

**YANGON UNIVERSITY OF ECONOMICS
MASTER OF DEVELOPMENT STUDIES PROGRAMME**

**IMPACTS OF TOURISM DEVELOPMENT IN MYANMAR
(A CASE STUDY OF THANDAUNGGYI AREA
IN KAYIN STATE)**

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EMDevS - 48 (14th BATCH)**

AUGUST, 2019

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A thesis submitted in a partial fulfillment of the requirements for the degree of
Master of Development Studies (MDevS)

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This is to certify that this thesis entitled “**Impacts of Tourism Development in Myanmar (A Case Study of Thandaunggyi Area in Kayin State)**”, submitted as a partial fulfillment towards the requirements for the degree of Master of Development Studies, has been accepted by the board of examiners.

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ABSTRACT

This study is tourism development in Myanmar with special reference to Thandaunggyi Township, Kayin State where abundance of natural scenery and tourist attracted area in Myanmar. Therefore, this study was be resolute on the tourism industry and the tourism development effect of environmental, socio-economic, and social-culture in Thandaunggyi area. This study analyzed on primary data collected among local community in Thandaunggyi area and secondary data published from Ministry Hotel & Tourism using SPSS statistical Software. Mostly positive impacts were found during the study. According to the study results, the significant positive economic impacts are increased employment, increased income opportunities, enhanced living standard, greater opportunities for investments, improved in infrastructure, and new business linkages and opportunities. In contrast, negative economic impact; an increase in land price is associated due to tourism development. In addition, peace of local area has been disturbed as there are more visitors in the study area. Tourism development in Thandaunggyi area would help for community development and employment opportunities for local people while need consideration for systematic plan of environmental protection by both local community and visitors.

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LIST OF ABBREVIATIONS

ASEAN	Association of Southeast Asian Nations
ATM	Automated Teller Machine
B&B	Bed and Breakfast
BEDC	Burma Economic Development Corporation
CBT	Community-Based Tourism
CIT	Community Involvement in Tourism
FESR	Fund for the Encouragement of Self-Reliance
GDP	Gross domestic product
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ)
GOM	Government of Myanmar
GSM	Global System for Mobile Communication
HIV	Human Immunodeficiency Virus
IFC	The Irrawaddy Flotilla Company
KNU	Karen National Union
MIMU	Myanmar Information Management Unit
MoHT	Ministry of Hotel and Tourism
NGOs	Non -Governmental Organizations
SLORC	State Law and Order Restoration Council
SPDC	State Peace and Development Council
SWIA	Sector-Wide Impact Assessments
T&T	Travel and tourism
TIS	Tourist Information Service
TTDWG	Thandaunggyi Tourism Development Working Group
UNWTO	United Nations World Tourism Organization
US	United State

CHAPTER I

INTRODUCTION

1.1 Rationale of the Study

Tourism is one of the world's largest economic sectors. The tourism industry is global. It is a big business and will continue to grow. Meeting this growth with well-planned, environmentally sound development is a challenge for planning all over the world. Travel & Tourism creates jobs, drives exports, and generates prosperity across the world. International tourism has continuous growth in the last decades and 2018 set a record of 1,403 million tourists traveling around the world.

For developing countries, tourism creates opportunities for earning foreign money and direct or indirect employment. There are many other positive and negative views of this economic boom which can have a huge effect on the local communities of host countries. These factors were never given adequate and much-needed attention by the advocate of tourism.

As a developing country with a great diversity of resource as well as the undamaged natural environment, Myanmar is expecting a large influx of tourists with the opening up of the country. Myanmar is becoming an emerging and fast-growing tourism destination in South East Asia. Myanmar government is likely to make major commitments to develop the tourism sector in the future, integrating tourism in the national development plan and several policies have been developed.

The most significant policies of “Republic of the Union of Myanmar” are the 2012 Responsible Tourism Policy; the 2013 Policy on Community Involvement in Tourism (CIT), and the Tourism Master Plan 2012-2020 set out by the Ministry of Hotels and Tourism in line with guidance from the Global Sustainable Tourism Council criteria. The 2012 Responsible Tourism Policy encourages local communities to engage in tourism development and to be aware of the effect of tourism on their environment, culture and local economy.

The government of Myanmar has also identified and encouraged the development of community-based tourism across the country, not only to attract

incoming international visitors but also to promote the involvement of communities in the tourism industry even though community-based tourism is a relatively new concept in Myanmar. There are at least fifteen CBT (Community-Based Tourism) initiatives in Myanmar.

Among them, Thandaunggyi Township is one of the tourists attracted to areas in Myanmar. Thandaunggyi has been initiated by Wildlife Conservation Society, Hanns Seidel Foundation and Peace Nexus Foundation. Thandaunggyi in Kayin State started offering B&B stays since 2010. Most Christian people are visiting Thandaunggyi due to pilgrimage traveling. There are many to visit attractive places in Thandaunggyi area. Travelers can visit the former British Hill Station, Tea Plantation, and factory, Small Butterfly Village, Waterfalls & Hot spring in the surroundings of Thandaunggyi, Naw Bu Baw Mountain, and also explore traditional Bamboo Baskets, Forest Walks, Trekking Trails, Cycling, Karen Festivals, Karen New Year Mountain, Harvesting. Therefore, this study will be focused on the tourism industry and the tourism effect of environment, socio-economic and social-culture in Thandaunggyi area.

1.2 Objective of the Study

The objective of the study is to identify the development of the tourism sector and its impacts of economic, environment and social-culture of Thandaunggyi Township in Kayin State.

1.3 Method of the Study

In this study, both quantitative and qualitative approaches were used. The primary data were collected from the 300 respondents from Thandaunggyi township who were owners of B&B (Bed and Breakfast), owners of restaurants, transporters, committee members of B&B or CBT, religious leaders and household members in Thandaunggyi township. The secondary data were collected from the library, internal sources, published books and data from the Ministry of Hotel and Tourism, various issues of Central Statistical Year Books, Tourism Statistics and previous studies about tourism and other related sources.

1.4 Scope and Limitations of the Study

This study was be studied for the Thandaunggyi area located in Kayin State only. Because, this area became one of the tourism attractions areas in Myanmar for the local and international visitors since 2014. This study will be examined the environmental, socio-economic and social-culture impacts of tourism development in the Thandaunggyi area. The study will be focused on only the period between 2014 and 2018.

1.5 Organization of the Study

This study consists of five chapters. Chapter I is the introduction which includes the rationale, objectives, scope and limitations of the study and method of study, Chapter II described the literature review on definition of tourism, types and categories of tourism. It also mentioned about positive and negative impacts of tourism, they are economic, environmental and social culture impact of tourism development. Chapter III is overview of the tourism history and tourism development in Myanmar. This chapter presents the tourism large impact of tourism and overview of the tourism policies in Myanmar. Then the Chapter IV is survey analyzing of the tourism impacts in Thandaunggyi area questionnaires are used for the survey. The final Chapter V concluded the findings impact of tourism sector in Thandaunggyi area and suggestions are provided.

CHAPTER II

LITERATURE REVIEW

2.1 Definition of Tourism

One of the earliest definitions defines tourists as “people on temporary trips away from home who also spend money derived from their home area and not from the place being visited” (Ogilvie, 1933; Shaw & Williams, 1994) People who are visiting a particular place for sightseeing, visiting friends and relatives, taking a vacation, and having a good time. They might spend their leisure time engaging in various sports, sunbathing, talking, singing, taking rides, touring, reading, or simply enjoying the environment. If we consider the subject further, we may include in our definition of tourism people who are participating in a convention, a business conference, or some other kind of business or professional activity, as well as those who are taking a study tour under an expert guide or doing some kind of scientific research or study. UNWTO defined "Tourism comprises the activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business, and other purposes.” (UNTO,1993)

2.2 Types and Categories of Tourism

There are two types of tourism which are domestic and international. Tourism can be divided into several categories. Depending on your purpose of travel. And then further World Tourism Organization divided following the categories.

Recreational Tourism includes people who travel to relax, and have fun. (Jeshna Jalim, 2018)

Cultural Tourism - Cultural Tourism is with a traveler's engagement with a country or region's culture, most importantly it focuses on the lifestyle of the people, their history, their art, their religion(S) and the other elements that help to shape their life. (Jeshna Jalim, 2018)

Nature Tourism - referred to as responsible travel to natural areas, which conserves the environment and improves the welfare of the local people. It is Tourism

based on the natural attractions of a specific area. Some examples include birdwatching, photography, camping, hiking, hunting, fishing, and visiting parks. These experiential tourists are interested in a diversity of natural and cultural resources. They want what is real and they want to be immersed in a rich natural, cultural or historical experience. Nature-based tourism provides incentives for local communities and landowners to conserve wildlife habitats upon the industry depends- it promotes conservation by increased value on remaining natural areas. (Jeshna Jalim, 2018)

Pleasure Tourism - Some people travel for their happiness and satisfaction. (Jeshna Jalim, 2018)

Religious Tourism- referred to as faith Tourism. It is a type of tourism where people travel individually or in a group for pilgrimage or leisure (fellowship) purposes. Normally these types of people travel to places like Mecca, Buddh Gaya, and Holy Land. (Jeshna Jalim, 2018)

Medical Tourism- Medical Tourism refers to people traveling to a country other than their own to obtain medical treatment. Medical Tourism most often is for medical checkups take medical treatment and surgeries. People with rare conditions may travel to countries where the treatment is better understood. Health Tourism is a term for travel that focuses on medical treatments and the use of healthcare services. (Jeshna Jalim, 2018)

Adventure Tourism -Adventure Tourism is nice tourism involving the exploration of travel with a certain degree of risk and it may also require special skills and physical exertion. Adventure tourists may have the motivation to achieve mental states characterized as rush or flow, resulting from stepping outside their comfort zone. (Jeshna Jalim, 2018)

Tourism is an industry with enormous economic impacts. It is also an industry that has many economic, social and cultural or physical consequences. Tourism like many other industries is often used as a national or regional development tool. In general, tourism development within a host community often has an impact on the community both in positive and negative ways. These impacts have been well documented and are usually classified as economic, cultural impacts.

2.3 Impacts of Tourism

Tourism is an industry which included huge economic impacts. Moreover it has many environmental and social consequences. It is necessary to understanding of each component of the tourism phenomenon and then can planning, management, and policy determination for a foundation decision-making. The positive economic impact of tourism development were recognized by residents, but were confused with potentially negative social and environmental impacts such as public safety issues, pollution and crime.

2.3.1 Economic Impacts

Due to tourism sector development, additional opportunities are created for investment, development, and infrastructure spending. Tourism often induces improvements in public utilities such as water, drain, sidewalks, lighting, parking, good communications, experienced guides, information centers, tour companies, hotels, guest houses, restaurants, recreation programs, souvenir shops, support services, and superstructure. Economic increases employment opportunities. additional jobs, ranging from low-wage entry-level to high-paying professional positions in management and technical fields, generate income and raise standards of living. Particularly in rural areas, the diversification created by tourism helps communities that are possibly dependent on only one industry. (Glenn Kreag, 2001)

When considering the economic impacts of tourism, it is essential to understand that tourism businesses often include a significant number of low-paying jobs, often at minimum wage or less. These jobs are often seasonal, causing under-employment or unemployment during off-seasons. The labor from tourism sector may be imported, rather than hired locally, especially particular skills or expertise is required, or if local labor is unavailable. Some tourism-related businesses are volatile and high-risk ventures that are unsustainable. Greater demand for goods, services, land, and housing may increase prices that in turn will increase the cost of living. Tourism businesses may claim land that could have higher- value or other uses.

