

**YANGON UNIVERSITY OF ECONOMICS
MASTER OF PUBLIC ADMINISTRATION PROGRAMME**

**A STUDY ON THE ROLE OF REGIONAL GUIDE TRAININGS
AND BARRIERS, CHALLENGES AND OPPORTUNITIES FOR
LOCAL TOURISM WORKFORCE IN SHAN STATE**

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EMPA - 37 (15th BATCH)**

OCTOBER, 2019

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A thesis submitted as a partial fulfilment towards the requirements for the degree of
Master of Public Administration (MPA)

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This is to certify that this thesis entitled “**A Study on the Role of Regional Guide Trainings and Barriers, Challenges and Opportunities for Local Tourism Workforce in Shan State**” submitted as a partial fulfillment towards the requirement for the degree of Master of Public Administration has been accepted by the Board of Examiners.

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ABSTRACT

Nowadays, tourism becomes a driving force behind many sectors. For the success of the tourism industry, training becomes vital. The objectives of the study are to identify the role of Regional Tour Guide trainings and to analyze barriers, challenges and opportunities for local tourism workforce. The simple random sampling method is used for primary data collection .138 respondents out of 817 regional guides are surveyed. Quantitative method and structured questionnaire were used. Most respondents view barriers to training changes includes language and knowledge. Training periods and practical trainings are not enough. Language course is weak. Junior guides face challenges as they have less chances for tour assignments than seniors. Most of regional guides do not receive tour assignments during low seasons and incomes are not enough for all year and experiencing low job security. Regional guides generated more income in 2017 than in 2018. Most of regional guides got National Guide license for their career development opportunities.

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LIST OF ABBREVIATIONS

ADB	Asian Development Bank
ASEAN	Association of South East Asia Nations
CLMV	Cambodia, Laos PDR, Myanmar and Vietnam
DHT	Directorate of Hotels and Tourism
DTSM	Diploma in Tourism Study and Management
GDP	Gross Domestic Product
GOV	Government of Vietnam
HCTS	Hotel, Catering and Tourism Sector
HRD	Human Resource Development
HTI	Hotel Training Initiative
ICT	Information and Communication Technology
ILO	International Labor Organization
IVA	International Visitor Arrivals
MICE	Meetings, Incentives, Conferencing and Exhibitions
MOET	Ministry of Education and Training (Vietnam)
MOEYS	Ministry of Education, Youth and Sport (Cambodia)
MOHT	Ministry of Hotels and Tourism
MOLISA	Ministry of Labor, Invalids and Social Affairs (Vietnam)
MRA – TP	ASEAN Mutual Recognition Arrangement on Tourism Professionals
MTF	Myanmar Tourism Federation
NGO	Non-government Organization
NMC	National Management College
RG	Regional Guide
SMVTI	Myanmar in Singapore Myanmar Vocational Training Institute
SSC	Sector Skills Council (UK)
SSTGA	Southern Shan State Tour Guide Association
TOT	Training-of-Trainers
TVET	Technical and Vocational Education Training
UMTA	Union of Myanmar Travels Association
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	United Nations World Tourism Organization
VET	Vocational Education and Training
WTTC	World Travel and Tourism Council

CHAPTER I

INTRODUCTION

1.1 Rationale of the Study

During the past six decades, tourism began to emerge as a global economic sector and it has great economic impact as a generator of foreign income and employment opportunities. The development of technology and global communication triggered more people to travel around the globe much easier and faster. This escalates the development of service sectors, including the hotel and tourism sectors, for those who work, study or travel in line with the changing global trends of movement around. When the tourism industry becomes booming, it brings effects to every corner of the globe as it creates employment opportunities for people from different walks of life, demographic and occupation backgrounds.

Tourism industry is one of the many sectors that many countries explore to build as one of the sources of national income, especially for those naturally granted with interesting geographical endowments that attracts millions of people around the globe to exploit them for the development of economy. Governments and policy makers and economic expertise around the world have been making good use of the naturally granted assets to create an alternative source of national income.

The industry is also seen as a driving force that can trigger and accelerate the transactions of other industries. The industry is like a big umbrella, with many arms that are attached to various sectors. It is linked to almost every sector and people which ranges from a daily wage earner (a porter/ a trishaw driver) to world class hotels, airlines and luxury cruises.

