 Hotel Situation in Yangon**

Compared to the neighboring countries like Thailand, India and Cambodia, the hotel rates are still higher. Hotel room rates have been edging down the last 3 years, especially rates for luxury hotels. The luxury hotels in Yangon and Mandalay that tripled their room rates in 2013 have lowered their rates significantly. The capitalist laws of supply and demand are quite valid in Myanmar cities; Yangon has limited room supply and will remain an expensive capital; in some other town, for example in the Shan state, the hotels can be much cheaper. Room prices in Bagan may remain stable, for the reasons mentioned above. For travelers it's worth the effort of planning a holiday are fully stay longer in cheap places and a shorter time in the busy capital Yangon and the popular but expensive Bagan. The outlook for travelers is good; the downward trend in the room prices will likely continue in the next few years. hotels are still being built whereas the increase in tourism is slowing down; supply and demand will make Myanmar cheaper.

## 2.6 Star Rated Hotels in Yangon, Myanmar

<b>Five Star Hotel</b>	<b>6</b>
<b>Four Star Hotel</b>	<b>17</b>
<b>Three Star Hotel</b>	<b>83</b>
<b>Two Star Hotel</b>	<b>116</b>
<b>One Star Hotel</b>	<b>102</b>
<b>Certificated Hotel</b>	<b>599</b>
-----	
<b>Total</b>	<b>923</b>

**Figure: 13 Foreign investments in Hotels and Commercial Complexes by Countrywide**

<b>Sr</b>	<b>Country</b>	<b>Hotel Apartment</b>	<b>Investment US\$</b>
	Singapore	26	1790.094
	Thailand	11	445.630
	Vietnam	1	440.000
	Hong Kong	5	187.700
	Korea	1	100.000
	Japan	4	73.665
	Malaysia	3	23.136
	U.K	3	14.500
	Luxembourg	1	5.200
	UAE	1	4.500
	<b>Total</b>	<b>56</b>	<b>3084.425</b>

(Sources: Ministry of Hotels and Tourism, 2017)

## **2.7 Policies Related to the Hotel Industry**

### **Strategic Plan for the Development of Accommodations in the Future**

- To renovate and upgrade existing local guest house and small hotels to be able to accommodate foreign tourists.
- To finish all delayed hotel project in 2013
- To welcome new hotel projects and assist for speedy operation.
- To amend the existing contract agreements of hotels for hiring rooms as offices, long stay accommodation.
- To do negotiation between hoteliers and tour operators.
- To invite more foreign direct investment.
- To encourage local entrepreneurs to do hotel business.
- To provide incentives on terms and conditions of the hotel contracts.
- To raise awareness of investment opportunities in hotel and tourism sector.

New hotel zones will be created between Yangon International Airport and Hangthawaddy Airport in Bago Region, which is to be constructed, has been announced. The projected zones lie in Mingalardon, Htauk Kyant and Hlegu areas. The creation of the new hotel zones was prompted to address the increasing number of foreign tourists in the country and the shortage of accommodations.

## **2.8 Government Incentives for Hotel Investments**

- Flat what type tax rate of 30%
- Exemption from income tax for 3 consecutive years
- Exemption or relief from income tax on profit which is reinvested within one year and up to 50% on the profit from exports
- Right to pay income tax of foreign employees (same as Myanmar citizens) and to deduct the same form the assessable income of the enterprise

- Right to deduct research and development expenditure
- Right to accelerate depreciation
- Right to carry forward
- Right to set off losses up to 3 consecutive years, from the year the loss is sustained
- Exemption or relief from customs and other taxes

## **2.9 Transportation Infrastructure**

To compared with ASEAN countries, Myanmar's transportation sector is under developed for a country of its size, population, and potential. There, the Ministry of Transportation intends to prepare a transport master plan to harmonize future transport planning with the new state constitution, integrate plans of different transport subsectors, pursue new opportunities to connect with other countries, promote domestic connectivity and multimodal transport networks, promote greater private sector participation, and identify technical, financial and human resources to implement the plan.

There has been much progress in infrastructure development particularly in the past two years. this would include:

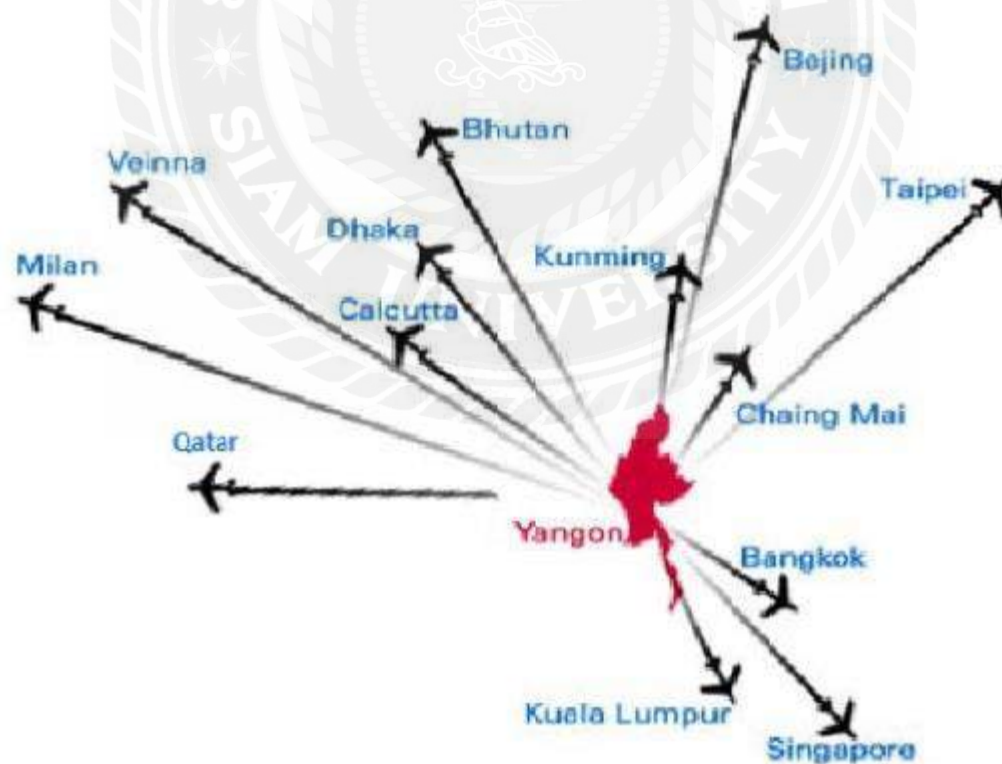
- Upgrading of existing roads and bridges.
- Construction of new roads and bridges.
- Developing new hotel zones in main destinations of Nay Pyi Taw, Yangon, Bagan, Inle and Mandalay. More hotel zoning will be designated such as the ones between the international airports, Yangon and Hanthawaddy.
- The authorities are reviewing the facilitation of Travel, also fort the ease of entry in and about Yangon, Myanmar for visitors.
- To open of more money exchanges around Yangon, and upgrade local banking systems.



## 2.10 Yangon International Airport

(YIA) Yangon International Airport is strategically located between China and India with two thirds of the world's great population within six hours flying range including cities such as Dubai, Tokyo, Singapore, Beijing and New Delhi. YIA is the busiest and largest airport in Myanmar recently. In 2015, YIA handled a total of 4.68 million passengers, which grew by 6.5% compared to the previous year. As of 1<sup>st</sup> March 2016, 26 airlines operate to/from 21 international destinations while 10 airlines operate 25 domestic routes. Over the last few years, Myanmar has seen tremendous growth in visitor traffic. As the country is set to experience more exponential growth, YIA, being the main gateway into Myanmar, is expanding to meet future demands.

**Figure:14** Getting There, Yangon



(Source: Ministry of Hotels & Tourism, 2017)

**Table: 5            Tourist Arrivals by Yangon International Airports**

The graph below shows Myanmar's tourist number and arrivals at the international airports Yangon and Mandalay from 2006 until 2016 (left) and the number of hotel rooms in Myanmar (right).

<b>Yangon Entry Point</b> (Including tourist arrivals through border entry points to Yangon )					
<b>Type of Tours</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
<b>(1) Tourist</b>	401,608	488,341	563,996	544,480	428,370
<b>(2) Business Travellers</b>	114,456	151,320	186,239	173,004	203,007
<b>(5) Others</b>	43,546	178,038	271,846	463,198	448,767
<b>Total</b>	<b>559,610</b>	<b>817,699</b>	<b>1,022,081</b>	<b>1,180,682</b>	<b>1,080,144</b>

(Source: Ministry of Hotels and Tourism, 2017)

## 2.11      Current Expansion Projects

Yangon International undergoing its biggest expansion to date. The opening of T1 is part of the first phase of YIA's development to handle greater passenger capacity as Myanmar continues to undergo economic reforms, which is expected to increase demand for aviation services in the country.

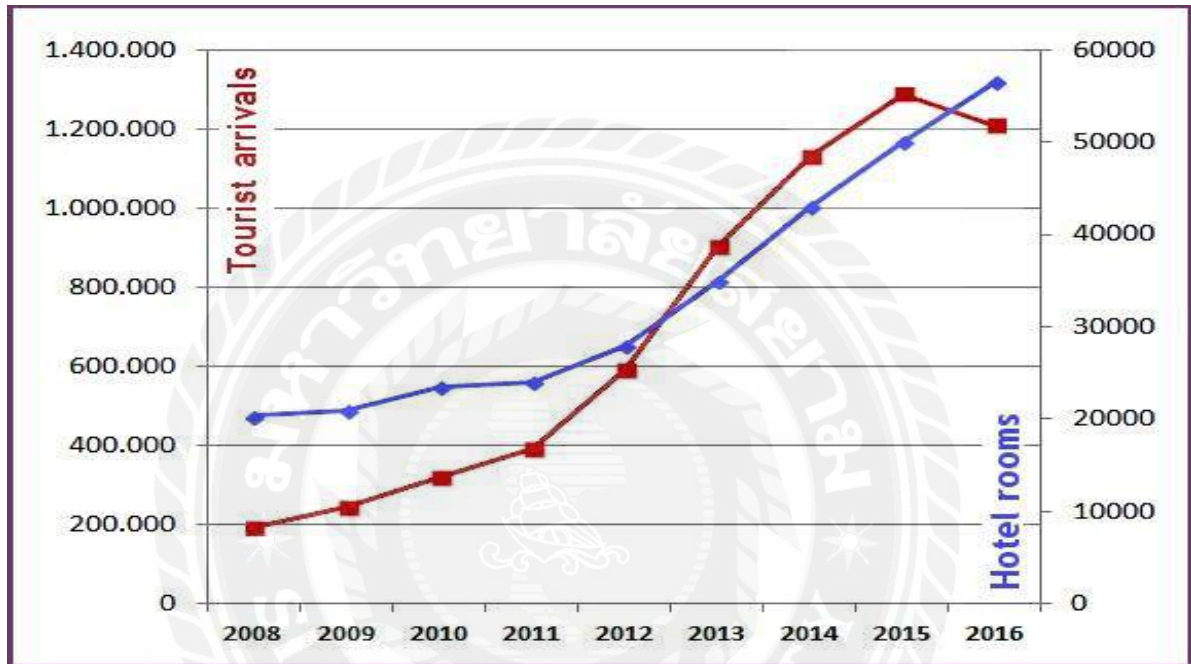
Terminal 1 was officially opened by President U Thein Sein on 12<sup>th</sup> March, 2016. With the expansion in capacity and continued integration of facilities, YIA paves the way for Myanmar to continue welcoming a rapidly growing number of business and leisure travelers to the country.

Yangon International Airport expansion will comprise of:

- Works for a new Domestic Terminal which has already begun;
- Expansion works to the current T1;
- Construction of a VIP and CIP Terminal; and
- Construction of a multi stores car park

on top of that, plans for an airport city are being conceptualized. The future airport city will further boost Myanmar's attractiveness as a travel destination with facilities and amenities close to the airport. These facilities may include hospitality, commercial and retail developments. (Source: Yangon International Airport desk)

**Figure: 15** Tourist arrivals by the International Airports, Myanmar



(Source: Ministry of Hotel and Tourism, 2017)

## 2.12 Civil Aviation

Myanmar has a network of 41 airports, including 3 international airports that are capable of handling 747 class aircraft. In mid-2013 there are seven national airlines; Air KBZ, Air Mandalay, Asian Wings, Golden Myanmar, Myanmar Airways, Yangon Airways with 32,106 scheduled domestic departures. Air KBZ handles the largest number of scheduled domestic flights 31%, followed by Air Bagan 24%, Yangon Airways 23%, and Air Mandalay 21%. Collectively, Yangon, Mandalay, Heho, Bagan, and Thandwe airports handle 85% of all domestic flights; however, they are frequently overcrowded and require upgrading.

Myanmar also offered 23 foreign carriers, accounting for about 80% of total capacity to and from the country. The main tourist gateway, Yangon International Airport, handles 94% of international air traffic. More than 10 international carriers launched flights to Myanmar between 2012 – 2013, including three of direct flights to Mandalay. Majority of additional flights are into Yangon, with Southeast and Northeast Asia delivering 64.6% and 31% of the additional capacity, respectively. Average seat occupancy in 2012 was 73.1%, compared to 62.7% in 2011. To relieve congestion in Yangon, MTF recently began promoting tours that enter and exit the country via Nay Pyi Taw and Mandalay.

In anticipation of continued growth, DCA is also evaluating proposals to expand the operating capacity of Yangon International Airport, from about 3 million to 5.5 million passengers per year. A fourth international airport is scheduled to open in 2016 at Hanthawaddy, 80 km from Yangon, with an operating capacity of at least 10 million passengers per year. Thus, by 2017, Myanmar's international airports are expected to have a total operating capacity of at least 20 million passengers per year, which will be sufficient to meet expected demand.

The study shows that after two years of rapid expansion, the growth of the aviation sector has started to slow. Reason for this include the overburdening of Yangon's airport terminal, air traffic control and baggage handling. These are discouraging investors from expanding existing airlines or starting up new ones. Another challenge is the safety record of Myanmar's aviation sector. In 2012, four of the domestic air carriers were involved in serious accidents with one accident causing a fatality at Heho airport. Myanmar government is working with private firms as well as thorough technical assistance from the Japanese International Cooperation agency (JICA) to upgrade airports' safety equipment.

### **2.13 International Airlines**

- Air Asia
- Air China
- Air India

- All Nippon Airways (ANA)
- Asiana Airlines
- Cathay Dragon
- China Airlines
- China Southern Airlines
- Condor
- EVA Air
- Japan Airlines
- Jetstar
- Korean Air
- Malaysia Airlines
- MAI
- Nok Airlines
- Qatar
- Silk Air
- Thai Airways International
- Thai Lion Air
- Tiger Airlines
- Vietnam Airlines

#### **Domestic Airline**

- Air Bagan
- Air KBZ
- Air Mandalay
- Apex Airlines
- Asian Wings Airways
- FMI Air Charter



- Golden Myanmar Airlines
- Mann Yadanarphone Airliens
- Myanmar National Airlines
- Yangon Airways

Yangon International Airport, recently the country's main entry point, handling 20 million passengers a year and to be extended to receive another 6 million. Myanmar has three international airports currently and Hantharwady International Airport will be the biggest International Airport of Myanmar, which began in 2014 led by the Incheon International Airport Corp (IIAC).