Additionally, non-local owners and corporations may export profits out of the community. The community may have to generate funds (possibly through increased taxes) to maintain roads and transportation systems that have become more heavily used. Similarly, if additional infrastructure (water, sewer, power, fuel, medical, etc.) is required, additional taxes may also be needed to pay for them. (Glenn Kreag, 2001)

Table (2.1) Positive and Negative Economic Impacts of Tourism

Positive Impacts	Negative Impacts
Contributes to income and standard of living	Increases the price of goods and services
Improves local economy	Increases the price of land and housing
Increases employment opportunities	Increases cost of living
Improves investment, development, and infrastructure spending	Increases potential for imported labor
Increases tax revenues	Cost for additional infrastructure (water, sewer, power, fuel, medical, etc.)
Improves public utility infrastructure	Increases road maintenance and transportation systems costs
Improves transport infrastructure	Seasonal tourism creates high-risk, under- or unemployment issues
Increases opportunities for shopping	Competition for land with other (high revalue) economic uses
Economic impact (direct, indirect, induced spending) is widespread in the community	Profits may be exported by non-local owners
Creates new business opportunities	Jobs may pay low wages

Source: The Impacts of Tourism By Glenn Kreag, 2001

The positive and negative impact of tourism business to Socio-Economic are shown in table 2.1, the role of tourism is important this sector has the main or only means of, as well as the most hopeful driving force for economic development in most developing and least developed countries. The negative economic impacts of tourism mainly deal with leakages, reserve tourism, infrastructure costs, an increase in prices, economic dependence on tourism, seasonal character of jobs.

There is a leakage of foreign exchange earnings from international tourism. There are two types of leakages, import leakage and export leakage. The former results from imports of equipment and materials for construction and consumer goods required for tourism industry, which cannot be produced by the locals while the latter one occurs when foreign investors take their profits and foreign workers repatriate their salaries back to their countries, and foreign debts incurred in the development of

tourism are amortized. Next “all-inclusive” tour packages reduce tourism incomes distributed to the local economy. Local people have fewer opportunities to exploit tourists’ expenditures and profits from tourism. (Glenn Kreag, 2001)

The public sectors are responsible for the provision of tourism-related infrastructure. Tourism development can burden the local Government and local people have to pay additional taxes for the infrastructure and other related costs. If those infrastructures are built by the local Government, the Government investment decreases in other critical areas, such as education sectors and the health sector, etc.

2.3.2 Environmental Impacts

As tourism moved into the 21st century, enterprises have to make the environment is a priority sector. Nowadays, tourism sector is the world's largest industry, the environment takes important stage in tourism development. Tourism is not only a powerful economic force but a factor in the physical environment as well. High-value natural resources environmental areas, like oceans, lakes, waterfalls, mountains, unique flora and wildlife, and great scenic beauty attract tourists and new residents (in-migrants) who seek emotional and spiritual connections with nature.

Any form of industrial development brings impacts upon the physical environment in which it takes place. Since tourists have to visit the place of production to consume the output, it is inevitable that tourism activity is associated with environmental impacts (Cooper et al., 1998). For that reason, tourism can lead to environmental negative consequences. Lands that could be developed can generate income by accommodating the recreational activities of visitors. Tourist income often makes it possible to preserve and restore historic buildings and monuments. Improvements in the area’s appearance through cleanup or repairs and the addition of public art such as murals, water fountains, and monuments (part of making a community ready for tourism) benefit visitors and residents alike. Tourism is generally considered a "clean" industry, one that is based on hotels, restaurants, shops, and attractions, instead of factories.

The highly polarized nature of development also generates intense environmental problems. This reduces the quality of life for locals as well as for tourists and, ultimately, may threaten the viability of the tourist industry itself (Williams & Shaw, 1991). The depletion of renewable resources can result in water shortages that may create great pressure on other local resources like energy, food,

etc., that already might be in short supply or destroy beautiful scenic landscapes. Pollution from tourists has impacts on the global level that disturbs the local population of the caused community.

For example, solid waste and littering in nature despoil the natural environment. The more physical impacts are degradation and loss of wildlife habitats and of scenery, and disturbance and erosion of the local ecosystem caused by clearing forested land and construction of tourism facilities and infrastructure (UNEP, 2001). However, tourism could be positive for the preservation of natural areas.

In many tourism projects the conservation of the natural, cultural and built environment is an important motivation for the initiation of the project. Moreover, some of the projects tend to deter local communities from illegal use and overuse of natural resources as well as they try to integrate the protected natural areas in regional and local development plans and programs. Therefore, tourism could and should contribute positively to environmental preservation.

Environmental impacts are not unique to tourism and tourism receives a disproportional share of criticism for its negative environmental impacts. The criticisms directed at tourism from an impact of development view have tended to focus on the deterioration of natural and cultural environments that tourism can cause. The development of tourism is frequently justified based on its potential contribution to the broader economic development of destination areas. Indeed, tourism is generally considered as an effective vehicle of development, yet the meanings and objectives of "development" and the extent to which it can be achieved through tourism, is rarely questioned.

Tourism can also degrade the environment. Visitors generate waste and pollution (air, water, solid waste, noise, and visual. As tourism develops, demand for land increases, especially for main locations like beachfront, special views, and mountains. The foresight, natural landscape and open space can be lost by tourism development. The destruction or loss of flora and wildlife can happen when desirable plants and animals are collected for sale or the land is flattened. Tourists or the businesses that provide to them often remove plants, animals, rocks, fossils, coral, and cultural or historical artifacts from an area. Uncontrolled visit or overdoing by visitors can degrade landscapes, historic sites, and monuments. Where water is scarce, tourists can overwhelm the available supply. Travelers can also inadvertently introduce non-indigenous species, as can increases in the trade of animals and plants. A constant

stream of visitors and domestic pets may disrupt wildlife by disturbing their breeding cycles and altering natural behaviors. (Glenn Kreag, 2001)

The quality of the environment, both natural and man-made, is essential source for tourism industry. However, the relationship between tourism and the environment is complex. It involves many activities that can have adverse environmental effects. Many of these impacts are linked with the construction of general infrastructures such as roads and airports, and tourism facilities, including resorts, hotels, restaurants, shops, golf courses, and marinas. The negative impacts of tourism development can gradually destroy environmental resources on which it depends.

On the other hand, tourism has the potential to create beneficial effects on the environment by contributing to environmental protection and conservation.

Table (2.2) Positive and Negative Environmental Impacts of Tourism

Positive Impact	Negative Impact
Re-evaluation of ecological values by the local population and authorities as a result of tourism interest.	Pollution (air, water, noise, solid waste, and visual)
Increasing awareness of the environment and nature in general among tourists.	Loss of natural landscape and agricultural lands to tourism development
Improvement of the area's appearance (visual and aesthetic)	Degradation of landscape, historic sites, and monuments
A "clean" industry (no smokestacks)	Water shortages
Introduction of planning and management	Introduction of colorful classes
Preservation of historic buildings and monuments	Disruption of environment and ecology cycles

Source: The Impacts of Tourism By Glenn Kreag, 2001

Some positive and negative impacts of tourism to environment are listed in table (2.2). There are many negative impacts than positive impact due to tourism development. Though the tourism industry protected the selected natural environments or preventing further ecological decline for those selected areas, there are many pollution issues such as air, water, noise, solid waste, and visual.

2.3.3 Social and Cultural Impacts

The social and cultural consequences of tourism permit careful consideration, as impacts can either become assets or disadvantages to communities. Influxes of tourists bring diverse values to the community and influence behaviors and family life. Individuals and the collective community might try to please tourists or adopt tourist behaviors. Interactions between residents and tourists can impact creative expression by providing new opportunities (positive) or by stifling individuality with new borders (negative). (Glenn Kreag, 2001)

Increased tourism can push a community to adopt different good conduct such as improved understanding between genders (positive) or increased criminal drug use (negative). Safety and health facilities and staffing tend to increase at the same time safety problems such as crime and accidents increase traditional ceremony may be renewed and revived by tourist interest or lost in alternative activities.

Community organizations can be invigorated by facing opportunities for tourism or overwhelmed by their associated problems. Calamities such as natural disasters, energy shortages, terrorism, political upheaval, disease outbreak, a chemical spill, or even widespread negative publicity could shut down tourism abruptly but sometimes can attract curious visitors.

Tourism can improve the quality of life in an area by increasing the number of attractions, recreational opportunities, and services. Tourism offers residents opportunities to meet interesting people, make friendships, learn about the world, and expose themselves to new perspectives. Experiencing different cultural practices enriches experiences, broadens horizons, and increases insight and appreciation for different approaches to living. Often, dwindling interest in host social and cultures is revived by reawakening cultural heritage as part of tourism development, which increases the demand for historical and cultural exhibits. This interest by tourists in local society and culture and history provides opportunities to support the preservation of historical artifacts and architecture. By learning more about others, their differences become less threatening and more interesting. At the same time, tourism often promotes higher levels of psychological satisfaction from opportunities created by tourism development and through interactions with travelers. (Glenn Kreag, 2001)

Tourism can come to a community with a dark social and cultural side, too. Illegal activities tend to increase in the relaxed atmosphere of tourist areas. Increased

underage drinking can become a problem especially in beach communities, areas with festivals involving alcohol, and villages. It is easier to be anonymous where strangers are taken for granted; bustling tourist traffic can increase the presence of smugglers and buyers of smuggled products.

Lifestyle changes such as alterations in local travel patterns to avoid tourist congestion and the avoidance of downtown shopping can damage a community socially and culturally. Hotels, restaurants, and shops can push tourism development into residential areas, forcing changes in the physical structure of a community. The development of tourist facilities in prime locations may cause locals to be or feel excluded from those resources.

As local ethnic Social and culture alter to fit the needs of tourism, language and cultural practices may change. In places where longer-term visitors tend to congregate, social cliques, such as condo tourists may be at odds with local interests and work to influence local issues. The "demonstration effect" of tourists (residents adopting tourist behaviors) and the addition of tourist facilities may alter customs, such as dating habits, especially those of a more structured or traditional culture. The potential of meeting and marrying non-local mates may create family stress.

In tourism, one of the neglected considerations is the assessment of social impacts. Without much consideration of social costs involved, acknowledgments solely focus on the social benefits of the industry. The industry has positive and negative dimensions. The presence of visitors in the country also affects the living patterns of the local people. Sometimes, resentment by local people can occur because of the apparent difference in economic circumstances, behavior patterns, appearance, and economic effects. (Glenn Kreag, 2001)

Tourists always seek local artifacts. Purchasing of these genuine works can lead to the loss of cultural form the host countries. Although some countries impose a strict ban on exports of such items, tourists keep purchasing them as an authentic example of local art. (Glenn Kreag, 2001)

Table (2.3) Positive and Negative Social and Culture Impacts of Tourism

Positive Impact	Negative Impact
Improves the quality of life	Excessive drinking, alcoholism, gambling
Facilitates meeting visitors (educational experience)	Increased underage drinking
Positive changes in values and customs	Crime, drugs, prostitution
Promotes cultural exchange	Increased smuggling
Improves understanding of different communities	Language and cultural effects
Preserves cultural identity of the host population	Unwanted lifestyle changes
Increases demand historical and cultural exhibits	Displacement of residents for tourism development
Greater tolerance of social differences	Negative changes in values and customs
The satisfaction of psychological needs	Family disruption
	Exclusion of locals from natural resources

Source: The Impacts of Tourism by Glenn Kreag, 2001

According to table (2.3), the positive and negative impact of tourism on Socio-Culture does not have a huge difference here. Though tourism improved the quality of life however there is also a negative impact on people behavior such as drinking alcohol and gambling are increased in the area. Local people have experienced dealing with the visitors, they get more knowledge of hospitality, making a different style of food, and housekeeping. It the important to note that the negative impacts of tourism are the crime rate increased, the growing rate of drug abuse, and exclusion of locals from natural resources. (Glenn Kreag, 2001).

2.4 Review on Previous Studies

Aung Myo Htwe (2011) studied about “A Study on Promotional Activities of Tourism Industry In Yangon.” The study aims to analyze the promotional activities of Marketing Committee, Myanmar Tourism Federation and explore the barriers faced while promoting Myanmar as a tourist destination. Tourism arrival to Myanmar is increasing the position of Myanmar tourism in world context is very negligible and

country's position was at bottom line in the South East Asian region despite of the country's unique attraction like unspoiled beaches, historical cultural heritage, snow-capped mountain, people of Myanmar and so on. One of the reasons of not succeeding Myanmar tourism is insufficient promotional measure undertaken for marketing the tourism industry. There were also barriers while conducting the promotional activities such as financial resources, human resources and rules and regulations. The policy makers of the tourism industry to consider the issue very carefully and on the priority basis for the expected development of the industry.