Thus, those who are in charge of shaping the tourism industry of nations have tried, or continued trying to figure out policies and practices to shape the successful economy in that field, in sustainable ways while promoting the countries' economy and preserving countries natural assets in the mean while. Myanmar is no exception among other nations whose strategic location, geographical and ethnical

diversification and diverse tourism products (sites) are surely attractive to the visitors around the globe.

Being a highly labor intensive industry, people are regarded as ‘the greatest asset’, institutions that take the role of providing courses to train potential entrants as well as current workforce is vital. This is especially true when the national planning to expand the industry is on its way and in the implementation stage. This will count not only on the number of institutions but also on the quality of the courses provided to produce qualified and quantified services personnel to fill in the gaps which come into face with the tourism development plans.

According to the statistics, Myanmar is the world’s 26th most populous country in the world, with a 2019 estimated population of 54.05 million. Of which, 4,477,638 residents are concentrated in Yangon, the capital city. This is due to the fact that Yangon is the hub for all commercial, business, financial, communication, health care and education services. Thus, employment opportunities are mostly concentrated in Yangon and causing the labor force to internally migrate from other regions and towns. In addition, trainings of all kinds are mostly concentrated in Yangon city. For those who can only stay in Yangon for their pursuit of training for career advancement or for job hunting are getting chances to job openings, while those living in other parts of the country have less chance for study and job.

However, with the expansion of tourism industry and creation of new tourism products (sites) in Myanmar, job opportunities are extended for those residing in different touristic zones. To create exposure to trainings for those who want to work in the tourism sector in the other places outside Yangon becomes vital in order to ensure that local people have chances to participate in the tourism industry development. Thus, there is a clear need for providing courses to train tourism work force, to service the increasing number of tourists not only in the main touristic areas but also in the new areas.

Myanmar tourism market is competing for its market share with its neighboring countries. To be able to beat the market prices, tourism services companies are trying to reduce the price of tour packages as much as possible while trying to improve the quality of services delivered. Moreover, with the chances of opening up or tourism boom to create touristic zones, there is still greater effort is needed to build the tourism sector in a sustainable and responsible manner and to develop the work force of the community to become part of the industry.

For tour guides working in the tourism fields, it is very fundamental to acquire at least English language. Only then, they can gain a chance to get chances for training exposure to gain basic knowledge of the industry and on which, they have to build their ability to become proficient in the field. However, the potential for eligibility for trainings is halted because of language barrier. Once they get enrolled for trainings, passed tests and exams and become licensed guides, they still find it difficult for getting connected to tour companies. Recommendation by a senior, requirement for experience and demand for practical training exposure are the buzzed reasons for new entrants. Furthermore, in the time of declining arrivals, new entrants are struggling to get tour assignment, while trying to survive on mere income gained during the tour season. Many feel insecure and many leave the industry in hunt for more secured job in the politically and socially unstable atmosphere of the country.

1.2 Objectives of the Study

The objectives of the study are to identify the role of Regional Guide trainings and to analyze barriers, challenges and opportunities for local tourism workforce.

1.3 Method of Study

This survey was based on random sampling method. The descriptive method is applied in this study. Quantitative method is used, based on survey with a well prepared questionnaire. There are altogether 817 successfully trained Regional Guides (RGs) during the period. The total survey size is 138 regional guides who received training and are working as Regional Guides in the Southern Shan State.

This study uses both primary and secondary data. Primary data are collected from the respondents working as Regional Guides (RG) in Southern Shan State using the structured questionnaire. Secondary data are obtained from the Ministry of Hotels and Tourism, Tourism Training School (Yangon), Regional Guide Associations (SSTGA) in these regions, reports of UNWTO and ADB and related internet websites.

Mainly consulted reports and articles are Sector Skills Assessment for the Hospitality, Tourism and Sport Sector, Training Needs of the Tourism Sector, Employment Relations in the Hospitality and Tourism Industries, Tourism Sector Assessment, Strategy, and Road Map for Cambodia, Lao People's Democratic Republic, Myanmar, and Viet Nam (2016-2018) and Myanmar Tourism Master Plan

(2013-2020). The questionnaires are distributed to Regional Guides (RGs) who completed the RG Training Courses organized by Tourism Training School (Yangon) incorporation with the regional DHT branch office in southern Shan State.