Currently, more than 26 International Airlines are operating from Yangon International Airport to other international destinations daily, and more than 25 domestic airlines operate domestic routes.

**Table: 6 Visitor Arrivals Numbers by Yangon Entry Port**

Name of Entry Points	2012	2014	2015	2016
Yangon	559,610	1,022,081	1,180,682	1,080,144

(Source: Ministry of Hotels and Tourism, 2017)

For many years Myanmar had between 200.000 tourists arriving at Yangon airport every year, and the total number including border tourists used to be between 600.000 and 800.000. border tourists are the visitors who cross land borders and stay mostly less than one day; day trippers, local traders and tourists doing a visa run. Until 2013 Yangon airport was the only entry point to Myanmar, but from August 2013 four land border crossings with Thailand have been opened for tourism entry. From 2011 onwards, visitor numbers started to rise dramatically and during high season there was a hotel room shortage. The year 2013 turned out to be the high point

in room prices. The hotel situation in Myanmar has since then improved because many new hotels have been built, the number of rooms in Yangon and Mandalay has almost doubled in 2016.

In 2015, There were 4.68 million tourists, and in March 2016 the ministry of Hotels and Tourism predicted that at least six million tourists would travel to Myanmar in 2016. It turned out that the actual number of foreign visitors to Myanmar in 2016 dropped to below three million. The drop in arrival numbers is misleading because it is caused by the change in one-day visitors crossing the land border in the Northern Shan state with China, and not real tourists who visit for a few days or weeks.

#### **2.14 Road**

Currently Myanmar has about 130,000 km of roads of all types about 2 km of road per 1,000 people, of which less than 21% are paved to all weather standards. In comparison, road density ASEAN wide is more than five times higher. This shortfall has two consequences for tourism activity. First, road travel between destinations is time consuming and some are essentially cut off from tourism due to inaccessibility. Second, road quality in and around destinations is inadequate, restricting visitor movement and spending. Myanmar has extensive biodiversity and abundant natural resources. Approximately one third of Myanmar's 62 million population lives in townships and cities.

Tourists use ground transport, mainly hired cars and minivans, coaches, and train. Cleanliness of transport options rated the second most unsatisfactory issue in the Tourism Master Plan survey 25%, and choice of transport options the fourth 21%. Road safety is a major problem throughout the country. Road accidents cause ten deaths a day in Myanmar and fatalities are rising. Accidents involve both international visitor and domestic tourists.

#### **2.15 Railways**

Myanmar rail network covers about 3,500 km with routes connecting primary, secondary and emerging tourist destinations. Although more expensive than travel by public bus,

trains are affordable, but not commonly used by tourists because of frequent delays and long travel times. Railway modernization will help support a lower carbon tourism economy and increase competitiveness by reducing freight cost.

## **2.16 River Cruise**

Yangon received 9 cruise liners carrying almost 3,000 passengers by 2012. Recently Yangon extended Water Bus ferry to solve heavy traffic jam matters with daily Yangon commuters. Three imported boats from Australia which can carry each 180-230 passengers, three boats from Thailand which can carry 60 passengers and seven locally constructed boats which can carry 150 passengers will run between 6:30 am to 6:30 pm every day. The initiative falls under the regional government's plans to upgrade public transport services to relieve worsening traffic jams in the former capital and commercial hub, following the new bus system that launched in January. It takes about two hours to drive from Insein to Botahtaung, downtown area usually, but by the water buses, it will only take around 45 minutes to main destinations. Insufficient infrastructure, facilities, and service capacity also restrict the number of international yachts that visit Myanmar. A stringy for developing cruise tourism and yachting in Myanmar's inland and coastal waterways is needed to assess the potential of these markets, guide infrastructure investment, and set out a program to build management capabilities.

A diverse way to experience the beauty of Yangon is to take a river cruise, particularly in the early morning as the sun warms the air or the final hours of a sultry day. Departing either at Botataung Jetty or Maw Tin jetty, you can discover the spectacular scenery of Yangon's waterways, observe the little known lighthouse of the Twante Canel, see Shwedagon Pagoda from a different perspective and enjoy the glow of the lights along the river banks as night falls.

## **2.17 Safety**

In places open to visitors, Myanmar is relatively safe, with very little crime. Still, you should take the usual precautions of using hotel lockers or safes for your valuables. Female travelers should not experience any harassment or different treatment.



## 2.18 Licensed Tourist Transportation

(a) Coach (26-50 Seater)	264
(b) Motor Boat	1194
(c) Hiace/ Townace (5-12 Seater)	322
(d) Mini Bus (13-25 Seater)	104
(e) Boat	33
(f) Yacht	16
(g) Saloon/ Van (Seater)	163
(h) Hot Air Balloon	3

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**Total** **2099**

## 2.19 Tour Operators

Since the Myanmar has opened up the number of tour operators and travel agents has increased due to a high demand of organized tours. Five types of tourism are being promoted by Myanmar tour operators and travel agencies as;

- Cultural and creative tourism
- Nature based tourism
- Adventure and experiential tourism
- Cruise and yachting tourism
- MICE – Meeting, incentive conference and exhibitions tourism.

## 2.20 Licensed Tour Companies

● a: Foreign Company	1
● b: J.V Company	25
● c: Local Company	1324
● -----	
<b>Total</b>	<b>1350</b>

Travel agencies, tour operators and other travel related businesses are brought together by the Union of Myanmar Travel Association (UMTA), which was created in 2002. UMTA was formed to organize registered travel agencies and tour companies to systematically develop the industry; to represent the tour and travel industry at the national and international level; to promote Myanmar as premier travel destination; to promote relations and opportunities between national and international travel and tour companies; and to help develop the human resources capacity of the tourism industry. recently UMTA represents 711 of the 1,366 registered tour and companies in the country. In June 2014, 80 of Myanmar tour operators participated in three 2-day training courses in Yangon to learn how to integrate sustainability and CSR principles in their businesses. The training was organized by UMTA and the Myanmar Hoteliers Association MHA in cooperation with Travelife, the Pacific Asian Travel Association PATA and the British Travel Association ABTA, supported by CBI, the Netherlands agency for the promotion of imports from developing countries. Out of the 188 participants, 20 belong to the tourism sector, of which 12 are travel and tour operators 6 are hotels and guesthouses.

## 2.21 Tour Guides

Myanmar has 2453 licensed tour companies, which included 2410 local companies, 42 J.V company group and one foreign company, following by 17 joint ventures that has three capacities to arrange classic tours. However, most firms are unable to organize customized programs. Among 4010 of licensed tour guides, 2,060 speak English and several hundred speak

Japanese, Thai Chinese, French and German. The high season typically experiences a shortage of trained guides, especially those who speak English, Japanese, and the European languages. Vehicles are also limited during the high season.

**Table: 7 Myanmar Tour Guide Training: Fast Facts**

<b>Government Tour Guide Training School</b>	
Year of operation	1992
Total students trained by the school	8326
Licensed guides (2014)	3776
Batches (number of courses)	46
Duration of training course	2 months
Cost of training course	100,000 kyats
Cost of first license, valid for two years.	100,000 kyats
Cost of license renewal	100,000 kyats
Estimated total cost of course to students (including additional materials, accommodation and food)	1,000 USD
Trainers fee (30 minutes)	10,000 kyats
Regional tour guide course fee	50,000 kyats
<b>MTGA</b>	
MTGA members	1281
MTGA registration fee (License holders can only apply)	10,000 kyat
MTGA annual membership fee	15,000 kyat
Regional guides registration fee	5,000 kyat
Regional guide annual membership fee	7,500 kyat
<b>Tour guide earnings</b>	
Throughout tour guide fee	Ranging from 35 to 60 USD a day
MTGA suggested our guide daily fee.	35 USD per day
Chinese speaking tour guides	60 to 90 USD a day. (Often used for business interpretation)
Good English speaker	40 to 60 USD a day
Local tour conductor fee (no set rate)	10 to 20 USD a day/ tour
Low season guiding rates at Inle	20 USD a day
High season guiding rates at Inle	70 to 80 USD a day
High Season	November to April
Low Season	June to September

(Source: BIF Myanmar Tourism, September 2017)

Tourist guide training is controlled by the central government and conducted in Yangon by the Tourism Training School under the Ministry of Hotels and Tourism. The 10-week accreditation training costs 1000 US\$, not easily affordable. Regional tour guide trainings are

conducted at the State or Regional level, producing guides who can provide local services. Many remote destinations have a low number of tour guides. Since communication channels between local tour guides and tour operators from Yangon and other major cities are weak, they often do not have enough business and move to Yangon to work there as tour guides.

## 2.22 Licensed Tour Guides by languages

(a) English	2586
(b) Japanese	335
(c) French	272
(d) German	261
(e) Thai	163
(f) Chinese	124
(g) Spanish	106
(h) Russian	70
(i) Italian	63
(j) Korean	30
<hr/>	
<hr/>	<b>4010</b>
<b>Regional Guides</b>	<b>2939</b>
<b>Total</b>	<b>6949</b>

**Figure: 16 Tourism Related Employment Potential**

Subsector	Conservative			High	
	2012	2015	2020	2015	2020
Accommodation	44,055	63,668	84,458	125,403	224,670
Food and beverage	146,850	212,225	281,528	418,009	748,901
Recreation and entertainment	29,370	42,445	56,306	83,602	149,780
Transportation services	58,740	84,890	112,611	167,204	299,560
Travel services	14,685	21,223	28,153	41,801	74,890
<b>Total</b>	<b>293,700</b>	<b>424,450</b>	<b>563,056</b>	<b>836,018</b>	<b>1,497,801</b>

Sources: World Travel and Tourism Council and Myanmar Tourism Master Plan Report (TA-8136).

(Source: World Travel and Tourism Council and Myanmar Tourism Plan Report, 2017)

**Figure: 17 Tourist Arrivals by Special Tours**

Tourist Arrivals by Special Tours		
Special Charter Flight Tours		
Year	No. of Charter Flight	No. of Pax
2012	23	2760
2013	30	4081
2014	28	3453
2015	51	2635
2016	4	287

Tourist Arrivals By Oceania Cruises		
Year	No. of Cruises	No. of Pax
2012	9	2932
2013	8	6408
2014	18	18611
2015	26	26776
2016	22	10769

Yachting Tours		
Year	No. of Pax	Income (US\$)
2012	1158	155392
2013	2157	257051
2014	2562	387462
2015	3248	468239
2016	3844	610640

Riverine Cruises		
Year	No. of Pax	Income (US\$)
2012	14635	2341315
2013	15809	4906305
2014	18077	8416289
2015	20816	8751254
2016	19810	10506074

Ballooning		
Year	No. of Pax	Income (US\$)
2012	8024	1979014
2013	11362	3109856
2014	17802	4231342
2015	23719	6436866
2016	28403	7417771

(Source: Ministry of Hotels and Tourism, 2017)

### 2.23 Myanmar Visa

Visa requirements: A tourist visa for Myanmar can be obtained from any Myanmar embassy or consulate worldwide. Visa are valid for 28 days, which can be extended by a further 14 days.

Free Visa: Normal passports holders' passports issued by the following 8 countries do not require a visa to enter Myanmar for tourism and business visits for up to 14 days or longer in some cases.

- Cambodia
- Brunei
- Indonesia
- Laos
- Philippines
- Singapore
- Thailand
- Vietnam

### 2.24 Myanmar E-Visa

Now, Myanmar has an online e-visa system. It's issued online for tourism and business purposes only. An e-visa is issued 28 days or 70 days. The free for a business E-visa is US\$70, while a tourist E-visa costs US\$50. E-visa holders must enter from one of the following ports of entry:

- Yangon International Airport
- Naypyidaw Airport
- Mandalay International Airport
- Tachileik Land Border Checkpoint
- Myawaddy Land Border Checkpoint
- Kawthaung Land Border Checkpoint



**Table: 8** Visitor Arrivals by Visa Type (Yangon)

Year	Package	F.I.T.	Total Tourist Visa	Business Visa	Entry Visa	Others	TOTAL
2000	77,646	46,690	124,336	37,032	8,043	37,367	206,778
2001	72,503	48,740	121,243	36,608	7,756	37,593	203,200
2002	78,723	55,017	133,740	37,084	9,505	32,139	212,468
2003	55,469	66,772	122,241	44,151	13,140	18,903	198,435
2004	48,191	109,934	158,125	40,521	16,505	21,219	236,370
2005	54,989	96,075	151,064	36,170	20,528	19,538	227,300
2006	74,389	106,140	180,529	35,629	22,592	18,844	257,594
2007	88,941	78,619	167,560	35,440	21,340	18,195	242,535
2008	48,656	61,884	110,540	36,392	21,827	19,007	187,766
2009	66,552	79,074	145,626	42,553	26,217	20,021	234,417
2010	87,932	109,222	197,154	48,549	28,240	23,303	297,246
2011	103,590	134,956	238,546	69,943	33,273	22,981	364,743
2012 Jan-Jul	61,661	118,493	180,154	60,979	20,323	19,457	280,913

\* Package + F.I.T.

*Source: Myanmar Tourism Statistics 2012*

(Source: Myanmar Tourism Statistics, 2017)

### 2.25 Banks and ATMs

Over the last few years, ATMs that takes international cards have started appearing throughout Myanmar, meaning that travelers no longer have to carry hundreds or thousands of dollars in cash around with them. ATMs can be found everywhere, even in relatively remoted destinations like Hsipaw and Mrauk U. KBZ and CB Bank have the most reliable ATMs they accept both Visa and Mastercard, and charge a fee of 5000 kyat- equal to US\$ 4 per transaction. It's also possible to receive international cash transfers via Western Union today. Master Card/ Visa card –AEC (American Express Card) can be used at the international hotels in Yangon, Myanmar.

## 2.26 Food and Beverage Providers

The number of F&B establishments in Myanmar, most of which are unlikely ever to be visited by tourists. The vast majority of restaurants are locally owned but international chains are starting to enter the country. Myanmar Restaurant MRA formed in 2011, brings together those at high end to work together to develop the equality and service of the restaurants in Myanmar and promote the regional food and cuisine to the local and city customers as well as to expatriates, international visitors and foreign tourists. Visitors generally expect access to edible, safe and hygienic food, underpinned by government regulation and enforcement. The MRA has acknowledged that food hygiene is an issue of national concern, and has started a project to educate street vendors about the importance and the process of preparing hygienic food.

**Table 9 Estimated Direct Tourism Employment in Myanmar, 2012-2020**

Subsector	Conservative			High	
	2012	2015	2020	2015	2020
Accommodation	44,055	63,668	84,485	125,403	224,670
Food and beverage	146,850	212,225	281,528	418,009	748,901
Recreation and entertainment	29,370	42,445	56,306	83,602	149,780
Transportation services	58,740	84,890	112,611	167,204	299,560
Travel services	14,685	21,223	28,153	41,801	74,890
<b>Total</b>	<b>293,700</b>	<b>424,450</b>	<b>563,056</b>	<b>836,018</b>	<b>1,497,801</b>

*Source: Myanmar Tourism Master Plan, 2013*

(Source: Myanmar Tourism Master Plan, 2017)



## 2.27 Development Activities in the Tourism Sector

Tourism market in Myanmar is attracting a high level of interest from other donor programs. The majority of these the donor programs are operating in Yangon, Naypyitaw, Bagan and Mandalay, with some others also working in Karan, Shan and Kachin states.

