

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

**STUDY ON REQUIREMENTS OF TOURISM
DEVELOPMENT IN MYANMAR**

**MIN MAUNG SOE
EMDevS - 37 (14th Batch)**

AUGUST, 2019

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

**STUDY ON REQUIREMENTS OF TOURISM
DEVELOPMENT IN MYANMAR**

**MIN MAUNG SOE
EMDEVS - 37 (14TH BATCH)**

AUGUST, 2019

YANGON UNIVERSITY OF ECONOMICS
MASTER OF DEVELOPMENT STUDIES PROGRAM

**STUDY ON REQUIREMENTS OF TOURISM
DEVELOPMENT IN MYANMAR**

**A thesis submitted as a partial fulfillment towards the requirements
for the degree of Master of Development Study (EMDevS)**

Supervised by:

Dr. Tha Pye Nyo
Professor
Department of Economics
Yangon University of Economics

Submitted by:

Min Maung Soe
Roll No. 37
EMDevS 14th Batch
(2017-2019)

AUGUST, 2019

ABSTRACT

This thesis analyzes to seek the requirements of tourism infrastructure and linkage of tourism infrastructures and tourism development. The subject of this paper is the consideration of relationship between the available requirements and the achieved level of tourism development. This paper used the two types of data; primary data and secondary data. Secondary data are collected from the publications of Ministry of Hotels and Tourism, the official website of Ministry of Hotels and Tourism, the annual and monthly paper of World Travel and Tourism Council and other tourism books by experts. And the paper collected the primary data by surveying the tourists who are departed to abroad from the Yangon International Airport. This paper is studied by using the demographic data of the tourists and destinations which have been favorite visiting in Myanmar. It was also found the satisfactions of the tourists are satisfactory, and the needs of the Myanmar tourism infrastructures in future are shopping malls and entertainment. It is noted that tourism infrastructure development is a factor that largely contributes to increase in the level of tourism development.

ACKNOWLEDGMENTS

I would like to thank Department of Development Studies of Yangon University of Economics and Ministry of Hotels & Tourism of Myanmar for making it possible for my development studies dream. It was truly an experience of a lifetime!

I would like to express my gratitude to Professor Dr.Tin Win ,Rector of the Yangon University of Economics , Professor Dr.Nilar Myint Htoo , Pro-Rector of Yangon University of Economics for their permission and giving me the opportunity to tzke the study.And then I also would like to thank Professor Dr. Cho Cho Thein (Head of department, Yangon University of Economics) for her guidance not only for the classroom lectures but also for this thesis.

I would also like to thank professor Daw Tha Pye Nyo for her willingness to guide me with her patience and expertise. Moreover, I deeply thank to all Professors from EMDEVS for their patience, and encouragement for me during two years of studying.

I would like to thank my classmate from EMDEVS 14th Batch for their encouragement and friendliness during the two years of EMDEVS programme.

Last but not least, I could not have completed this work without my wife, Hnin. Her unending sacrifice, and at times, much needed encouragement helped me complete this seemingly impossible task. I thank her for her willingness to support me in this and all my endeavors.

TABLE OF CONTENTS

	Page
ABSTRACT	i
ACKNOWLEDGEMENTS	ii
TABLE OF CONTENTS	iii
LIST OF TABLES	v
LIST OF FIGURES	vi
LIST OF ABBREVIATIONS	vii
CHAPTER I INTRODUCTION	
1.1 Rationale of the study	1
1.2 Objectives of the study	2
1.3 Method of study	2
1.4 Scope and limitation of the study	3
1.5 Organization of the study	3
CHAPTER II LITERATURE REVIEW	
2.1 Origin and meaning of tourism	4
2.2 World economy and tourism industry	5
2.3 Concept of tourism requirements	7
2.4 Contribution of Tourism to Economy	15
2.5 Review on previous study	21
CHAPTER III TOURISM SECTOR IN MYANMAR	
3.1 Tourism policy and Tourism law	24
3.2 Tourism Contribution to Myanmar economy	32
3.3 Importance of tourism to Myanmar Economy	33
3.4 infrastructures in tourism sector	38
CHAPTER IV ANALYSIS ON SURVEY DATA	
4.1 Survey Profile	43
4.2 Survey Design	43

4.3	Survey Result	44
4.4	Strengths and Challenges of the Myanmar tourism	53
CHAPTER V	CONCLUSION	
5.1	Findings	58
5.2	Suggestions	60

REFERENCES

LIST OF TABLES

	Page
Table 3.1 Total tourism Contribution to GDP	23
Table 3.2 Tourist arrival by region and entry points	25
Table 3.3 Tourist Arrival by Nationalities	26
Table 3.4 Yearly income from tourism sector	27
Table 3.5 FDI in Tourism	28
Table 4.1 Age classification of correspondents	33
Table 4.2 Nationalities of respondents	33
Table 4.3 Employment status of respondents	34
Table 4.4 Main reason for travelling	34
Table 4.5 Types of tour by Nationalities	34
Table 4.6 Visited destinations of respondents	35
Table 4.7 Accommodation used of respondents	35
Table 4.8 Responses for the tourism requirements	37
Table 4.9 Factor statistics/loadings of destination image	39
Table 4.10 Mean value of the evaluation of destination image	40
Table 4.11 Recommendation result of respondents	41

LIST OF FIGURES

	Page
Figure 2.1 Types of tourism infrastructure	10
Figure 2.2 Components of tourism infrastructure	11
Figure 3.1 Direct Contribution of Tourism to GDP	23
Figure 3.2 Int'l tourist arrival to Myanmar by year	27

LIST OF ABBREVIATIONS

ASEAN	Association of Southeast Asia Nation
DICA	Directorate of Company Administration
GDP	Gross Domestic Product
MOHT	Ministry of Hotels & Tourism
UNWTO	United Nation World Tourism Organization
WTTC	World Travel and Tourism Council

CHAPTER I

INTRODUCTION

1.1 Rationale of the study

Myanmar's tourism industry has become one of the fastest growing in the country. The direct contribution of Travel & Tourism to GDP was 2.7% of total GDP in 2017, and it was forecasted to rise by 5.2% of total GDP in 2018, according to an estimate from the World Travel and Tourism Council. The WTTC also forecasts in its 2018 business outlook for the tourism industry that the sector's total contribution to Myanmar's GDP will increase by a further 2.9% per annum through to 2028.

Myanmar had the least amount of tourist arrivals of any ASEAN country at just over three hundred thousand in 2010. In comparison, Laos had 1.2 million tourists, and Thailand had 14 million. However, the number of tourists visiting Myanmar has increased 30% from 2011 to 2012. 2012 marked the first year over 1 million tourists visited Myanmar. In 2015, Myanmar welcomed 4.68 million tourists, over a 50% increase from the 3.08 million that visited the country in 2014. According to the Ministry of Hotels and Tourism, Myanmar is projected to receive 5 million tourists in 2019. Myanmar is expecting to host 7.5 million tourists in 2020.

The sudden boost in arrivals in recent years may require more development in other sectors. The Experts told that “Tourist numbers have risen considerably in recent years due to the fact that Myanmar has so many hidden paradises. However, the rapid influx has put a strain on supporting infrastructure such as airport capacity and so on.

However, the existing infrastructure has not been in proportion to the current travel demand, with only 30 per cent of the rooms met international standards, hundreds of hotel and guesthouses are in poor quality. The roads to some tourist destinations have renovated slowly. Credit cards have not widely accepted in hotels and restaurants. Myanmar's tourism continues to suffer shortages in the number of high-qualified tour guides and tour companies, capacity of domestic airlines.

For developing the industry, the government must ameliorate the tourism infrastructure in all aspects, encourage new foreign investments and enact the new existing law (replace the law in 2018) which has proposals to improve investor protection, financial infrastructure, super infrastructures and requirements.

The tourism industry provides many opportunities for small businesses, such as travel guides, hotels and hostels, restaurants and tour operators. The significance of tourism on local businesses depends on many factors including how well the business can market itself to its target audience.

The economic benefits of tourism to a country affect many areas of enterprise even if they are not directly in the tourism industry. For example, if your small business sells outerwear and you're located in a cold climate, you may find that tourists make up a significant portion of your customers simply because they don't have the proper clothes for their trip when they arrive. Many people who live in warm climates don't own winter parkas, for example.

This thesis aims to assess tourists "perceptions towards quality tourism services provided at destination in Myanmar, and to measure tourist satisfaction by examining the impact of quality tourism product on overall tourist satisfaction.

1.2 Objectives of the Study

The objectives of the study are to identify the current situation of the tourism industry in Myanmar and to examine the requirements of Myanmar tourism development based on the responses of visitors.

1.3 Method of the Study

The study used descriptive study in Yangon region, based on the primary data (Survey in Yangon international airport, secondary data: Ministry of Hotels & Tourism (Myanmar)' data, UNWTO books and data, WTTC data, and other related tourism books, Journals, reports and websites. The primary data survey will be emphasized on the international travelers who are visiting to Myanmar during the February to March tourism peak season in 2019.

1.4 Scope and Limitation of the study

The study emphasized the requirements for the tourism development and satisfaction of the tourists. And also study the nature and practices of tourist who were visited to and departure from Yangon entry point.

The scope of the study is based on the tourism trends from 2001 to 2018 and it will focus the inbound tourists from abroad.

1.5 Organization of the Study

The study is organized into five chapters: Chapter one includes the introduction and explaining the rationale of the study, objectives of the study, method of the study which will be using in the context, Scope and Limitation of the study and the illustration of the study contents. In the Chapter two reviews the origin of tourism , concept of tourism , Employment and Job creation in tourism, World Economy and tourism industry and Chapter Three will be represented about the situation of Myanmar Tourism , tourism contribution to Myanmar economy and importance of infrastructures in tourism sector. Chapter three, examine and analyses the result of primary data and secondary data. In conclusion chapter five, according to the finding of above chapter the study will be result the needs of tourism infrastructure for the Myanmar tourism development.

CHAPTER II

LITERATURE REVIEW

2.1 Origin and meaning of tourism

The tourism business is at least 2,000 years old. It began when wealthy citizens of ancient Rome, deciding they would rather spend their summers away from the city, took trips to the countryside and the coast.

A tourist industry up to cater for the Romans' travel and accommodation needs and for a while it thrived. But Roman tourism ended with its empire, and for hundreds of years the turbulent economic, social and military situation in Europe made frequent, safe travel out of the question.

During the medieval era, however, tourism again appeared thanks to a growing interest in pilgrimages. The organizers arranged the tourism basics of itineraries and places to eat and sleep. And from records such as Chaucer's Canterbury Tales, it's evident that many pilgrims were keen to relax and enjoy themselves as well as visit a holy shrine. In fact it's from the Old English word hāligdæg (holy day) that "holiday" derives.

But it was two other factors hundreds of years later that encouraged the start of more widespread and regular tourism: health and culture. Those who could afford to do so began to visit the spa and seaside towns of eighteenth century Europe to benefit from the spring waters and fresh air. Others, most notably the English, took educational holidays to countries such as Italy with the intention of studying paintings, sculptures and architecture, and visiting historical sites.

Straightforward leisure tourism took hold when industrialization across Europe gave rise to an affluent middle class with an increasing amount of free time. Entrepreneurs started to build tourist hotels with an infrastructure of roads, carriages

and ferries. Tourism began to take shape as an international industry.(2.Alhemoud, A. M., & Armstrong, E. G. Image of tourism attractions,1996)

The industry was popular and steadily successful from the early nineteenth century. But for the most part, it was expensive and limited to a small number of locations. Then everything suddenly changed. In the 1960s, a growing number of people had disposable incomes, and with this extra money came a desire for a different lifestyle. At the same time, reasonably-priced commercial aircraft were able to carry passengers to and from any airport in the world.(Journal of Travel Research, Spring, 1976–80.)

The Definition of Tourism varies source by source, person by person. There is no consensus concerning the definition of tourism. Nearly every each institution defines "Tourism" differently. But when it comes to explain it with the basic terms, we can sum it up as follows;

"Tourism is a collection of activities, services and industries which deliver a travel experience comprising transportation, accommodation, eating and drinking establishments, retail shops, entertainment businesses and other hospitality services provided for individuals or groups traveling away from home"

"The sum of the phenomena and relationships arising from the interaction of tourists, business suppliers, host governments and host communities in the process of attracting and hosting these tourists and other visitors" (Macintosh and Goeldner, 1904).