1.4 Scope and Limitations of the Study

The scope of the study mainly focuses on Regional Guide Training Programs in Southern Shan State in Myanmar and the program's contribution to the local people of the region in creating job opportunities and getting actively involved in the tourism sector of the region. The region and period covers only Southern Shan State, from 2013 to 2019. This survey was conducted within 14-day period, from 9 August 2019 to 22 August 2019.

1.5 Organization of the Study

This thesis contains five chapters. Chapter One consists of an introduction: Rationale of the study; Objectives of the study; Method of study; Scope and limitations of the study and Organization of the study. Chapter Two presents Literature Review: Nature of Tourism Industry; Role of Tourism Industry; Impacts of Tourism; Tourism Workforce and Human Resource Development Trainings; and Review on Previous Studies. Chapter Three describes Tourism Industry in Myanmar: Historical Background of Tourism Development in Myanmar; Potential for Myanmar Tourism; Tourism Master Plan (2013-2020); Stakeholders in Tourism Industry; Socio-Economic Contributions by Tourism; and Human Resource Training Institutions. Chapter Four consists of Survey Profile, Survey Design and Survey Results and Findings. Chapter Five is the conclusion with findings and recommendations.

CHAPTER II

LITERATURE REVIEW

2.1 Nature of Tourism

Many academics, industrialists and policy-makers have attempted to define the nature of the tourism industry but there is still no one commonly accepted definition. Among many other definitions, the followings cover the general concept of tourism.

Tourism is the commercial organization and operation of holidays and visits to places of interest. (Oxford Dictionary, 2006) According to World Tourism Organization, tourism encompasses the activities of persons traveling and staying in places outside their usual environment for not more than one consecutive year for leisure, business, and other purposes. (World Tourism Organization (UNWTO), 2019)

Technology and transportation infrastructure developments made comfortable and affordable for most people to travel around. Description of the range of people a person buying a package holiday is likely to interact with: the retail travel agent; insurance companies; ground transport to and from the airport; at least two sets of airport handling agents ; airport services the airline on all legs of the journey; immigration and customs services; local ground transportation; the hotel or apartment; tour services at the destination; companies and individuals selling a diversity of goods and services at the destination ;emergency services at the destination ; service providers on return illustrate the interactive nature among different industries. (Nickson, 2007)

Tourism can be categorized mainly as international and domestic tourism. International tourism is further divided into inbound tourism and outbound tourism. Many forms vary depending on the purposes and interests of the ones who tour, among which cultural tours, historical tours and eco-tourism are the most common ones, while other types include adventure tourism, wildlife tourism, community-based tourism, cruise tourism, MICE tourism and so on.

The sector as a whole is made up of 14 sub-sectors: hotels; restaurants; pubs, bars and night-clubs; contract food service providers; membership clubs; events; gambling; travel services; tourist services; visitor attractions; youth hostels; holiday parks; self-catering accommodation; hospitality services. (Nickson, 2007)

These indicate that tourism is a large and diverse sector with many of the activities may overlap. The characterization of the HCTS recognizes that, in reality, many jobs in hospitality and tourism, ‘share common attributes and are associated with both hospitality and tourism activities’. Clearly, the potential for a lack of precision in describing the tourism and hospitality industries has been recognized. (Lucus, 2004)

Thus, within this broad classification of travel, tourism and hospitality there is massive diversity in the types of jobs generated. These diversifying nature of the tourism industry demands tourism work force with different skills and educational requirements, regional and cultural background and knowledge to be able to get employment.