Their focus varies and the common areas can be identified as below:

- Hospitality Training
- Capacity Development of the Ministry of Hotels and Tourism
- Responsible Tourism Development
- Destination Management
- 

## 2.28 Tourist Attractions in Yangon.

### **Shwedagon Pagoda**

One of highly Buddhism's most sacred sites, the 325ft Zedi here is adorned with 27 metric tons of gold leaf, along with thousands of diamonds and other gems, and is believed to enshrine eight hairs of the Lord Buddha.

### **Kyaukhtatgyi Pagoda**

Housed in a large metal roofed shed, this beautiful 215ft long reclining Buddha is hardly publicized at all, even though it's larger than a similar well known image in Bago.

### **Melamu Pagoda**

Situated next to the Nga Moe Yeik creek, this Disneyland pagoda is a hoot. Large than life 3D studio depictions of the Buddha's life and practice litter the compound.

**Ngahtagyi Pagoda**

One of Yangon's most gorgeous Buddha images is this 46ft tall seated one at the Ngahtatgyi Pagoda, sitting in calm gold and white repose and adorned with a healthy splash of precious stones.

**Botataung Pagoda**

Botataung's spacious riverfront location and lack of crowds give it a more down to earth apiritual feeling than Shwedagon or Sule Pagoda. It's most original feature is the dazzling zigzag corridor, gilded from floor to ceiling, that nakes its way around the hollow interior of 131ft golden stupa.

**Sule Pagoda**

It's not every city where a primary traffic circle is occupied by a 2000-year-old golden temple. This 46m zedi, said to be older than Shwedagon Pagoda.

**People's Park**

Notable for its splendid views of the western side of Shwedagon Pagoda, this well-tended park offers plenty of pleasant features, such as flower gardens and ponds; fountains, including one made of concentric rings of white elephants; and treetop observation platforms linked by fun swinging bridges.

**Minister Office**

Although recently closed to the public, it's worth making a circuit of this spectacular red brick complex, which takes up a 16-acre block. Built in stages between 1889 and 1905, the secretariat was the British seat of government of Myanmar. General Aung San and six of his colleagues were assassinated here in 1947.

### **U Thant House**

One of Myanmar's most respected international politicians, U Thant was UN secretary general from 1961 to 1971. When his grandson, That Myint U, discovered his house in the old Windermere estate area in 2012, the place was wreck.

### **Strand Hotel**

Opened in 1901, and run by the famed Sarkies brothers, they also owned the Raffles in Singapore and the Eastern and Oriental in Penang, this historic hotel in its early years hosted the likes of Rudyard Kipling, George Orwell and W Somerest Maugham.

### **Kandawgyi Lake**

Also known as Royal Lake, this artificial lake, built by the British as a reservoir, is most attractive at sunset, when the glittering Shwedagon Pagoda is reflected in its clam waters.

### **Yangon National Museum**

Even though the museum's collection is appallingly labelled and often badly lit, the treasures that lie within this cavernous building deserve a viewing.

### **Inya Lake**

Inya Lake, created by the British as a reservoir in 1883, is roughly five times larger than Kandawgyi. The best spots from which to view the lake are the parks running along part of Pyay road and Kaba Aye Pagoda road.

### **Martyrs' Mausoleum**

This striking mausoleum houses the remains of General Aung San and the six comrades who were assassinated on 19 July 1947. The Soviet style, red painted concrete complex, surrounded by beautifully manicured grounds, was fully renovated in 2016 in time for Martyrs' Day, the first to be celebrated by a government led by Aung San's daughter.

### **Taukkyan War Cemetery**

Eleven miles north of Yangon's airport is this huge, immensely sad but beautifully maintained cemetery. It contains the graves of 6347 Allied soldiers who died in the Myanmar and Assam campaigns of Second World war.

### **491- 591 Merchant Street**

Around 250 workers were trained in new skills for the sensitive restoration of this two story colonial era building housing 80 residents from 12 families spanning the city's multi ethnic and religious population.

### **Holy Trinity Cathedral**

Yangon's principal Anglican Church was designed by India based architect Robert Fellowes Chisholm. The red brick painted neo Gothic structure took nine years to construct, opening in 1895.

### **Kheng Hock Keong**

Supported by a Hokkien association, Yangon's largest Chinese temple is most lively from around 6 am to 9 am, when it's thronged with worshippers offering candles flowers and incense to the Buddhist and Taoist altars within.

### **Former Ministry of Hotels and Tourism**

Also known as the old Tourism Myanmar building, this stately 1905 vintage construction has been empty since its former ministerial tenants decamped to Pya Pyi Taw in 2006.

### **City Hall**

This colossal lilac and purple painted colonial building, constructed between 1925 and 1940, is adorned with traditional Myanmar decorative detail such as peacock, dragon and tiered pyatthat turrets.

### **High Court**

Lording it over the east side of Mahabandoola Garden, the 1911 Queen Anne style former High Court with its bell clock tower and rooftop statues was designed by James Ransome.

### **Independence Monument**

This 165ft white obelisk inside Mahbandoola Garden is surrounded by two concentric circles of lions.

### **Yangon Stock Exchange**

Looking like a giant vault, this monumental neoclassical structure was originally built in 1937 to house the Reserve Bank of India.

### **Myanmar Post and Telecommunications**

This is one of colonial architect John Begg's grand designs. During the 1950s almost 200,00 international cables a year passed through this building.

### **Myanmar Gems Museum and Gems Market**

The glitter has dimmed at this small museum since the government carted off the biggest Gems to another repository in Nya Pyi Taw.

### **Bogyoke Aung San Market**

This shop-house is a fantastic prewar structure in Yangon known as Scott market before, one of famous shopping place for visitors. Myanmar arts and handicrafts are best souvenirs available there at reasonable prices.

### **Aung San Suu Kyi's House**

When she's not in Nya Pyi Taw, Aung San Suu Kyi lives in this lakeside house, the former home of her mother and where she spent 15 years under house arrest. It's not open to the public yet.

## **2.29 Finance and Investment**

Public and private investment in infrastructure and services is critically needed to support the expansion of Myanmar's tourism industry. While government is increasing budget allocations to develop tourism infrastructure sectors, it's need significant levels of private finance. Myanmar's government setting a financial master plan to facilitate private access to loans, credit, and financial series, intended to help national investors overcome challenges to obtaining affordable financé for tourism and other projects. Government has liberalized the bank deposit and lending rates within a fixed corridor, lifted additional capital requirements for branch expansion, raised allowable loan ceilings, expanded eligible collateral, and eliminated the deposit to capital ratio requirement.

Myanmar has a total of 36 foreign investments in hotels and commercial complexes valued at 1.41 US\$ billion. Thirty projects have been complete and six are in the development stage, including a 414 rooms 300 US\$ million build operate transfer BOT project that was approved in 2012. Once completed, the projects will add 1,559 rooms to Myanmar's accommodation stock.

## **2.30 Foreign Investment Laws**

Myanmar's new investment laws, rules and procedures have sparked widespread interest as they introduce reforms to boost investor confidence, increase efficiency, ease the doing of business and attract more foreign investments into the country. The MIL, from its start date, applies to existing or new investments in Myanmar except for matters coming under the old foreign investment law 2012 such as investment disputes or prior permit investments previously suspended form business operations before the start date or investment projects suspended by governmental measures under general and national security exemptions. With the merging and consolidation of the foreign investment law 2012 and the citizens' investment law 2013 into the new MIL, the government will not treat foreign and local investment projects equally in terms of expansion, management, operation and sale of direct investments.

### **2.31 ASEAN Clean Tourist City Standard**

The purpose of the ASEAN Clean Tourist City Standard (ACTCS) is to provide ASEAN member countries with a tool that will improve that quality of tourism in their cities, increase their marketing competitiveness but also improve the situation of local residents and their livelihood by alleviating poverty. It's also designed to protect the environment thus responding to the impacts of climate change and contributing to the sustainable development of ASEAN cities. Yangon's governor trying to meet this standard to Yangon and promote hygiene public restrooms, parks and tourist spots around Yangon City.

the standard focuses on tourist cities where is flow of visitors and where cultural, natural and man-made attractions exist.

### **2.32 Potential Sector Wide Impacts of Tourism**

This sector consider how the sector can drive positive and negative impacts on human rights, in particular economic, social and cultural rights, in three areas: economic, governance, and environmental and social.

These sector wider impacts can either result from government action, policies, laws, actions by government institutions that require or at least support responsible business approaches or activities that undermine or even prohibit them.

### **2.33 Sector wide Economic Impacts**

than 100 million workers are employed in the tourism sector worldwide, and tourism revenues account for more currency flow to developing countries than all aid flows from foreign donors. According to the Ministry of Hotels and Tourism, the tourism sector is expected to bring in US\$ 905 million in the year 2014. Further, the World Tourism and Travel Council estimates that every dollar spent on travel and tourism generates over three dollars of economic output.

### **2.34 Benefit Sharing**

Where the benefits of the tourism sector are shared equitably with local populations, the sector has the potential to benefit the poor. However, studies elsewhere demonstrate that a majority of tourist revenue is lost through payments of goods and services purchased outside of the host country.

The development of logistics and infrastructure for the tourism sector such as roads, transport, electricity supply and information and communication technology ICT can benefit the Myanmar economy and the local population, if it takes into consideration their needs as well as those of tourist and is carried out in a sustainable manner.

### **2.35 Electricity**

Nationwide power shortages due to insufficient electricity have been a long standing issue in Myanmar. Shortages of electricity are common in small towns as well as big cities like Yangon. Due to frequent power cuts, hotels and other industry players use expensive diesel driven generators as alternative supply in many areas. This shortage of electricity has caused delays in investment in new hotels in less well known destinations. To solve this issue, the Myanmar Tourism Master Plan includes as a key action the provision of a reliable electricity supply in all main tourist destinations.

### **2.36 Information and Communication Technology ICT**

Telecommunications sector in Myanmar is significantly underserved but the situation is rapidly changing. As of June 2014 prior to the launch of Ooredoo and Telenor and a fall in the price of SIM cards., there were thought to be 9.36 million users 18% of the population. There were thought to be 2.6 million people using the internet 5% of the population as of May 2014, up from 60,000 users in 2012.



### 2.37 Foreign Exchange and Tax Revenues

Through levying of income taxes on tourism business, licensing fees, and user fees on tourists, the tourism industry contribute to the tax base needed to support reforms and finance investments in sectors such as health, education and infrastructure.

**Table: 10 Regional Markets for Myanmar Tourism**

Country	2005	2006	2007	2008	2010	2011	2012 (JAN- JUL)
Africa	488	502	432	539	816	993	776
Middle East	1,920	2,177	2,281	1,379	2,208	2,607	2,129
<b>ASIA</b>	<b>133,894</b>	<b>149,631</b>	<b>145,512</b>	<b>128,279</b>	<b>212,454</b>	<b>259,692</b>	<b>197,128</b>
Hong Kong	2,593	3,159	3,048	2,410	3,081	3,820	2,642
Japan	19,584	18,945	15,623	10,881	16,186	21,321	23,277
Malaysia	9,858	9,588	8,693	8,268	16,186	23,287	15,921
Singapore	9,674	10,952	9,310	8,599	12,114	15,391	12,697
Thailand	27,199	30,400	35,002	27,311	59,692	61,696	48,100
China	19,596	24,893	29,551	30,792	46,141	62,018	38,684
Taiwan	17,600	15,827	13,707	11,472	14,170	15,542	11,662
Korea	10,934	18,265	13,821	12,369	18,930	22,524	17,805
Bangladesh	1,506	1,342	1,046	1,001	1,441	1,988	1,114
India	7,679	7,540	7,675	7,173	9,849	12,318	8,949
Others	7,671	8,720	8,036	8,003	14,664	19,787	16,277

Source: Tourism Statistics 2011 Ministry of Hotels and Tourism

(Source: Ministry of Hotels & Tourism, 2017)

As the table shows, Thailand and China tops the list of the visitors entering Myanmar.

Asian visitors, including Thailand and China, make up 66% of the market in 23011. Thailand tops the list of foreign visitors into Myanmar, and has held that position for the last decade, followed

by Chain. Both have borders share with Myanmar and visitors from these 2 countries enter Myanmar via their respective border as well as by air.

In the year 2011-2012, there were a total of 61,696 Thai visitors or 16% of all tourists entering Myanmar. Flights operate between Bangkok and Yangon 8 times daily and Bangkok acts as the main point of embarkation for visitors coming into Myanmar by air.

China, the second largest group of visitors has recently caught up with Thailand this year, contributing an equivalent 16%. Currently, there are a total of 9 flights per week from the cities of Guangzhou and Kunming, but the number of flights, as well as number of Chinese cities that well have flights to Myanmar, are growing.

**Table: 11 Visitor Arrivals by Continent/ Regional Groupings**

**Table 3.1d** Visitor Arrivals by Continent/ Regional Groupings

Continent	Asia Pacific	Column1	Europe	Column2	Americas	Column3	Africa & Middle East	Column4
Year	Asia	Oceania	West EU	East EU	North America	Latin America	Middle East	Africa
1998	125,232	5,305	50,950	709	12,698	606	1,909	317
1999	128,483	4,205	50,877	750	12,149	599	1,416	316
2000	131,165	4,716	53,739	1,166	14,691	621	1,263	314
2001	123,904	5,069	55,948	1,542	15,864	807	1,416	312
2002	125,547	5,912	63,400	2,077	16,953	871	2,022	430
2003	121,392	7,076	58,161	2,203	15,775	799	1,148	390
2004	146,774	7,076	62,901	2,510	19,260	1,191	1,831	395
2005	133,894	7,181	64,531	3,402	19,509	1,192	1,920	488
2006	149,631	7,533	76,767	4,024	21,350	1,530	2,177	502
2007	145,515	7,693	68,532	4,295	17,854	1,477	2,281	432
2008	128,279	6,079	37,156	3,729	15,229	929	1,379	539
2009	-	-	-	-	-	-	-	539
2010	212,454	8,695	59,817	6,118	18,911	1,669	2,208	816
2011	259,692	9,126	61,812	4,816	21,825	1,927	2,129	776

From: Myanmar Tourism Statistics (2012)

(Source: Myanmar Tourism Statistics, 2017)

## Theory

### 2.38 Customer Satisfaction

Kotler and Keller mentioned that satisfaction is a person's feelings of pleasure or dissatisfaction that result from comparing a product's perspective performance or outcome to expectations. If the performance not meet the expectations, the client is dissatisfied. If it matches expectations the customer is satisfied. If it exceeds expectations; the customer is highly satisfied or much delighted. Customer level of product performance depends on many factors, especially the type of loyalty relationship and brand psychology. Consumers often form more favorable perceptions of a product with a brand they already feel like before. Buttle stated that customer satisfaction is a pleasurable fulfillment response to a client experience or some part of them. Customer satisfaction is the customer's fulfillment response and dissatisfaction is fulfillment response differently.