Le Hoang Trang (2014) studied about “ The Effects of Tourism Impacts The quality of Life of Community Residents (A Case Study in Ho Chi Minh City And Ca Mau Province) he has found some explanation for how residents” perception of the impact of tourism influences their satisfaction with particular life domains, and how resident specific life satisfaction affects their overall life satisfaction. The importance of examining factors that influence the perception of the impacts of tourism as well as those that affect the satisfaction of specific life conditions; recognition of the roles of the cultural, social impact of tourism; the material, community, emotional, and health and safety well-being domains; and the establishment of a theoretical foundation for the examination resident through tourism impact.

Mie Mie Khaing (2017) studied about the “A Case Study on Community Based Tourism In Myanmar”. In her thesis she focused to compare CBT pilot projects by three phases and to examine the potential for successful CBT situation in Myanmar through the perspective of local residents from pilot projects areas and to study existing situation of tourism industry in Myanmar. Purposive sampling and qualitative data from Myanmar tourism statistics. The study specifically focused on the community-based tourism pilot projects of Thandaunggyi, Pa-O, Myaing, Indawgyi Lake, Irrawaddy Dolphins and Kayah State which were both initiated under the previous government. In this study, tourist arrival to Myanmar is increased year by year. Some locals referred to CBT as a business strategy or gateway to engaging with foreigners. Local residents from five CBT pilot project area received various training relating with tourism except Irrawaddy Dolphin, Mandalay, CBT can create more job opportunities for local community the living style of local people. However, it would be hard to compare the situation of six different pilot project areas in every detail as these CBT projects have a very different background and their operations have only

been in place for a year. CBT projects can benefit for local population and so CBT projects should expand the whole country of Myanmar.

Jamie Lee Espina (2017), also studied about “The Effect of Tourism in The Economic, Cultural and Social Development of The Philippines”. He emphasized changes in economy, the culture and social development in the consistent growth of Philippine local tourism. The research aims to discover factors that might change and get affected because of the demand in tourism. The study on the effect of tourism in the Philippines can be beneficial to raise the Filipino economy by giving out livelihood to the unemployed as tourism is a fantastic source of income. Tourism also plays a huge role in giving recognition on local goods and products. It can also help Filipinos to maintain traditions and culture to find ways how to improve tourism in the country. This study gathered data from several related literature of economics and tourism. It was supported by data gathered from observation, articles, and records. Based on the study of the research, tourism plays a huge role to give opportunities to have investments and employment, it also helps the locals to be mindful of the country’s history and landmarks. The research also conducted to some adverse effects of tourism in the environment and changes in the country’s culture.

Khin Thandar Htay (2018) examined about the positive and negative effects of community – based tourism on local people at Kyaithale Community Base Tourism (CBT) village, Twante Township. Her research findings were CBT has positive effects on the lives of people living in the village regardless of gender, education, age, marital status, ethnicity or social status and significant positive effective to the community especially in the environmental and sociocultural context such as capacity building process and a feeling of empowerment in the community from the opinions of women. Though it offers some potential to directly assist in poverty reduction in the short and medium term at a small scale, it is questionable for the long term to be more sustainable and large scale.

CHAPTER III

OVERVIEW OF TOURISM SECTOR DEVELOPMENT IN MYANMAR

3.1 History of Tourism in Myanmar

The history of tourism in Myanmar can be fragmented into four different chronological periods: the period of high colonialism in South-East Asia (1870-1940); the parliamentary democracy period (1948-1962); the socialist period (1962-1988); and the market-oriented period (since 1990).

Tourism in Myanmar, at that time Burma, started in 1865 when a fleet brought by the British government was bought by a Scottish entrepreneur to set up an upmarket river transport business called The Irrawaddy Flotilla Company (IFC) (Hitchcock, Michael, et al., 2009). The 1920s represented the peak period when thousands of Dutch tourists were traveling to Bali and IFC carried 9 million passengers a year being the largest riverboat company in the world. After Burma got independence from the British colonizers, the IFC went under the Government Inland Water Transport Board of the Union of Burma (Ko Ko Thett, 2012).

In 1948, with the starting of the independence period, tourism changed its development direction. In that period Burma was characterized by a capitalist driven economy. There were numerous private travel agencies as well as privately owned hotels in the major cities. A Tourist Information Service (TIS), under the branch of the Union of Burma Airways, was formed to promote and facilitate tourism. One of the decisions which encouraged tourism growth was to issue entry visas with the length of a month (Kyaw Oo, 2008). Despite these facilitator programs, tourism in that period still represented an insignificant part of the Burmese economy, due to the post-war conditions in western countries but also to institutional instabilities. In 1958, after a series of insurgencies, General Nay Win's government handed the state power over the military. This represented the starting point of the socialist period which officially started in 1962. During these four years, the TIS was converted into Tourist

Burma and incorporated under Burma Economic Development Corporation (BEDC) and entry visa duration was reduced to 24 hours.

In 1964, the nationalization program following the Burmese Way to Socialism was undertaken. Every tourism business, such as hotels and tour operators were nationalized and administered by the Ministry of Trade which also controlled Tourist Burma (Tucker & Shelby. 2001). In 1978, the TIS and Tourist Burma were combined to form the Hotel and Tourism Corporation under the Ministry of Trade. Throughout that period, tourism development was not encouraged as priority was given to the protection of national culture and traditions from foreign influences (Kyaw Oo, 2008).

In 1998, after a nationwide uprising, the socialist regime was replaced by the military government. After the uprising, tourist arrivals dropped dramatically and the attempts of the government to commercialize the economy were not successful due to their inexperience and influence from the previous rule (Ko Ko Thett, 2012). In the 1990s the government recognized the opportunities and benefits of the tourism sector and decided to set tourism development as a priority in their national development agenda. As a consequence, the Myanmar Tourism Law was passed in 1990 and the Ministry of Hotels and Tourism was nominated in 1992 foreign investments were encouraged, border crossing points were opened and visa duration was extended to one month (Kyaw Oo, 2008). One of the drastic measures taken by the government of that time (SLORC - State Law and Order Restoration Council renamed as SPDC - State Peace and Development Council) was to displace and relocate over 200 thousand people in new areas all over the country.

After the general elections in 2010, several reforms have been made to encourage development in the country and subsequently, international opinions have been revised and sanctions removed. Tourism development is and has been considered one of the top priorities of the government. After 2010 the government has launched many tourism sector-specific policies which are based on responsible development. In September 2012 a Responsible Tourism policy was launched, followed by the Policy on Community Involvement in Tourism in May 2013 and the Myanmar tourism master plan 2013-2020 in June 2013.

3.2 Tourism Policies in Myanmar

There were Responsible Tourism Policy launched in 2012, Myanmar Tourism Master Plan (2013 – 2020) published, and Policy on Community Involvement in Tourism launched in 2013 to support tourism sector in Myanmar.

3.2.1 Responsible Tourism Policy 2012

Myanmar Responsible Tourism Policy, the Republic of the Union of Myanmar commits to develop, plan, manage and promote a tourism industry that emphasize on sustainability, quality and competitiveness and recognizes cultural responsibility and social justice, environment sustainability and economic viability.

Building a viable and sustainable tourism industry in Myanmar requires strong public and private sector partnerships as well as inclusion and support from the local communities and civil societies. The role of the private sector is driving development and investment in tourism services and experiences while the public sectors plays a catalytic role of providing and improving infrastructure as well as providing a conducive climate for investment. A participatory integrative approach shall be adopted where local communities, the private sector, NGOs, the general public and other stakeholders are given opportunities to take part in the planning and decision-making process and ownership of the tourism industry.

The Master Plan adopts this vision for tourism in Myanmar and the nine aims of the Myanmar Responsible Tourism Policy as its guiding principles. The guiding principles are:

- (1) Develop tourism as a national priority sector.
- (2) Maintain cultural diversity and authenticity.
- (3) Enable the sector to complete on product richness, diversity and quality.
- (4) Strengthen the country's institutional system to plan and manage tourism.
- (5) Minimize unethical Practices.
- (6) Promote broad based local socio-economic development.
- (7) Conserve and enhance Myanmar's protected areas and natural environment.
- (8) Ensure the health, safety and security of our visitors.
- (9) Promote a well-trained and rewarded workforce.

The Myanmar Responsible Tourism Policy is leading the vision which is supported by nine aims which are described in Table 3.1. In the table the overview of the tourism policies in Myanmar plan to achieve responsible tourism in Myanmar. The aims provide the directions for the action points that will guide the implementation of the Myanmar Responsible Tourism Policy.

3.2.2 Myanmar Tourism Master Plan (2013-2020)

As a result of the remarkable political and economic reforms, the Republic of the Union of Myanmar is enjoying unprecedented tourism growth. Myanmar received over 1 million international visitors. Other key drivers of growth include the rapid expansion of scheduled inbound flights, eased tourist visa-on-arrival privileges at gateway airports, improving business and investment conditions, and the growing demand for international travel among regional and long-haul markets. Although Myanmar possesses diverse and extensive cultural, natural, and historic assets, it has only begun to develop its enormous tourism potential.

Due to the income- and employment-generating opportunities it creates, tourism is a global industry with special economic significance to developing countries. Consequently, the Government of Myanmar (GOM) has prioritized tourism development in its Framework for Economic and Social Reforms. To help ensure that tourism growth delivers broad and equitable social, economic, and environmental benefits, GOM adopted the Myanmar Responsible Tourism Policy in 2012. The policy is also endorsed by the Myanmar Tourism Federation (MTF), and is highly acclaimed by both civil society and development partners. The vision for tourism in Myanmar, as set out in the Responsible Tourism Policy is *“We intend to use tourism to make Myanmar a better place to live in—to provide more employment and greater business opportunities for all our people, to contribute to the conservation of our natural and cultural heritage and to share with us our rich cultural diversity. We warmly welcome those who appreciate and enjoy our heritage, our way of life, and who travel with respect.”* (MOHT, 2013)

The Ministry of Hotels and Tourism (MOHT)-the agency mandated by GOM to oversee the systematic development of tourism-prepared the Myanmar Tourism Master Plan (the Master Plan). The Master Plan adopts this vision for tourism in Myanmar and the nine aims of the Myanmar Responsible Tourism Policy as its

guiding principles. It sets out strategic programs, priority projects, and activities in a long-term implementation framework covering 2013-2020 and a short-term action plan for 2013-2015. The goal of the Master Plan is to maximize tourism's contribution to national employment and income generation, and ensure that the social and economic benefits of tourism are equitably distributed. Key objectives for each strategic program are:

- (1) Strengthen the institutional environment
- (2) Build human resource capacity and promote services quality.
- (3) Strengthen safeguards and procedures for destination planning and management
- (4) Development quality products and services.
- (5) Improve connectivity and tourism-related infrastructure.
- (6) Build the image, position and brand of tourism Myanmar

The vision and aim are the founding of the Master Plan. A follow-up process is underway to develop policy guidelines for engaging local communities in tourism, including minimum standards for community involvement. GOM also recognizes that tourism is competitive and fragmented industry associated with a variety of negative impacts. Consequently, the Tourism Master Plan emphasizes purposeful development of quality tourism through strategic and responsible actions to deliver equitable economic benefits, social well-being, and environmental sustainability.

3.2.3 Policy on Community Involvement in Tourism (CIT) 2013

National and international tourists are becoming more and more interested in experiencing tourism with local people and living cultures. Interestingly, ten years ago, community-based tourism (CBT) projects in countries like Thailand and Indonesia were predominantly visited by Western tourists. Nowadays, the majority of visitors to CBT projects are increasingly urban domestic and regional tourists.

Maximizing the benefit for local communities requires a holistic view in which "sharing the cultural and spiritual significance of different sites" involves much more than the mere interpretive experience of just delivering facts and figures about the community or ethnic group. The provision of access to the destination and to general tourist services is equally important, particularly in remote areas.

There are various ways to encourage community involvement in the tourism industry and to attract community support and participation. According to the international discussion, community participation is a crucial determinant to ensure that local communities will benefit from tourism and that their lifestyles and values are being respected. This policy should be seen as a living document and shall be regularly adapted to the tourism development process by reviewing the implementation outcomes in order to create flourishing benefits for community tourism in Myanmar.