In order to prevent the disaccords to define "Tourism", UNWTO defined it as indicated below;

"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."(UNWTO)

2.2 World economy and Tourism industry

As one of the world's largest economic sectors, Travel & Tourism creates jobs, drives exports, and generates prosperity across the world. In our annual analysis

of the global economic impact of Travel & Tourism, the sector is shown to account for 10.4% of global GDP and 313 million jobs, or 9.9% of total employment, in 2017. The right policy and investment decisions are only made with empirical evidence. For over 25 years, the World Travel & Tourism Council (WTTC) has been providing this evidence, quantifying the economic and employment impact of Travel & Tourism. Our 2018 Annual Economic Reports cover 185 countries and 25 regions of the world, providing the necessary data on 2017 performance as well as unique 10-year forecasts on the sector's potential. 2017 was one of the strongest years of GDP growth in a decade with robust consumer spending worldwide. This global growth transferred again into Travel & Tourism with the sector's direct growth of 4.6% outpacing the global economy for the seventh successive year. As in recent years, performance was particularly strong across Asia, but proving the sector's resilience, 2017 also saw countries such as Tunisia, Turkey and Egypt that had previously been devastated by the impacts of terrorist activity, recover strongly. This power of resilience in Travel & Tourism will be much needed for the many established Travel & Tourism destinations that were severely impacted by natural disasters in 2017. While our data shows the extent of these impacts and rates of recovery over the decade ahead, beyond just numbers, WTTC and its Members are working hard to support local communities as they rebuild and recover. Inclusive growth and ensuring a future with quality jobs are the concerns of governments everywhere. Travel & Tourism, which already supports one in every ten jobs on the planet, is a dynamic engine of employment opportunity. Over the past ten years, one in five of all jobs created across the world has been in the sector and, with the right regulatory conditions and government support, nearly 100 million new jobs could be created over the decade ahead. Over the longer term, forecast growth of the Travel & Tourism sector will continue to be robust as millions more people are moved to travel to see the wonders of the world. Strong growth also requires strong management. (Journey to 2030, UNWTO, 2019)

The direct contribution of Travel & Tourism to GDP reflects the 'internal' spending on Travel & Tourism (total spending within a particular spending by government on Travel & Tourism services directly linked to visitors, such as cultural (e.g. museums) or recreational (e.g. national parks). The direct contribution of Travel

& Tourism to GDP is calculated to be consistent with the output, as expressed in National Accounting, tourists. The direct contribution of Travel & Tourism to GDP is calculated from total internal spending by ‘netting out’ the purchases made by the different tourism sectors. This measure is consistent with the definition of Tourism GDP, specified in the 2008 Tourism Satellite The total contribution of Travel & Tourism includes its ‘wider impacts’ (ie the indirect and induced impacts) on the economy. The ‘indirect’ contribution includes the GDP and jobs supported by: Travel & Tourism investment spending –an important aspect of both current and future activity that includes investment activity such as the purchase of new aircraft and construction of new hotels; Government 'collective' spending, which helps Travel & Tourism activity in many different ways as it is made on behalf of the Domestic purchases of goods and services by the sectors dealing directly with tourists – including, for example, purchases of food and cleaning services by hotels, of fuel and catering services by airlines, and IT services by travel agents. The ‘induced’ contribution measures the GDP and jobs supported by the spending of those who are directly or indirectly employed by the Travel & Tourism industry.(WTTC ,Tourism Barometer 2018)

2.3 Concept of tourism requirements

Tourism is an ever-expanding service industry with vast growth potential and has therefore become one of the crucial concerns of the not only nations but also of the international community as a whole. Infact, it has come up as a decisive link in gearing up the pace of the socio-economic development world over. It is believed that the word tour in the context of tourism became established in the English language by the eighteen century. On the other hand, according to oxford dictionary, the word tourism first came to light in the English in the nineteen century (1811) from a Greek word 'tomus' meaning a round shaped tool.' Tourism as a phenomenon means the movement of people (both within and across the national borders).Tourism means different things to different people because it is an abstraction of a wide range of

consumption activities which demand products and services from a wide range of industries in the economy. (Baloglu, S. & Brinberg, D. (1997).)

In 1905, E. Freuler defined tourism in the modern sense of the world "as a phenomena of modern times based on the increased need for recuperation and change of air, the awakened, and cultivated appreciation of scenic beauty, the pleasure in, and the enjoyment of nature and in particular brought about by the increasing mingling of various nations and classes of human society, as a result of the development of commerce, industry and trade, and the perfection of the means of transport". Tourism refers to all activities of visitors, including both tourists (overnight visitors) and 'same day visitors'. In general way tourism can be defined as the temporary movement of the people to destinations away from their usual place or normal habitat, the activities entered upon during their stay in those destination and the facilities developed to provide their requirements / needs. The study of tourism involves the motivation and experience of the tourists on the one hand, the expectations of and adjustment made by the local residents of the concerned area, and the role played by the several interceding agencies of moving, housing, feeding, and entertaining people as they go from a place of their habitat to another for business and or pleasure. The industry primarily incorporates five groups of activities, i.e., transportation, accommodation, Catering/retail, recreation, and travel related services. The main characteristics of tourism are as follows (UNWTO):

- A movement of people to different destinations having two key elements. One: the journey and two: the stay, both of which come off not within but outside the normal area or place of domicile and work.
- The movement is primarily of a temporary nature and for a relatively short duration making it different from migration.
- It brings about activities dissimilar to those of the host population of the place visited.
- The prime purpose of participation in tourism is by and large recreation and certainly not the purpose of seeking permanent

residence or employment remunerated from within the place visited and finally.

- Tourism in an abstract sense is basically a pleasure activity implying a use of readily disposable incomes and of free time and one's own free will.

Tourism infrastructure is the basis of tourism development and utilization of existing destination resources. Tourism infrastructure includes a large number of services, necessary to meet the needs of tourists and increase satisfaction during their stay at the destination [Volume 5, Issue 1 (8), 2016,Ecoforum].It is the consideration of relationship between the available infrastructure and the achieved level of tourism development and suggests that future tourism development depends on intensive investment in infrastructure and its modernization, as an important factor of development of the tourism sector.

Tourism infrastructure can be regarded as the physical elements that are designed and erected to cater for visitors. The strong relationship between tourism development and infrastructure has been theoretically established by a number of authors (Adebayo, Iweka, 2014). Some authors point to the difference between tourism infrastructure and superstructure, claiming that superstructure depends on infrastructure. Tourism infrastructure includes ancillary and complementary facilities, equipment, systems, processes, and resources necessary for the functioning of every tourist destination. This primarily includes roads, railways, airports, and the like, which make a tourist destination accessible for tourists. In addition, infrastructure includes health care systems, services, and public services. Building on infrastructure, superstructure includes building facilities, which exist only because of tourism activities. Their main purpose is accommodation and meeting the needs and desires of tourists, in the form of hotels, campsites, restaurants, sports facilities, and the like (Popesku, 2011).

Tourism infrastructure is the basis of tourism development, as well as a base for utilization of destination resources. The importance of tourism infrastructure is reflected in the fact that it can contribute to increasing the efficiency of production and distribution of tourism services, and, in some cases, such as remote destinations,

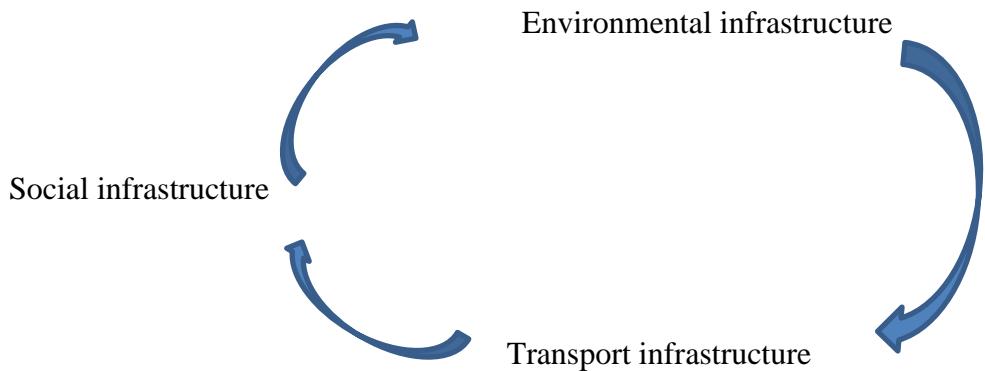
even increase the supply of tourism services. For tourists to be able to reach some tourist destinations, there should be the developed transport infrastructure, which is a precondition for consuming other tourism services of the destination itself. The arrival of tourists enhances the efficiency of human resources at the destination, as tourists require certain services in order to feel better during their stay at the selected tourist destination.

In particular, there is an increase in the demand for infrastructure services in terms of water supply, waste disposal, communication and electricity supply, as the necessary elements for comfortable functioning of tourists at the selected destination. Infrastructure is defined as the provision of public safety, transportation services, medical systems, financial systems, education systems, and other services involved in the population's, as well as in tourists' demand (Ritchie, Crouch 2005). As a component of the regional tourism product, tourism infrastructure is of special importance for long-term tourism growth and the general progress of tourist destinations in providing the required services to tourists. Literature provides different views on the number and type of components representing tourism infrastructure. Thus, according to the Tourism & Transport Forum (Tourism & Transport Forum, 2012), tourism infrastructure is the supply chain of transport, social and environmental infrastructure collaborating at a regional level to create an attractive tourism destination.

Transport infrastructure in this chain provides destination access to tourists from the international and domestic markets, and includes roads, airports, and railways. Social infrastructure relates to accommodation facilities in the form of rooms to accommodate tourists and other supporting physical structures for various kinds of activities and services that attract tourists. This infrastructure includes hotels, convention centers, stadiums, galleries, and other necessary facilities. Environmental infrastructure is a natural value, and refers to national parks, marine parks, and reserves which visitors can tour (Figure 1). In addition to these three types of infrastructure, tourism infrastructure includes the shared infrastructure, made of a network of regional, state, and national tourism organizations on the market where

there is a tourist destination, and is engaged in the distribution of tourism products (Tourism & Transport Forum, 2012).

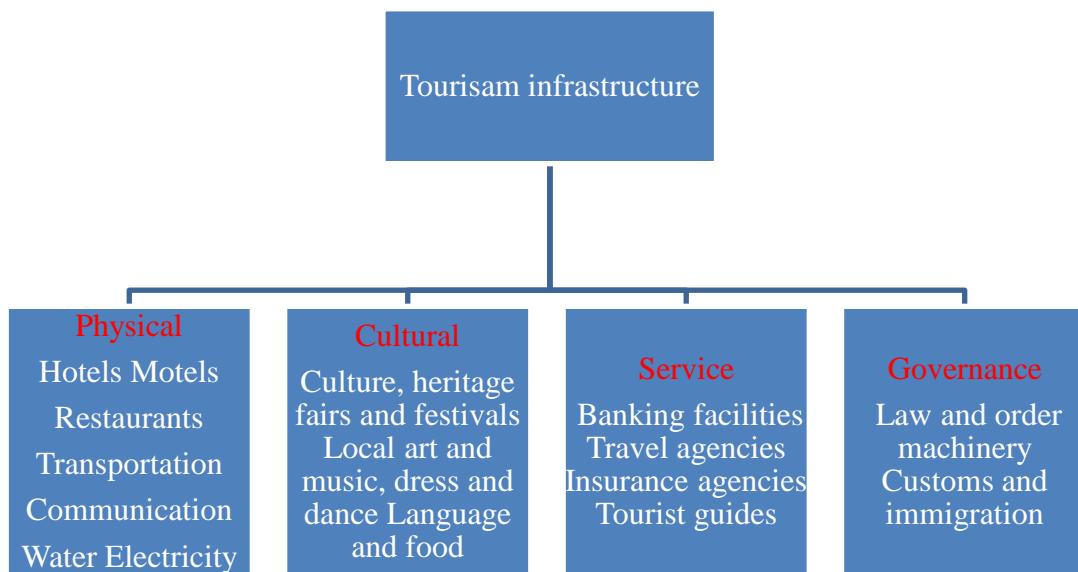
Figure 2.1 Types of tourism infrastructure



(Source : Tourism & Transport Forum (TTF), (2012) Tourism Infrastructure Policy and Priorities)

In addition to this classification, literature often points to the classification of tourism infrastructure into four categories, namely : 1. Physical (Hotels, Motels, Restaurants, Transportation, Communication, Water, Electricity); 2. Cultural (Culture, heritage, fairs and festivals, Local art and music, dress and dance, Language and food); 3. Service (Banking facilities, Travel agencies, Insurance agencies, Tourist guides); 4. Governance (Law and order machinery, Customs and immigration).

Figure 2.2 Components of tourism infrastructure



(Source : Raina, A., Ecology, Wildlife and Tourism Development: Principles, Practices and strategies)

The issue of ownership of tourism infrastructure, which is an integral element of tourism supply chain, depends on the part observed. Infrastructure in the area of tourism is based largely on investment, coming from the private sector, and this share reaches 78% of the total investment in tourism (Tourism & Transport Forum, 2012). Social infrastructure is financed mainly from the private sector, while environmental infrastructure belongs to the state and includes public goods. Transport infrastructure is mostly owned by the state, and it is directly responsible for investment in this area, as well as development. The formation of tourism infrastructure substantially contributes to increasing the complexity of the tourism phenomenon, which affects the increase in functional complexity and territorial, destination, competitiveness (Lovelock, 2013).