The experience of component of the definition suggests that the satisfaction evaluation can be directed at any or all elements of the customer's experience. It's included product, services, process and any other components of the customer experience. Accordance with Lucas's explanation, keeping customers can be difficult in a competitive, global marketplace because so many organizations have joined the race for customers. By supporting a personal, professional strategy, that can help ensure that customers return. Building a good relationship in order to increase customer satisfaction is valuable.

The global service marketplace continues to be very competitive. Lodging business have been challenged to increase their levels of quality and service, improve their product design, and decrease their product development cycle times. Significant progress has been made in these areas, but one of the most important objectives in the hotel marketplace today is providing total customer satisfaction (Skogland a. Siguaw, 2004).

Customer satisfaction is considered to be one of the most important outcomes of all marketing activities in a market oriented firm. The obvious need for satisfying the firm's customer

is to expand the business, to gain a higher market share, and to acquire repeat and referral business all of which lead to improved profitability (Barsky 1992).

### **2.39 Service Quality Management**

American society of Quality (ASQ) defines quality as the totality of features and characteristics of a product or service that bears on its ability to satisfy given needs. (Hakserver et al)

Park, Robertson and Wu 2004 define service quality and service value as: service quality can be defined as a customer's overall impression of the relative efficiency of the organization and its services. Whereas service value can be defined as customer's overall assessment of the utility of a product based on perceptions of what is received and what is given. (Wirtz and Johnston 2003) stated that delivering excellent service is both inconspicuous and elusive. Customers know when they have received it and when they have not. Service, both poor and excellent has a strong emotional impact on clients, creation profound feelings about the organization, its employees and its services, and affection their loyalty to it.

Service excellence requires a total approach. Excellent customer service results from all the appropriate components being situated properly, from the correct strategic focus and service culture to a clear understand of service, good people, training, systematic and processes.

Organizations that want to perform service quality excellence should:

- Have strategic focus on clients or in other be customer centric.
- Value staff and take care of them.
- Take every opportunity of continually develop staff and systems.
- Re-create the service offered by predicting potential customer needs.
- Emphasize the surprise effect.

- Listen to feedback from all areas of the company and clients.
- Carefully consider clients complains and compliments seriously.
- Invest in training, particularly for front line staffs.
- Introduce learning orientation based on continuous improvement.
- Reward and recognize staff for contributions to service excellence.
- Focus on cost and profits.

#### **2.40 Tourist Satisfaction**

Tourist satisfaction is an important part to successful destination marketing because it has an influence on the choice of destination, the consumption of products and services, and the decision to return (Kozak and Rimmington, 2000) several researchers have studied customer satisfaction and provided theories about tourism (Brammwell, 1998, Bowen 2001). As Parasuraman, Zeitham, and Berry's (1985) expectation perception gap model, Oliver's expectancy disconfirmation theory (Pizam and Milman, 1993), Sirgy's congruity model (Sirgy, 1994; Chon and Olsen, 1991), and the performance only model. (Pizan, Neumann, and Reichel, 1978) have been used to measure tourist satisfaction with specific tourism destinations. In particular, expectancy disconfirmation has received the widest acceptance among these theories because it is broadly applicable. Pizan and Milan (1993) utilized Oliver's (1980) expectancy disconfirmation model to improve the predictive power of travelers' satisfaction. They introduced the basic dynamic nature of the disconfirmation model into hospitality research, while testing part of the original model in a modified form. In order to assess the casual relationship between two different disconfirmation methods, they employed a regression model with a single expectation met measure as the dependent variable, and 21 difference score measures as the independent variables. Some studies on customer satisfaction are also notable in tourism behavior research. Pizan, Neumann and Reichel (1978) investigated the factors structure of tourists' satisfaction with their destination areas. The authors showed eight distinguishable dimensions of tourist satisfaction.

## **2.41 Related Research**

### **Tourism in Myanmar in the 1970s and 80**

The history of Myanmar tourism can be divided into three periods as: the parliamentary democracy (1948-1962), the socialist period (1962-1988) and that of the opening up of the tourist market (since 1990).

During the period of parliamentary democracy, Myanmar economic policy was oriented towards capitalism. Despite a relatively low number of tourists, a few private travel agencies were opened. (SIT) the Tourist Information Service later called Tourist Burma was charged with informing and guiding tourists. During that period, tourist visas were valid for a month.

In 1962, the visas validity was reduced to just 24 hours. In conformity with the Socialist Regime's Nationalization Law, Tourist Myanmar and the Hotels became State owned. The tourist sector became smaller quickly, in order to protect the traditional norms and customs from foreign influence, according to the authorities. At the beginning of 1990s the new military government that taken power by a coup feat, consider to use a new strategy to open foreign investment market. The military government decided to make development of tourism as one of their economic priorities. In 1992, the Ministry of Tourism and Hotels was set up and it was the time of basic infrastructures of tourism were started. Although it had started, "Visit Myanmar Year 1996" was launched in 1996 as opened the doors to tourists.

### **2.42 The Promotional Campaign Based on Two Major Objectives:**

Economic necessity: foreign currencies can be earned through the tourists to supply arms, needed by military dictatorships in other to stay in power longer, on the other hand, money laundry of the drug trade by recycling it into a legal economic sectors.

To regain prestige: following the cancellation of 1990 election results, won by National League of Democracy, the opposition leader Aung had been maintained under the house arrest,

the Generals wanted to show the international community as another face of Myanmar for the relief of political and human rights views on military government.

Myanmar is a beautiful country with lots of offers which travelers seeking an exotic destination. It has long unseen of underdeveloped beaches, interesting ethnic groups, warm, friendly people, golden temples, deserted islands, deserted islands, cultural sites still damaged by development, and many unusual things. “Myanmar is the last of the truly magical destinations of the orient,” Philip Sehnnon wrote in the New Your Times. It’s the most devoutly Buddhist nation on earth, a land of glistening pagodas and hand-carved sandstone temples tended by hushed, saffron robed monks. “Rudyard Kipling praised the “mist on the rice-fields”, “the old pagoda looking lazy at the sea”, and “a neater, sweeter maiden in a cleaner, greener land” on the Road to Mandalay.

Since 1992, the Myanmar government has encouraged tourism. However, some of 750,00 visitors enter the country annually. To boost tourism industry, the new Myanmar government is in the process of making “immediate adjustments,” such as having looser visa rules, modeled on those of successful holiday destinations such as Thailand. (source: Reuter, January 20, 2013)

In 2006, Joshua Kurlantzick wrote in the washigton Post, “In the late ‘90s, it seemd possible that Burma, one of Asia’s most culturally rich nations, would enjoy a tourism mini-boom. The temples of Pagan, dotted across a plain, have survived for nearly a millennium. The region outside Mandalay contains ruins of ancient capitals of Burmese kingdoms and hill stations that resemble British resorts. Even chaotic Yangon boasts a wealth of crumbling but still magisterial colonial architecture. However, the country gets fewer than a million visitors per year. The gleaming Mandalay airport sits empty, a lone staffer wandering its cavernous halls. (Source: Joshua Kurlantzick, Washington Post, April 23, 2006)

Tourism remains a growing sector of the Myanmar economy. It is served internationally by number of airlines via direct flights. Also domestic and foreign airlines operate flights within the country. Cruise shops dock at Yangon and neighbor. Across land entry via border is permitted

at several border checkpoints. A valid passport with an entry visa for all tourists and business people is required.

Tourism was introduced to Myanmar in the time of colonialism of Southeast Asia (1870 – 1940). In 1865, the British government shut downed a fleet of four stammers and three cargo boats, which had been in service on the Irrawaddy since the annexation of lower Myanmar to British India in the early 1850s.

A young entrepreneur Glaswegian bought a fleet and set up the water ferry transportation business called (IFC) The Irrawaddy Flotilla Company Limited. Burma's last King Thibaw and royal family were, on board the Irrawaddy Flotilla Company Limited (IFC) steamer, into their exile in India after the fall of Mandalay in 1885. During the second World War, IFC was the main supporter among Japanese and Burmese nationalist military forces. When Burma gained independence in 1948, the IFC was offered to the government Inland Water Transport Board of the 'Union of Burma.'

Paul Theroux wrote in "The Great Railway Bazaar". "Tourists are welcome, treated with huge courtesy, invited to Myanmar homes, taking photo, and squired around and given special privileges". It's how Myanmar people are kind and polite to their guests. Most of accommodations were not well facilitated yet, and the cost of accommodations were high at that time. Shortage of everything in the hotels, such as electrical parts, room furniture, bedsheets were not very good.

### **2.43 Foreign Travelers to Myanmar**

According to official data, 2010- 2011, 424, 000 visitors visited Myanmar, and 570 hotels and 160 of guest house had a total capacity of 24,692 rooms were quickly filled. Compared to neighboring country Thailand, where the same climate and landscape to Myanmar, has more than 4,000 hotels attracted 19 million visitors the same year of 2010-2011, the fiscal years. overall tourist's arrivals in Myanmar during the year 2009- 2010 stood at 300,000 up from 255, 288 in the earlier year.



In 2007, about 150,000 visitors visited Myanmar, and 500,000 foreign visitors visited in 2002 show the figure of highly suspect. According to the World Tourism Organization, the actual number was more likely 200,000 including diplomats and businessmen, with 12,000 from the United States. This was up from 160,000 foreign visitors in 2000 and only 20,000 in 1994.

In 2003, about 600,000 foreign visitors came to Myanmar makes 20 percent up from 2002, according to government resources. These travelers made \$116 million in revenues, compared to \$99 million the year before. Visitor from neighboring countries such as Thailand, Singapore and Malaysia accounted for 44 percent of the increase and made up more than half of all visitors. This made up 10.8 percent of all visitors to Thailand in 2003. They were the largest group, followed by citizens of Taiwan, Japan and China. Germany was the sources of the largest number of Western tourists followed by United States, France, Britain and Italy. (Source: World Tourism Organization)

Every foreign visitor had to apply a visa on the arrival of Yangon and Mandalay international airports without having to make any prior arrangements with travel agencies in 2010, and an estimate show 1 million of Chinese visit Myanmar every year. Many of them visit on arrival visa and hit the border towns patronized mainly bet them to gamble and to sexual pleasure.

In the 1990s and 2000s, the number of European and North American travelers fell off at various times. Asian travelers from Japan, South Korea and China was increasing as the same time happening. They have not been so inclined to follow or had even heard about the tourism boycotts of Myanmar. During the time of unrest in Myanmar, during the peak season for tourism, many hotels in popular spots, such as those surrounding the ancient Buddhist temple of Bagan, were virtually empty. When that happened cooks and chambermaids at hotels and restaurants as well as curio hawkers, tour company workers and craftsmen lost their jobs or sources of income.

Hotel employees and tour guides in Myanmar have been given instructions not to discuss local politics with foreigners. There will be punishment if they are found guilty. Hotel guest list is required to give to the military intelligence office. Although military show low profile in tourist

area and helping to the tourist, there have been cases of visitors being detained in locked rooms. In September 2011, a Japanese tourist was killed by military troopers and Chiharu Shiramastu, 31 was murdered near the Bagan tourist site, said government official.

#### **2.44 Tourism Campaigns Development by Military Junta**

Through the 1990s and 20002 the military government see tourism as a way of foreign money earning, and started a campaign to attract foreign visitors with filling clean bathrooms, comfortable seats and entrance gates of train stations, hotel and other accommodations. During the 1996 was designated as “Visit Myanmar Year”, 34 of local hotels were still under the constructions, financed with foreign investors and opium lords, and new roads were built with forced labor. “Visit Myanmar Year” was not success.

Myanmar’s underdevelopment is one of its charms that visiting in Myanmar like going back to the time of stone age, no electricity, no televisions, less factories and busy people. 7-Elevens and McDonald’s were not arriving in 2000s. the only one way of Myanmar Junta’s hands on foreign currency was by requiring tourists to change 300 USD into Myanmar foreign exchange coupons when they entered the country and required them to pay for train tickets, hotel accommodation and transportation fees. Foreign travelers arriving at the airport were also encouraged to sign up for 500 USD, every earned foreign currency go to the Myanmar Junta. In 2001, new international airport was opened in Mandalay and most hotels built by foreigners are required to have a Myanmar partner.

#### **2.45 Tourism and Politics in Myanmar**

According to the United Nations, Tourism is an important source of jobs and foreign currency for Myanmar. Over many years its fortune has been affected by politics in Myanmar. Myanmar’s leader Aung San Suu Kyi asked visitors to avoid her country until democracy prevailed. Human rights also urged tourists to avoid the country. Lonely Planet disagreed, arguing

that tourism's benefits to ordinary Myanmar outweighed the impact of the money that ended up in the hands of the military regime. In 2007, tourism was hit hard by images seen around the world of soldiers beating up monk and shooting protesters.

Military junta's forced labor projects were focused around tourist destinations which have been heavily criticized for their human rights records. Even disregarding the obviously governmental fees, Minister of Hotels and Tourism Major General Saw Lwin recently admitted that the government receives a significant percentage of the income of private sector tourism operations. There are not any relevant to ordinary people to receive money from tourists and military tightly controls the interaction between foreigners and the people of Myanmar.

In the early 2000s, traveling to Myanmar became a politically correct issue as it was claimed that much of the tourism money spent in Myanmar ended up in the hands of the military regime and thus supporting the regime's repression and forced labor. Among those who opposed a boycott on tourism to Myanmar was Lonely Planet Guides. They argued that 1. such a boycott deprived thousands of ordinary people of desperately needed money, 2. Exchanges between foreign tourists, and Myanmar helped open the eyes of the Myanmar to the outside world, 3. And the same exchanges educated foreigners about Myanmar's problems and needs. In its guide for Myanmar, lonely Plant offers suggestions on ways to minimize support of the junta but concludes that travel is the type of communication that in the long term can change lives and unseat undemocratic governments.

Travel agencies who dealt with Myanmar suggested travelers to Myanmar to avoid hotels and airlines which supporting the regime. Boycott opposites argued by travelling independently tourists could regime liked businesses and can maximize the good they brought to ordinary Myanmar. Supporters of the boycott were most against large scale mass tourism. To have a very big cruise ship with hundreds of tourists coming in that's a lot of money for the regime, and so we don't like such huge business, Win Tin told the Times.

Myanmar's leader Aung San Suu Kyi said, "Myanmar will be here for many years, so tell your friends to visit us later. Visiting now is tantamount to condoning the regime." Some member of her own party even disagree with her views on this issue. One member of NLD told the New York Times, "if there are no visitors, factory worker women will lose their jobs. They are the ones who suffer, not the generals." One souvenir shop owner told the Washington Post. "if no tourist come I cannot feed my family."

Kira Salak wrote in National Geographic, "Since 1996 the Myanmar military government has sponsored a campaign to encourage tourism, but there's been much debate in the West about traveling to this country. Aung San Suu Kyi advises against it, arguing that tourism funds the government's oppression; other Myanmar exiles believe tourism creates many job opportunities for local people.