2.2 Role of Tourism

Among the verities of economic aspects, many countries consider tourism as the activity more important than others for its diverse aspects and as the driving force behind the economic growth. The reasons are that it open doors for development of economy by creating chances for investments in macroeconomic level, improvement in infrastructure, foreign currency source and human resources development. (World Travel and Tourism Council, 2012)

Tourism industry enable the participation of micro and macro economical organizations causing positive impacts on development of economy of respective countries. As investment in the development of the infrastructure is necessary to develop tourism industry, realization of projects in infrastructure, not only will accelerate tourism but also will it promote the general welfare of the community. (Ministry of Planning and Finance, 2018) Foreign income generation from the influx of visitors can make the governments possible to relocate the receipts from this industry to other essential industries, such as health and education. (Glenn, 2001)

Another point to be highlighted here is job creation. When there are high number of job openings, the number of qualified trained employees who are capable of delivering quality service become vital. To reflect the demand of the market, the role of schools for human resources training become important to the realization of quality of the people in service sector and to ensure the delivery of quality services at all time. Qualified numbers of work-force to deliver quality service is one of most essential point for client approach that accounts the most in the service sector. (World Tourism Organization (UNWTO), 2019)

Thus, it is very clear that tourism is very important as it contributes to welfare of a society and its region or country and to enhance GDP growth, in terms of local and foreign investment amount, number of employment, infrastructure development and generating government income. This has been continuously reflected in many surveys and reports. The importance of tourism and hospitality employment in both developed and developing countries is attested to by the World Travel and Tourism Council (WTTC), who suggest that travel- and tourism-related activities account for over 230 million jobs, or 8.7 per cent of jobs worldwide in 2006. (Nickson, 2007)

By 2018, the top ten countries with the highest number of tourist arrivals include France, Spain, USA, China, Italy, Mexico, United Kingdoms, Turkey, Germany and Thailand, with the figures ranging from 86.9 to 35.4 million arrivals. (Kishor, 2019)

2.3 Effects of Tourism

2.3.1 Potential Economic and Non-Economic Effects

The impacts of tourism can be identified in terms of positive economic benefits. Tourism create SME business opportunities which provide employment and earnings from the sales of goods and services. It creates employment in formal sector businesses by the poor, gains from concession or lease agreements with formal sector enterprises, generate income form collection of user fees for passing through a village or visiting a tourism zone and charitable donations from tourism businesses or from tourists. (Walter Jamieson, Harold Goodwin and Christopher Edmunds, 2004)

However, there are also negative economic impacts as there are usually pressure on the quality of the services offer and also necessitates increased investment for required facilities. Moreover, it can have increased cost of living for local people in the touristic zones.

In addition to economic impacts, tourism also brings positive and negative non-economic impacts. Opportunities for capacity building, education and training, improvements in health, education and other forms of well-being are some of the areas which can be advanced, while values such as local traditions and ways of life are negatively impacted, traditional residents are displaced and there can also be increases in crime, pollution and even in degradation of the environment. (Walter Jamieson, Harold Goodwin and Christopher Edmunds, 2004)

2.3.2 Measuring Effects of Tourism

Traditionally, the impact of tourism and tourism growth is most often measured depending on the data of international arrivals, length of stay, bed occupancy, tourism expenditures and the value of tourism spending. However, these measures fail to provide any means of determining the scale of the impact on the poorer population of the globe or of a country. (Walter Jamieson, Harold Goodwin and Christopher Edmunds, 2004)

Tourism development surely enriches local elites, international and expatriate companies. Most tourism plans fail to deliver benefits to the poor but brings more benefits to the non-poor and thus is an indicator for requirement of targeting efficiency. Tourism development needs to employ those in the lower social and economic classes and to generate income and encourage their participation in the industry. (Walter Jamieson, Harold Goodwin and Christopher Edmunds, 2004)

There have been references to the importance of tourism in the Least Developed Countries (LDCs), developing countries, rural and marginalized areas, but there is very little consideration of the impact of tourism on the poor or people in less-favored social and economic conditions. Within tourism planning and development there has also been a growing realization to develop tourism policies and practices that enable inclusion of poorer population. This is reflected in programs of various international organizations such as the WTO, ESCAP and ADB. (World Tourism Organization (UNWTO), 2019)

Targeting mechanisms are essential solution to ensure benefits go to people in different places and areas as well. Geographic targeting is one of the ways to focus development efforts on poor areas or localities under the assumption that the poor will tend to benefit from development in their area. The accuracy of geographic targeting depends upon how small an area is targeted—the smaller the jurisdiction defined the

higher the targeting efficiency tends to be. (Walter Jamieson, Harold Goodwin and Christopher Edmunds, 2004)

In order to enhance to positive impacts of tourism development, to reduce unemployment rate and to ensure participation of local community in tourism industry, publicly supported training programs for local tourism workforce in areas with tourism potential through geographic targeting becomes vital.