Today, enhancing the construction of tourism infrastructure concerns a large number of countries, wishing to achieve higher tourism results and its significant impact on economic development. Generating the effects of the overall development is conditioned by the way of managing the relationship between tourism infrastructure, tourism, and the local economy (Swyngedouw, 2000). It follows, then,

that both the state and public enterprises, and the private sector are responsible for the quality of infrastructure. Planning the sustainable development of tourism infrastructure in line with this requires overall development of basic infrastructure and facilities, along with all tourism facilities in a balanced way. (Smith (1994)) points out that the level of development and functional use of tourism infrastructure and lack thereof in the vicinity of tourist destination and in it are obstacles that can really affect the experience and satisfaction of tourists in respect of a certain tourist destination (Smith, 1994). After a visit to a tourism destination, tourism infrastructure has an important role in the tourist's overall experience and impression regarding a specific destination. General infrastructure of the destination and services provided represent one of the most important factors of overall tourism development.

Tourism offers a wide range of benefits, including economic benefits for countries attracting a large number of visitors, due to the money they spend not only on their actual stay, but also in local businesses. It also provides a large number of jobs for people working in the transport and hospitality industry, among others.

Moreover, tourism has the potential to improve relationships between nation states or businesses, to create opportunities for entertainment and recreation, and to improve the value of a currency. It can also open up cultural exchange opportunities, while for tourists, it can lead to improved happiness, well-being and education.

The transportation sector is concerned with helping tourists to get where they need to go, via the provision of transport. This may include providing them with the means to get to their intended holiday destination in the first place, but may also include assisting them with getting around after they arrive at their destination. Included within this sector are services related to road, rail, air and sea travel.

The accommodation sector is central to the travel and hospitality industry, because people travelling to different areas require somewhere to stay, rest, sleep and unwind. In fact, by many definitions, a tourist is only classed as such if their stay exceeds 24 hours and they use some form of overnight accommodation. Within this sub-section, there are a number of different components, ranging from the hotel industry to camping, hostels and cruises.(Baloglu, S. & McCleary, K. W. (1999))

The food and beverage sector has an interesting role within the tourism industry, providing tourists with essential refreshments at all stages of their travel experience, including during travel, when spending time in their chosen accommodation, and when they are out and about exploring the location they have travelled to.

In addition to catering for travellers' basic requirements, however, the food and beverage sector also offers them opportunities to socialise, meet new people and enjoy themselves. Some tourists travel to new locations in the pursuit of entertainment. Such travellers may be drawn to entertainment options that are not available in their home location, or they may simply require more general entertainment, which would be accessible almost anywhere in the world, as part of their trip. Entertainment attractions or venues are sometimes the main thing drawing travellers to a particular tourist location. On the other hand, many other entertainment offerings are set up to capitalise on existing tourism.

In the modern travel and hospitality industry, tourist information exists both online and offline. Examples of online tourist information include informational websites highlighting local attractions, tourist sites or facilities. Meanwhile, offline services include tourist information centres and literature produced by the tourist board. The retail industry and the travel industry are closely connected and most major tourist destinations will also provide shopping facilities. Shopping can even, in some cases, attract tourists in the first place, while the shopping sub-section of the entertainment sector also includes things like duty free shopping and local market trading. Tourist guides provide tourists with access to organised tours of local attractions, landmarks, educational buildings and other places of interest. In doing so, they are able to offer assistance, expert insight, and context, often making the experience more enjoyable, convenient and worthwhile for the tourist(s). (Alexandris, K., Kouthouris, C. & Meligdis, A. (2006))

Finally, there are also a number of industries that are either directly or indirectly connected to the tourism industry. These include industries based on actually connecting customers with travel services, as well as industries based on providing customers with important information that can assist them on their travels.

Some of the most notable related industries are detailed in greater depth below: Financial services can be linked to the travel industry in a number of ways, with the most obvious being the provision of insurance products, which offer financial protection in emergency situations, or in cases where medical treatment is needed. Additionally, financial services may be connected to things like currency exchanges.

Travel agents sell travel or tourism-related products to customers on behalf of suppliers. They generally receive a commission from suppliers and also offer travellers advice on the best travel products to suit their particular needs or preferences. Some travel agents also offer business travel services.

Tour operators tend to sell package holidays, which combine multiple travel and tour services into a single product. A package holiday might, for example, include charging tourists for flights, airport transfers, a hotel stay, and services from a local rep. It could also include holiday experiences or a set itinerary.

Online travel agencies, or OTAs, offer similar services to other travel agents, although these services are delivered over the internet, providing more of a self-service experience. Some of the most popular OTAs include Expedia, Booking.com, Kayak and lastminute.com. These OTAs may also double as metasearch engines.

Tourism organisations are essentially organisations that exist to look out for the tourism industry and act on its behalf. They may have influence over national tourism policies, might lobby governments in the interests of the tourism industry, and could also work to bring the various sectors together.

Finally, the travel industry also increasingly includes an educational component, with many people travelling to attend conferences or exhibitions, which are often centred around specialised topics. Additionally, schools and training programmes form part of this sub-section of the travel and hotel industry. (Anderson,W., & Sullivan, M. (1993))

2.4 Contribution of Tourism to economy

Tourism is one of the world's largest and rapidly growing industries. In the 21st century, global economy is driven by three major industries includes technology, telecommunication and tourism. Tourism is the collection of activities, services and

industries that deliver a travel experience including attractions, transportations, accommodations, eating and drinking establishments of retail shops, entertainment, business and other hospitality services provided for individuals or groups of travelling away from home.

Tourism and hospitality industries create many employment opportunities in different areas like accommodations, transportation, attractions sites. Therefore, the availability of skilled and trained manpower is a crucial element in the success of any tourism development plan or programme. However, the constraints of employment in tourism industry are unstable employment, low job status, long antisocial working hours and low pay. The immediate and most obvious consequences of such a situation is the difficulty of recruiting suitable staff and high staff turnover, these are costly to the success of the industry.

Indeed, less due attentions have been giving to employees working in tourism and hospitality sectors. However, staffs are the heart for excellent and prompt service delivery system. Thus, such staffs are arguably the most indispensable assets of the organization. The relationship between human resources and tourism can be expressed in two main aspects. First, tourism can only flourish if the industry can employ an adequate supply of good quality staff or sustainable workforce. The other issue is that the way in which staffs are treated by both managers and customers and vice versa should be in line with social equality and justice. Equally important, the quality of tourists' experiences and images in a destination is highly depending on employees' professionalism. Therefore, this is aimed to give summarized information on the issues of employment opportunities and challenges of tourism and hospitality and indicated the implication of the findings to concerned stake holders including, academicians, policy makers and business owners of tourism and hospitality so as to take actions to bring sustainable work force in the industry.

Tourism is also the main economic engines for nations with total contribution of 9.5% to global GDP and 8.9% of total employment in 2013. Tourism can only flourish if the industry can employ qualified staff or sustainable workforce which is the heart for excellent and prompt service delivery system. Thus, this review made to give summarized information about challenges and opportunities of tourism and

hospitality employment. Narrative review was used where selected and related articles, reports and studies of the topic are compared and summarized. Tourism and hospitality creates diversified employment opportunities in different sectors like accommodation, food and beverage establishments, transportation services, travel agencies, tour operation companies, natural and cultural attractions sites. The challenges are poor pay and working conditions, sexual harassment, discrimination, unequal treatment, low education and training, undemocratic and rigid corporate culture, seasonality and political instability which drastically reduce the number of visitors which in turn brings high employees' turn over. Concerned stakeholders including, academicians, policy makers and business owners of tourism and hospitality shall take actions to bring sustainable work force for the development tourism and hospitality sectors. (Bigné, E., Sánchez, M. I. & Sánchez, J. (2001))

The most important economic feature of activities related to the tourism sector is that they contribute to three high-priority goals of developing countries: the generation of income, employment, and foreign-exchange earnings. In this respect, the tourism sector can play an important role as a driving force of economic development. The impact this industry can have in the different stages of economic development depends on the specific characteristics of each country. Given the complexity of tourism consumption, its economic impact is felt widely in other production sectors, contributing in each case toward achieving the aims of accelerated development.

A major difficulty in defining the boundaries of the tourism sector is to ascertain what investment costs should be ascribed to the development of tourism. Although heretofore not treated by international agencies as a “sector” in national accounting terms, tourism entails a collection of goods and services that are provided specifically for visitors and would not have been provided otherwise.

Because of its interdependence with other sectors of the economy, it is difficult to analyze and plan for tourism. The lack of reliable statistical data hampers identification of the mechanisms by which tourism generates growth, as well as its potential for development. Yet, in those instances where analysis has been carried out and research has preceded planning, tourism's priority in competing for scarce

investment funds has been established. In these cases, long-term programs for tourism development have been designed.

Nature and heritage tourism development has investment needs that differ, in certain respects, from traditional tourist hotel development. There may be a greater need to improve access to the attraction site or facility, and for a mode of development that does not interfere with a sensitive habitat or historic area.

Three primary factors influence the level of nature and heritage tourism demand: overall tourism growth, the growth in specialty travel, and increasing awareness of and concern for the environment. Each of these factors is in turn influenced by a number of elements. Overall tourism, for instance, is expected to continue to grow more rapidly than world economic output as a result of factors such as population growth, rising incomes and employment, shorter work weeks in many parts of the world, and the increasing integration of the world's economies and societies. The rapid growth of specialty travel is fueled by some of the same factors, but there are a number of additional explanations: the boom in outdoor recreation and the new interest in health and fitness, for example. Environmentalism is another of the elements that have changed people's attitudes about how they should spend their vacations. (Bigné, E., Sánchez, M. I. & Sánchez, J. (2001))

The tourism sector in the Latin American and Caribbean countries contributes significantly to GDP earnings, though this contribution is not reflected in the domestic income and product accounts of most countries. In the Bahamas, tourism accounts for about one-third of GDP, and most sectors of economic activity are directly or indirectly linked to it. In Barbados, tourism is the leading economic sector, accounting for 15 percent of the GDP in 1992. In Jamaica, the tourism contribution to GDP was 13.4 percent in 1992, while in Mexico it was only 4 percent.

Not all tourism receipts are retained within the economy. In fact, there is an outflow of foreign exchange for some of the goods and services consumed by visitors, as well as for capital goods invested in tourism and for payments abroad. Import needs depend on the level of development and the degree of diversification of a country's economy. These needs are also dependent on the availability of substitutes

for imported products and on the qualitative level of the tourist supply in each country.

The value-added concept is particularly important when considering the impact of tourism in the Caribbean region. Value is added when a product is developed, processed, refined, or marketed in a manner that allows it to be sold at a higher price than the prices of the raw materials, services, and components bought for its production. Countries with large domestic agricultural sectors supplying tourist consumption are well positioned to achieve higher levels of value-added in the tourism sector.

When a country's natural resources are packaged by foreign tour operators and sold through sophisticated marketing techniques, a substantial portion of the value-added is created and captured by those tour operators and therefore not returned to the country. To increase the value-added of tourism, host-country businesses and residents must offer travel services such as packaged tours ("land services"), offering locally owned accommodations and providing the necessary means to visit natural areas.

The IDE offers one of the strongest socioeconomic arguments in favor of tourism development. It describes how income generated by the sector is distributed. The analysis can be undertaken at a spatial and at a functional level.

At the spatial level, tourists prefer to travel in regions with little industrial development. They also tend toward areas of little agricultural value. For these reasons, tourism can become a dynamic force in regional economies. Within a country, tourism demand originates in urban concentrations where the highest incomes are found. A percentage of such incomes is normally set aside for tourism in areas that are geographically different from the visitors' home base, reinforcing the process of internal income redistribution. Internationally, a portion of the tourism consumption by developed countries occurs in developing countries, favoring the process of international income redistribution.

At the functional level, the income generated tends to favor employment, which is estimated to contribute more to the total value-added of the industry than other factors do, because so much of tourism involves personal services. It has been

estimated that, worldwide, tourism directly or indirectly supports sixty-five million jobs, including hotel managers and staff, taxi drivers, tour operators, and shop attendants, among others. Secondary employment is generated in agriculture, industry, handicrafts, and services.

Tourism compares favorably with other economic activities as a generator of both employment and income, both directly and diffused through the economy. An study on new hotel development in the Caribbean estimates that every investment of US\$80,000 in the tourism industry in the region generates forty-one jobs. The same investment would create only sixteen new jobs in the petroleum industry and fifteen in metallurgy. According to the CTO, the 77,319 hotel rooms in fifteen Caribbean countries equaled 88,697 jobs, or almost 1.15 per room.

Tourism can make an important contribution to a country's balance of payments. The IDB estimates that in the Latin American and the Caribbean five-star hotels can generate US\$5.4 for each dollar spent in their operation. The figure for three- and four-star hotels averages US\$4.2.9 From an economic viewpoint, services performed in tourism are classified as exports. Tourism activity in the Caribbean does not usually require sophisticated technology, and can absorb more personnel without skilled training than other industries.(IDB report , 2016)

In 2013, Travel and Tourism's total contribution to the global economy rose to 9.5% of global GDP. In total, nearly 266 million jobs (8.9% of total employment) were supported by Travel and Tourism in 2013 (1 in 11 of all jobs in the world).