#### **2.46 Myanmar Opposition Drops Tourism Boycott and Myanmar Visa Before the Election**

In November 2010, Kenneth Denby wrote in Time Times, "The 15-year-old, opposition inspired tourism boycott of Myanmar has been declared over after the party of democracy leader Aung San Suu Kyi said it would now welcome foreign travelers. Win Tin, a senior leader of the National League for Democracy, told the Times that foreigners should visit Myanmar and see for themselves the suffering of the people under one of the world's stubbornness and repressive military dictatorships. "we want people to come to Myanmar, not to help junta, but to help the people by understanding the situation; political, economic, moral everything," said U Win Tin, a cofounder of the NLD and close friend of Aung San Suu Kyi. "for the outside world to see, to know our situation, that can help our cause a lot, we think. (sources: Kenneth Denby, The Times, Nov 4, 2010)

U Win Tin said that the new policy had not received that explicit approval of Aung San Suu Kyi but he said that her silence on the matter, in messages brought out by the few visitors

permitted to visit her, suggested that she supported the new policy. “the matter is not so very easy for us, so we haven’t decided yet whether we reverse Aung San Suu Kyi’s request. But our view is that we should allow people to come, to see how people are suffering under the regime; there’s no response from Aung San Suu Kyi.

In August 2010, Reuters: “Army ruled Myanmar has suspended visas on arrival for tourists from September ahead of its first elections in two decades, official said. Potentially restricting access to the country for foreign observers. The reclusive country began offering visas to arriving tourists in Mya to lift tourism. But the scheme will be suspended. “we think the real motive for this measure could be to prevent outside reporters and monitors from entering the country ahead of the Nov 7 elections, “a private tour operator said. Many foreign journalists traveled to the country on tourist visas during September saffron revolution in 2007 and Cyclone Nargis hit in 2018. The regime offers few opportunities for foreign observers to visit the country. Journalists and observers granted official visas are accompanied by minders. (sources: Aung Hla Tun, Reuters, August 23, 2010)

#### **2.47 Hotel Chains Eye Myanmar as It Opens Up**

“Visitors hopping to catch a glimpse of glittering Shwedagon Pagoda and hear the “Tinkly temple bells” of Kipling’s “Road to Mandalay might one day be able to book into a Westin or Marriott, thanks to Myanmar’s emergence from political isolation. Starwood Hotels and Resorts which runs chains such as Westin, Sheraton and La Meridien and Marriott International both said they wanted to start running hotels in Myanmar s one of the most isolated countries in Asia, is being welcome back into the international fold after two decades of sanctions, thanks to democratic reforms. “Marriott would love to be there if conditions are right, “said Arne Sorenson, president of Marriott International. “Myanmar has captured people’s imagination for decades.” (Souces: Paritosh Bansal and Ploy Ten Kate, Reuters, January 26, 2012)

Hotel chains in Myanmar are Asian based companies such as Shangri-La Hotel and Resorts, Singapore’s Sedona Hotels International, and GHM Luxury Hotels, a Myanmar company

that owns the Strand in the commercial capital. The few five-star hotels outside of Rangoon are mostly in beach resorts or tourist centers such as Mandalay and Bagan. However, as tourists grow visiting Myanmar rapidly, the government admits the shortage of accommodation.

Westin chains sees an opportunity as Vasant Prabhu, Chief financial officer of Starwood Hotels and Resorts said “I think it’s right time for people like us to look at Myanmar. “I think Myanmar is the interesting new opportunity a little bit like Vietnam might have been 20 years ago. We have a decent presence in Vietnam right now. Jail Mekouar, managing director for the Middle East and Africa for Jones Lang LaSelle Hotels, a hotel investment services firm, said Myanmar’s potential for tourism and hotels was huge given its landscape, islands and rich history. Executive vice president of development for Carlson Hotels, Nancy Johnson suggested her company also interested in going into Myanmar. “It’s a beautiful country,” Nancy said. “if there’s an opportunity to go there, we’ll be there.”

The operating hotel chains in Thailand see huge potential in Myanmar, but are not rush to set up there. They also aware of the risks attached to investing in a country with a long history of corruption and unclear rules and regulations. “We are looking for ways to expand in Myanmar. Our desire is get in there by managing local hotels, “said Ronnachit Mahattanapreut, a senior vice president at Central Plaza Hotel. “I don’t think we need to hurry because rules and restrictions are not really settled. “Prakit Chinamourphong, head of the Thai Hotels Association, which represents about 800 hotels, including the mandarin Oriental, the Four Seasons, owned by Minor International Pcl, and Dusit Thani, said it would be at least two years before Thai chains made a move. Myanmar is opening up but nobody is talking to open un there, it’s bit early for us to get in now. “they told Reuters. “There are still high risks to make a move there. Politics, especially, is not much clear yet. Having said that, we see a very good opportunity.”

#### **2.48 Tourism rush to Myanmar as the Reforms and Release of Aung San Suu Kyi**

Tourism in Myanmar is still a small slice of the economy, but it's a fast-growing part of Myanmar's basis service sector. Amanda Jones wrote in the Los Angeles Times: Times are changing in Myanmar, and it's happening with 21<sup>st</sup> century speed. The military Junta, As Aung San Suu Kyi was released from house arrest in 2010, and waiting tourists have rushed into the country. This onslaught of visitors 820,00 in 2011, 1 million in 2012 and 1.5 million estimated in 2013 means no enough accommodations were prepared, as the travelers need to book in advanced before they coming. It also means feverish hotel construction, and not always with the best planning. (Sources: Amenda Jones, Los Angels Times, December13, 2013)

#### **2.49 Thailand's pretests hit tourism to Neighboring Myanmar**

In January 2014, Chrisina Larson of Blommgerg wrote: "Thousands of antigovernment protesters have filled the streets of Bangkok, clogging intersections and calling for PM Yingluck Shinawatra to step down. The country's tourism industry is expected to take a major hit, with visitors from China projected to decline 70 percent in January and during the crucial Chinese New Year holiday. (Sources: Christina Larson, Bloomberg, January 15, 2014)

It's not only Thailand's tourism suffering. Myanmar is also feeling the chill. "Usually this time of year is a popular tourist season, "Aye Mra Tha, an official at state run Myanmar Airways International, told the Democratic voice of Myanmar media group. She said that passengers were down 40 percent on flights between Bangkok and Yangon (Many international flights to Myanmar's capital are routed through Bangkok). Travel agencies based in Rangoon reported that few visitors arrived in Rangoon and business booking Bangkok was lesser.

## 2.50 Definition of Terms

World Tourism Organization has standardized tourism terminology and classification some extent to world tourism. The standards are also imitated by the United Nations Statistical commission (Frechtling, 1996)

**Tourism** is consisted of the actives of person travelling to another place and staying outside their usual environment for not more than once consecutive year leisure, business and other purposes.

Weave and Lawtwon, (2012) mentioned the tourism as the sum of the phenomena and relationships arising from the interaction of tourists, business suppliers, host government, and host communities in the process of attracting and hosing these tourist and other visitors.

**Tourism** is composed the following categories in general by WTO

1. Domestic Tourism: residents of a country visiting destination in the own country.
2. Inbound Tourism: visit to a country by non-resident.
3. Outbound Tourism: residents of a country visiting destinations in other countries.
4. Internal Tourism: the combination of domestic tourism and inbound tourism.
5. National Tourism: the combination domestic and outbound tourism.
6. International Tourism: the combination of inbound and outbound tourism.

**Tourist Satisfaction** is the result of the relationship between tourists' expectations about destination based on their previous images of the destination and their evaluation of the outcome of their experience at the destination area.

**Tourism Industry** is the set of enterprises, establishments and other organizations one of whose principal activities is to provide goods and services to tourists.

**Tourist Destination** is a city, town or other area the economy of which is dependent on a significant extent on the revenues accruing from tourism. It may contain one or more tourist attractions.



**Tourist Attraction** are natural and artificial such as nature parks, beaches, marine areas, archaeological sites and historic places, cultural features such as arts and entertainment crafts, traditional architectural styles, economic activities, traditional customs and ceremonies and theme parks and casinos and special events such as fairs, festivals and sports competitions.

**Safety** is a freedom from danger or risks and feeling of safety in the visiting areas, in this point, Encyclopedia Americana Volume 24, (1986) stated the concept of “safety” as the condition of being free from the danger of harm and freedom. As a legal concept, it implies a state of relative security from accidental injury or death due to measures designed to guard against accidents, laws that encourage the maintenance of safety standards are often called safety.

**Service** means that tour and travel services which are necessary to make travel arrangements for tourists and provide guide services. Providing tourist information services in the area are very important. Other services include restaurants and other types of eating and drinking establishments, postal services, medical services for tourists who experience medical problems while travelling, banking and money exchange, retail shops that handle convenience items, crafts and souvenirs, art galleries and antique shops and often special items such as designer clothes, personal services like a hair dressing and other types. (WTO 1998)

**Tourist Expenditure** is the total consumption expenditure made by a visitor during his or her visit and stay at a destination. (Bian Yan 2011)

**Tourist Receipt** is the receipt in the form of direct or indirect currency payments made by tourists from abroad to cover the cost of goods and services excluding expense of international transportation. The calculation of tourist or tourism receipts is used by multiplying the total number of international tourists by the average length of stay and by the average expenditure per person per day (Bian Yan 2011)

## CHAPTER 3

### RESEARCH METHODOLOGY

#### 3.1 Type of Research Methodology

This research is quantitative research that will be done by the survey of Yangon tourism development in Yangon region, Myanmar. In order to obtain data collection for the calculation of explicit and implicit importance, as well as the level of tourism sectors development, this study is done using questionnaires to collect data from visitors. The questionnaires were asked to the visitors who are visiting Shwedagon Pagoda, Yangon and to rate the level of satisfaction of tourism sectors in Yangon by choosing multiple items.

#### 3.2 Research Design

The researcher used the descriptive or quantitative design with Pearson correlation method. The samples are 222 visitors visiting Shwedagon Pagoda, Yangon, Myanmar. Therefore, about 222 of randomly questions were asked as sample of this research.

#### 3.3 Data Collection

The questionnaires were distributed to the tourists at Shwedagon Pagoda, one of the highly tourist attractions in Yangon region. The questionnaires comprised three parts as demographic characteristics, guest satisfaction on Yangon tourism infrastructures and suggestions on Yangon's tourism infrastructures and things to see in the future. The procedure of data collection was carried out by the researcher to test the sample. The 222 questionnaires, comprising of demographic, attraction, infrastructure, accommodation, safety, services, transportation, arrivals of tourist by Yangon International Airport and satisfaction level were collected from 6<sup>th</sup> November to 3<sup>rd</sup> December, 2017 in Shwedagon Pagoda, most tourist attraction, Yangon, Myanmar.

## Measurement

**Demographic Characteristics:** for this part, gender, age, education background, occupation, income, income and marital status are involved.

**Yangon Tourism Infrastructures:** for this part, Yangon's basic tourism infrastructures were asked such as multiple questions on Yangon's accommodation price, transportation, security, attraction, destinations, services, banking system, visa status, flight status and satisfaction respectively.

**Tourist arrivals by Yangon International Airport:** for this part, tourist arrivals by Yangon International Airport data collections were calculating yearly and rating for airport services.

The 5-point rating scale ranges from "strongly satisfied to strongly dissatisfied" analyzing at the average of mean:  $\bar{x}$  and standard deviation S.D.

**Table: 12**      **Satisfaction Measurement**

Average	Meaning
1.0 – 1.49	Strongly Satisfied
1.50 – 2.49	Satisfied
2.50 – 3.49	General
3.50 – 4.49	Dissatisfied
4.50 – 5.00	Strongly Dissatisfied

### 3.4 Formula Used in Analysis

The instrument used in data analysis was the statistical package for social science (SPSS version 20) with the satisfactory scale: strong satisfied, satisfied, general, dissatisfied, and strongly dissatisfied. The results were analyzed by using descriptive statistic with frequency, percentage, mean and standard deviation and relationship correlation methods, two tailed.

The sections of the questionnaire, the descriptive statistic including frequency, percentage, mean and standard deviation were used to explain the demographic data of the responders. In second section, the likert scale was utilized in measuring the level of satisfaction in relation to tourist destination with Pearson correlation and the other comments were stated.

The sample of this research is calculated by using Taro Yamane (1973) formula with 95% confidence level according with statistic of 1,272,596 international tourist arrivals as an example from the data collection by Yangon International Airport, Ministry of Hotel and Tourism 2016 report.

**Table: 13**                      **Design of the Study Table**

<b>Research Objectives</b>	<b>Sources of data</b>	<b>Research Instrument</b>	<b>Data analysis and Methods</b>
<p>1.To study Yangon tourism sectors development.</p> <p>2.To analysis the tourist arrivals of Yangon international airport.</p>	<p>The sample size is 222 tourists, visiting Yangon, former capital city of Myanmar.</p>	<p>Questionnaire</p> <p>Started Dated: 6<sup>th</sup> November to 3<sup>rd</sup> December, 2017</p> <p>at Shwedagon Pagoda, most tourist visiting place, Yangon, Myanmar.</p> <p><b>Part 1.</b></p> <p>Demographic characteristic</p>	<p>Descriptive statistic method and Person correlation method.</p> <p>Two tailed.</p>

<p>3.To research Yangon's current tourism improvement.</p>		<p><b>Part 2.</b> Education background, purpose of visit, satisfaction, accommodation price, transportation, visa status of multiple choice questions.</p> <p><b>Part 3.</b> Suggestion, things to seen next time, and recommendation to Yangon's tourism development.</p>	
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## CHAPTER 4

### 4.1 Finding

In this chapter is divided into three major sections. The first section provides the demographic characteristics of the respondents. The second section defines results on the respondents' satisfaction degree with multiple choice items collected in Yangon, Myanmar. In the last section, the results of the comments and discussions were mention as below:

**Section 1:** Analysis of demographic characteristics such as age, sex, nationality, purpose of travel and accommodation selection by using descriptive statistic.

**Section 2:** Analysis of level of customer's satisfactions on mode of Yangon tourism infrastructures and spots.

**Section 3:** Analysis of Hypothesis Testing and comments.

**Table:1** frequency table of the gender respondents

**What is your gender?**

	Frequ ency	Perc ent	Valid Percent	Cumulati ve Percent
ma le	195	85.9	87.8	87.8
fe ma le	27	11.9	12.2	100.0
Tot al	222	97.8	100.0	
Mis sin g	5	2.2		
Total	227	100. 0		

According to Table 1 of Gender, out of 380 questionnaires approached, 227 of people participated in this research, and 195 frequency respondents, 85.9% were male respondents and 27 frequency respondents, and 11.9% were female respondents, so male respondents were more than female answer positively.

**Table: 2**      **Frequency Table of Age Respondents**

What is your age?					
		Frequ ency	Perc ent	Valid Percent	Cumulati ve Percent
	less than 24	69	30.4	31.1	31.1
	between 24-39	110	48.5	49.5	80.6
	between 40-50	31	13.7	14.0	94.6
	over 55	12	5.3	5.4	100.0
	Total	222	97.8	100.0	
Mis sin g	System	5	2.2		
Total		227	100. 0		

The table 2 revealed that the range of age age of respondent who were participated in this research in Yangon City could be divided into four categories. Firt range is less than 24 years old with 69 of frequency respondent or 30.4% percentage. However, between 24 – 39 were

highest frequency or percentage as 110 frequency or 48.5 percentage. In additional, between 40-50 were 31 of frequency as of 13.7 percentage and over 55 years old as 12 frequency or 5.3 percentage were lower than others age groups.