Table (3.1) Overview of the Tourism Policies in Myanmar

Aim 1: Tourism is a national priority	Aim 2: Broad-based local social economic development	Aim 3: Maintain cultural diversity and authenticity	Aim 4: Conservation and enhancement of the environment	Aim 5: Compete on product richness, diversity, and quality – not just price	Aim 6: Ensure health, safety, and security of our visitors	Aim 7: Institutional strengthening to manage tourism	Aim 8: A well trained and rewarded workforce	Aim 9: Minimising unethical practices
	Objective 4: Encouraging local entrepreneurship through micro and local enterprises			Objective 5: Diversifying and developing quality products and services at the community level		Objective 1: Strengthening the institutional environment and civil societies	Objective 2: Capacity building or community-related activities in tourism	Objective 6: Monitoring positive and adverse impacts of community involvement in tourism
Objective 3: Developing Safeguards, Systems, and Procedures to Strengthen Community Planning and Management in Tourism								
				Strategic Programme 4: Develop quality products and services		Strategic Programme 1: Strengthen the institutional environment	Strategic Programme 2: Build human resource capacity and promote service quality	
Strategic Programme 3: Strengthen safeguards and procedures for destination planning and management								
Strategic Programme 5: Improve connectivity and tourism-related infrastructure								
Strategic Programme 6: Build the image, position, and brand of Tourism Myanmar								
	Responsible tourism policy 2012							
	Policy on community involvement in tourism 2013							
	Myanmar tourism master plan 2013-20							

Source: Ministry of Hotel and Tourism Myanmar, Responsible Tourism Policy, Policy on Community Involvement in Tourism, Myanmar Tourism Master Plan. (2012-2013)

3.3 Community Based Tourism in Myanmar

Community-based tourism (CBT) refers to tourism that involves local communities, occurs on their lands, and is based on their cultural attractions and the natural assets found in their areas. CBT requires some form of partnership or joint venture with these villagers whereby locals receive payment in exchange for access to their lands.

(1) B&B with Thandaunggyi CBT (Kayin State)

Thandaunggyi in Kayin State started offering B&B stays since 2010. Most Christian people are visiting to Thandaunggyi due to pilgrimage traveling.

(2) Nyaung Shwe Township in Shan State

In Lwenwe Phaya Taung Yay Seit, Nyaung Shwe Township, Shan State. Community Based Tourism in Phaya Taung Village was started and implemented in 2016.

(3) Danu Self-administered Zone in Shan State

After permitting community-based tourism by Danu self-administrative committee in Pin Sein Pin and, Sikyaa Inn villages at Pintaya Township.

(4) Nwe Nyein Village, Shwebo in Sagaing Region

Community based tourism have been implemented based on Nwe Nyein, Shwe Khun, Shwe Tiek, Melar, Makhauk, Nwe Nyein in Shwe Bo district, Sagaing region in November 2017.

(5) Ta Suan Village, Falam Township in Chin State

Community based Tourism has been opened and implemented in Ta Suan Village by the permission of regional government on 31st March, 2018, Falam township, Chin state.

(6) Sithe Community Based Tourism, Singu Township in Mandalay Region

Community Based Tourism has been implemented in Sithe village at 30th October 2016. It is in Myit Kan Gyi Village, Singu Township, Mandalay Region.

(7) Magyikan Village Community Based Tourism village in Magway Region

Magyikan Village (Tamarind Lake Village Homes) is located in Salay Town, Chauk Township. Magyikan Village was created as an alternative livelihood for the locals, to preserve and showcase the lovely local culture to the visitors, and for the visitors to enjoy delightful culture of Myanmar rural society.

(8) Kyaikthalae Community Based Tourism and Bio Garden in Yangon Region

Visitors can see how to plant the Bio-garden in Kyaikthalae village, Twante Township, Yangon. Visitors could observe making a bamboo basket and weaving, visit the Mingalar monastic school to greet the children that study and resides there.

(9) Sorlounge Community Based Tourism in Chin State

Chin State showing off the traditions and daily lives of Chin people, their customs and clothing. The tour offers a fascinating and unforgettable experience where you can climb Mt Khaw Nau Sone, stay overnight in a remote Chin village and meet some of the villagers who live there. Term left over from colonial days, is now better known in Myanmar as “Nat Ma Taung” or in Chin language as “Khaw Nau Sone”. Mt Khaw Nau Sone (Mount Victoria) is a protected area, in Khaw Nau Sone National Park which was established in 1994. Its area is 279 square miles.

(10) Community Based Tourism with Dolphins in Mandalay Region

Ayeyarwaddy River villages between Myingun in Mandalay Region and Kyaukmyaung in Sagaing Region, local partners developed a unique program where visitors can actively learn the traditional fishing methods and can see Ayeyarwaddy Dolphins.

(11) Myaing Community Based Tourism in Magway Region

The specific objectives of this CBT in Myaing, Magway Region are to foster alternative livelihoods opportunities by providing hospitality skills training and employing interested community members.

(12) Pa-O Community Involved Tourism in Shan State

Four villages in Nyaungshwe and Taunggyi townships in Shan State are already opened for tourists to explore Pa O ethnic’s culture and their arts and crafts.

(13) Sakar Village in Shan State

Community Based Tourism was implemented by the permission of state government in Sakar village, Nyaung Shwe Township, Shan State. Community Based Tourism in Sakar village was started and implemented in 2016.

(14) Kayah Cultural Community Based Tour in Kayah State

Two Kayan ethnic villages, Hta Nee La Leh and Pan Pet villages and one Kayaw ethnic village; Htay Kho in Kayah State, have been offering CBT.

(15) Inndawgyi Community Based Tourism in Kachin State

The country's first-ever eco-tourism site, the Indawgyi wildlife sanctuary, was established by the ministries of hotels and tourism and environmental conservation in 2013.

3.3.1 Ecotourism in Myanmar

The Union Myanmar well-endowed with a diversity of species, and a variety of natural resources that it is an absolutely wonderful paradise for ecotourism in Myanmar. The national ecosystems are considered to be one of the biological reservoirs in Asia. There are 9 of the ecotourism sites in Myanmar.

- (1) National Kandawgyi Garden is located Pyin Oo Lwin, Mandalay is the location of National Kandawgyi Garden with the total area of about 344.81 acres. This Garden was established in 1915, formerly known as National Botanical Garden. It serves as a recreation center for the public and as an ecotourism site for the tourists.
- (2) Moeyingyi Wetland Wildlife Sanctuary is situated in Waw Township, Bago Division with the total area 40 square miles. The sanctuary was established in 1986 with the purpose of conserving resident and migratory water birds and their habitats and research migratory water birds.
- (3) Shwesettaw Wildlife Sanctuary is located in Minbu, Setote-taya, Saku and Ngapeh Townships of Magwe Division. It was established in 1940, with the area of 213.4 square miles. This sanctuary is to conserve the deer of Myanmar and the dry zone.
- (4) Khakaborazi National Park is in Naungmung Township of Kachin State located Khakaborazi National Park, which covers an area of 1,472 square

miles. This park is to conserve natural forests and wildlife in the northern part of Myanmar, to establish and maintain a national park of high quality and up to the standard of modern environment.

- (5) Inle Lake Sanctuary is a wetland sanctuary and situated in Naung Shwe, Pinlaung and Peh Kon Townships of Southern Shan State. It covers an area of 642.32 square miles and was founded in 1985. This sanctuary is to conserve and protect natural vegetation, wetland birds and freshwater fishes in Inlay sanctuary.
- (6) Seint Ye Forest Camp is situated in Oaktwin Township of Bago Division and was founded during the year 1996. It covers an area of 102 acres. This forest camp is to observe natural teak forests and teak growing environmental conditions.
- (7) Myaing Hay Wun Elephant Camp is located in Taikkyi Township of Yangon Division. It is founded in 1986 and occupies a land 10 of acres. The intention of this Camp is to develop and promote from Elephant Nursing Camp to Myaing Hay Wun Elephant Research Camp.
- (8) Nat Ma Taung National Park is located in Kanpet-let, Mindut and Matupi Townships of Chin State. It was established in 1994 and covers an area of 279 square miles. To conserve the watershed areas of Lemro river, Myitha river, Saw Chaung, Maw Chaung, Salin Chuang, Che Chaung, Yow Chaung, Mon Chaung and the animals in it.
- (9) Indawgyi Lake Wildlife Sanctuary is situated in Mohnyin Township of Kachin State. It is 299.32 square miles and was established in 1999. The sanctuary determines to conserve the largest inland lake in Southeast Asia and to protect it's the dwelling birds.

3.4 Tourist Arrivals in Myanmar

According to the Myanmar Tourism Statistics, the progress of Myanmar tourism sector can be seen through the increasing in tourist year after year starting from 2007 to 2015. Then the number of tourists noticeably declined in 2016 then increased again in 2017 up to 2018. Table (3.2) Show tourist arrival to Myanmar from 2007 to 2018. Tourist arrival is increased year by year. According to the table, the tourist arrival is slightly increased from 2007 to 2011. In 2012, tourist arrival was rose

to 1,058,995. Tourist arrival was increased double in 2013 and triple increased in 2014. In 2015 is the highest point of tourist arrival.

Table (3.2) International Tourist Arrivals in Myanmar (2007-2018)

Year	No. of Tourist Arrivals
2007	716,434
2008	731,230
2009	762,547
2010	791,505
2011	816,369
2012	1,058,995
2013	2,044,307
2014	3,081,412
2015	4,681,020
2016	2,907,207
2017	3,443,133
2018	3,551,428

Source: Myanmar Tourism Statistics (2007-2018)

However, tourist arrival sharply rises in 2015 that may be Political changes in Myanmar. And also, many countries are very interested to visit Myanmar after 2012. However, due to the Rakhine conflict, the tourist arrival was declined in 2016 and 2017.

Although the tourist arrival was declined in 2016 and 2017, in 2018 Myanmar received over 3.551,428 foreign tourists. However, the number could not reach tourist arrival in 2015 which is a higher number between 2007 and 2017, according to the Ministry of Hotels and Tourism. The 3.55 million tourists in 2018 included 1.3 million who came by air and 9,370 by cruise ship. Of the total, 1.4 million came with visas and 2.2 million came through border crossings, according to the ministry.

3.4.1 Entry Points

Table (3.3) shows the international tourist arrival by entry points. There are major five entry points to Myanmar such as Yangon, Mandalay, Thailand/Myanmar

Nay Pyi Taw and Border gateways such as Mawlamyine, Myeik, Kawthoung, and Musai. Nay Pyi Taw's entry point was opened starting from 2011. Among them, Yangon and Mandalay are the main entry points for tourist as the transportation is convenience for them. The total number of tourist arrival was 3,551,428 in 2018.

Table (3.3) International Tourist Arrival of Entry Points (2007 – 2018)

Year	Yangon	Mandalay	Thailand/Myanmar Border	Nay Pyi Taw	Border Gateways	Total
2007	242,535	5,541	-	-	468,358	716,434
2008	187,766	5,553	-	-	537,911	731,230
2009	234,417	8,861	-	-	519,269	762,547
2010	297,246	13,442	-	-	480,817	791,505
2011	364,743	20,912	-	5,521	425,193	816,369
2012	559,610	32,521	-	1,250	465,614	1,058,995
2013	817,699	69,596	1,024	11,842	1,144,146	2,044,307
2014	1,022,081	90,011	271	19,261	1,949,788	3,081,412
2015	1,180,682	107,066	-	13,835	3,379,437	4,681,020
2016	1,080,144	128,387	47,841	16,224	1,634,611	2,907,207
2017	1,146,069	157,860	41,942	17,077	2,080,185	3,443,133
2018	1,158,747	169,852	53,257	16,242	2,153,330	3,551,428

Source: Myanmar Tourism Statistics (2007-2018)

Tourist entry point is highest in border gateway in each year from 2007 to 2015. Tourist arrival is decline in 2016 due to political effect and after rose in 2017 and 2018. Yangon entry point is the second highest in each year. Mandalay entry point in third in each year. Yangon is the commercial city of Myanmar and tourists are very interested to invest in Myanmar. Nay Pyi Taw entry point was opened in 2011. Thailand-Myanmar border gateway had the lowest numbers of tourist arrivals in 2012 and then Thailand-Myanmar border at Kawthoung, Myawaddy, Tachileik, Hteekhee, Prior permission is start recoded in 2016.