Tourism is extremely labor intensive and a significant source of employment. It is among the world's top creators of jobs requiring varying degrees of skills and allows for quick entry into the workforce for youth, women and migrant workers. In some countries, the contribution of tourism for employment is indispensable; for instance, India is the second largest employment generator in the field of tourism as large as 25 million jobs Chandrakanta Sahoo's cited in Dayananda. In Ethiopia, the total contribution of Travel and Tourism to GDP was 898.4 million (9.3% of GDP) and there was 2,291,500 jobs in 2014 (8.5% of total employment).

International experience demonstrates that tourism accounts for about one tenth of the labor (313 million) market in the world in 2017, In 2017, the Travel &

Tourism industry experienced 4.6% growth, compared to the global economy (3%). One in five new jobs was created by the industry.

Tourism is a major engine for job creation and a driving force for economic growth and development, as highlighted by recent figures. According to the World Travel and Tourism Council data, in 2015 tourism directly created over 107 million jobs (3.6 per cent of total employment representing 3 per cent of total GDP) and supported (directly and indirectly) a total of 284 million jobs, equivalent to one in 11 jobs in the world. By 2026, these figures are expected to increase to 136 and 370 million jobs respectively representing one in nine of all jobs worldwide.

Within G20 countries, China, India, Indonesia, Mexico and South Africa are expected to be among the fastest growing tourism and travel destinations. Among the non-G20 economies Kyrgyzstan, Myanmar, Tanzania, Vietnam and Zambia are expected to show the strongest growth. These statistics highlighting the significant contribution of tourism to employment and GDP speak for themselves. Furthermore, it is essential to make sure that the growth and development of this sector is sustainable, socially responsible and creates decent work opportunities.

Tourism is a major contributor to employment creation particularly for women, youth, migrant workers, rural communities and indigenous peoples and has numerous linkages with other sectors. As a consequence, tourism can lead to the reduction of poverty and to the promotion of socio-economic development and decent work. However, if tourism does not respect local cultures and is uncontrolled, unsustainable or not socially accountable, it can also have a negative impact on local communities, their heritage and environment, exacerbating inequalities. (WTTC annual report ,2018)

2.5 Review on previous study

A number of researchers have conducted studies on various features and characteristics of Myanmar tourism in order to evaluate on consumer perceptions. Due to the rise in the popularity of importance of tourism business, several researchers have reviewed the Myanmar tourism infrastructures based on the reviews and comments of visitors.

Among them, there are an effective and efficient research on the “Explaining Tourists Satisfaction And Intention To Revisit NHA TRANG, VIET NAM” by TRAN THI AI CAM ,Master candidate of The Norwegian College of Fishery Science (May,2011). The first purpose of the thesis is to find how visitors evaluate the quality of different facets or attributes of a destination image of Nha Trang, how satisfied they are with Nha Trang, loyalty intention to revisit and willingness to recommend Nha Trang to others. The second is to investigate what “image” is most important to explain global satisfaction with visiting Nha Trang. The third is to investigate how perceived quality, satisfaction and other motivational or dismotivational factors (e.g., demographic characteristics, variety seeking) influence loyalty intention to revisit and willingness to recommend to others.Nha Trang is identified as one of the 10 tourism centers of the whole country . It advantages are based on unique service.

In this study, the international tourists reported that they had strongly positive interesting the local food toward visiting Nha Trang as a destination . It is consistent to previous studies on food and enjoyable holiday relation.

By the result, In addition, environment and culture & social are slightly attractiveness to tourists visiting Nha Trang (the mean value was 5.27 and 5.05 respectively). Beside that, the causal effect environment and culture & social on satisfaction are significant. It is logical and similar to previous studies. As mentioned above, Nha Trang city is an international marine tourism center which cultural value and humanity is appreciated, environment is quite clean, a man is gentle and courteous. Moreover, the wonderful natural scenery of the bay, ocean, mountains, rivers and diverse marine ecosystems are more attractive to tourists. Although other places have natural resources, it is not enough attractive about cultural and social . Those results confirms the findings about destination image attracted Chinese tourists in Vietnam .

However, the findings showed that tourist leisure & entertainment and infrastructure & accessibility were less quality and value associated with Nha Trang . In the empirical survey, international tourists complained that they were invited with insistence and follow them. Moreover, snatch and run assets of travellers are still happened. In addition, tourism products are still limited, not satisfied tourists' need.

This findings support argument of Gratton & Taylor, 1987 and Littrell et al., 1994 that tourists not only invest time toward shopping during their travels, but they also spend approximately one-third of their total tourism expenditures on retail purchases.

In particular, the study tested which factors are most important in explaining general evaluation or satisfaction with Nha Trang as a destination. Specific, international tourists were satisfied with Nha Trang as a beauty of scenery; islands; attractiveness of city; quality of foods, variety and uniqueness of foods; festival/event, friendliness and hospitality of people in Nha Trang. However, they were not satisfied as public transport; quality of roads; nigh life; shopping in Nha Trang. This findings also seem to be accordance with the above findings. This indicates that Nha Trang seems to be a destination for those who want to discover and experience own culture characteristics, unheard-of to things and special food in Nha Trang. This results was accordance with the previous finding in the literature that explained the significant relationship between destination image and satisfaction .

As expected, the results in this study confirmed the positive relationship between destination image/perceived quality and tourists satisfaction; and the similar relationship between satisfaction and intentional loyalty toward intention to revisit and recommendation. It is logical because if the tourists feel that the general quality of the different facets of Nha Trang is good, they are satisfied with their travel. When they are satisfied, they want to recommend Nha Trang to others and have intention to revisit Nha Trang. It is accordant with studies on satisfaction in the recent years.

Based on the findings of this study, several implications could be made to promote and increase international tourist satisfaction and intentional loyalty toward recommend to other and revisit to Nha Trang. This study has shown that the environment, local food and culture & social have a significant relationship with the satisfaction of tourists. This result can be useful to the tourism planners and marketers focus more on enhancing, improving and maintaining factors that contribute to tourists satisfaction. For environment, local authorities and planners should educate citizen to have a sense of protect life environment and tourism environment; behave

to tourists culturally, friendly and condescending. For local food and culture & social, marketers should extend many kinds of tourism product such as swim underwater, climb up a mountain, casino, modern dance hall, building many shopping ward, eating and drinking, music and song place, so on. Especially, holding common people festival, eating and drinking cultural festival, classical drama. Moreover, holding many tours of island tourism and traditional village tourism. In addition, the findings have indicated that tourist leisure & entertainment and infrastructure & accessibility have not a significant relationship with the tourists satisfaction. For infrastructure & accessibility, the marketers may need some effort to improving in public transport facilities, providing quality service of hotel; special events; developing tour with diversity of activities at night to attract to international tourists such as singing & dancing, theatres, camps in the countryside or music camps in ancient houses. For tourist leisure & entertainment, planners should be training a professional staff and using English fluently follow service standards in over the world. Establishing a group with militia and police who can speak English fluently to solve to complain of international tourists and guarantee international tourists' safe in tourism area. According to the above paper, the development of tourism infrastructures are depended on the volume of effective and efficient tourism satisfactory, and if the country has an easy and good access for tourist, they will visit to the specific destination. This was directly linked to the tourism infrastructure and tourist satisfactions. The study contributes to the literature on tourists satisfaction as well as intention to revisit and intention to recommend measurement. It also contributes to practices. (TRAN THI AI CAM, 2011)

CHAPTER III

TOURISM SECTOR IN MYANMAR

3.1 Tourism Policy and Tourism Law

After taking over the State on 18th September 1988, the Governments: state Law and order Restoration Council (SLORC) and State Peace and Development Council (SPDC) adopted the market-oriented economic system in Myanmar. The Governments made effort to expand tourism sector by given priority as very potential economic activities of Myanmar. Thus, new regulation; Tourism law 1990 was promulgated in June 1990. The SLOR/SPDC Governments had implemented the policies of tourism development. Being recognized and convinced that tourism industry can benefit the economy within short period, therefore, established the Ministry of Hotels and Tourism (MOHT) in September 1992. Since then, the tourism industry was systematically and firmly established following the new the Tourism Law (1993) by formulating Directorate of Hotels and Tourism and the Myanmar Hotels and Tourism services. And The Government of The Republic of the Union of Myanmar is laid down the newest Tourism Law (2018) and formed the state and regional tourism committee for supervising the all tourism business and implementing the tourism development activities within the related region. (Jeffrey Hays,2014)

The overarching legal directives for tourism in Myanmar are enshrined in the 1993 Myanmar Hotel and Tourism Law. The objectives of the Law are: (i) systematic development of the hotel and tourism industry; (ii) enable tourists to observe Myanmar cultural heritage and natural scenic beauty; (iii) prevent destruction and damage of cultural heritage and natural scenic beauty due to the hotel and tourism industry; (iv) contribute to international friendship and understanding through the hotel and tourism industry; (v) develop technical knowledge relating to the hotel and

tourism industry and to open up more employment opportunities; and, (vi) provide security and satisfaction for tourists. The Law defines the functions and duties of MOHT, provides guidance on procedures for tourism investment and licensing, and sets out prohibitions, penalties, and grievance redress procedures. Orders for the licensing of hotels and lodging houses, tour operations, tour guides, and tourist transport businesses were reviewed in 2011. Articles on the establishment of outbound tourism services for Myanmar citizens and guidelines on social and environmental safeguards have yet to be developed.(MOHT,2011)

The recently approved Labor Organization Law and Settlement of Labor Dispute Law,as well as the draft Minimum Wage Law, safeguard the rights of tourism workers to organize and seek fair wages and safe working conditions. Other recently updated laws and policies highly relevant to tourism include the 2012 Foreign Investment Law and the 2012 Myanmar Responsible Tourism Policy.

The 2012 Foreign Investment Law and its associated Notifications broadly promote foreign investment to provide financial and technical resources needed to fulfill national development objectives. Priority sectors include transportation, energy, finance, education, manufacturing, and service industries (e.g., tourism) that maximize job creation for Myanmar's citizens. Foreign investment must be scrutinized by the Myanmar Investment Commission to ascertain compliance with the Law and verify financial credibility, economic justification of the enterprise, appropriateness of technology, and environmental safeguards. The Law and Notifications clarify permitted activities for foreign investors in the tourism sector, which activities require a joint venture, and provide details on regulations and procedures on applying for an investment license. Clarification on land use, transfer of shares, tax incentives, remittance of foreign exchange, and taking of security on land and buildings is also in the Notifications.

Myanmar's Responsible Tourism Policy presents the national vision for tourism, nine aims and 58 action points that will guide implementation of the policy. The vision and aims are the foundations of the Master Plan and are elaborated in Section II of this document. A follow-up process is underway to develop and

implement policy guidelines for engaging local communities in tourism, including minimum standards for community involvement.(MOHT.2013)

Following the adoption of the above Laws and the Responsible Tourism Policy, there is a need to review the 1993 Myanmar Hotel and Tourism Law to determine where appropriate amendments are needed. Priority issues include a review and recommendations on how integrated resorts with gaming and casinos could better align with the vision and aims of the Responsible Tourism Policy and defining procedures to establish businesses that manage outbound tourism for Myanmar citizens wishing to travel abroad.

As a signatory to several international conventions and agreements,¹⁹ GOM is committed to enacting necessary legislation and regulatory measures to ensure that tourism-related projects conform to international standards and incorporate sound environmental and social safeguards.

The Ministry aimed to implement the eight objectives as a goal for the tourism and other related activities;

- To support Myanmar as an international tourist destination by creating domestic and international markets effectively;
- To protect the rights of tour operators and tourists, and comply with their obligations;
- To ensure the quality and safety of tourism services;
- To enhance coordination and cooperation for the development and management of the tourism sector;
- To create employment opportunities and develop human resources by enhancing the awareness of tourism;
- To develop responsible tourism activities that will contribute to the country's sustainable development, eco-tourism, and conservation of the natural environment;
- To develop local business, small and medium enterprises based on tourism and economic opportunities for local communities, as well as Community-Based Tourism(CBT);

- To coordinate and cooperate with local and international institutions and tourism experts in conducting research for tourism development.

And also made the six policies for the future paths of the Ministry and tourism industry as well;

- To be the most important contributor to the national economy;
- To preserve and conserve natural environment, traditional heritage and custom of the local people in order to sustain the development of tourism industry in Myanmar;
- To develop socio-economy of the people and private sector by means of tourism development;
- To implement the regional and international contracts for the good of the national interest;
- To contribute to the peace process by developing tourism sector;
- To develop sustainable and inclusive tourism:

The Myanmar Responsible Tourism Policy was formulated from 22nd May to 5th June 2012. It included information gathering working sessions with public and private stakeholders from Yangon, Bagan, Inlay Lake, Kyaing Tong and Ngwe Saung. Nearly 350 stakeholders participated in the working session process. Concluding workshops were held with the private sector in Yangon and the public sector in Nay Pyi Taw to shape the policy formulation. In Nay Pyi Taw, on 5th June 2012 a draft Myanmar Responsible Tourism Policy was presented to the public and private sector and the responsibilities of each action point were discussed and approved by the participants.

The Myanmar Responsible Tourism Policy is led by the following to intend to use tourism to make Myanmar a better place to live into 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.