**Table: 3**      **Frequency table of Nationality Respondents**

**What is your country?**

	Frequ ency	Perc ent	Valid Percent	Cumulati ve Percent
Valid	asia	175	77.1	78.8
	n			
	ame	20	8.8	87.8
	rica			
id	euro	27	11.9	100.0
	pe			
	Tot	222	97.8	100.0
	al			
Mis	Syst	5	2.2	
sin	em			
g				
Total		227	100.	0

According to the table 3 revealed, out of 227, Asian were 175 frequencies as 77.1 percentage respondents. American were 20 frequencies as of 8.8 percentage, following by 27 of Europe as 11.9 percentage respectively respondents.



**Table: 4      Frequency Table of Occupation Respondents**

**What is your occupation?**

	Frequ ency	Perc ent	Valid Percent	Cumulati ve Percent
Valid	student	20	8.8	9.0
id	employer	75	33.0	42.8
	retired	110	48.5	92.3
	others	17	7.5	100.0
	Total	222	97.8	100.0
Mis sin g	System	5	2.2	
Total		227	100.0	

Table 4 shows that employments of visitors visiting Yangon City respondents. Majority of respondents are 110 frequencies of 48.5% percentage. Second frequency of respondents are 75 of employers or 33.0 percentage, and 17 frequencies or 7.5% of respondents are others type in this employment respondents.

**Table: 5**      **Frequency Table of Education Level Respondents****What is your education level?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	undergrad	90	39.6	40.5
	uate			
	graduated	100	44.1	85.6
	highschool	10	4.4	90.1
	others	22	9.7	100.0
	Total	222	97.8	100.0
Mis		5	2.2	
sin	System			
g				
Total		227	100.0	

According to table 5, it shows the education level of respondents. Out of 227 total respondents, the 100 respondents of 44.1 percentage are graduated. 90 respondents of 39.6 are undergraduates and 10 frequencies of 4.4 respondents are highschool students. 22 frequencies of 9.7 respondents made as other type.

**Table: 6**      **Frequency Table of Monthly Income Respondents**

**What is your monthly income?**

	Frequ ency	Perc ent	Valid Percent	Cumulati ve Percent
less than 2000 USD	70	30.8	31.5	31.5
between 2000-3000 USD	30	13.2	13.5	45.0
between 3000-4000 USD	100	44.1	45.0	90.1
upper 5000 USD	22	9.7	9.9	100.0
Total	222	97.8	100.0	
Mis sin g Total	5	2.2		
System				
	227	100.		
		0		

Table 6 describes that the monthly income of respondents. The majority of respondents are income with between 3000 – 4000 US\$, as 100 frequencies of 44.1 respondents. Second ranges are as of 70 frequencies of 30.8 percentage respondents less than 2000 US\$. Between 2000 – 3000 respondents are 30 frequencies of 13.2 percentage. Upper 5000 US\$ of frequency are only a few of 22 as of 9.7% percentage in each.

**Table: 7**      **Frequency Table of Marital Status Respondents**

**What is your marital status?**

	Frequ ency	Perc ent	Valid Percent	Cumulati ve Percent

	single	95	41.9	42.8	42.8
	married	80	35.2	36.0	78.8
Valid	others	47	20.7	21.2	100.0
	Total	222	97.8	100.0	
Mis	System	5	2.2		
g					
Total		227	100.0		

The 7 denies that the frequency of marital status of respondent who participated in this research in Yangon City, Myanmar classified as single, married and others into three categories. Single status is 95 frequencies as of 41.9% percentage respondents, 80 of married frequency is 80 frequencies as 35.2% percentage, and 47 of 20.7% percentage are small number of respondents in this research.

### Statistics

I think Yangon

accommodations are

N	Valid	222
	Missing	5
Mean		1.83
Std. Deviation		.78
		1.00
		263

**Table: 8**      **Frequency Table of Accommodations Rates**  
**I think Yangon accommodations are**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	strongly satisfied	110	48.5	49.5
	satisfied	60	26.4	76.6
	normal	30	13.2	90.1
	dissatisfied	22	9.7	100.0
	Total	222	97.8	100.0
Missing	System	5	2.2	
Total		227	100.0	

According to the table of frequency 8, Tourists visiting Yangon are classified into four groups as Strong Satisfied, Satisfied, Normal and Dissatisfied. Majority of visitors are satisfied with Yangon's accommodation as 110 of frequency or 48.5% respondents. 60 frequency or 48.5 % percentage are respondents. 30 frequencies of 13.2 were following by 22 of dissatisfied into 9.7% percentage respondents separately.

### Statistics

I think Yangon  
transportations are

Valid	222
Missing	5
Mean	1.77
Std. Deviation	.799

**Table: 10** Frequency Table of Yangon Transportations Rate

I think Yangon transportations are

	Frequency	Percent	Valid Percent	Cumulative Percent
strongly satisfied	95	41.9	42.8	42.8
satisfied	90	39.6	40.5	83.3
normal	30	13.2	13.5	96.8
dissatisfied	7	3.1	3.2	100.0
Total	222	97.8	100.0	

Mis	5	2.2		
sin				
g				
Total	227	100.		
		0		

Table 10 shows that majority of visitors visiting Yangon rate Yangon's transportations as strongly satisfied. 95 frequencies into 41.9% percentage respondents as most highly strongly satisfied. 30 of frequency into 39.6% percentage shows satisfied with Yangon's transportations. 30 frequencies into 13.2% percentage respondents are following by 7 into 3.1% percentage of dissatisfied are respondents separately.

### Statistics

I think Yangon hotel prices are

N	Valid	222		
	Missing	5		
Mean		1.90		
Std. Deviation		.54		
		.708		
		.75		

**Table: 11 Frequency Table of Yangon Hotel Prices Rate****I think Yangon hotel prices are**

	Frequ ency	Perc ent	Valid Percent	Cumulati ve Percent
strongly satisfied	60	26.4	27.0	27.0
satisfied	130	57.3	58.6	85.6
normal	25	11.0	11.3	96.8
dissatisfied	7	3.1	3.2	100.0
Total	222	97.8	100.0	
Mis sin g System	5	2.2		
Total	227	100. 0		

According to table 11, 60 of people are strongly satisfied with Yangon's hotel prices following by 130 of frequency are satisfied. 25 frequencies into 11.0 % percentage rate Yangon's Hotel Price as normal and very a few frequencies of 7 into 3.1% percentage rate as dissatisfied.



### Statistics

I think tourist attractions  
are

N	Valid	222
	Missing	5
Mean		2.42
Std. Deviation		.34
		.947
		.01

**Table 12** Frequency Table of Yangon Tourist Attractions Rates

I think tourist attractions are

	Frequency	Percent	Valid Percent	Cumulative Percent	
Valid	strongly satisfied	50	22.0	22.5	22.5
	satisfied	50	22.0	22.5	45.0
id	normal	100	44.1	45.0	90.1
	dissatisfied	22	9.7	9.9	100.0
	Total	222	97.8	100.0	
Mis	Missing	5	2.2		
sin	System				
g					
Total		227	100.0		

Table 12 describes that Yangon's tourists' attractions rate 100 as majority and 22 of fewer rate as dissatisfied. Double frequencies of 50 into 22.0 % percentage rates strongly satisfied and satisfied with Yangon Tourist Attractions. 50 into 22.0% percentage respondents Yangon Tourist Attractions as normal and only 22 frequencies into 9.7% percentage respondents rate dissatisfied.

### Statistics

I think Yangon hotel  
services are

Valid	222
Missing	5
Mean	1.5901
Std. Deviation	.81195

**Table: 13**      **Frequency Table of Yangon Hotel Services Rate****I think Yangon hotel services are**

	Frequ ency	Perc ent	Valid Percent	Cumulati ve Percent
strongly satisfied	130	57.3	58.6	58.6
satisfied	60	26.4	27.0	85.6
normal	25	11.0	11.3	96.8
dissatisfied	7	3.1	3.2	100.0
Total	222	97.8	100.0	
Mis sing System	5	2.2		
Total	227	100. 0		

As showing the table 13, the majority of respondents at 57.3% for strongly satisfied, followed by 26.4% as satisfied. 11.0% respondents at normal and only 3.1% respondent as dissatisfied.

**Statistics**

I think the safety of

Yangon Intl-airport is

N	Valid	222
	Missing	5

Mean	2.82
Std. Deviation	1.23

**Table: 14** Frequency Table of Safety of Yangon International Airport

**I think the safety of Yangon Intl-airport is**

	Frequency	Percent	Valid Percent	Cumulative Percent
strongly satisfied	55	24.2	24.8	24.8
satisfied	25	11.0	11.3	36.0
normal	45	19.8	20.3	56.3
dissatisfied	97	42.7	43.7	100.0
Total	222	97.8	100.0	
Misusing System	5	2.2		
Total	227	100.0		

According to table 14, 42.7% of respondents as strongly dissatisfied with Yangon International Airport, followed by 24.2% of strongly satisfied. Between 11.0% and 9.8% respondents at satisfied and normal percentage.

### Statistics

Yangon Intl -airport

information services are

N	Valid	222
	Missing	5
Mean		1.81
Std. Deviation		.53
		.987
		.31

**Table: 15** Frequency Table of Yangon International Airport Services Rate  
Yangon Intl -airport information services are

	Frequency	Percent	Valid Percent	Cumulative Percent	
Valid	strongly satisfied	115	50.7	51.8	51.8
	satisfied	50	22.0	22.5	74.3
id	normal	40	17.6	18.0	92.3
	dissatisfied	17	7.5	7.7	100.0
	Total	222	97.8	100.0	
Mis	System	5	2.2		
sin					
g					
Total		227	100.0		

According to frequency and percentage of satisfaction with Yangon International Airport Services Rate, 115 of visitors' respondents at strongly satisfied followed by 50 respondents at satisfied, 40 of visitors' respondents at normal and 17 respondents as dissatisfied with Yangon International Airport Services satisfying.

### Statistics

I think Yangon Intl-airport tax is

Valid	222
Missing	5
Mean	1.73
Std. Deviation	.842

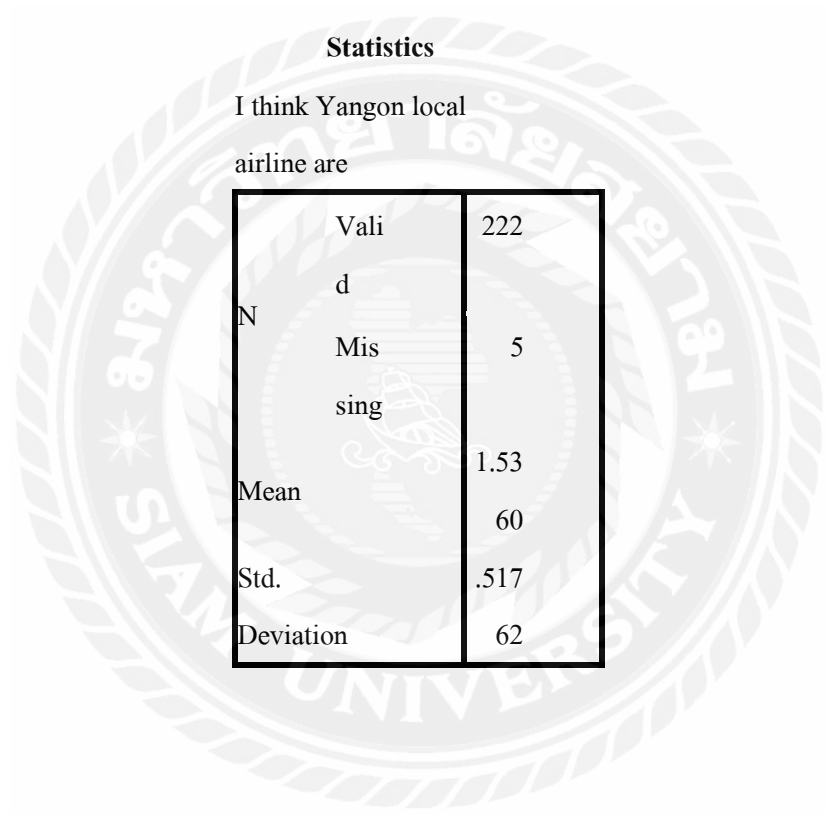
**Table: 16** Frequency Table of Yangon International Airport Taxation

I think Yangon Intl-airport tax is

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	115	50.7	51.8	51.8
id	50	22.0	22.5	74.3
	57	25.1	25.7	100.0
	222	97.8	100.0	
Missing	5	2.2		
System				

Total	227	100.		
		0		

The table shows that satisfied with Yangon International Airport Taxation by visitors into three categories as strongly satisfied, satisfied and normal respect. 115 of respondents' rate at strongly satisfied, and 50 of respondents at satisfied followed by 57 of respondents only rate at normal satisfied with Yangon International Airport Taxation.



**Table:17**      **Frequency Table of Yangon Local Airlines Rate****I think Yangon local airline are**

	Frequ ency	Perc ent	Valid Percent	Cumulati ve Percent
strongly satisfied	105	46.3	47.3	47.3
satisfied	115	50.7	51.8	99.1
normal	2	.9	.9	100.0
Total	222	97.8	100.0	
Mis sing System	5	2.2		
Total	227	100. 0		

As shown table 17 of Yangon Local Airlines Rate, majority of 105 of respondents at strongly satisfied, followed by 115 respondents at satisfied, and normal only were respondents at 2 frequencies with Yangon Local Airlines rating.

**Statistics**

I think the proce of local  
airline are

Valid d	222
Mis sing	5
Mean	1.74
Std. Deviation	.834



**Table: 18** Frequency Table of Price of Local Airline Rating**I think the proce of local airline are**

	Frequ ency	Perc ent	Valid Percent	Cumulati ve Percent
strongly satisfied	100	44.1	45.0	45.0
satisfied	90	39.6	40.5	85.6
normal	20	8.8	9.0	94.6
dissatisfied	12	5.3	5.4	100.0
Total	222	97.8	100.0	
Mis sing System	5	2.2		
Total	227	100. 0		

The table shows satisfaction of local airline rating as strongly satisfied at 44.1%, followed by 39.6% and only 8.8% are respondents at normal rate.

**Statistics**

I think visiting around in

Yangon is

Valid	222
Missing	5
Mean	1.78
	38

Std.	.771
Deviation	73

**Table 19: Frequency Table of Visiting Around Yangon Rate**

**I think visiting around in Yangon is**

	Frequency	Perc ent	Valid Percent	Cumulati ve Percent
Val id	95	41.9	42.8	42.8
	80	35.2	36.0	78.8
	47	20.7	21.2	100.0
	222	97.8	100.0	
Mis sin g	5	2.2		
Total	227	100.0		

The table describes 41.9% are respondents at strongly satisfied, following by 35.2% at satisfied, and only 20.7% respondent as normal with satisfying by visiting around Yangon City.

**Statistics**

The safety of tourist

attractions are

Valid	222
Missing	5
Mean	1.33
	33

Std.	.576
Deviation	04

**Table:20 Frequency Table of Safety of Tourist Attractions in Yangon**

**The safety of tourist attractions are**

	Frequ ency	Perc ent	Valid Percent	Cumulati ve Percent
Val id	160	70.5	72.1	72.1
	50	22.0	22.5	94.6
	12	5.3	5.4	100.0
	222	97.8	100.0	
Mis sin g	5	2.2		
	227	100.		
Total		0		

The table 20 states that 70.5% respondents at strongly satisfied, following by 22.0% and 5.3% only are rating at normal respondent with safety of tourist attractions in Yangon City.