3.4.2 Average Expenditure and Average Length of Stay in Myanmar

Table (3.4) shows tourist expenditure and average length of stay. In 2008, the amount of tourist expenditure was decrease as the effect of declining tourist arrival to Myanmar due to Cyclone Nargis. The amount of tourist expenditure was continuously increased after 2008. The Ministry of Hotels and Tourism provides Tourism Revenue in USD. Tourism Revenue of Myanmar reached USD 2,197.15 Million in December 2016. Myanmar's Tourism Revenue was dropped USD 1,651 Million in December 2018.

Table (3.4) Average Expenditure and Average Length of Stay in Myanmar (2007-2018)

Year	Tourist Arrival to Myanmar	Tourist Expenditure (Million in USD)	Average Expenditure (Person Per Day in USD)	Average Length of Stay (Days)
2007	716,434	182	98	7.5
2008	731,230	165	95	9
2009	762,547	196	95	8.5
2010	791,505	254	102	8
2011	816,369	319	120	8
2012	1,058,995	534	135	7
2013	2,044,307	926	145	7
2014	3,081,412	1,789	170	9
2015	4,681,020	2,122	171	8
2016	2,907,207	2,197	154	11
2017	3,443,133	1,969	153	9
2018	3,551,428	1,651	122	9

Source: Myanmar Tourism Statistics (2007-2018)

3.4.3 Visitors Arrivals to Myanmar by Nationality

Table 3.5 and shows the visitor arrivals to Myanmar by nationality. Most of tourist came from Asia, West Europe, East Europe, North America, Oceania, Other Americas, Middle East and Africa. Among them, tourist from Asia is largest portion

and Africa is lowest portion. the largest tourist top entry to Myanmar are from Thailand and China who are low-yield producers with shorter vacations of 3 to 4 days in Myanmar visiting Yangon and surrounding mostly. Most of the tourist arriving at airports.

Table (3.5) Visitors Arrivals to Myanmar by Nationality (2010 - 2018)

Region		Asia	West Europe	East Europe	North America	Oceania	Other Americas	Middle East	Africa	Total
2010	No.	212454	59817	6118	18911	8695	1669	2208	816	310688
	%	68.38	19.25	1.97	6.09	2.8	0.54	0.71	0.26	100
2011	No.	259692	80895	7622	25365	11622	2380	2607	993	391176
	%	66.39	20.68	1.95	6.48	2.97	0.61	0.67	0.25	100
2012	No.	380404	130296	9077	44074	20650	3535	3747	1598	593381
	%	64.11	21.96	1.53	7.43	3.48	0.6	0.63	0.26	100
2013	No.	630399	158163	10183	62628	28079	4625	3396	2688	900161
	%	70.03	17.57	1.13	6.96	3.12	0.51	0.38	0.3	100
2014	No.	807806	186828	13592	74899	33421	7043	4714	3321	1131624
	%	71.39	16.51	1.2	6.62	2.95	0.62	0.42	0.29	100
2015	No.	938487	209300	15433	83866	35566	9575	5527	3829	1301583
	%	72.1	16.08	1.19	6.44	2.73	0.74	0.42	0.29	100
2016	No.	864523	237889	17568	91526	39172	10999	7140	3779	127259
	%	67.94	18.70	1.37	7.19	3.08	0.86	0.56	0.30	100
2017	No.	953801	239358	20069	87153	37644	12592	6465	5866	1362948
	%	69.98	17.56	1.48	6.39	2.76	0.92	0.48	0.43	100
2018	No.	1066846	183472	18386	76122	32455	10786	5686	4346	1398098
	%	76.31	13.12	1.32	5.44	2.32	0.77	0.41	0.31	100

Source: Myanmar Tourism Statistics (2010-2018)

3.5 Impact of Tourism in Myanmar

There are many impacts of Tourism in Myanmar such as Economic impact, Environment impact, Social and Cultural impact. Tourism activities could serve as a catalyst for the development of other sectors of the Myanmar economy such as agriculture, fisheries, manufacturing, construction, and crafts production. Myanmar tourism can contribute to the establishment of environmental protection mechanisms, conservation, and restoration of biological diversity and more sustainable use of

natural resources. The growth of the tourism industry and the influx of tourists including – Myanmar tourists traveling within the country can have positive cultural impacts on a country and its population, including through the promotion and preservation of tangible and intangible cultural heritage and traditions, development of new forms of cultural expression and promotion of exchanges with other languages and cultures.

3.5.1 Economic Impacts in Myanmar

The economic benefits of tourism can be derived directly or indirectly. The primary effect is direct benefits that result from direct tourist expenditure for goods and services in the destination. These are realized through business receipts, income, employments and government receipts from the sectors that directly received the tourism expenditure.

According to the Ministry of Hotels and Tourism, the direct contribution of Travel and Tourism to GDP in 2017 was MMK 2,647.2 billion (2.7% of GDP). This is forecast to rise by 5.2% to MMK 2,784.2 billion in 2018. 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 by tourists. Further, the World Tourism and Travel Council estimate that every dollar spent on travel and tourism generates over three dollars of economic output.

Tourism activities could serve as a catalyst for the development of other sectors of the Myanmar economy such as agriculture, fisheries, manufacturing, construction, and crafts production, which could then contribute to poverty reduction, and enhance economic benefits for the local community. Further, according to sources almost 60 percent of entry-level positions in the tourism sector are occupied by women.

The tourism sector has the potential to create large numbers of jobs. The services sector currently accounts for about 6.5% of the GDP. The tourism sector's expansion requires less in the way of specialized skills and infrastructure than most other service industries since the key resource is the interest in and attractiveness of the country itself. A report by the World Tourism and Travel Council claims that employment in the travel and tourism sector within Myanmar, including jobs

indirectly supported by the industry, has grown by 5.7% reaching 1,282,500 jobs in 2017. The Tourism Master Plan estimates that direct tourism employment by 2020 will provide between 500,000 and 1,500,000 jobs. There is significant potential for business start-ups related to the tourism sector such as hotel bakery suppliers and bicycle hire shops. (WTTC, 2018)

The Myanmar Tourism Federation also announced in October 2014 that it will set up a privately-owned Tourism Bank Public Company Ltd, which will provide financial support to small and medium enterprises operating in the tour and travel industry.

Many jobs in the tourism sector are low-paid and may be seasonal positions that offer no job security. Furthermore, while the tourism sector does create quality jobs these may be concentrated in larger cities or require specialized skills that local community members do not possess. Most available tourism and hospitality training is concentrated in Yangon and several other urban areas. The financial and time costs of attendance for individuals in more remote areas is often a major deterrent to attend such training and obtain the certification needed to apply for higher skilled jobs. Therefore, accessible hospitality training programs outside the larger cities are required to develop skills across the country.

3.5.2 Environmental Impacts in Myanmar

Relevant government policies, including the Myanmar Tourism Master Plan, the Responsible Tourism Policy and the Policy on Community Involvement in Tourism commit to environmental and social protection. But there is a risk that in practice there is a lack of national-level laws and capacity in these areas to regulate adverse impacts, particularly as Myanmar currently has a weak framework for the protection of the environment and society.

The 2012 Environmental Conservation Law (Environmental Conservation Law 2012) is only a framework law and must be complemented by more detailed laws and regulations. While the law provides for general environmental protection obligations, it does not stipulate whether and how infringements of the law are punishable and it does not specify any sector-specific obligations and regulations. It is unclear if the law provides for claims for compensation for damages only from the government or also from individuals harmed by environmental pollution, although

claims for damages from local communities are making their way to court under other laws.

Further, Myanmar has weak regulatory guidelines for natural resource management and pollution prevention; for example, there are no air quality monitoring standards. Finally, there is no agency in place that is responsible for and regulates discharges, pollution and waste disposal by industries. On the social side, the labor law framework is more developed but is undergoing an extensive overhaul. There are significant gaps in laws covering many non-labor social issues relevant to the tourism sector, such as land acquisition and resettlement procedures, community health, safety, and security, as well as other emerging issues such as indigenous peoples' rights. Given the absence of laws and vague or outdated provisions, it will be very difficult for the Government to hold companies accountable to operate to the "high environmental standards" as promised in the FESR.

The tourism sector can also be an enabler for environmental protection mechanisms and has the potential to raise awareness about the environment. The sustainable management of tourism facilities such as hotels can increase the benefits of tourism to protected areas. However, this requires careful planning and controlled development and should be based on a sound environmental impact assessment.

Increased tourism in Myanmar also has the potential to increase public appreciation of the environment and to spread awareness of the country's environmental problems. This may heighten awareness of the value of nature and lead to conscious activities to preserve the environment. For example, the Greater Inle Lake region is suffering from environmental decline due in particular to the use of pesticides by farmers and increased tourism.

Myanmar tourism can contribute to the establishment of environmental protection mechanisms, conservation, and restoration of biological diversity and more sustainable use of natural resources. Revenue from park entrance fees, collected from tourists and tour operators, can be allocated to pay for the protection and management of environmentally sensitive areas.

3.5.3 Social and Culture Impacts in Myanmar

Strong national identities and years of isolation, both self-imposed and externally-imposed have resulted in Myanmar is far less exposed to foreign cultural influence than neighboring countries in South East Asia, which represents one of its

selling points as a tourist destination. However, with greater international travel by Myanmar citizens and exposure to foreign media, as well as increasing numbers of foreign visitors and investors, this is starting to change, particularly in cities. Exposure to foreign cultures is creating generational tensions and a fear among more conservative older generations that 'Myanmar culture' and 'Myanmar values' may be overwhelmed.

The growth of the tourism industry and the influx of tourists including – Myanmar tourists traveling within the country can have positive cultural impacts on a country and its population, including through the promotion and preservation of tangible and intangible cultural heritage and traditions, development of new forms of cultural expression and promotion of exchanges with other languages and cultures. Intangible cultural heritage includes oral traditions and expressions, including language as a vehicle of the intangible cultural heritage; performing arts; social practices, rituals and festive events; knowledge and practices concerning nature and the universe; and traditional craftsmanship. Tourism can increase demand for traditional handicrafts such as Myanmar art and paintings, lacquerware, silverware, woodcarving, and weaving.

The behavior of tourists can also have negative social and cultural impacts. These may include the lack of respect for local traditions, customs, and religion, including respect for religious buildings (Eleven Media, 28 November 2013), the consumption of alcohol and drugs, and gambling practices (The Irrawaddy, 5 September 2014)

CHAPTER IV

ANALYSIS OF SURVEY DATA

4.1 Survey Profile

Thandaunggyi is situated in the north of Kayin state, 200 miles away from Yangon. It has been a summer getaway for the British during the colonial era since 1852. As indicated in the 2017 Population and Housing Census (Myanmar Information Management Unit-MIMU), Thandaunggyi township is composed of 1,128 households with approximately a population of 6,942. The majority of the population is Karen ethnic believing in Christianity with few other Buddhists and Hindus. The late military regime has initiated to transform Thandaunggyi into mountain resort in 1990-2000. But the process was stranded as a ceasefire agreement with Karen National Union (KNU) broke down in 2005.

Thandaunggyi Township is one of the tourist attracted and areas in Myanmar. There are many positive and negative effects on the environment, socio-economic, and social-culture of Thandaunggyi Township. Geographically, Thandaunggyi is located in the northern part of Kayin state, about five hours drive from Yangon and it is covered by many mountains and diverse landscapes. The ecosystems of the town have been well preserved up to now and its cool climate is a big draw. Many attractive places and historic buildings can be found around the Thandaunggyi township, such as the Old British Fort built 100 years ago on a small hilltop and with a unique spiral staircase, the Tea Factory also built 100 years ago to product tea, the Karen New Year Mountain, and a Hindu temple. The inhabitants of the town are mainly Karen people and the population living in the town was used as a resort for soldiers and administrators for recreational activities. Besides, the town is famous for its folktale about Dawparkho, also known as Nawbubaw, which is now a prayer mountain and is always occupied by pilgrims from different parts of the country regardless of religion. Due to the outbreak of fighting between the Karen National Union and the government in 1989, Thandaunggyi was a forgotten town for many years. The tension continued until the signing of the bilateral ceasefire agreement

between KNU and the previous government led by U Thein Sein in January 2012. The town is now regarded as safe and open to all again. (Community-based Tourism in Myaing and Thandangyi, 2017)

A nationwide peace process is ongoing, with the involvement of the Government and 16 ethnic armed groups. A nationwide ceasefire accord is under negotiation, although deadlines have not been met, and talks continue. (The Irrawaddy, 2014) Ceasefires have made land more available to commercial interests, some of which are linked to the central Government and the military. Ethnic minority armed groups also have business interests in their territories. These areas are highly militarised, including by Myanmar army troops and allied militias, ethnic minority armed groups, and armed criminal elements. This has resulted in very poor land governance, with a heightened risk of land grabs, instability and a climate of fear. (Transnational Institute/Burma Centrum Netherland, 2013)

Future demining operations that make land more accessible and commercially viable will likely exacerbate these risks. Many ethnic minority areas have considerable tourist potential. There are areas of historical and cultural significance (war cemeteries; the Burma Railway; pagodas and ethnic heritage buildings and great scenic beauty such as the Thandaunggyi in Kayin State. Therefore, this study will be the focus on the tourism industry and the tourism impact of environment, socio-economic and social-culture of Thandaunggyi township.