Action points are the drivers of the Myanmar Responsible Tourism Policy. They were densified during the information gathering working sessions, refined

during the public and private sector workshops and prioritized during the concluding conference of the policy formulation process. Each action point has a leading stakeholder that takes on the responsibility as a focal point. The focal point's responsibility is to coordinate and monitor the implementation of the action points.

Other stakeholders take on responsibilities an advisory, liaising or supportive role. The priorities of each action point were determined a participatory approach with the stakeholders. All action points were defined as priorities; nevertheless, they were distinguished in high, medium and low priorities according to the urgency and the ability to implement the action points, including potential budgets, human resource capacities, and the continuity of the process. Actions points (58) are assigned to the aims (9) of the Myanmar Responsible Tourism Policy.

The vision is supported by nine aims for achieving responsible tourism in Myanmar. The aims provide the directions for the action points that will guide the implementation of the Myanmar Responsible Tourism Policy. The following nine aims guide the Myanmar Responsible Tourism Policy: Integrate domestic and international tourism into the national economic policy, and develop linkages between tourism and other economic sectors to maximize benefits. Further strengthen cooperation mechanisms within the public sector and with the various tourism sector stakeholders (private sector, local communities and civil society).

Spread benefits in the community, encourage local entrepreneurship and civil society engagement to secure livelihoods of women and youth and to alleviate poverty. Preserve national Identity and encourage the development of cultural heritage and living cultures. Take leadership applying responsible environmental practices in flora and fauna, through adherence to environmental legislation and encouragement of conservation and sustainable usage of natural resources.

Reflex on the tourism products and experiences that are traditional character of Myanmar, as well as on the market demands and expectations visitors, with an interest supporting responsible and sustainable tourism development. Meet set standards of all tourism services on health, safety and security across the tourism Industry. Enhance the understanding and effective management of tourism from a national to a local level and with the stakeholders in destinations, Establish an

adequate and appropriate capacity building programme through continuing professional development, training and education. Apply ethical standards through tourism development to minimize social, economic and environmental harm.

Monitoring the Myanmar Responsible Tourism Policy is the responsibility of the Ministry of Hotels and Tourism. The Ministry of Hotels and Tourism also coordinates comments and suggestions on the policy document and reports on progress and challenges of implementing the policy. A report will be distributed to all tourist related Ministries and tourism stakeholders. The Myanmar Responsible Tourism Policy “living document” and the vision, aims and action points are not “Cast in stone”. It should be regularly adapted to the tourism development process in Myanmar. Review of the document should be continuous and in collaboration and exchange with broad range of tourism stakeholders. Action points and priorities are reviewed annually at the tourism stakeholder forum. The Myanmar Responsible Tourism Policy serves as a platform for the National Tourism Master Plan and regional development strategies for the major tourism destinations.

The Framework for Economic and Social Reform (Draft, Nov. 2012) states that “Tourism is potentially one of Myanmar’s most important sectors, with tremendous potential to contribute to greater business opportunities and balancing social and economic development if properly managed and developed. The Government of Myanmar will also ensure that a comprehensive tourism strategy is developed which is commensurate with the cultural and customary practices of local communities as well as the environmental and social endowment of the country”.

The National Biodiversity Strategy and Action Plan (2011) also includes community involvement in tourism. Objective 2 of the Action Plan towards Sustainable Ecotourism states: “Develop an ecotourism policy that ensures benefits for local communities.” In order to achieve these policy objectives, the Ministry of Hotels and Tourism and Myanmar Tourism Federation have decided to elaborate this Policy on “Community Involvement in Tourism in Myanmar” as a complementary and more specific policy for the promotion of community activities in tourism.

The Myanmar Policy on “Community Involvement in Tourism in Myanmar” was formulated from 30 January to 15 February 2013. It included the conduction of

eight workshops with approximately 250 stakeholders representing the public and private sector and local communities from Yangon, Bagan, Inle Lake, Kyaing Tong and Loikaw. On 15 February, the draft policy was presented and discussed at a conference in Nay Pyi Taw with more than 50 participants from the public and private sector. Subsequently the draft was sent to those stakeholders who were not able to participate in the conference and a request was made to receive further comments. On 20 March 2013, therevised draft was discussed again for final approval at the Ministry of Hotels and Tourism in the presence of Union Minister for Hotels and Tourism.

Ministry of Hotels and Tourism enacted the new Myanmar Tourism Law (2018) on September , 2018.The law is important for the emerging of the destination management organization and authority sharing from the union level to the regional level.The Myanmar Tourism Law actually came into effect on 17 September 2018. Its key objectives are to: support domestic and international tourism marketing activities with a view of promoting Myanmar as a choice tourist destination; protect the rights of tour operators and tourists; ensure adequate quality of tourism services and safety of tourists; enhance cooperation and coordination in developing and managing tourism; train hospitality staff and increase employment opportunities; promote responsible tourism and sustainable development support the tourism community and create opportunities for them; and promote research and development in the tourism sector to setting out the rights and responsibilities of tour operators and tourists, the Tourism Law also provides for the formation of the Central Committee on National Tourism Sector Development, and its functions and duties the formation of the Tourism Working Committee, and its functions and duties; the formation of the Inspectorate, and its powers in relation to the classification of tourism businesses and licenses and their respective applicable fees; formation of the Regional Tourism Working Committee, and its functions and duties the functions and duties of the Directorate ;the application of prior permits before carrying out building or renovation of tourists accommodation; and the licensing of entities and persons in the tourism sector (including tour operators, hotel businesses and other tourism related services). It should be noted that, under the Tourism Law, ‘Tourism’ has a broad definition of all businesses undertaken related to travelling, including businesses engaged in

offering tours, hotel and guest house accommodation, tourist guiding and other services related to travelling. It also includes ‘representative of such related businesses’.Therefore,Above law , regulation and policies are playing on the important role of the Myanmar tourism sector and the tourism sector will be used such guide lines for the tourism promotion in Myanmar.(MOHT'news and anouncement,2019)

3.2 Tourism contribution to Myanmar economy

Growing international interest in Myanmar, following the easing of sanctions by the West, has led to a period of unprecedented growth in the tourism industry and has seen visitor numbers soar to near 4 million last year from 300,000 in 2010, according to MOHT's figures.The World Travel and Tourism Council (WTTC), which analyses the sector's performance across 184 countries, expects Myanmar to feature on its list of the top ten fastest-expanding tourism industries globally.

In 2017, the direct contribution from travel and tourism to GDP stood at Ks 2647.2 billion, or 2.7 percent of GDP, according to the WTTC. The total contribution to GDP, which takes into account the wider effects from investment, the supply chain and income effect. At the same time, fears that accelerated growth could negatively impact the quality of service and prized attractions, if left unchecked, are sparking calls from some industry players for a more cautious pace of development.(statistics data,MOHT,2018)

Table 3.1 Yearly Comparative of contribution to GDP

Year	GDP (\$ bn)	Tourism Earning (\$ bn)	Con to GDP(%)
2010	49.54	0.254	0.51
2011	59.98	0.319	0.53
2012	59.94	0.534	0.89
2013	60.27	0.926	1.54
2014	65.54	1.789	2.73
2015	59.69	2.122	3.56
2016	63.26	2.197	3.47
2017	66.72	1.969	2.95
2018	71.21	1.651	2.32

Source : Ministry of Hotels and Tourism

According to the MOHT data for 2018, looking at amounts in expenditures by foreign tourists, there has been a growth trend ever since democratization was implemented in 2011. In comparison, the period before democratization was sluggish and remained at low levels due to the effects of economic sanctions and the rarity of visits by foreign tourists. One look at above table will make this tendency quite obvious. When we compare domestic expenditure by foreign tourists in 2011 and 2018, we can see how major growth has been achieved during those years, at 320 million dollars in 2011 (a proportion of GDP of 0.5%), jumping to 1.7 billion dollars in 2018 (a proportion of GDP of 2.3%). Activity between 2013 and 2014 is especially notable. During this period tourist expenditure won major growth from 926 million dollars to 1.789 billion dollars. It was during this time that democratization could be seen as coming along smoothly, while in addition, Myanmar was the host country for the 2014 meeting of the ASEAN.

3.3 Importance of tourism to Myanmar Economy

Myanmar is a rich and unique culture based country in tourism sector across the world. Therefore, Myanmar is famous and widely known as the cultural destination among the visitors.

The tourism business has played a major role in driving forward Myanmar's economic development since the start of national reforms in 2011. Myanmar is endowed with many potential tourist attractions arising from its 1,930 km coastline, its historical landmarks and variety of cultural traditions. The government has drawn up a tourism development master plan, which seeks to build Myanmar into a leading tourist destination in Southeast Asia, and to cater to the increasing number of tourists arriving in Myanmar. The Ministry of Hotels and Tourism declared that inbound tourists to Myanmar amounted to 3.5 million in 2018. Moreover, political and economic stability are seen as opportunities for the development of the tourism industry.

Table 3.2 Tourist arrival by region and entry points in previous eight years

Yangon	Mandalay	Nay Pyi Taw	Border	Total
297246 37.55%	13442 1.7%	-	480817 60.75%	791505 100%
364743 44.68%	20912 2.56%	5521 0.68%	425193 52.08%	816369 100%
559610 52.84%	32521 3.07%	1250 0.12%	465614 43.97%	1058995 100%
817699 40.00%	70620 3.45%	11842 0.58%	1144146 55.97%	2044307 100%
1022081 33.17%	90282 2.93%	19261 0.63%	1949788 63.27%	3081412 100%
1180682 25.22%	107066 2.29%	13835 0.3%	3379437 72.19%	4681020 100%
1080144 37.15%	176228 6.06%	16224 0.56%	1634611 56.23%	2907207 100%
1146069 33.29%	199802 5.8%	17077 0.5%	2080185 60.41%	3443133 100%
1158747 32.62%	169582 4.77%	16242 0.45%	2206587 62.13%	3551428 100%

International tourist arrival to Myanmar (2010-2018) (Source : MOHT)

This above figure shown that the tourist arrival to Myanmar is steadily increased year by year. As a compare of the arrival of 2010 and 2018, tourist arrivals were getting huge growth to 449 percentage increment of 2010. Thus, the arrival is rapidly growing and interesting on Myanmar destination is still remaining among the international tourists.

Table 3.3 Tourist Arrivals by Nationality

Region	2010	2011	2012	2013	2014	2015	2016	2017	2018
Asia	212454 68.38%	259692 66.39%	380404 64.11%	630399 70.03%	807806 71.39%	938487 72.10%	864523 67.94%	953801 69.98%	1066846 76.31%
West Europe	59817 19.25%	80895 20.68%	130296 21.96%	158163 17.57%	186828 16.51%	209300 16.09%	237889 18.70%	239358 17.56%	183472 13.12%
North America	18911 6.09%	25365 6.48%	44074 7.43%	62628 6.96%	74899 6.62%	83866 6.44%	91526 7.19%	87153 6.39%	76122 5.44%
Oceania	8695 2.80%	11622 2.97%	20650 3.48%	28079 3.12%	33421 2.95%	35566 2.73%	39172 3.08%	37644 2.76%	32455 2.32%
East Europe	6118 1.97%	7622 1.95%	9077 1.53%	10183 1.13%	13592 1.20%	15433 1.19%	17568 1.37%	20069 1.48%	18386 1.32%
Other America	1669 0.54%	2380 0.61%	3535 0.60%	4625 0.51%	7043 0.62%	9575 0.74%	10999 0.86%	12592 0.92%	10786 0.77%
Middle East	2208 0.71%	2607 0.67%	3747 0.63%	3396 0.38%	4714 0.42%	5527 0.42%	7140 0.56%	6465 0.48%	5685 0.41%
Africa	816 0.26%	993 0.25%	1598 0.26%	2688 0.30%	3321 0.29%	3829 0.29%	3779 0.30%	5866 0.43%	4346 0.31%
Total	310688 100%	391176 100%	593381 100%	900161 100%	1131624 100%	1301583 100%	1272596 100%	1362948 100%	1398098 100%

International tourist arrival by Nationality (2010-2018) (Source : MOHT)

Table 3.4 Yearly Income from Tourism Sector

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018
Total Earnings (US \$M)	254	319	534	926	1789	2122	2197	1969	1651
Average Expenditure per person per day (US \$)	102	120	135	145	170	171	154	153	122
Average length of Stay(Days)	8	8	7	7	9	9	11	9	9

Source : Ministry Of Hotels & Tourism

Although Myanmar has enjoyed a boom in the tourism industry, the government needs to improve infrastructure in all aspects to meet international standards. In 2018, 4428 Million USD of foreign investment went into the development of the hotel and tourism related business, which includes 12466 hotel rooms across 68 projects. This investment is now 52% complete. The growth of the tourism industry in Myanmar relies on political reforms, economic stability, and clear procedures for foreign investment. The Myanmar government established a clear investment law to encourage foreign direct investment, which also included a Tourism law. The aim is to build investors' confidence in Myanmar.