### Statistics

I think most of Yanogn

tourist guides are

Vali d	222
Mis sing	5

Mean	1.46
Std. Deviation	.598

**Table:21 Frequency Table of Yangon Tourst Gude**

**I think most of Yanogn tourist guides are**

	Frequ ency	Perc ent	Valid Percent	Cumulati ve Percent	
Val id	strongly satisfied	130	57.3	58.6	58.6
	satisfied	80	35.2	36.0	94.6
	normal	12	5.3	5.4	100.0
	Total	222	97.8	100.0	
Mis sin g	System	5	2.2		
Total		227	100. 0		

The table shows that 130 of frequencies into 57.3% respondents at strong satisfied, following by 80 frequencies into 35.2% respondents at satisfied. 12 of 5.3% respondent at only normal rating.

### Statistics

I think Yangon  
environments are

N	Valid	222
	Missing	5
Mean		1.99
Std. Deviation		1.02

**Table 22: Frequency Table of Yangon Environment**  
**I think Yangon environments are**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	strongly satisfied	95	41.9	42.8
	satisfied	55	24.2	67.6
	normal	50	22.0	90.1
	dissatisfied	22	9.7	100.0
	Total	222	97.8	100.0
Missing	System	5	2.2	
Total		227	100.0	

According to this table 22, 95 frequencies respondents as strongly satisfied, following by 55 frequencies respondent as satisfied and only 50 frequencies respondent at normal status.

**Statistics**

I think current Yangon  
tourism sectors are

N	Valid	222
	Missing	5
Mean		1.64
Std. Deviation		.86
		.618
		.69

**Table 23: Frequency Table of Current Yangon Tourism Sectors**

**I think current Yangon tourism sectors are**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	strongly satisfied	95	41.9	42.8
id	satisfied	110	48.5	92.3
	normal	17	7.5	100.0
	Total	222	97.8	100.0
Missing	System	5	2.2	
g				
Total		227	100.0	
			0	

According to table 23 shows, 110 of frequencies are leading following by 95 of frequencies respondent at strongly satisfied and satisfied. Normal respondents only are 17 frequencies at this research.

**Statistics**

Are you satisfied with  
Yangon tourism  
development sectors?

Valid	222
Missing	5
Mean	1.18
Std. Deviation	.392

**Table: 24 Overall Satisfaction of Yangon Tourism Development Sectors**

**Are you satisfied with Yangon tourism development sectors?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	180	79.3	81.1	81.1
No	42	18.5	18.9	100.0
Total	222	97.8	100.0	

Mis	Sys	5	2.2		
sin	te				
g	m				
Total		227	100.		
			0		

The table shows two options of Yes and No for Yangon tourism development scoters. 180 frequencies respondents as YES and only 42 respondents as No for this research.

**Statistics**

Are you satisfied with arrivals of Yangon International Airport?

N	Valid	222
	Missing	5
Mean		1.21
Std. Deviation		.409



**Table: 25 Overall Satisfaction of Arrivals of Yangon International Airport**

**Are you satisfied with arrivals of Yangon International Airport?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid				
Yes	175	77.1	78.8	78.8
No	47	20.7	21.2	100.0
Total	222	97.8	100.0	
Missing	5	2.2		
Total	227	100.0		

The table shows 175 frequencies respondents at Yes, and 47 respondents at No for this research of satisfied with arrivals of Yangon International Airport.

**Statistics**

Are you satisfied with

Yangon tourist

attractions?

Valid	222
Missing	5
Mean	1.12
	16

Std.	.327
Deviation	.59

**Table: 26 Overall satisfaction of Yangon Tourist Attractions**

**Are you satisfied with Yangon tourist attractions?**

	Frequ ency	Perc ent	Valid Percent	Cumulati ve Percent
Yes	195	85.9	87.8	87.8
No	27	11.9	12.2	100.0
Total	222	97.8	100.0	
Missing	5	2.2		
Total	227	100.0		

The table shows that 195 of frequencies respondent at Yes satisfaction, and 27 of frequencies respondents at No for this research.

#### 4.2 Data Analysis

**Table: 27 Descriptive Statistic & Correlation of Tourism Sectors Statistics**

##### Descriptive Statistics

Tourism Sectors	Mean	Std. Deviation	N
Development			

I think Yangon accommodations are	1.8378	1.00263	222
I think Yangon transportations are	1.7703	.79956	222
I think Yangon hotel prices are	1.9054	.70875	222
I think tourist attractions are	2.4234	.94701	222
I think Yangon hotel services are	1.5901	.81195	222

According to table 27 of Tourism Sectors Development, descriptive statistics were sample size of 222 populations, Yangon accommodation was 1.8378 (x) and 1.00263 (SD), Yangon Transportation was 1.7703 (x) and .79956 (SD), Yangon Hotel Price was 1.9054 (x) and .70875 (SD), Tourist Attraction was 2.4234 (x) and .94701 (SD), Yangon Hotel Service was 1.5901 (x) and .81195 (SD) respondents perspectival.

<b>Correlations</b>	I think Yangon accommodations are	I think Yangon transportations are	I think Yangon hotel prices are	I think tourist attractions are	I think Yangon hotel services are
Pearson	1	.902**	.793**	.826**	.907**
I think Yangon accommodations are Correlation					
Sig. (2-tailed)		.000	.000	.000	.000
N	222	222	222	222	222
Pearson	.902**	1	.864**	.864**	.886**
I think Yangon transportations are Correlation					
Sig. (2-tailed)	.000		.000	.000	.000
N	222	222	222	222	222
Pearson	.793**	.864**	1	.855**	.821**
I think Yangon hotel prices are Correlation					
Sig. (2-tailed)	.000	.000		.000	.000
N	222	222	222	222	222
Pearson	.826**	.864**	.855**	1	.745**
I think tourist attractions are Correlation					
Sig. (2-tailed)	.000	.000	.000		.000
N	222	222	222	222	222
Pearson	.907**	.886**	.821**	.745**	1
I think Yangon hotel services are Correlation					
Sig. (2-tailed)	.000	.000	.000	.000	
N	222	222	222	222	222

\*\* . Correlation is significant at the 0.01 level (2-tailed).

The Pearson's correlation analysis revealed that Tourism Sectors Development concerning with Yangon accommodation ( $r = 1, p < .000$ ), Yangon transportation ( $r = .902, p < .000$ ), Yangon hotel price ( $r = .793, p < .000$ ), Tourist attraction ( $r = .826, p < .000$ ), Yangon hotel services ( $r = .907, p < .000$ ), were positively correlated with Tourism sectors development at the statistical significance level of 0.01. it means Yangon accommodation, Yangon transportation, Yangon hotel price and Tourist attraction communication with Yangon hotel services were relationship with Yangon Tourism Sectors Development satisfaction in Yangon City.

**Table: 28** Descriptive Statistic & Correlations of Tourists Arrivals by Yangon Intl Airport

**Descriptive Statistics**

Tourists arrivals by Yangon International Airport	Mean	Std. Deviation	N
I think the safety of Yangon Intl-airport is	2.8288	1.23210	222
Yangon Intl -airport information services are	1.8153	.98731	222
I think Yangon Intl-airport tax is	1.7387	.84245	222
I think Yangon local airline are	1.5360	.51762	222
I think the price of local airline are	1.7477	.83442	222

Tale 28 of Tourists arrivals by Yangon International Airport statistics and correlation were total sample size of 222 populations. Tourists arrivals by Yangon International Airport group – Safety of Yangon International Airport was 2.8288 (x) and 1.23210 (SD), Yangon International Airport Information Services was 1.8153 (x) and .98731 (SD), Yangon International Airport Tax

was 1.7387 (x) and .84245 (SD), Price of local Airline was 1.7477 (x) and .83442 (SD) respondent's perspective.

### Correlations

Touirsts Arrivals by Yangon International Airport	I think the safety of Yangon Intl-airport is	Yangon Intl - information services are	I think Yangon IntL-airport tax is	I think Yangon local airline are	I think the proce of local airline are
	Pearson	1	.751**	.794**	.847**
	Correlation				
	Sig. (2-tailed)	.000	.000	.000	.000
	N	222	222	222	222
	Pearson	.751**	1	.970**	.797**
	Correlation				
	Sig. (2-tailed)	.000	.000	.000	.000
	N	222	222	222	222
	Pearson	.794**	.970**	1	.831**
	Correlation				
	Sig. (2-tailed)	.000	.000	.000	.000
	N	222	222	222	222
	Pearson	.847**	.797**	.831**	1
	Correlation				
	Sig. (2-tailed)	.000	.000	.000	.000
	N	222	222	222	222
	Pearson	.746**	.893**	.833**	.817**
	Correlation				
	Sig. (2-tailed)	.000	.000	.000	.000
	N	222	222	222	222

\*\* . Correlation is significant at the 0.01 level (2-tailed).

The Pearson's correlation analysis revealed the Yangon Tourism Sectors Development concerning with Tourists arrivals by Yangon International Airport group – Safety of Yangon International Airport ( $r = 1, p < .000$ ), Yangon International Airport Information Services ( $r = .751, p < .000$ ), Yangon International Airport Tax ( $r = .794, p < .000$ ), Yangon Local Airline ( $r = .847, p < .000$ ), Price of Local Airline ( $r = .746, p < .000$ ), were positively correlated with Yangon Tourism Sectors Development at Tourists Arrivals by Yangon International Airport at the statistical significance level of 0.01.

**Table: 29** Descriptive Statistic & Correlations of Yangon Tourist Attraction Improvement

**Descriptive Statistics**

Yangon Tourist Attractions Improvement	Mean	Std. Deviation	N
I think visiting around in Yangon is	1.7838	.77173	222
The safety of tourist attractions are	1.3333	.57604	222
I think most of Yangon tourist guides are	1.4685	.59894	222
I think Yangon environments are	1.9955	1.02678	222
I think current Yangon tourism sectors are	1.6486	.61869	222

<b>Correlations</b>	I think visiting around in Yangon is	The safety of tourist attractions are	I think most of Yangon tourist guides are	I think Yangon environme nts are	I think current Yangon tourism sectors are
Pearson Correlation	1	.763**	.798**	.935**	.902**
Sig. (2-tailed)		.000	.000	.000	.000
N	222	222	222	222	222
Pearson Correlation	.763**	1	.831**	.829**	.698**
Sig. (2-tailed)	.000		.000	.000	.000
N	222	222	222	222	222
Pearson Correlation	.798**	.831**	1	.872**	.800**
Sig. (2-tailed)	.000	.000		.000	.000
N	222	222	222	222	222
Pearson Correlation	.935**	.829**	.872**	1	.916**
Sig. (2-tailed)	.000	.000	.000		.000
N	222	222	222	222	222
Pearson Correlation	.902**	.698**	.800**	.916**	1
Sig. (2-tailed)	.000	.000	.000	.000	
N	222	222	222	222	222

\*\* . Correlation is significant at the 0.01 level (2-tailed).



Table: 28 of Yangon Tourist Attraction Developments of descriptive statistics and correlation were total sample size of 222 populations. For the tourist attraction group, visiting around Yangon was 1.7838 (x) and .77173 (SD), Safety of Tourist Attraction was 1.3333 (x) and .57604, Yangon tourist guide was 1.4685 (x) and .59894 (SD), Yangon environment was 1.9955 (x) and 1.02678 (SD), Current Yangon Tourism Sector was 1.6486 (x) and .61869 (SD) respondents perceptively. The Pearson's correlation analysis revealed that Yangon tourism sectors development concerning with Yangon tourist attraction developments group – visiting around Yangon ( $r = 1$ ,  $p < .000$ ), Safety of tourist attraction ( $r = .763$ ,  $p < .000$ ), Yangon tourist guide ( $r = .935$ ,  $p < .000$ ), Yangon environment ( $r = .902$ ,  $p < .000$ ), Current Yangon tourism sector ( $r = .902$ ,  $p < .000$ ), were positively correlated with Yangon Tourism Sectors Development at the statistical significance level of 0.01.

#### 4.3 Data Analysis of Overall Yangon Tourism Sectors Development

**Table: 29** Man, Standard Deviation, and Correlation Between Observed Variables

**One-Sample Statistics**

Overall Satisfaction	N	Mean	Std. Deviation	Std. Error Mean
Satisfied with Yangon tourism development sectors	222	1.1892	.39254	.02635
Satisfied with arrivals of Yangon International Airport	222	1.2117	.40944	.02748
Satisfied with Yangon tourist attractions	222	1.1216	.32759	.02199

referring to table 29, One-sample Statistic is the result of regression analysis for independent variables and dependent variables for overall Tourism Sectors Development satisfactions with Yangon Tourism Sectors Development, Arrivals of Yangon International Airport, Yangon Tourist

Attractions of visitors visiting in Yangon. One-sample statistical analysis revealed that Yangon Tourism Sectors Development Mean = 1.1892 and S.D = .39254, Arrival of Yangon International Airport Mean = 1.2117 and S.D = .40944, Yangon Tourist Attractions Mean = 1.1216 and S.D = .32759.

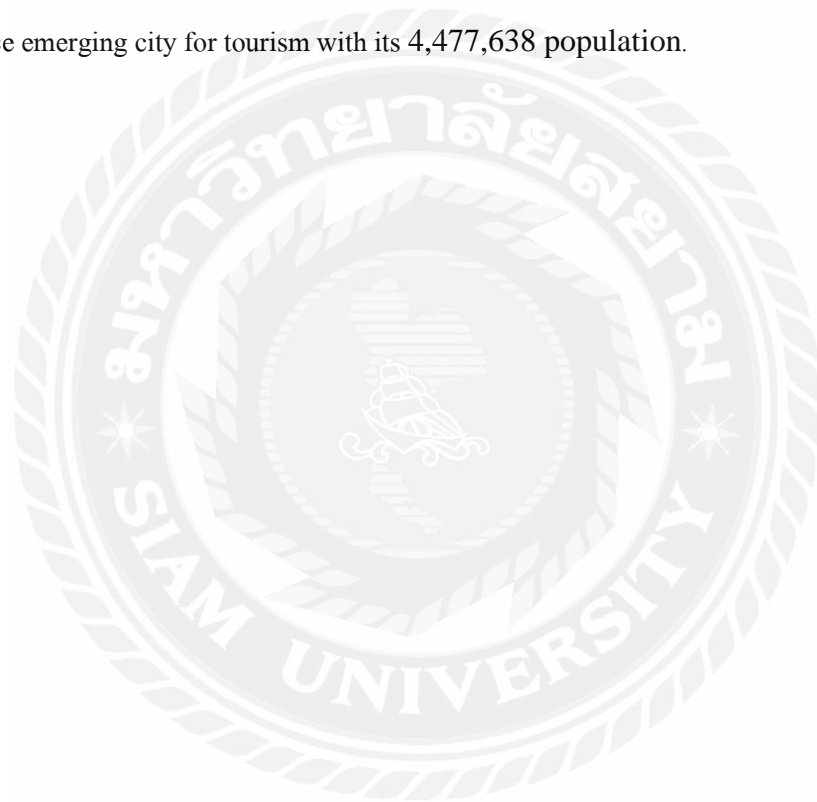
### One-Sample Test

Overall Satisfaction	Test Value = 0					
	t	df	Sig. (2-tailed)	Mean Difference	95% Confidence Interval of the Difference	
					Lower	Upper
satisfied with Yangon tourism sectors Development	45.138	221	.000	1.18919	1.1373	1.2411
satisfied with arrivals of Yangon International Airport	44.094	221	.000	1.21171	1.1576	1.2659
satisfied with Yangon tourist attractions	51.015	221	.000	1.12162	1.0783	1.1650

According to One-sample Test, the results of Tourism Sectors Development in Yangon City is most satisfied with Yangon tourist attraction was  $x = 51.015$ ,  $P < .000$  which means there is relationship between Yangon tourist attraction and Yangon tourism sectors development. Second satisfaction of Yangon tourism sectors development was  $x = 5.138$ ,  $P < .000$  which means there is relationship between Yangon tourism sectors development and Tourism sectors development in Yangon. Third satisfaction of Arrivals of Yangon International Airport was  $x = 44.094$ ,  $P < .000$  which means there is relationship between Arrivals of Yangon International Airport and Tourism sectors development in Yangon City.