2.3.3 Socio-Economic Contributions of Tourism

Tourism is commonly considered to be a facilitator of socio-economic development, especially in less-developed countries (LDC's) and peripheral and/or rural areas. It is also proclaimed to be an important pillar for achieving UN Millennium Development goals—i.e. poverty, hunger, gender inequalities and environmental degradation can be alleviated through sustainable development of tourism. (Miočić, 2013)

In 2015, international tourism generated \$15 billion and supported about 4.6 million jobs in CLMV. This represents a 49% increase in tourism employment compared to 2013. Across the four countries, about \$3,500 in tourism expenditure sustains one job. (UNDP, 2018) Direct contribution of travel and tourism to GDP is highest in Cambodia (13.5%), followed by Viet Nam (6.6%), the Lao PDR (4.6%), and Myanmar (2.6%). Investment in tourism-characteristic subsectors such as hotels, air and land transport services, and leisure and recreation services that deal directly with tourists totaled \$4.75 billion in 2014 and rose to \$6.1 billion in 2015. Average expenditure per visitor, inclusive, is lowest in the Lao PDR (\$155) and highest in Viet Nam (\$1,204), while expenditure per visitor in Asia and the Pacific is \$1,500. (Schipani Steven, 2018)

At least half of tourism workers in CLMV are women, but gender profile by job type varies considerably. Women tend to be employed in lower-skilled jobs paying lower wages, while men hold more managerial positions in government and private tourism enterprises. This situation is consistent with global benchmarks, which indicate that women comprise 33% of senior management in hospitality professions and 27% of leadership positions in food and beverage services.¹² Many poor and lower income women enter the tourism sector with small personal investments. Most would benefit from better access to affordable credit and vocational training; this is

particularly true for ethnic women and when the household head is a woman. (Schipani Steven, 2018)

As a result of supportive government policies, the average annual growth rate of international visitor arrivals to CLMV is 15%, approximately twice the rate in ASEAN-6. CLMV attained an all-time high of 22.08 million international visitors in 2015. Domestic tourism is also substantial, led by Viet Nam, with more than 30 million annual domestic trips, followed by Cambodia (8.5 million), Myanmar (2.2 million), and the Lao PDR (2.1 million). Although recent growth has been impressive, CLMV receive only 20% of ASEAN's total international visitor arrivals. (Schipani Steven, 2018)

In Cambodia, the number of tourist arrivals reflects continuous incline during 2013-2017 with the number 4,210,165; 4,502,775; 4,775,231; 5,011,712; and 5,602,157 respectively. This generates \$2,547,000; \$2,736,000; \$3,012,000; \$3,212,000 and \$3,838,000. (Ministry of Tourism , 2017)

For Laos, the number of tourist arrivals showed continuous increase during 2013- 2018, except for a slight drop in 2017. The figures reflected in each year were 3,779,490; 4,158,719; 4,684,429, 4,239,047; 3,868,838; and 4,186,432. The projections for 2019 is expected to reach 4,475,720. The revenues generated from tourism were \$595,909,127 in 2013; \$641,636,543 in 2014; \$725,365,681 in 2015; \$724,191,957 in 2016; \$648,067,008 in 2017 and \$ 811,010,661 in 2018, with the estimation for 2019 to be \$855,184,922 respectively. Tourism ranked as the fourth foreign income earner when comparing with those incomes earning from Laos' major exports in three consecutive years from 2016 to 2018. (Tourism Development Department, 2018)

For Vietnam, the number of tourist arrivals showed increases during 2013 and 2018 and the revenue from tourism accounted for \$9,554,353 in 2013; \$ 10,875,904 in 2014; \$15,584,748 in 2015; \$18,237,848 in 2016; \$22,838,914 in 2017 and \$27,431,374 in 2018 respectively. (Das, 2019)

According to UNWTO's forecasts, Asia and the Pacific travel and tourism is expected to generate \$3.7 trillion and sustain 197 million jobs by 2024. The ASEAN countries are among the world's fastest-growing tourist destinations and international visitor arrivals in ASEAN are expected to continue increasing by 5.1% per year and reach 187 million in 2030. The long-term outlook for global tourism growth is bright,

with United Nations World Tourism Organization (UNWTO) forecasting international visitor arrivals will rise an average 3.3% per year and reach 1.8 billion in 2030. (Schipani Steven, 2018)

2.4 Tourism Workforce and Human Resource Development Trainings

Tourism is a labor intensive industry and the success of the industry can be gained only through skills which can deliver quality service.