4.1.1 Demographic Information of Thandaunggyi Area

Thandaunggyi town is divided into 5 quarters, according to the 2019 data the population breakdown is as shown as table 4.1. Thandaunggyi total population is 7,185 and total household were 1,160 house hold. Thandaunggyi has one state high school, one post-primary school, two primary schools, and seven nursery school with three other church-based nursery schools. The town has one hospital accommodating 70 beds and one regional health care center. There has one Myanmar Economic Bank and Inwa Bank. The majority of the population earns their living through agriculture and 20% are estimated to be working in public sector employment. It is estimated that more than two hundred people are involved directly or indirectly in tourism-related businesses such as accommodations, restaurant, retail shops, tour guiding, and transportation services.

Table (4.1) Thandaunggyi Household and Population (2019)

No	Quarter	Household	Male	Female	Total
1	Quarter-1	480	1,515	1,557	3,072
2	Quarter-2	200	516	568	1,084
3	Quarter-3	345	1,073	1,082	2,155
4	Quarter-4	124	329	329	658
5	Quarter-5	32	120	96	216
	Total	1,160	3,553	3,632	7,185

Source: Survey Data Source, April 2019

4.1.2 Thandaunggyi Tourism Development Working Group (TTDWG)

The Thandaunggyi Tourism Development Working Group (TTDWG) was formed during the “Multi-stakeholder Tourism Planning Working Group Meeting” on 15th December 2014 in Thandaunggyi. The establishment of such a working group was one of the major recommendations from a series of workshops on the broad topic of “Tourism and Peace” held in 2014 in Karen State.

Over 25 participants attended this first meeting to form the TTDWG, includes two bodies: a) an advisory board consisting of Karen National Union (KNU), Civil Society Organizations and Government and b) an implementing action body with about 15 villagers with strong gender equality. The Working Group is jointly supported by the Peace Nexus Foundation, the Myanmar Tourism Federation (MTF) and the Hanns Seidel Foundation (HSF). They meet regularly with the objectives of developing the tourism sector in the area in a responsible way and sustaining both natural resources and cultural heritage. Extra income for the community and satisfied visitors has desired outcomes of this tourism development in Thandaunggyi.

In 2015 there has been a lot of progress in overcoming major challenges. Travel restrictions for international visitors have been lifted in the area, followed by several workshops/activities to prepare the community for increased tourist numbers: Bed & Breakfast Basic Training, Hygiene and Cooking Training. Village Tour Conductor Training, assessment of sights and trekking routes, Village Stories and Contemporary History, and mapping the area.

In September 2015 there was a further success for Tourism sector in Thandaunggyi area the approval of overnight stays for foreign tourists and the first

license for two Bed & Breakfast (B&B) which were piloting areas such as Thandaunggyi and Myaing Townships. Four other B&B got licenses in January 2016. Also, there have been multiple articles about this tourism development in Thandaunggyi with a focus on the licensing of the Bed and Breakfasts. Articles have been printed in both the local and international press. Through this media coverage, the number of tourists has increased.

Despite the successes seen so far, various challenges in the area still need to overcome. In the upcoming month, the TTDWG will work further on Product Development, Customer Service, Village Tour Conductor Training, and visitor management to become an even more attractive tourist destination in Myanmar. The Thandaung Gyi Tourism Development Working Group is a pilot project in the field of responsible tourism development in Myanmar.

During the high season (October-May) many domestic tourists visit Thandaunggyi. There are no official figures kept on the exact numbers, but on weekends and during special events including; Christmas, Easter and Karen New Year, hundreds of perhaps a thousand tourists visit the town for celebrations. Table 4.2 show that before 2012 tourist arrival of Thandaunggyi area was about 10,000. In 2014 tourist arrival increased.

Before 2012 tourist arrival of Thandaunggyi area was about 10,000. Then in 2018, the tourist arrival was noticeably increased up to over 150,000. One of the main reasons was that the road transportation to Thandaunggyi from Yangon, Mandalay and others areas significantly improved and easy to access as Nay Pyi Taw highway road was constructed and opened since 2011. In 2015 travel restrictions for international visitors have been lifted in the area.

Table (4.2) List of Tourist Stay at Bed and Breakfast (2016- 2017)

Year	Domestic	Foreigners	Total
2016	627	89	761
Jan: to May 2017	1,684	110	1,794

Source: Thandaunggyi Tourism Development Working Group's report data, 2018

Though B&B service was started in Thandaunggyi since 2010, that business license was granted to B&B service in September 2015 as the resident business people applied community-based tourism there. The visitors were increased

comparatively from 2016 and early 2017 both domestic and foreigner who stayed in B&B.

4.2 Survey Design

The questionnaire is designed to clear and easy language to understand, the structure in the questionnaire also is clear and short and avoids making the respondents confused. The questionnaire to make sure that it was convenient and time-saving to answer but ensured the quality of the survey. The survey instrument consisted of five sections. The section (1) is about demographic characteristics of Thandaunggyi's household members. The section (2) is the frequency distribution of involvement degree in the tourism sector.

The section (3) is the local people perception about the impact of tourism such as Economic Impacts, Environment Impacts, and Social and Cultural Impacts. the questionnaire descriptive statistics it describes as a 5-point Likert type scale. The tourism impacts economic, environmental, social-cultural and environmental of community and respondents are asked to indicate their agreements from strongly agree to strongly disagree. The three parts include questions that evaluating the perception and knowledge on the effect of the tourism sector to the local community so that the participates were asked to indicate their agreements from strongly agree to strongly disagree.

The sample size of this study was 300 respondents but the collected respondents were 223 only due to the unavailability of the respondents in the peak season of the visitors in the areas. It would be sufficient for this paper. The data was random sampling data.

4.3 Survey Results

Survey data were analyzed by using excel and the Statistical Package for Social Scientists (SPSS) software. 223 respondents participated in self-administered and face to face personal interviews survey was done with local community households in Thandaunggyi during the first week of April 2019. A total of 300 respondents were planned to be interviewed. However, 50 questionnaires did not get any response because some of the farm owners stayed at their orchard garden and 27 questionnaires were not completed due to the unavailability of the respondents. Finally, 223 questionnaires were analyzed in this study table 4.3.

Table (4.3) Respondents Rate

No. of Questionnaires	Respondents	Respondents Rate	Male	Female
Completed questionnaires	223	74%	92	131
Uncompleted questionnaires	27	9%	17	10
No answer questionnaires	50	17%	22	28
Total	300	100%	131	169

Source: Survey data, April 2019

131 females and 92 males, among the respondents who participated in the survey, which shows females respondents are more than male. The total respondents are 223 in which 59% is female while 41% is male.

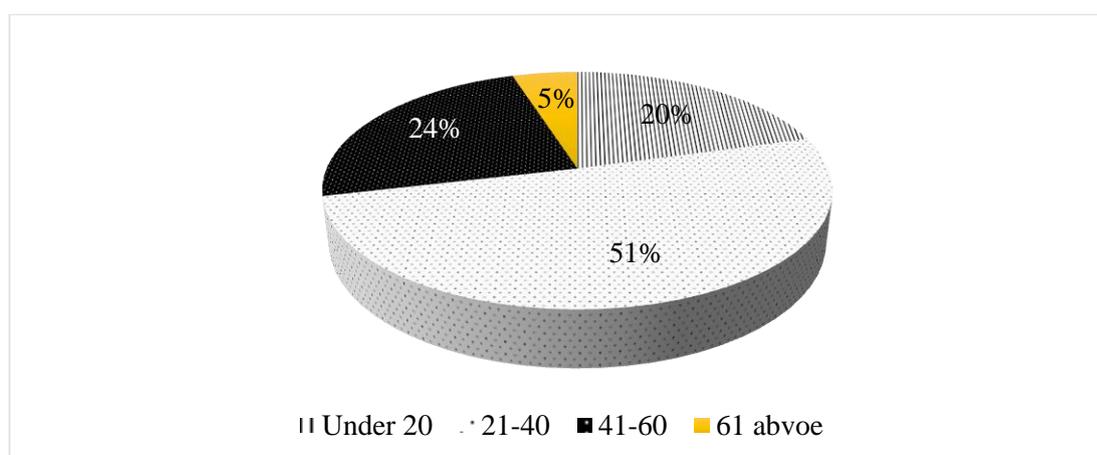
Gender of the responded are shown in table 4.3. Women also play important role in Tourism sector. According to the survey result of focus group discussion with women group in Thandaunggyi, women also play important role in Tourism sector. Their local products especially coffee beans are interested by the tourists who visited to their villages. Many of the products in local areas are seasonal crops so they do not get year-round income by those crops. Men are more engaging in cultivation and plantation while women have to involve in final products of their seasonal crops. As the tourism sector is developed in their areas, they involve in tourism activities as seasonal labors for carrying out Bed and Breakfast business, selling local product and cultivation basis of workers in the region. The worker earns 300,000/- mmk in a month during the tourism peak season. The women expressed that they earned money without going out from their home, producing home-made products such as coffee, green-leaf, tea-leaf, and wine, etc. However, those products quality and quantity need to be improved in order to upgrading international market through tourism sector. It is also need to build up the capacity of women who play important role not only at home but also in the community welfares.

Table (4.4) Age Groups of Thandaunggyi Community Respondents

Age Groups	Frequency	Percent (%)
Under 20	46	21%
21-40	113	51%
41-60	53	24%
61 above	11	5%
Under 20	46	21%

Source: Survey data, April 2019

Figure (4.1) Age Group of Thandaunggyi Community Respondents



Source: Survey data, April 2019

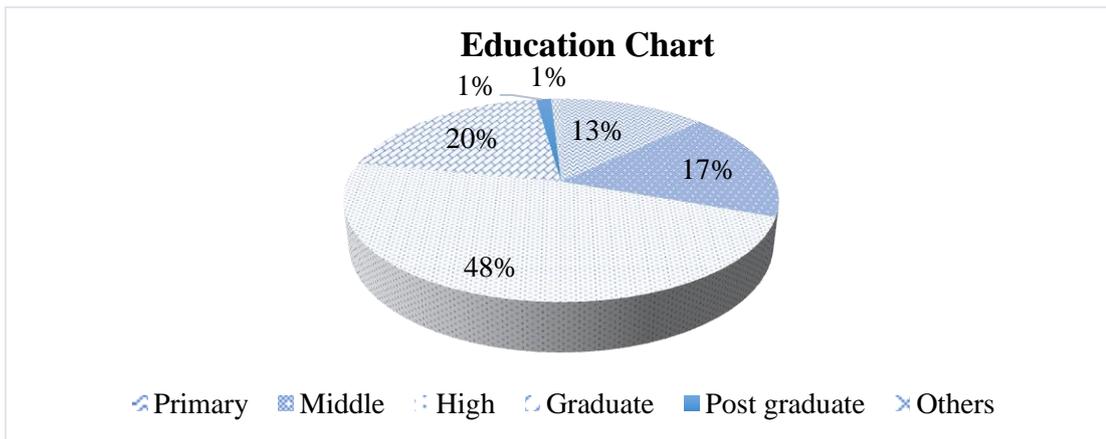
The largest percentage is from 21 to 40 years old (51%). People from under 20 and from 41 to 60 years old follow behind within 24% and 20%. Meanwhile, people of another age range which is 61 above year old account for 5%.