Table 3.5 Foreign Investment in Hotels Industry (2010-2018)

Year	Projects	Rooms	Investment (US\$Million)
2010	36	6560	1194.419
2011	36	6560	1194.419
2012	36	6766	1416.919
2013	39	8029	1917.149
2014	46	9443	2557.558
2015	48	9132	2678.380
2016	57	11253	3086.9254
2017	64	12194	4370.9654
2018	68	12466	4428.8694

Source: Ministry of Hotels & Tourism

For the time being, there is excess supply in the tourism industry. The country has 1,530 hotels and 65,978 hotel rooms, more than 7,820 tour guides and 2,593 tour companies. In transport sector, there are 10 domestic airlines in Myanmar with only 30 aircrafts. In Thailand, there are only six domestic airlines with 500 aircrafts. We need to revise the current circumstance to fill the actual requirement of the sector.

In order to get a healthy demand, the sector needs monetary supports as well as infrastructure development. The NTOs plays a vital role in attracting investment for the sector.

Negative publicity and the weak tourism security strongly impact the tourism development in our country, which is facing conflicts in Kachin area and problems in Rakhine State.

3.4 Infrastructures in tourism sector

Tourism infrastructure is the basis of tourism development and utilization of existing destination resources. Tourism infrastructure includes a large number of services, necessary to meet the needs of tourists and increase satisfaction during their stay at the destination.

Future tourism development depends on intensive investment in infrastructure and its modernization, as an important factor of development of the tourism sector.

“Tourism has been a major growth industry globally for over five decades. Factors underpinning this growth include the growth of incomes and wealth, improvements in transport, changing lifestyles and consumer values, increased leisure time, international openness and globalization, immigration, special events, education, information and communication technologies, destination marketing and promotion, improved general and tourism infrastructure and so on” (Matias et al., 2007).

It is clear that the tourist destination develops in a particular area at a particular time, and that it directly and indirectly affects the shaping of that area, both physiologically, through various tourism infrastructure facilities, superstructure, and the presence of a large number of tourists, and by function, where the destination, next to the existing functions, gains the tourism function, which can be the dominant or the only function (Jovičić, 1980). Despite the fact that a destination has a number of natural beauties, lack of accommodation

Facilities and quality of road infrastructure can be an obstacle for successful tourism development. The subject of the work is the assessment of the relationship between infrastructure and tourism development, while having in mind that tourism development depends on the modernization of infrastructure, and points to the need to intensify investment in infrastructure, as an important driver of improving the tourism sector.

During the present government’s term, it can be seen that investment increased due to changes and political and economic reforms resulting in increased job opportunities for the people. To develop the Myanmar tourism sector the government was also increasing the working rights of the private sector and inviting local and foreign investments. As the government was striving and implementing towards creating job opportunities and developing the private sector, States and Regions were urged to give priority to projects on constructing and developing basic tourism infrastructures and cooperate hand in hand with the government and the private sector. As the tourism sector developed in Myanmar, more jobs will be created for the Myanmar people while increasing their living standards as well.

The Ministry of Hotels and Tourism has established the Myanmar Tourism Master Plan 2013-2020 as a guide to future works. It was learnt that the ministry was cooperating with the World Tourism Organization and development partner organization Luxembourg Development Agency to draw up projects for the 2020 to 2025 period. Tourism required cooperation with all sectors and cooperation between private entities and relevant departments was required. State/Region governments were also learnt to be coordinating and drawing up region wise tourism master projects that would increase local participation.

The Ministry of Hotels and Tourism on its part was also raising Myanmar's travel image through implementing the Digital Marketing system for tourism sector development, participating in international travel and tourism exhibitions, inviting news media to produce video/audio to inform international travellers on visiting a peaceful and stable Myanmar, producing and distributing pamphlets, produce DVDs and increasing advertisements through Myanmar embassies, arranging and inviting FAM (familiarization) Trips and appointing travel ambassadors.

Investment in tourism plays a vital role in creating the country's economic development and sharing the benefits of the tourism sector to local people was very important. Regional tourism work committees, relevant ministerial departments, state/region government members and private organizations were urged to coordinate and cooperate.

When thinking of attracting tourists travelling for various reasons services were required to be provided towards travel for leisure and relaxation, business travel, adventure travel, travel for gaining knowledge, travel for taking health care treatment, travel for sporting activities, nature based travel, travel for food etc.

Development of travel infrastructure, establishing new travel destinations, arranging train and boat voyages for travellers to enjoy natural beauties, upgrading local airport buildings etc. were urged to be conducted through government (public) and private cooperation. In doing this not only short term profit but long term benefits also need to be considered together.

Yangon International Airport (YIA) is strategically located between India and China with two-thirds of the world's population within six hours flying range

including cities such as Tokyo, Dubai, Singapore, Beijing and New Delhi. YIA is the busiest and largest airport in Myanmar.

In 2018, YIA handled a total of 6.035 million passengers. Today, 34 airlines operate to and from 33 international destinations, while five airlines operate our domestic routes.

Over the last few years, Myanmar has seen tremendous growth in visitor traffic. As the country is set to experience more exponential growth, YIA, being the main gateway into Myanmar, is built to meet future demands with a handling capacity of up to 20 million passengers per year.

YIA has undergone its most significant expansion to date. The opening of T1 was part of the first phase of YIA's development to handle higher passenger capacity as Myanmar continues to undergo economic reforms, which is expected to increase demand for aviation services in the country.

Officially opened on 12 March 2016 as well as the expansion in capacity and continued integration of facilities, YIA paves the way for Myanmar to continue welcoming a rapidly growing number of business and leisure travelers to the country.

In anticipation of the growth in air travel, Terminal 3 was built over a span of 15 months and operational in less than one year after the official opening of the international terminal T1. Offering unparalleled connectivity to domestic destinations, T3 provides similar facilities to T1 – such as a variety of F&B outlets, retail options, business lounges, baggage handling & security systems – for a safe and comfortable experience.

Terminal 2 was first main international terminal serving a mix of international and regional airlines. Terminal 2 is a familiar sight to travelers from all over the region and it is undergoing a facelift.

YIA consists the tourism facilities and infrastructures for the tourists and the other purposed travelers . These are the rapid immigration system, secure and fast luggage handling system and tourist information counters of Ministry of Hotels and Tourism and private and public transportation system.

At the tourist information counters of Ministry of Hotels and Tourism , the traveler can get and enquire the all of information about the Yangon destination and

the whole country as well. The information counter provides the accurate and useful information to the tourists. And they also provide the domestic flight tickets, Highways bus tickets, tour package , transportation coach , guides services and accommodations.

Thus, the traveler who are entered to Myanmar get the all tourism services for conveniences of their trip and they can arrange the trip by their self at once. Therefore, Yangon International Airport (YIA) is the very important and useful infrastructure not only for the tourist but also for all of the passengers.

Tourism has no boundaries. The country will face big challenges as we merging with the ASEAN Economic Community and establish a single market with free movement of skilled labour, capital and investment. So as to develop the tourism service business, the NTOs needs to reduce some restrictions that do not harm the national interest.

CHAPTER IV

ANALYSIS ON THE SURVEY

4.1 Survey Profile

This chapter discusses the data analysis and findings from 455 questionnaires completed by tourist who visited to Myanmar during from June to July in 2019. This chapter focuses on the analysis of the questionnaire data. It addresses including the 17 precise questions for tourist satisfactions and requirements for tourism promotion of Myanmar.

Questionnaires were given to the western tourists any age level when they are waiting at the departure lounge of the Yangon International Airport. The objectives of the study were to examine the demographic, needs and satisfactions of the tourists who are visited to Myanmar. The another objective was to explore the requirements of Myanmar tourism sector based on the responses of visitors.

4.2 Survey Design

The data from the questionnaires were statistically analyzed by the Microsoft office Excel program was used for the data analysis. The findings are discussed according to the sections of the questionnaire and then with reference to tourism statistics of MOHT. There are four sections of the questionnaire were:

- (A) Demographical data of respondents (Questions No;(1) to (6),
- (B) Travelling mode in Myanmar (Question No;(7) to (13),
- (C) Response on the elements of tourist destinations (Question No (14))
- (D) Satisfaction on the destination (Question No (15) to (17)

4.3 Survey results

Tourism evaluation is the most appropriate means of demonstrating the industry's value to an economy, and should be considered as equally important as having a tourism strategy itself. Well-prepared and executed monitoring and evaluation can be enormously influential where the evidence is clear and tangible with measurable outcomes and impacts that can be attributed to policy initiatives.

4.3.1 Travel behavior and demographical characteristics of respondents

This study is based on 455 responses of tourists who are visited to Myanmar; 182 were from France, 41 were from Great Britain, 136 were from United State Of America , 45 from the Australia , 23 from the Canada and the rest were from other Europe countries. 45 % of them are aging between 21 to 30, 23 % of them are between 31 to 40, 12 % are between 41-50 and the rest are others.

General, the table(4.1) show that the dominant age group of respondents was 21 to 30 years old (45%), followed by 31 years and older (51%) and the smallest group made up 3% of the respondents was 0 to 20 years. These results indicate that international tourists visited Myanmar was Adults . Because of the Myanmar destination is cultural based destination .Thus , 31 years and above are interesting to known the different cultures and different ways of life in different world.

Table 4.1 Age classification of correspondents

Ages	Percentage(%)
0-20	3
21-30	45
31-40	23
41-50	12
51-60	11
61 and above	6

(Source: Survey data)

All of the respondents are from the Western countries and the most are from the Western Europe. The most responded nationality is French, the second is USA and the third is Australia.

The reason for the most visited national is the French because the French is standing at the second outbound tourist to the world after China (UNWTO,2018 barometer).Therefore, the French also most visited to Myanmar from western region.

Table 4.2 Nationalities of respondents

Nationality	Amount	Percentage
France	182	40
USA	136	30
Australia	45	10
Great Britain	41	9
Canada	23	6
Others	28	5

Source : Survey data

The gender distribution of the respondents was 51% male tourists, higher than proportion of female tourists (49%), the 42 percentage of the respondents are from private sector, 19 percentages are students and 8 percentages are from government sector.The results indicate that the private stakeholders are visiting to the country and 42 % of them are gentlemen.

With Annual income of respondents, the largest group included US \$31,000 to US \$40,000 (27.4%), followed by US \$41,000 to US \$50,000 (20.4%), US \$21,000 to US \$30,000 and US \$51,000 and more with 18.9% and 17.4% respectively, and 15.9% of the respondents had an annual household income of less US \$20,000 (Table 4.1). However, comparing income across nations are difficult because each country has different standards of living, social welfare and tax policy.

Table 4.3 Employment status of respondents

Employment	Pax	Percentage (%)
Private	191	42
Student	84	19
Self-employed	56	12
Government	36	8
Retired	19	4
Others	68	15

Source : Survey data

4.3.2 Travelling purpose in Myanmar

By the answers on survey, 121 respondents are travelling alone in Myanmar and the rest are travelling with the travel mate. 362 respondents are travelling for the relaxation in their holidays and 25 pax are travelling for the business purpose.the least amount of visitor was visitors who are visited to the friend and relatives(VFR).the VFR is followed by the others purposed travelers (5 %).

The result shows that 80 percentage of the traveler are visiting to Myanmar with relaxation , recreation and entertaining reasons. The 5 % of travelers are want to do business in Myanmar and visiting friend and relatives are only 2 percentage.Thus , the most of travelers are counted in the tourism context.

Table 4.4 Main reason for travelling

Reason	Amount	Percentage
Relaxation	362	80
Business	25	5
VFR	8	2
Others	23	5

Source : Survey data

Table 4.5 Type of tour by Nationalities

Nationality	Purpose of visit				Total
	Tour	Business	VFR	Others	
France	172	3	2	5	182
USA	118	5	1	12	136
Australia	29	7	1	8	45
Great Britain	25	4	2	10	41
Canada	12	3	1	7	23
Others	6	3	1	18	28
Total	362	25	8	60	455

Source: Survey data

According to the above table, French also visited to Myanmar for leisure purpose and Great Britain is followed by the French and American is most visited to Myanmar from North America region. For Business purpose, Australia is led and American is standing behind the Australia. Great Britain and France are visited to Myanmar to visit their relatives.

The French national are the most interesting to Myanmar and they are visiting to Myanmar for travelling across the country. The United States of America are followed by the French and they also enjoyed the Myanmar tourism context. For the western countries Canada is standing the last position of the table and need to promote the tourism activities to them.

Table 4.6 Visited destinations of respondents

Destinations	Visited quantity	Percentage
Yangon	417	92
Bagan	381	84
Mandalay	253	56
Inlay Lake	280	62
Golden Rock	30	7
Mrauk U	5	1
Beaches	74	16
Others	202	44

Source : Survey data

The answers shown almost of respondents are visited in Yangon because Yangon is the main gateway to Myanmar and they just stay in Yangon one day trip. And then 381 respondents are visited to ancient city Bagan. Bagan is well known destination for the Asian and but also in western countries as well. The third favorite destination is Inle lake. Inle Lake is remarkably different from the three key tourist destinations of Myanmar: Yangon, Bagan and Mandalay. It is significantly smaller compared to the aforementioned main cities. It does not have as many attractions, but it is an established tourist center in the country. The fourth is Mandalay which is the Nay Pyi Taw of the last kingdom of Myanmar. Mandalay has the Royal Palace of the last Konbaung Dynasty. Mandalay inherits many cultural heritages from the ancient Myanmar Kingdoms and beautiful places to visit. Thus , 92 percentage of the respondents are visited in Yangon and 84 percentage of respondents are visited to Bagan . Therefore , Bangon is the most attractive destination after main gateway Yangon. For transportation used in Myanmar,227 of all respondents are used the

public bus , 217 are taxi and 167 are fly by flights. That is mean that public transportation(Highway Express)is the popular for the travelers. Travel By air is least interesting usage transportation in Myanmar.