2.4.1 Tourism Workforce

The International Labor Organization (ILO) in their wide-ranging report on the global tourism and hospitality industry provides evidence that suggests that the industry globally is largely reliant on ‘marginal workers’, such as women, young workers, casual employees, students, relatively high numbers of part-timers and migrant workers. (Schipani Steven, 2018)

Within the UK, women make up around 58 per cent of the broader hospitality, leisure, travel and tourism workforce. Young people are also prominent within the hospitality, leisure, travel and tourism sector. 37 per cent of the total UK workforce is under 24 years and 58 per cent under 34 years. Significant part of the tourism and hospitality workforce consists of student, seasonal and migrant workers. Students are an increasingly important segment of the labor market for hospitality and tourism organizations. (Alastair Galbraith and Muriel Bankhead, 2012)

2.4.2 Human Resource Development Trainings

Tourism education plays a major role in preparing potential workforce to gain professional and practical skills required by the tourism industry.

Training institutions are responsible for tourism human resource development through the provision of formal tourism education and training programs both in quantitative and qualitative terms. In other words, they are responsible for matching the demand for trained tourism human resources both in terms of the number of graduates they train and in terms of their human capital and skill matching with tourism industry needs. In addition, practical training is necessary for students to find the opportunity to apply what they have learned into practice and to develop personal skills and abilities.

The responsibility is hugely significant and it ranges from student selection, curriculum development, partner institution selection, investment in education resources, recruitment of academic staff, industry liaison and awareness and image creation. The sector is also responsible for the delivery of continuous professional development.

Despite tourism industry is regarded as highly labor intensive industry, there are some constraints in the industry itself. As most tourism activities are seasonal, many labor relations are temporary and require flexible working forms, not only in terms of annual seasonal variation but also in shorter spaces as the week or even the day. For this situation, the sector is often perceived as unstable from the point of view of employment, and it hinders the attraction of talent by the tourism companies and discourages the investment of resources in training. (Cristina Boada , Eva Miñarro, Marta Olivella and Xavier Riudor , 2012)

According to Schipani Steven , it is necessary to make efforts on expanding the number and geographic spread of quality public and private TVET facilities. Together with its spread to a wider scope to diverse location, there is a need for increasing the number of teachers as well as their professional development for effectively and efficiently departing tourism knowledge and sharing experience. Moreover, collaboration between government and private industry is counted as vital to develop and implement competency based curriculum and certification frameworks.

Thus, tailored training courses that match the time and resource constraints of learner and also the tourism market become vital in promoting human resources. It is also essential to change widely held negative perceptions about pursuing a career in the tourism industry and to attract the trained workforce to stay in the tourism industry, without draining the investment costs for trainings. (Schipani Steven, 2018)

The training programs for the development of human resources in tourism sectors are under the Ministry of Education, Youth and Sport (MOEYS) in Cambodia, Lao National Institute of Tourism & Hospitality “Lanith” and Ministry of Education and Training (MOET) and Ministry of Labor, Invalids and Social Affairs (MOLISA) in Vietnam.

In Cambodia, Cambodia’s new Technical and Vocational Education and Training (TVET) Policy 2017-2025 was approved by the government on 16 June 2017. It intends to promote understanding of the policy among the wide range of

TVET stakeholders including ministries, training institutions, employer and employee associations, development partners, civil society organizations, and Cambodia's youth. The policy was developed through a consultative process with technical assistance from the Asian Development Bank (ADB) with the goal of transforming and modernizing Cambodia's skills development system to better serve new labor force entrants, existing workers, and Cambodia's future development.

Lao PDR's Tourism Development and promotion Strategic plan 2006-2020 define policy, guidelines and overall goal of the development and promotion of tourism. The strategy is fundamental for formulating the plan and action plan for short and medium term for development in promotion of tourism human resource development.