#### 4.4 Conclusion

The aims of this research is to study whether relationship between Yangon tourism sectors development, Arrivals of Yangon International Airport and Yangon tourist attractions in Yangon City. So, regarding to this research, this study has shown how visitors visiting Yangon are significantly having relationship with Yangon tourism sectors, main entry port of Yangon International airport and attractions around Yangon are finding in this research. This section also allowed the visitors to give their comments on Yangon Tourism Sectors Development. Most of their comments are strongly satisfied with Yangon's tourism sectors development. Yangon is a safe and nice emerging city for tourism with its 4,477,638 population.



## CHAPTER 5

### CONCLUSION AND RECOMMENDATION

#### 5.1 Conclusion

The tourism of Yangon has been seen improving quite a lot within these years. although tourism infrastructures in Yangon has been slowly developing, number of visitors are increasing with a curious mind to see Yangon's local culture, living style, local businesses, traditional way of living, tourist spots around Yangon and religious way of faith. In the Southeast Asia, Myanmar is becoming an emerging and fast growing tourism destination with currently experiencing rapid growth in tourism demand.

Success is assured and tourism will continue to grow rapidly in the short run. Myanmar tourism risks potential unsustainable tourism growth and negative impacts relating to the environment, culture and society. There was a consensus that a Myanmar Responsible Tourism Policy is urgently needed a set of national policy principles that provides the foundation for Myanmar tourism development strategy. As foreign investment law is going to laid down, more of foreign investors are expected to come to Yangon, the commercial city of Myanmar.

Although Myanmar's tourism has been improving, the basic tourism sectors are still much need to improve, comparing to the neighboring countries. The shortage of Yangon accommodations and prices are a big challenge to visitors. For the transportation, Yangon's local train MRT need to be upgraded and road system to easily access. As most of local airlines prices are still higher than international flights, so the visitors like to use the busses or other transportations instead. Although most of Yangon tourist destinations are clean and safe, it's is need a good system of information and technology to give fully functions to the visitors.

As visa status is one of the most important matters for foreign travelers, Myanmar has launched arrival visa for total 48 countries, who are eligible for visa on arrival. Tourist visas are

valid for 28 days with allowing to be extended by a further 14 days. 70-days business visa is now available at the arrivals of Yangon, Mandalay and Naypyidaw International Airports.

## 5.2 Recommendation

Based on the research data, most of visitors visiting Yangon City give positive comments on Yangon's tourism infrastructures, Yangon International airport, accommodation, tourist spots and local transportation. Although visitors' comments are on the positive side, it's need the incentives for the travelers to visit the same place again. Just one-time visit is not the right result for the Yangon's future tourism. There many sectors of tourism are need to meet the standard of ASEAN, including hotel and air ticket prices. With no high competition, Yangon's local hotel and air-lines are double priced than Thailand and other neighboring ASEAN countries.

Myanmar's Tourism industry need to promote these facts:

- Focusing on quality tourism and minimizing the negative impacts of tourism;
- Improving the standard of accommodations;
- Improving the standard of tourist transportation;
- Providing necessary assistance to tourists for their safety and security;
- Upgrading the existing tourist destinations and attractions and seeking for the new ones;

Currently, Myanmar tourism industry has faced a significant decline stage compared to previous years. To analysis the cause of decline, the authority need to monitor for the further development of the tourism market. It's need to develop transport infrastructure, lodging facilities, human resources and tourist security at tourist destinations of Yangon. Hotel fees also need to decrease from the peak prices. Myanmar's tourism industry needs to revise the current circumstance to fill the actual requirement of the sector. It's the reason that Myanmar tourism industry is delaying due to lake of main tourism infrastructures, no correct travel data collection

and no maintenance of tourist destinations caused Myanmar tourism industry decline. Government should extent the collaboration with private sector for the further development.

In order to receive more visitors, Yangon's tourism sector needs monetary supports as well as infrastructure development. Government allowing budget for tourism industry is very small amount comparing to ASEAN countries, to promote the sector. Until now, there are three international airports and the destinations, Bagan, Heho, Sittwe, where most tourist visits areas have not been open international airports yet. A week- stay cost in Myanmar available two weeks in Thailand and Vietnam. To welcome more visitors, reasonable price should be set up. Tourism market promotion is one of the significant role for the development of tourism industry. to showcase in the international tourism markets, local tourist destinations are introduced and get more attentions from international tourists.

Myanmar is rich with beautiful landscapes, including beaches, lakes, islands, rivers and green forests. For the natural environment, sustainable management is necessary to develop ecotourism in resource rich areas. for the ecotourism, at the present time, a small number of foreign visitors entering the country, responsible travel to natural areas. Community based tourism projects should implement to explore new tourist attractions, observing the culture and lifestyles of ethnic minority communities. The survey has shown that visitor enjoy involving community activities, visiting new tourist spots and learning local way of living styles.

In overall, Myanmar is one of beautiful tourist destinations in Southeast Asia. Myanmar is known as the land of the lady, and this attracts foreign travelers to visit the country. International visitors are interested in visiting countries with impressive landscapes and charming people. Those who have traveled to Yangon, Myanmar share good news in their communities, positive reviews about safety and security and especially charming and kind-hearted of Myanmar people. According to the survey, most of their feedbacks show that Yangon's most beautiful destination, very generous and helpful people are living. Almost every visitor described about Great Holly Shwedagon Pagoda, which they want to see again.

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**APPENDIX****QUESTIONARE****Questionnaires for Tourism Sector Developments in Yangon, Myanmar**

- 1. What is your gender?**
  - a. Male**
  - b. Female**
  
- 2. What is your age?**
  - a. Less than 24**
  - b. Between 24-39**
  - c. Between 40 – 50**
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- 3. What is your country?**
  - a. Asian**
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- 4. What is your occupation?**

- a. Student
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5. What is your education level?

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- b. Graduated
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- d. Other

6. What is your monthly income?

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- b. Between 2000-3000 USD
- c. Between 3000-4000 USD
- d. Upper 5000 USD

7. What is your marital status?

- a. Single
- b. Married
- c. Other

8. I think Yangon accommodations are:

- a. Strongly satisfied
- b. Satisfied
- c. Normal
- d. Dissatisfied

**9. I think transportations are:**

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**20. I think most of Yangon tourist guides are**

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**21. I think Yangon environments are**

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- b. Satisfied

- c. Normal
- d. Dissatisfied

**22. I think current Yangon tourism sectors are**

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- b. Satisfied
- c. Normal
- d. Dissatisfied

**23. Are you satisfied with Yangon tourism development sectors?**

- a. Yes
- b. No

**24. Are you satisfied with arrivals of Yangon International Airport?**

- a. Yes
- b. No

**25. Are you satisfied with Yangon tourist attractions?**

- a. Yes
- b. No

**BIOGRAPHY**

**Name:** Janeya @ Zar Ni

**Date of birth:** 10 May 1983

**Place of Birth:** Kyauk Phyu, Rakhine State, Myanmar

**Nationality:** Myanmar

**Educational Background**

**2014:** (BA) Mahachulalongkorn University, Bangkok, Thailand

**2017:** (MBA) Siam University, Bangkok, Thailand

(Hotel and Tourism Management)

A large, faint watermark of the Siam University seal is centered on the page. The seal is circular with a double border. The outer border contains the text 'SIAM UNIVERSITY' at the bottom and Thai script at the top. The inner border contains Thai script. The center of the seal features a traditional Thai emblem.

## CHAPTER 5

### CONCLUSION AND RECOMMENDATION

#### 5.1 Conclusion

The tourism of Yangon has been seen improving quite a lot within these years. although tourism infrastructures in Yangon has been slowly developing, number of visitors are increasing with a curious mind to see Yangon's local culture, living style, local businesses, traditional way of living, tourist spots around Yangon and religious way of faith. In the Southeast Asia, Myanmar is becoming an emerging and fast growing tourism destination with currently experiencing rapid growth in tourism demand.

Success is assured and tourism will continue to grow rapidly in the short run. Myanmar tourism risks potential unsustainable tourism growth and negative impacts relating to the environment, culture and society. There was a consensus that a Myanmar Responsible Tourism Policy is urgently needed a set of national policy principles that provides the foundation for Myanmar tourism development strategy. As foreign investment law is going to laid down, more of foreign investors are expected to come to Yangon, the commercial city of Myanmar.

Although Myanmar's tourism has been improving, the basic tourism sectors are still much need to improve, comparing to the neighboring countries. The shortage of Yangon accommodations and prices are a big challenge to visitors. For the transportation, Yangon's local train MRT need to be upgraded and road system to easily access. As most of local airlines prices are still higher than international flights, so the visitors like to use the busses or other transportations instead. Although most of Yangon tourist destinations are clean and safe, it's is need a good system of information and technology to give fully functions to the visitors.

As visa status is one of the most important matters for foreign travelers, Myanmar has launched arrival visa for total 48 countries, who are eligible for visa on arrival. Tourist visas are



valid for 28 days with allowing to be extended by a further 14 days. 70-days business visa is now available at the arrivals of Yangon, Mandalay and Naypyidaw International Airports.

## **5.2 Recommendation**

Based on the research data, most of visitors visiting Yangon City give positive comments on Yangon's tourism infrastructures, Yangon International airport, accommodation, tourist spots and local transportation. Although visitors' comments are on the positive side, it's need the incentives for the travelers to visit the same place again. Just one-time visit is not the right result for the Yangon's future tourism. There many sectors of tourism are need to meet the standard of ASEAN, including hotel and air ticket prices. With no high competition, Yangon's local hotel and air-lines are double priced than Thailand and other neighboring ASEAN countries.

Myanmar's Tourism industry need to promote these facts:

- Focusing on quality tourism and minimizing the negative impacts of tourism;
- Improving the standard of accommodations;
- Improving the standard of tourist transportation;
- Providing necessary assistance to tourists for their safety and security;
- Upgrading the existing tourist destinations and attractions and seeking for the new ones;

Currently, Myanmar tourism industry has faced a significant decline stage compared to previous years. To analysis the cause of decline, the authority need to monitor for the further development of the tourism market. It's need to develop transport infrastructure, lodging facilities, human resources and tourist security at tourist destinations of Yangon. Hotel fees also need to decrease from the peak prices. Myanmar's tourism industry needs to revise the current circumstance to fill the actual requirement of the sector. It's the reason that Myanmar tourism industry is delaying due to lake of main tourism infrastructures, no correct travel data collection

and no maintenance of tourist destinations caused Myanmar tourism industry decline. Government should extent the collaboration with private sector for the further development.

In order to receive more visitors, Yangon's tourism sector needs monetary supports as well as infrastructure development. Government allowing budget for tourism industry is very small amount comparing to ASEAN countries, to promote the sector. Until now, there are three international airports and the destinations, Bagan, Heho, Sittwe, where most tourist visits areas have not been open international airports yet. A week- stay cost in Myanmar available two weeks in Thailand and Vietnam. To welcome more visitors, reasonable price should be set up. Tourism market promotion is one of the significant role for the development of tourism industry. to showcase in the international tourism markets, local tourist destinations are introduced and get more attentions from international tourists.

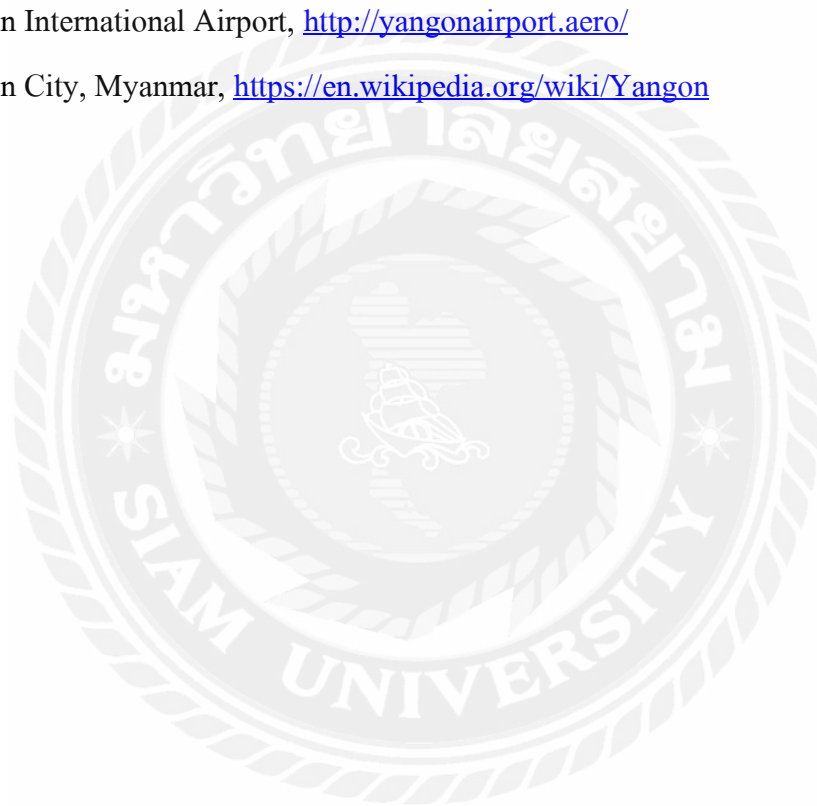
Myanmar is rich with beautiful landscapes, including beaches, lakes, islands, rivers and green forests. For the natural environment, sustainable management is necessary to develop ecotourism in resource rich areas. for the ecotourism, at the present time, a small number of foreign visitors entering the country, responsible travel to natural areas. Community based tourism projects should implement to explore new tourist attractions, observing the culture and lifestyles of ethnic minority communities. The survey has shown that visitor enjoy involving community activities, visiting new tourist spots and learning local way of living styles.

In overall, Myanmar is one of beautiful tourist destinations in Southeast Asia. Myanmar is known as the land of the lady, and this attracts foreign travelers to visit the country. International visitors are interested in visiting countries with impressive landscapes and charming people. Those who have traveled to Yangon, Myanmar share good news in their communities, positive reviews about safety and security and especially charming and kind-hearted of Myanmar people. According to the survey, most of their feedbacks show that Yangon's most beautiful destination, very generous and helpful people are living. Almost every visitor described about Great Holly Shwedagon Pagoda, which they want to see again.

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## APPENDIX



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## BIOGRAPHY

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