Table (4.5) Education Level of Thandaunggyi Community Respondents

Education Level	Frequency	Percent (%)
Primary School	29	13%
Middle School	39	17%
High School	106	48%
Graduate	44	20%
Master	3	1%
Others	2	1%

Source: Survey data, April 2019

Figure (4.2) Education Level of Thandaunggyi Community Respondents



Source: Survey data, April 2019

Table (4.5) shows education level of 223 respondents. The 48% of the respondents attained high school education level and it is the highest education level the graduate are only 20%. The primary school and middle school rates are 13% and 17%. The number of respondents who graduate from Master and others is 1% only.

4.5.1 Involvement in Tourism

The 140 out of 233 respondents said that their family members work in tourism-related jobs. Among them, 57 of respondent's family member work in tourism sector and 83 respondents work in tourism and their main incomes come from tourism. Other respondents are doing their livelihood with other non-tourism job in Thandaunggyi area such as farm workers.

Table (4.6) Job Involvement in Tourism Sector

Job	Respondent	Percentage
Family member work in Tourism job	57	24%
Main income got form Tourism	83	36%
Non work in Tourism job	93	40%
Total	233	100%

Source: Survey data, April 2019

Table (4.7) Economic Impact of Tourism Development

Particular	Strongly agree	Agree	Neutral	Disagree	Strongly Disagree	Mean	Standard Deviation
The resident's income increased due to the development of tourism.	34.50%	38.10%	18.80%	6.30%	2.20%	3.97	0.98
Resident's Job opportunity is increased due to the development of tourism.	40.80%	34.50%	14.80%	9.40%	0.40%	4.07	0.99
The local product has sales increment due to the development of tourism.	50.20%	36.80%	9.40%	3.10%	0.40%	4.35	0.78
Prices of local housing and land are increased due to the development of tourism.	43.90%	33.20%	18.40%	4.00%	0.40%	4.19	0.9
Local products and transportation costs are increased due to the development of tourism	16.10%	32.30%	29.60%	10.30%	11.70%	3.3	1.19
There is no regular income for those who work in the tourism sector.	23.80%	20.60%	23.80%	14.80%	17.00%	3.22	1.39

Source: Survey data, April 2019

The respondents were asked six questions to understand the economic impact of tourism development in Thandaunggyi township. According to their response below analysis results were obtained from the survey.

Related to the income of residents, 3.97 of the average respondents answered that income is increased by tourism development. It is found that 38.1% of the respondents agreed and 34.5% of the respondents strongly agreed resident's income increases due to the development of tourism. The 18.8% of the respondents were neutral. 6.3% and 2.2 % of the respondents disagreed and strongly disagreed. As a result of the survey, over 70% of the respondents believed that income was increased by tourism.

Job opportunity was increased by tourism sector developed in the township. The mean value 4.07 indicated that development of tourism brings job opportunities. The 40.8% of the respondents strongly agreed and 34.5% of the them agreed resident's job opportunity was increased due to development of tourism because some of the local people were employed at restaurants, Bed and Breakfast and transportation services. 14.8% of the respondents were neutral. 0.4 % and 9.4% of the respondents strongly disagreed and disagreed the job opportunity was increased by tourism. So, 75.3% agreed and 9.8% disagreed on increasing the job opportunity by tourism development. The people who disagreed the job opportunity was not increased by tourism are farm workers.

The average 4.35 of respondents agreed that local product sale was increased by tourism development. In terms of local product sales, most of the respondents 50.2% strongly agreed and 36.8 % agreed local product sale (coffee, honey and green tea, etc.) has increased due to the development of tourism. The respondents 9.4% are neutral. 3.1% and 0.4% of respondents disagree and strongly disagree. People who strongly disagreed and disagreed local product sale was increased by tourism development are farmers.

The mean value of 4.19 respondents said that their local housing and land's prices were increased due to development of Tourism. That is the negative effect due to tourism development. The price of land and house in study area, 43.9% of the said that the housing price and land prices were increased year by year. The 33.2% of the respondent also agreed that when the transportation is improved, the villagers who lived near the township came and stayed in Thandaunggyi area so the land prices increased than before. 18.4% were neutral and about 4% of the respondents strongly disagreed and 0.4% disagreed local housing and land's prices were increased due to development of Tourism. Those who strongly disagreed and disagreed on the statement were from the adjacent villages, came and stayed in Thandaunggyi area.

The average of the 3.30 responded answer that the increasement of local product and transportation costs do not much relate to development of Tourism. Most of the respondents agreed that the transportation cost and price of local products were increased. According to the result, 11.7% of respondents strongly disagreed local products and transportation costs were increased due to tourism development. The 10.3% of respondents disagreed the increasement of transportation cost due to tourism development. Because the transportation cost was increased due to the increasement of fuel price in the township. 29.6% of respondents were neutral. 16.1% and 32.3% of respondents strongly agreed and agreed.

The mean value 3.22 respondents answered that regular income of people who work in tourism sectors does not much depends on development of tourism. For the stable income, 23.8% and 20.6% of responding strongly agreed and agreed that tourism sector could not give regular income. Tourism sector could not provide regular income for the community because the travelers cannot visit the whole year. During the raining season, the weather is so drizzly and stormy in Thandaunggyi mountain area. When the visitors were less during the raining season, the households work at orchard farms and some are odd workers. 23% were neutral and the disagreed and strongly disagreed with the respondent's percent were 14.8% and 17.0%. Those respondents who disagreed and strongly disagreed with the question are transportation workers or work in the transportation services. However, the Golden Crown Bed and Breakfast owner said that some of the visitors visited in the raining season especially who would like to take a rest there.

When the tourist sector is developed, business was increased such as establishment of bed and breakfast, restaurants, the various production units, construction of roads and creation of various amenities which could affect the environmental distressed in the township. Because immigrants were increased so that their waste disposal become dumped. Trees are cut for the business booming then the area becomes deforestation. These all help in polluting of the environment unless the action is taken by the authorities to take remedial measures.

Table (4.8) Environmental Impact of Tourism Development

Particular	Strongly agree	Agree	Neutral	Disagree	Strongly Disagree	Mean	Standard Deviation
The resident receives knowledge to protect natural resources and environmental by tourism sectors.	38.10%	31.80%	18.40%	8.50%	3.10%	3.94	1.06
Resident receives good practices on waste disposal through the development of tourism.	45.70%	31.40%	8.10%	12.10%	2.70%	4.06	1.11
Road transportation is improved due to the development of tourism	66.40%	25.10%	5.40%	2.70%	0.40%	4.55	0.73
Due to the increasing number of travelers, both domestic and international distressed local people worship services	17%	16.60%	26%	22.00%	18.40%	2.91	1.34
Increase the number of traveler's waste disposal effect to environmental pollutions.	25.10%	33.60%	18.40%	16.10%	6.70%	3.54	1.22
Increase local production base on local resources (orchid and honey etc...) due to the development of tourism.	58.70%	28.70%	5.40%	6.30%	0.90%	4.39	0.91

Source: Survey data, April 2019

The data was collected from the respondents through 6 specially structured questions. The views of the respondents on Environmental impact are collected.

About the mean value 3.94 of the respondent agreed that they received knowledge to protect natural resources and environmental because of tourism sector. The 70.0% of the respondents were aware to protect natural resources and environmental by tourism sector. 38.1% of the respondents strongly agreed and 31.8% of the respondent agreed. Those respondents said that they obtained knowledge about how to protect the environment and they often received environmental knowledge training from the organizations which have a concern the distressing of environment. The respondents believe that when they maintain the natural resource and environmental it would make more attractive for tourists. 18.4% of the respondents were neutral. 8.5% and 3.1% of the respondents disagreed and strongly disagreed with the environmental knowledge that they received from tourism development.

The average 4.06 of respondents have good practices of proper waste disposal because of tourism. 45.7 % of the respondents strongly agreed and 31.4 % of the respondents agreed residents received good practices on waste disposal through the development of tourism. Now there are many government offices in this area and the government provides one garbage truck to collect waste disposal once per week in every ward. Some of the youth volunteers clean the main road every Saturday. 8.1% of the respondent were neutral. 12.1% of the respondent disagreed and 2.1% of the respondents strongly disagreed. They believe that there will be garbage when the number of tourists is increased.

The mean value 4.55 people agreed road transportation in Thandaunggyi is developed. This is the highest point of the environmental effect. The 66.4% of the respondents strongly agreed on road transportation improvement and 25.1% of the respondents agreed. The 5.4% of the respondents were neutral. 2.7% and 0.4% of the respondents agreed and strongly disagreed. The government provides basic infrastructure like road and communication service in the tourist area but the needs are higher than those facilities. In the question (19), the view of the respondents was revealed that the road condition is improved.

People generally do not think local prayers were disturbed due to visitors. So, the average of 2.91 responded disagreed on the visitors distressed local people worship services. 22% and 18.4% of respondents disagreed and strongly disagreed on visitors distressed local people worship services due to the increasing number of local

and international travelers. 26 % of the respondents are neutral on the statement. The 17% and 16.6% of the respondents strongly agreed and agreed that the visitors were disturbing local prayers.

The respondents answer the environment was negatively affected due to tourism. 25.1% and 33.6% of the respondents strongly agreed and agreed that increasing number of travelers' waste disposal affect to environmental pollutions because some of the budget tours used the disposal cup and plastic bags. They throw their waste near the prayer mountain and on the way to the mountain. It is one of the main reasons that the local community did not favor tourism in their areas. 18.4% were neutral on the question. The 16.1% and 6.7% of the respondent disagreed and strongly disagreed because most of the community using the plastic bag and they did not have a proper system of waste disposal. Moreover, some communities cut off the trees for firewood which made a lot of environmental degradation.

The mean value 4.39 of the respondent agreed that the tourism sector can promote local production. The 58.7% and 28.7% of the respondents strongly agreed and agreed the increasement of local products based on local resources (orchid and honey, etc...) by development of tourism. The local residents did not like selling natural products such as honey and orchid to the visitors because they did not know how to renew and retain those natural resources. The respondents of 5.4% was neutral. The 6.3% and 0.9% of the respondents said that natural honey cannot be produced the whole year and it can be produced only from June to August (3 months) of the year. But now the local people can sell the honey which can get from bees' firm for the whole year.

Table (4.9) Social-Culture Impact of Tourism Development

Particular	Strongly agree	Agree	Neutral	Disagree	Strongly Disagree	Mean	Standard Deviation
Due to the development of tourism, young people would like to study more on English, Computer and vocational training for tourism.	48.00%	34.50%	11.20%	5.80%	0.40%	4.22	0.91
Due to the development of tourism, job opportunities are increased so that the migration of young people rate is reduced.	7.60%	20.20%	37.20%	22.00%	13.00%	2.89	1.11
Community living standard is improved due to the development of tourism.	49.30%	33.60%	10.80%	5.80%	0.40%	4.24	0.9
Due to the development of tourism, immigrants are higher than before in Thandaunggyi area.	38.10%	33.60%	10.80%	5.80%	0.40%	3.94	1.1
Due to the development of the tourism crime rate is increased.	2.70%	13.50%	33.50%	32.70%	17.00%	2.5	1.04
Due to the development of tourism cultural change.	13.00%	37.70%	17.00%	15.20%	17.00%	3.15	1.3

Source: Survey data, April 2019

For the impact study, its effect on society both in social and cultural terms is considered as of greatest importance. In the tourist area, tourists arrived from different areas within the country, different cultures, communities and other countries of the world having different ways and methods of leading their lives left a certain impact in

the area consciously or unconsciously. In this study, the social – culture impact of tourism development is analyzed through questions number 1 to 6.

The mean value 4.22 of the responded agreed due to the development of tourism, young people would like to study more on English, Computer and Vocational training for tourism. 48.0% and 34.5% of the respondents strongly agreed and agreed that young people would like to study more on English, Computer and Vocational training which related to tourism due to the development of tourism. When tourism develops, many tourists came to Thandaunggyi prayer mountain then the youth received job opportunities and their concept on the importance of education changed. The young generation would like to learn new subjects on tourism more and more. One of the respondents said that the parents understand important of education is really helpful for them as they give a study time to their children and children also recognized well and tried it. 11.2% of the respondents were neutral. 5.8% and 0.4% disagreed and strongly disagreed about the improvement of youth education was one of the effects of tourism.