In Vietnam, since 2001, the GOV has been working to strengthen vocational education and training (VET) system to respond to the increased demand for skilled workers. Vietnam's Socio-Economic Development Strategy for 2001-2010 declared that the proportion of the workforce holding professional qualifications should increase to 40%, with these targets incorporated into the Socio Economic Development Plans. The Law on Vocational Training (2006) defines the institutions and qualification levels in Vietnamese VET. (Schipani Steven, 2018)

2.5 Reviews on Previous Studies

Literature review of previous about human resource training in tourism sector found as follows.

According to Laphai Naw Lar's (2013) "A Study on HRD Program in Tourism Sector in Myanmar", on direction contribution of tourism to employment between ASEAN countries, Myanmar with a population of over 60 million generates 293,700 jobs. The industry is now working towards the target of three million tourist arrivals in 2015. By 2020, it is estimated that direct employment in tourism will reach 563,056 jobs with indirect and induced employment providing 1,497,801 job. There are only small-scale training centers in place and there are just over 10 tourism training institutes all over the country. There is a clear requirement for a strategic approach at the national level to better coordinate demand and supply. The study also pointed out the underlying issues to be addressed in order to develop human resource in tourism sector in Myanmar, and recommended significant points contributing

towards sustainable tourism development for the perspective of human resource development.

In Aung Soe Moe's (2013) "A Study on the Policy and Challenges Faced by Tourist Guides in Myanmar", it is found that tourist guides are well trained and licensed but they do have constraints in their work during the tour plan and with their work during the tour plan and with their respective tour companies. These guides face difficulties when there are flight delays leading to arrangement of accommodation by themselves; even accommodations for themselves is not arranged by the companies. Most companies usually pay the guide fees only after a month for they can earn mostly in tour season lasting for about three months. For tourists, visa on arrival is the constraint that guides have to solve and then, choosing the right restaurant for them is difficult and souvenirs sellers always made problems by forcing the tourists to purchase their products and these are also problems for the tour guides as well.

CHAPTER III

TOURISM INDUSTRY IN MYANMAR

3.1 Historical Background of Tourism Development

Myanmar has been reforming its various sectors since the opening of its doors to international society, and tourism industry is no exception. (Kristian Stokke, Roman Vakulchuk, Indra Øverland, 2018) . As it is one of the great potential industries for earning foreign incomes as well as it can, to a certain degree, solve the issue of unemployment of the country, especially for semi-skilled graduates of working age group. Tourism has a wide and inclusive value chain that includes farmers, craftspeople, and rural workers; it also provides comparative advantages for women seeking employment. (Martine Bakker and Louise Twining-Ward, 2018)

The government, to promote the tourism industry of the nations, have tried to figure out policies and practices to build the successful economy in that field, in sustainable ways, in the mean while promoting the countries' economy and preserving countries natural assets as well.

Table (3.1) Tourism Actions and Measures

Year	Action
1990	Myanmar Hotel & Tourism Law enacted
1992	Tourism industry was systematically and firmly established with the formation of the Ministry of Hotels and Tourism.
1993	Government also plans to update the 1993 Tourism Law to streamline licensing formalities for hotels, restaurants, tour operators and tour guides
1996	Tourism encouraged with launch of “Visit Myanmar Year 1996”.
2007	Political events (the Saffron Revolution)
2008	Natural disasters (Cyclone Nargis)
2011	Visa on Arrival revoked (September)
2012	Visa on Arrival reissued (June)
2013	Tourism Master Plan (2013-2020)

Source: Ministry of Hotel and Tourism (MOHT)

The year 1990s, when Myanmar opened its door to foreign investments, was marked as the kick-start to the new wave of the tourism industry. The historical landmarks of actions and measures for the industry can be presented in chronological order from 1990's to the Present as in the following table. (Ministry of Hotels and Tourism, 2019)