While they are visiting in Myanmar, they have used the various types of accommodations. The most one which they have used is Hotel and the guest house is followed by the hotels.The luxury hotel is at third place and that option is for high-end tourist only.Today hotel booking system is very easy and traveler can book the room from anywhere by using the Agoda,Booking.com and other online agents.As the result , the three to four stars hotels are very favorite and high occupancy in peak season of the year.

Table 4.7 Accommodation used of respondents

Types of Accommodation	Amount of users	Percentage
Hotels	234	51
Residence	4	1
Luxury Hotels	55	12
ROF	15	3
Private Home	5	1
Guest House	216	47

Source : Survey data

4.3.3 Response on the tourism infrastructures

This section will be identified the requirements of tourism development and what is the needs, wants and expectations of the tourists who were visited to Myanmar. In this section, we can be divided into the 8 intangibles factors and 9 tangibles factors for total 17 questions.

For the intangibles factors, they almost felt that Myanmar is very safe country for visiting with unspoiled natures, diversities of cultural and historical attractions. And friendliness of the local people and opportunity for the rest were very well appreciated by the respondents.

As the tangibles factors, they've highlighted the high hotel price, local airfare, rare place for shopping tours and night life and lack of sport tourism and MICE

tourism as well. However, they all appreciated the good Myanmar food and language skills of tourist guide.

Table 4.8 Response on the tourism infrastructures

ELEMENTS OF TOURIST DESTINATION	Satisfactions											
	Strong		Disagree		Neutral		Agree		Strong		I don't Known	
	1	2	3	4	5							
Intangible infrastructures	No:	%	No:	%	No:	%	No:	%	No:	%	No:	%
Personal safety and security.	18	4	42	9	20	4	70	15	295	65	10	2
Unspoiled nature.	5	1	10	2	20	4	10	2	405	89	5	1
Diversity of cultural/historical attractions (architecture, Tradition and customs...)	5	1	10	2	10	2	80	18	345	76	5	1
Friendliness of the local people.	12	3	27	6	5	1	5	1	396	87	10	2
Opportunity for rest	27	6	33	7	25	5	28	6	322	71	20	4
Tangible infrastructures												
Accommodation.	75	16	45	10	50	11	110	24	156	34	19	4
Local transport	49	11	20	4	30	7	56	12	295	65	5	1
Shopping	90	20	85	19	32	7	120	26	123	27	5	1
Night Life	155	34	98	22	26	6	62	14	99	22	15	3
Sport facilities	160	35	103	23	25	5	28	6	121	27	18	4

Source : Survey data

According to the Table (4.8),The unspoiled nature is very recommended elements for the visitors and 405 respondents are answered the completely strong satisfaction for them and the percentage of the total respondents is 89 percentage. After the unspoiled nature , friendliness of the local people is standing behind it with the 396 recommendation for strong satisfaction and 87 percentage of all respondents. And another intangibles requirements have got the 71 percentage,76 percentage and 65 percentage respectively.

For the tangibles elements, the respondents responded that some of tangible factor are very rare to find in their trip in Myanmar . For example , Night life ,Sport facilities and shopping are need to promote for the shopping tour and recreational tour.Among the tangible factors, the local transportation is impressed with the 295 respondents are satisfaction and get the 65 percentage of all respondents.

By the results of survey data, the figure shown that the respondents accepted the Myanmar is a very beautiful country with unspoiled nature, diversity place of cultural and historical buildings, traditional and stories. And they all felt Myanmar people are very friendly and almost have been getting the rest during Myanmar trip.

The above table showed that they are not satisfied on the night life and entertainment activities in Myanmar and they also did not see the perfect sport and recreational facilities in their trip. For the accommodation services, some are enjoyed the hotel and service quality and they are pointed out the local transportation services are still need to improve for more convenience.

Some of the respondents are mentioned that they do not know the questions and they do not want to answer the positives and negatives because they cannot decided the at the moment and some are they cannot recalled the memory of the experiences.

For the last section of the chapter, 447 respondents of them were answered for giving the recommendation to other people to visit Myanmar. And 264 are Extremely satisfied on Myanmar trip , 85 are satisfied and 3 are not at all satisfied remarks for responses.

4.3.4. Factor analysis on the variables

An exploratory factor analysis for items that the two factors with 17 variables and labeled based on the core variables. Attributes with loading factors less than 0.5, loadings lower than 0.4 and with loadings higher than 0.4 on more than one factor were eliminated. The factors included local cuisines, environment, infrastructure & accessibility, culture & social, tourist leisure & entertainment. The KMO measure of sampling adequacy is 0.81, which is goodness fit. The Bartlett's Test of Sphericity is 1.391E3, the significance of the correlation matrix (p-value) is 0.000. This number indicate that data for exploratory factor analysis to perform.

Table (4.9) shows that the almost of the intangibles infrastructures are average and unspoiled nature , diversity of cultural and historical attractions and friendliness of local people have gotten the high loading in the area.

For tangibles infrastructures, Night Life(0.51) and shopping (0.61) are least factor loading and they have liked the local transportation(0.80) in Myanmar and Accommodation is second liked factor in tangible infrastructures.

Table 4.9 Factor statistics/ loadings of destination image

Attribute	Factor Loading	
	Factor 1	Factor 2
Factor 1: Intangible		
Personal safety and security.	0.50	
Unspoiled nature.	0.85	
Diversity of cultural/ historical attractions (architecture, Tradition and customs...)	0.72	
Friendliness of the local people.	0.85	
Opportunity for rest	0.84	
Factor 2 : Tangible		
Accommodation.		0.72
Local transport		0.80
Shopping		0.61
Night Life		0.51
Sport facilities		0.81
Variance (%)	30.92	11.31
Cumulative variance (%)	30.92	42.23
Note: Extraction Method : Principal Components Analysis Rotation Method : Varimax with Kaiser Normalization KMO(Kaiser-Meyer-Olkin Measure of Sampling Adequacy = 0.81 Bartlett's Test of Sphericity : p=0.000=1.391E3		

Source : Survey data

This number indicate that data for exploratory factor analysis to perform. Principal components analysis started with 17 items. However, the result of reliability analysis of variety seeking factor are not fit, the alpha coefficients is 0.47, less than 0.5 and 3 items out of 6 items of variety seeking have total correlation are

lower than 0.3, thus 3 items are eliminated from analysing. In addition, 3 items in satisfaction factor with loading factors less than 0.5 and 1 item in recommendation with loading factors more than 1.00 were removed from the scale. There are 10 items covering the two constructs were selected for further analysis. Those items/factors explained of 75.86% of cumulative variance of the data. The results of the factor analysis has presented in the table (4.9).

This study is to find how visitors evaluate the quality of different facets or attributes of a destination of Myanmar, how satisfied they are with Myanmar, loyalty intention to revisit and willingness to recommend Myanmar to others. Thus showing the following results of descriptive analysis is to fulfill this purpose and to evaluate Myanmar as a tourism destination. The mean value of tourists for the environment, local food, infrastructure & accessibility, culture & social, and tourist leisure & entertainment were presented to evaluate of Myanmar.

Table (4.10) show the mean value of tourists for two facets/dimensions and the corresponding attributes of destination image. The mean values indicated that the most attractiveness value is Intangible products. The tourists were reported that the unspoiled nature related to Intangible products, and the product to be the most interesting to attract tourists visiting Myanmar (the average mean value was 5. 13 on a scale from 1-5). Moreover, they also reported that friendliness of the local people and opportunity for rest to be main attractiveness to evaluate Myanmar as a destination (the average mean value was 5.44 and 5.27 respectively), but not much interesting as the unspoiled nature.

Table 4.10 Mean value of the evaluation of destination image

Variables	Mean(SD)
Factor 1: Intangible	
Personal safety and security.	4.78
Unspoiled nature.	5.68
Diversity of cultural/historical attractions (architecture, Tradition and customs...)	4.45
Friendliness of the local people.	5.44
Opportunity for rest	5.27
Factor 2 : Tangible	
Accommodation.	4.70
Local transport	4.4
Shopping	4.71
Night Life	4.63
Sport facilities	4.42

Source : Survey data

Table 4.11 Recommendation result of respondents

Satisfaction Level	Respondents	Percentage (%)
Extremely Satisfied	264	58
Strong Satisfied	89	20
Satisfied	85	18
Not Satisfied	12	3
Not at all satisfied	3	1

Source : Survey data

Overall Extremely satisfaction on the Myanmar destination are 58 percentage, 30 percentage are satisfied and the rest 12 percentage are not satisfied by their answers. Most of visitors recommended the poor garbage system, high hotel rates, and public toilet system and need more tourist activities.

4.4 Strengths and Challenges of the Myanmar tourism development

The tourism business has played a major role in driving forward Myanmar's economic development since the start of national reforms in 2011. Myanmar is endowed with many potential tourist attractions arising from its 1,930 km coastline, its historical landmarks and variety of cultural traditions. The government has drawn up a tourism development master plan, which seeks to build Myanmar into a leading tourist destination in Southeast Asia, and to cater to the increasing number of tourists arriving in Myanmar. The Ministry of Hotels and Tourism estimated that inbound tourists to Myanmar amounted to 7 million in 2020. Moreover, political and economic stability are seen as opportunities for the development of the tourism industry.

The Myanmar Tourism Master Plan 2013-2020 has set a target of 7.48 million international visitors in 2020, which means an increase of around 3 million tourists from 2019. Myanmar has seen an increase in the number of hotel rooms from 9,132 at the end of 2015 to about 12,000 at the end of November 2018. However, there is still high demand for hospitality services which need to be improved for Myanmar to achieve its target for the tourism industry.

The World Travel and Tourism Council forecasts that Myanmar's tourism industry will rank second out of 184 countries in 2019, and has the potential to grow more within the next decade. The exponential growth of the sector is predicted to increase employment in the tourism industry by 66% to 2.1 million jobs by 2026, and to contribute to Myanmar's GDP by an average of 6.5% between 2015 - 2026.

According to the Ministry of Hotels and Tourism, 3.55 million tourists entered Myanmar in 2018, as of September 2019. The number of tourists slightly increased compared to the same period in 2017. However, 4.4 billion USD of foreign investment went into tourist attractions across 68 projects as of the end of December 2018.

Although Myanmar has enjoyed a boom in the tourism industry, the government needs to improve infrastructure in all aspects to meet international standards. The growth of the tourism industry in Myanmar relies on political reforms, economic stability, and clear procedures for foreign investment. The Myanmar

government is working to establish a clear investment law to encourage foreign direct investment, which also includes a tourism law. The aim is to build investors' confidence in Myanmar. For example, since July 2016, the application for and renewal of hotel operation license, tour company and tour guide license, as well as license for tourist transportation can be done online.

Analysts conclude that the growth of the tourism industry will be driven by large projects, which are funded by foreign investors. If the hotel and tourism investment law and a draft tourism law are encouraged by investors, foreign investments in this sector will increase, and contribute to tourism development in Myanmar. Moreover, the Myanmar Tourism Master Plan 2013-2020 has presented its vision to develop the tourism and hospitality sector to create job and business opportunities for the Myanmar people.

The country's tourism sector rose in 2012 like a tsunami. However, the sector returned to normal in 2013 because of a lack of human resources and tourism infrastructure. In 2014 and 2015, the country saw a slight increase in the sector. According to the Hotels and Tourism Ministry, the sector declined 38 per cent in financial year 2015-2016. The tourism sector this year increased 25 per cent over the same period last year, according to half year statistics of the Ministry of Hotels and Tourism and the Department of Immigration. We need to monitor further development of the tourism market in high season.

The country hosted about three million visitors last year. It is estimated that visitor arrivals are likely to reach the ministry's target of 3.5 million this year as the country has developed transport infrastructure, lodging facilities, human resources and tourist security at some destinations. Hotel fees have also decreased from their peak prices.

Among western visitors, most come from the U.S., followed by France, Germany, Italy and Spain. Some Russians also visit the country. In Asia, Thai visitors are ranked first among the top list of international visitors in Myanmar, followed by China, Japan, Korea, Singapore and Malaysia.

Myanmar Tourism Marketing reported 160,000 tourist arrivals in January 2019, a 20 per cent year-on-year increase. Not only did overseas tourist numbers

increase, the number of domestic tourists visiting sites as Bagan, Kalaw or Inle Lake saw double-digit growth, leading to fully booked hotels during Myanmar's holiday periods.