The average 2.89 of the respondents answered that development of tourism does not make job opportunity increased and, migration of young people rate was reduced. 27.6% and 20.2% of respondents have strongly agreed and agree for job opportunities are increased so that the migration of young people rate was reduced due to the development of tourism. 37% of them are the neutral respondent. 22% and 13% of the respondents disagreed and strongly disagreed about decrease the migration rate. The tourism sector has been developed in Thandaunggyi since 2014. However, it could not create job opportunities for local people. So local people go to work in other areas and aboard countries.

The mean value 4.24 of respondents agreed that living standard of community is improved due to development of tourism. 49% and 33.6% of respondents strongly agreed and agreed community living standard was improved due to the development of tourism. 10.8% of respondents were neutral. 5.8% and 0.4% of the respondents disagreed and strongly disagreed. Most of the respondents said that the living standard of people (housing, materials, social and lifestyle, etc.) was significantly changed in Thandaunggyi area.

The mean value 3.94 of respondents accepted that development of tourism does not make immigrants and population higher than before in Thandaunggyi area. It was found that most respondents 38.0% and 33.6% gave their feedbacks that

immigrants were higher than before in Thandaunggyi area due to the development of the tourism sector, people moved into the township. The respondents think that it was one of the effectiveness of tourism development. 17.0% of the respondents were neutral. 7.6% and 3.6% of the respondents gave feedbacks that the growth of the population was not affected by tourism development it depended on children education, civil war, and good transportation.

The average 2.50 of the respondents agreed due to development of tourism does not make crime rate increase in Thandaunggyi area. As the survey result, 33.5% of the respondents are neutral. 32.7% and 17.0% of the respondents disagreed and strongly disagreed crime rate is increased due to the development of tourism. The respondents gave feedback that most of the crimes have happened among the local people when they were drunk. 2.7% and 13.5% of the respondents gave feedback that the increase in crime rate is due the tourism development.

The mean value 3.15 of respondents agreed that their people cultural changed by development of tourism. The 13% and 37.7% of the respondents strongly agreed and agreed on tourism cultural change due to the development of tourism. 17% of respondents are neutral. 15.2% and 17% of the respondents disagreed and strongly disagreed because some of the local people worked in other cities and when they came back to their native town, their cultural norms were already changed. They believed that tourism itself effects on cultural change.

4.3.1 Impacts of Tourism Development on Thandaunggyi Area

The number of international and local tourists who visit to Thandaunggyi has been increased from the late 2010 to nowadays comparatively. Tourism is one of the important sectors for the area which represents as the main source of income for some community people. The major economic impact has been changed along with social and cultural change. Income level of local people has also been increased significantly. Not only this, it has diversified the income sources of local people too. Employment opportunities were increased for local community. The public infrastructure was improved at that area. There are many positive direct and indirect impacts there. However, the significant negative economic impacts of tourism development are increased land and housing price.

The positive environmental impacts of tourism development are being in the critical form of tourism, locals have to use it as a window to spread awareness of their

cultural values far and wide. The income that people earn from this sector should be used in different generating activities for sustainability of income such as giving due care in maintaining the region's ecological diversity and ecosystem. Thandauggyi has developed in a suitable form of tourism, appropriate for the hill side environment. The present form of tourism development has not generated any serious environmental impacts with careful guidance and management of community leaders who are the members of TTDWG has developed appropriate rules and proper plans and it has already started mechanisms to apply strict standards and regulations. After gaining the knowledge on the environmental related issues, local community has actively involved in the campaign of garbage collection and preservation of historic buildings and monuments in Thandauggyi.

The social impact of tourism development refers to changes in the quality of life of residents of tourist destinations. Social impacts not only benefit for the development of tourism but also interaction between residents and visitors and promote social transformation. The social and cultural impacts of tourism are the way in which tourism is contributing to change in value system, individual behavior, family relationship, life style, safety level, moral conduct, religion, language, interpersonal relationship at the destination. These social impact effect on the local people of host communities of their direct and indirect association with tourists. Firstly, tourist purchasing some goods or services from the local people. Secondly tourist and local people find themselves side by side and thirdly tourists come face to face with the object of exchanging information and ideas. This third situation is more important for international understandings. The demonstration effect is also an aspect of the direct social impact of tourism. Tourist influence the behavior of the host population. The local people tend to observe and learn the life style of the richer visitors from affluent societies and try to emulate their way of life. Though there were many positive impacts on social and culture by the tourism sector no significant negative impacts by it such as crime, drug abuse, and gambling.

CHAPTER V

CONCLUSION

5.1 Findings

The tourism sector in Myanmar is currently experiencing significant growth and has been identified as a priority sector in the government's 'Export Strategy'. Tourist arrival to Myanmar is increased year by year. The status of tourist arrival is slightly increased from 2006 to 2012. However, tourist arrival is sharply increased in 2013 and reach 3,551,428 at the end of 2018. Yangon and Mandalay are the main entry points for tourist as the transportation is convenience for tourist. Most of the tourist come from Asia, West Europe, East Europe, North America, Oceania, Other Americas, Middle East and Africa. Among them, tourist from Asia is largest portion and Africa is lowest portion. Given the variety of unique tourism experiences Myanmar has to offer, it has the potential to contribute significantly to employment creation and economic growth.

This country is finally emerging from decades of ethnic conflict, authoritarian rule and economic isolation, it is, and will remain for some time, a high-risk country with poor governance. Responsible business conduct in the tourism sector in Myanmar therefore requires enhanced due diligence to determine what impacts business activities may have on society, including on human rights. Ministry of Hotels and Tourism is implementing community-based tourism development project as an initiative for the progress of tourism at designated areas nationwide and on course of fostering awareness among local community of the importance of tourism and its economic values, social- cultural and political. Thandaunggyi is one of the pilot projects of community tourism and peace building in post-conflict area in Myanmar.

Despite the work and potential of the industry to contribute much to the national development, it remains largely on the sidelines of the formal process at the international level. Engagement, consultation and participation of a wide range of stakeholders should form the basis of tourism development projects from the very start. This is particularly important in ethnic minority and post-conflict areas where it

is essential to take the time to engage directly with as wide a range of stakeholders as possible to get a more complete picture of the conflict and communal dynamics, and to understand how local people would like to see the destination opened to tourists and benefits shared.

This paper study about tourism development of economic impacts, environmental impacts and socio-cultural impacts in Thandaunggyi. Findings of this study show that development of tourism in Thandaunggyi area has created both positive and negative Development of Tourism. Employment results an increase in income of the local community and facilitates uplifting standard of living. Increased women's participation in economic activities, their socio-economic empowerment and awareness about education are significant socio-cultural impacts of development of tourism in this area. The negative impact of tourism development of tourism increases land price and in Thandaunggyi area.

Communication infrastructure between Thandaunggyi and Taungoo has been improved throughout these years. Government has also constructed internal roads in this area maintained by government itself. To examine the ways in which local community wants to get involved in tourism. According to the surveys local community has a high desire to get involved in development process in this area and believe that recent development of tourism has not only given them a chance to get involved but also opened opportunities for socio-economic development. Thandaunggyi community received tour conductor and hospitality training, product development training and workshop on tourism impacts.

Government policymakers with local working group TTDWG (Thandaunggyi Tourism Development Working Group) formulate policies, generally follow a closed-door approach in decision making and seek suggestions from locals. Even during implementation phases, locals can easily express their suggestions as local government officials and community leaders were involved in decision making process. Therefore, local people feel that they are totally accepted from development process which is being developed for them. Local community of Thandaunggyi also believe that this accepting is one of the main reasons for getting proper benefits.

Major findings of this research are precisely summarized according to economic, environmental and socio-cultural impacts. It is found that development of tourism brings economic benefits to local community in the forms of employment opportunities, increase in income of development of small and medium size

enterprises, environmental awareness and increase in land price. However, one of the major findings is that economic benefits are evenly distributed among local people.

The study identifies significant changes in socio-cultural and people's perception about education, women's empowerment and attitude of people caused by demonstrations. Local people now realize importance of education and treat education as an effective tool to avail better employment opportunities. Women are now getting involved in tourism related jobs and businesses, enjoying more decision-making power and are playing active roles in family and society. Fortunately, demonstration effects are stay originality and cultural heritage of the host community.

As tourism sector develops, local community starts to aware the importance of maintaining natural resources. There are always pros and cons associating in the development of Thandaunggyi Tourism Sector. The environment can be devastated by the overconsumption of natural resources and waste disposals. Thus, local people begin to manage the disposal of wastages.

5.2 Suggestions

As Thaundaunggyi township is a hilly region resort, it is a designated place for leisure tourists and business meetings. In this situation, TTDWG must facilitate those people and groups with traditional food and dance to promote the tourism development. Traditional weaving will soon be extinct if it has not been properly maintained. The display of weaving industry and its products can be displayed as part of tourism package to attract the tourists. This can contribute increase in income of women and empowering them in the sector.

Information of travel and local update situation related pamphlets and fact sheets must be in placed in B&B and local restaurants. Furthermore, warnings and land direction signs should be erected because it can be helpful for trekking tourists.

According to the study results, there are many young people who have recently graduated from high school (matriculation). They are the important human resource for Travel & Tourism sector. According to them, they would like to contribute to community development by involving as an educated person. So, T&T trainings should be offered for them strategically and systematically.

The local community would like to extend their road connection from Thandaunggyi township to Leik Tho, Kayar State. In order to construct road between those areas, the local situation must be stable and conflict should not be occurred.

According to the study results, tourism sector contributes various positive impacts, thus, everyone has responsibility to maintain those positive impacts to be implemented sustainably. At the same time, negative impacts may also arise if the management has not been carried out properly. As a good citizen, everyone has to involve actively to stop the negative impacts for the betterment of tourism development in Thandaunggyi, Myanmar.

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Appendix

Questionnaires Survey for “The Environment, Socio-Economic and Culture Impacts of Tourism Development”

The information which collected from this survey will be used only for my thesis of Master of Development Study Program. These information will not be shared others.

Thank you for your response.

Session (1)

Sr.	Question	Answer
1	Name	
2	Sex 1 – Man 2 – Woman	
3	Age Group 1. >20 2. 21 -40 3. 41-60 4. 61+	
4	Education Level 1.Primary 2.Secondary 3. High School 4. Graduate 5. Post Graduate 6. Others (Specified) (including illiterate)	
7	Occupation 1. Dependent/Unemployment 2. Orchard 3. Government Staff 4. B&B owner 5. B&B employee 6. Owner of restaurant 7. Owner of Grocery / store 8. Motorcycle Carrier 9. Restaurant’s employee 10. Community leader 11. Religious leader 12. Others (Specified)	

Session (2)

6	Does your jobs / business connect with tourism? 1. Yes 2. No	
7	Do you main earn main income from tourism? 1. Yes 2. No	
8	Does anyone of your family member work in tourism? 1. Yes 2. No	
8(a)	If the answer is yes – How much does the person earn monthly from tourism?	
9	Are you native of Thandaunggyi or are you immigrate from others regions? 1. Yes 2. No	

Session (3)

Economic Impact of the Tourism Development.

No.	Questions	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
11	Resident's income increases due to development of tourism.					
12	Resident's Job opportunity are increase due to development of tourism.					
13	Local product have sale increase due to development of tourism.					
14	Local housing and land price are increase due to development of tourism.					
15	Local product and transportation costs are increase due to development of tourism					
16	There is no regular income for those who working in tourism sectors.					

Session (4)

Environmental Impact of the Tourism Development.

No.	Questions	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
17	Resident receive knowledge to protect natural resources and environmental by tourism sectors.					
18	Resident's receive good practices on waste disposal through development of tourism.					
19	Road transportation accessible is improve due to development of tourism					
20	Due to the increase number of travelers both domestic and international distressed local people worship services					
21	Increase number of traveler's waste disposal effect to environmental pollutions.					
22	Increase local resources (orchid and honey etc... production due to development of tourism.					

Session (5)

Social-culture Impact of the Tourism Development

No.	Questions	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
23	Due to the development of tourism, young people would like to study more on English, Computer and vocational training for tourism.					
24	Due to development of tourism, job opportunities are increased so that migration of young people rate is reduced.					
25	Community living standard is improved due to development of tourism.					
26	Due to development of tourism, immigrants is higher than before in Thandaunggyi area.					
27	Due to development of tourism crime rate is increased.					
28	Due to development of tourism cultural change.					