International brands such as Courtyard by Marriott and Sheraton are set to open in Yangon. Rosewood Hotels & Resorts has been appointed by Prime Residence to manage Rosewood Yangon, as the brand's first property in Myanmar and seventh in Asia.

Meanwhile, in January, the American Society of Travel Advisors (ASTA) opened its newest chapter in Myanmar, along with plans to work on a variety of projects. These include a pavilion at the ASTA Global Convention in August and the Myanmar Road Show with activities including tourism education and training of US travel advisors.

Moreover, German wholesale company Metro this month announced its entry into Myanmar, allowing for greater trade engagements in the country that could contribute to economic growth in sectors such as agriculture, tourism and hospitality, said Philippe Palazzi, COO of Metro.

Also notably, the first Rakhine Investment Fair took place in Ngapali in February, where attempts were made to attract investors to join in the development of the state, especially its hotel and tourism sector. The fair was supported by the Myanmar Investment Commission and the Rakhine state government, and co-organised by Japan International Cooperation Agency (JICA) and the Japan External Trade Organization (JETRO).

“As the last frontier of South-east Asia, Myanmar presents immense potential for foreign investment. And tourism is a good way to connect people and to bring development and peace all over the country for any race or religion,” said the experts of Myanmar Tourism Marketing.

The country adapted the foreign investment law late last year and made it possible for foreigners to buy 35 per cent of shares of a local company, with industry-specific examples including local guesthouse, restaurant, bar or hotel.

For the time being, there is excess supply in the tourism industry. The country has 60,000 hotel rooms, more than 5,000 tour guides and 2,300 tour companies. In transport sector, there are 10 domestic airlines in Myanmar with only 30 aircrafts. In Thailand, there are only six domestic airlines with 500 aircrafts. We need to revise the current circumstance to fill the actual requirement of the sector.

Negative publicity and the weak tourism security strongly impact the tourism development in our country, which is facing conflicts in Kachin area and problems in Rakhine State. But the commercial capital of Yangon with its many historic landmarks is safer than New York City over the past 20 years. Now, it is hard to walk alone on that city's streets. Our neighbor, Thailand, also faces greater security risks, even in downtown areas, but tourism is fine because of positive publicity. In our country, it is not easy to get public support for tourism development.

Tourism has no boundaries. The country will face big challenges as we merging with the ASEAN Economic Community after 2017 and establish a single market with free movement of skilled labour, capital and investment. So as to develop the tourism service business, the government needs to reduce some restrictions that do not harm the national interest..

The year 2018 was a challenging year for Myanmar's tourism sector as Western tourist arrivals continued its downward trend, but the trade is hopeful that 2019 will mark a turnaround as the year started on a positive note with foreign investments and arrivals on the up.

CHAPTER V

CONCLUSION

5.1 Findings

The objectives of the thesis are to examine the demographic situation of the tourists who are visited to Myanmar and to explore the requirements of Myanmar tourism sector based on the responses of visitors. In order to achieve the study objectives, the qualitative research was done by the research questions: (1) What are the main difficulties for visitors while they are staying in Myanmar?; (2) What kind of products are attractive for them? What are the requirements for Myanmar tourism promotion? To analyze the research questions, the qualitative research method were used and data collection and analyzing were balanced with the secondary data. The following is referred to main findings and discussion about the results, implications as well as limitations and future research.

By the tourism publication documents, tourism is a starter of the whole economics engine and it is used as an effective tool for economics recovering process. Especially in the ASEAN region, all of the regional countries are striving to boost the tourism sector and they put the tourism as a leading role of the priority sector. And also they are discussed and agreed to launch the AEC and it will be coming soon to this region,

At the same time, Myanmar is transforming into the democratic country in 2011 and the world is interesting to visit to Myanmar. Thus, Myanmar facing the tremendous amount of tourist arrival and lack of tourism infrastructures. Tourists are visiting around Myanmar and some of them are liked the authenticities of the place and Myanmar tribes. But some are given the negative comments on the difficult to direct access from the world , hight hotel price and low hospitality services. And also comment the bad garbage system and lack of attractive tourism activities.

According to the research results, they are openly answered the questions and they have good mind to develop the Myanmar tourism sector across the region. Most of them are coming from the Europe and America. They are visited the most favorite countries across the world. Therefore, they have the travelling experiences to the Asian countries and ASEAN countries as well. They have worry on the safe and security of the country before their trip to Myanmar. After that, they almost all satisfied the peaceful situation of the country and the loved the country. And also they liked the unspoiled and untouched natures and tasty local cuisines.

Both the exploratory and confirmatory factor analysis of the structure of destination image confirmed a two-factor solution: tangibles and intangibles In this study, the international tourists reported that they had strongly positive interesting the unspoiled nature toward visiting Myanmar (the mean value was 5.68). Moreover, friendliness of the local people is found to significantly effect on satisfaction with visiting Myanmar as a destination. They are pointed on the uncleanliness of the destinations and cities, and also the scantily shopping facilities are cheated of shopping tourists. For the young tourists, they've wanted to see the night life and entertainments of the country and they said about the barely situation of said kind of entertains.

They pointed the hotel room rates in Myanmar are higher than other regional countries. And local airfare are not reasonable for the trip and they used the lot of money to use the domestic flight. They also highlighted the rare facilities for the sport tourists and lack of recreational activities for them.

Most of the respondents are agreed with personal safety and security of the destinations, unspoiled nature, climate nature, friendliness of the local people, tasty local food and guide services are good. Thus, they all satisfied the intangible infrastructures and they want to argue the intangible infrastructures to improve more.

In paticular, this study tested which factors are most important in explaining general evaluation or satisfaction with Myanmar as a destination. Specific, international tourists were satisfied with Myanmar as a beauty of scenery; islands; attractiveness of city; quality of foods, variety and uniqueness of foods; festival/event, friendliness and hospitality of people in Myanmar. However, they were

not satisfied as public transport; quality of roads; nightlife; shopping in Myanmar. This findings also seem to be accordance with the above findings. This indicates that Myanmar seems to be a destination for those who want to discover and experience own culture characteristics, unheard-of to things and special food in Myanmar.

5.2 Suggestions

According to the survey data, the mainly and important tourists for Myanmar are visitors from the Western countries. They used to stay in Myanmar a few week and they made the tourism expenditures at the various destinations. And also used the expenditures for local community.

This study has shown that the environment, local food and culture & social have a significant relationship with the satisfaction of tourists. This result can be useful to the tourism planners and marketers focus more on enhancing, improving and maintaining factors that contribute to tourists satisfaction. For environment, local authorities and planners should educate citizen to have a sense of protect life environment and tourism environment; behave to tourists culturally, friendly and condescending. For local food and culture & social, marketers should extend many kinds of tourism product such as swim underwater, climb up a mountain, casino, modern dance hall, building many shopping ward, eating and drinking, music and song place, so on. Especially, holding common people festival, eating and drinking cultural festival, classical drama. Moreover, holding many tours of island tourism and traditional village tourism.

The recommendation for the tourism is to target the western tourists for coming to Myanmar and most of tourism promotion activities should be related to the Europe and North America market. Most of them are from French and the most visited age level is 21-30. Thus, we need to emphasize the French tourists by using the promotional tools for young people.

In addition, the findings have indicated that tourist leisure & entertainment and infrastructure & accessibility have not a significant relationship with the tourists satisfaction. For infrastructure & accessibility, the marketers may need some effort to improving in public transport facilities, providing quality service of hotel; special events; developing tour with diversity of activities at night to attract to international

tourists such as singing & dancing, theatres, camps in the countryside or music camps in ancient houses. For tourist leisure & entertainment, planners should be training a professional staff and using English fluently follow service standards in over the world. Establishing a group with militia and police who can speak English fluently to solve to complain of international tourists and guarantee international tourists' safe in tourism area.

To be included, for promotion of the Myanmar tourism sector, we need to emphasize on the basic required infrastructures; the stability of hotel room rates, reasonable price of air tickets, more space and place for shopping and entertainment shows are required. Precisely, we have to make the encouragement and awareness to hoteliers and airline owners for the more investments to the sectors. More support to the souvenirs shops and cultural performers for inventing and revealing the authenticity of Myanmar cultural and values.

And also need to aware to the all of the tourism stakeholders to recognize the importance of unspoiled nature, diversity of cultural and historical attractions (architecture, tradition and customs...) are mainly linked with the tourism promotion. While we are making the implementation process of the tourism tangibles infrastructures, on the other hand, we need to maintain the our intangibles own values for examples history, tales, festivals and etc.

It is hoped that this results and this recommendation will be valuable information to tourism marketers and planners in Myanmar in evaluating and giving marketing strategies and management in the future. Myanmar will attract more foreign tourists and potential tourists from many different countries over the world.

Some limitations of this study should be discussed in following to improve in future research. The study was carried out in Yangon city. Primary data had to collect from international tourists Yangon. Sample is relatively small. Beside, at this time, Rakhine crisis is happening in Myanmar. This effected to western countries in the world and tourist's psychology are afraid to travel to the country, thus the population of this study was limited to international visitors. The sample size constituted 455 respondents and they are not statistically representative to the total visitors to Myanmar. To overcome this limitation, future research could conduct in different

seasons, collect to a larger population and extend the research scope to another famous tourism city in Myanmar.

The future studies should apply this conceptual model of this study in a comparative examination of the segmentation with the difference nation tourists, which not practiced in this study. Because each tourist has own characteristic such as age, social classes, habit, taste, cultural, so on. This effected to evaluate and feeling of each tourist and to decide to return and recommend to others or not. This is an important issue for tourism marketers to give many strategies which can be satisfied with many kinds of tourists.

REFERENCES

1. Alexandris, K., Kouthouris, C. & Meligdis, A. (2006). Increasing customers' loyalty in a skiing resort: the contribution of place attachment and service quality. *International Journal of Contemporary Hospitality Management*, 18(5): 414–425.
2. Alhemoud, A. M., & Armstrong, E. G. (1996). Image of tourism attractions in Kuwait.
3. Journal of Travel Research, Spring, 76–80.
4. Anderson, W., & Sullivan, M. (1993). The antecedents and consequences of customer satisfaction for firms. *Marketing Science*, 12, 125–143.
5. Baloglu, S. & Brinberg, D. (1997). Affective images of tourism destinations. *Journal of Travel Research*, 35(4):11-15.
6. Baloglu, S. & McCleary, K. W. (1999a). A model of destination image formation.
7. Annuals of Tourism Research, 26: 868–897.
8. Baloglu, S. & McCleary, K. W. (1999b). US international pleasure travelers' images of four mediterranean destinations: A comparison of visitors and nonvisitors. *Journal of Travel Research*, 38(2), 114–129.
9. Barroso, Castro, C., Martin Armario, E. & Martin Ruiz, D. (2007). The influence of market heterogeneity on the relationship between a destinations image and tourists' future behavior. *Tourism Management*, 28(1): 175–187.
10. Beerli, A. & Martin, D. (2004). Factors influencing destination image. *Annals of Tourism Research*, Vol. 31, No. 3, pp. 657– 681.
11. Berne', C. (1997). Modelizacion de la poscompra: satisfaccion y lealtad. In: Mugica JM
12. and Ruiz S (eds) *El comportamiento del consumidor*. Barcelona: Ariel, 163–180.
13. Berne', C., Mugica, J.M. & Yague, M.J. (2001), “The effect of variety-seeking on customer retention in services”. *Journal of Retailing and Consumer Services*, Vol. 8, pp. 335-45.
14. Berne', C., Mugica, J.M. & Rivera, P. (2005). “The managerial ability to control the varied behavior of regular customers in retailing: interformat

- differences". Journal of Retailing and Consumer Services, Vol. 12, pp. 151-64.
16. Bigné, E., Sánchez, M. I. & Sánchez, J. (2001). Tourism image, evaluation variables and after purchase behaviour: Inter-relationship. *Tourism Management*, 22(6), 607–616.
 17. Ministry Of Hotels & Tourism of Myanmar;<https://tourism.gov.mm/wp-content/uploads/2019/05/Myanmar-Tourism-Law-English-Version.pdf>
 18. Ministry Of Hotels & Tourism of Myanmar;<https://tourism.gov.mm/wp-content/uploads/2019/05/ASEAN-Tourism-Strategic-Plan-20162025.pdf>
 19. Ministry Of Hotels & Tourism of Myanmar;<http://www.mediafire.com/file/6exccu4apmbwscn/MTMP%2528Myanmar Version%2529.pdf/file>
 20. Myanmar Tourism Master Plan(2013-2020)
 21. Myanmar Statistical book(2017)by Ministry of Planning and Finance,Myanmar.
 22. Ministry Of Hotels & Tourism of Myanmar; <https://tourism.gov.mm/statistics/>
 23. MYANMAR 2019 ANNUAL RESEARCH: KEY HIGHLIGHTS by World Travel and Tourism Council
 24. Comprehensive TOURISM SECTOR STUDY on Investment and PPP Environment in Myanmar by Eurocharm Myanmar(March,2018)
 25. Tourism and the Sustainable Development Goals – Journey to 2030, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284419401>

APPENDIX