A series of steps have been taken for the tourism industry. In 1990, Myanmar Hotel and Tourism Law was enacted. In the following two years, the Ministry of Hotels and Tourism was firmly established. To encourage the industry, Visit Myanmar Year 1996 was launched in 1996. In 2011 and 2012, there were also changes for visa regulations to facilitate the flow of the arrivals. In 2013, Myanmar has implemented Tourism Master Plan (2013-2020) in cooperation with Asia Development Bank (ADB) and the plans remain as the backbone of the tourism actions to present day. Thorough out the period, Myanmar had experienced political and social unrests in different places. (Coles, 2017) In addition to these, it suffered from natural disasters which caused negative images or impacts and halt the development of the industry in large scale. (Ministry of Hotel and Tourism and Asia Development Bank, 2013)

3.2 Potential for Myanmar Tourism

Myanmar is the largest country in mainland Southeast Asia, with a population over 50 million, stretching over 2,000 km from north to south, with a total land area of 676,577 sq. km (261,288 sq. miles). It shares a total of 5,858km of international borders with five nations_China, Laos, Thailand, India, and Bangladesh _ and has over 2,800km of coast line. (Coles, 2017)

It is endowed with natural and geographical diversity that ranges from ice-capped mountains in the north, with historical sites in the center plain regions, and miles of beautiful beaches lining in the southern part. Its tourism product types range from historical sites, dates back to as early ancient Pyu period, and cultural sites (Bagan and Mandalay Regions), to eco-tourism sites in the most far flung places. According to the AGD's data of Natural and Cultural Protected Areas in the Association of Southeast Asian Nations, Myanmar has a total of 57 natural protected areas, which accounted for the total area of 48,592km² and 7% of the total land area. (Myanmar Centre for Responsible Business, 2018)

In order to escape the tourist congestion in the main touristic spots like in Mandalay, Bagan, Inle, etc., the country still has chances and capacity to expand its horizon by creating new products (sites) to be launched into the global tourism market. Some recent new sites include the products Chin State, Kayah State, Thanindaryi Region and so on. Myanmar has great potential for developing ecotourism as it possesses some of Asia's richest biological diversity. There are also seven Association of Southeast Asian Nations Heritage Parks: Alaungdaw Kathapa National Park; Indawgyi Lake Wildlife Sanctuary; Inle Lake Wildlife Sanctuary; Khakaborazi National Park; Pampi Kyun Wildlife Reserve; Meinmhala Kyun Wildlife Sanctuary and Nat Ma Taung National Park and so on. (National Commission for Environmental Affairs (NCEA) , 2009) . Moreover, Myanmar owns two UNESCO World Heritage Sites: one is the sites of three Pyu Ancient Cities 200BC-900AD: Halin, Beikthano and Sri Ksetra), nominated in 2014, the second site is Bagan, freshly nominated in July 2019. (World Heritage Committee, 2014)

Adding to these is the culturally diverse people. Myanmar is home to over 135 different types of ethnic groups. It is ranked as the 75th most diverse countries in the world.(Sarah L Clarke, Seng Aung Sein Myint and Zabra Yu Siwa, 2019)These diversities together with diverse geographical conditions make the Myanmar possible to create new tourism products (sites) marketable to the highly competitive in the global tourism industry.

Apart from key attractions of culture, history, nature, and landscapes, tourism growth in Myanmar is driven mainly by improved physical connectivity with regional and global markets_ modernization of Yangon and Mandalay International Airports and increased scheduled air services; construction of transnational highways that link CLMV to large outbound-generating markets in the PRC and Thailand; and development of leisure cruising on Irrawaddy River. (Schipani Steven, 2018)

Another driven factor is the facilitative tourist visa policies_ the UNWTO mentions Southeast Asia is the most open sub region in the world in terms of tourist visa requirements. About 33% of the world's population can obtain a tourist visa on arrival, and 26% are not required to obtain a visa when traveling for tourism.

The third factor is rapid advances in information and communication technology (ICT) _ the introduction of electronic visas, the use of government and

private websites for destination marketing, online advertising, business listings on online travel agents, and the use of peer-to-peer sharing economy websites. (Kee-Yung Nam, Maria Rowena Cham, and Paulo Rodelio Halili, 2015)

Most of all, the rising affluence of developing Asia provide further impetus for continued expansion of the tourism industry.

3.3 Tourism Master Plan (2013-2020)

Tourism Master Plan (2013-2020) was developed in consultation with tourism experts from Asian Development Bank (ADB). It was first drafted in June 2013 and came into force for implementation with a clear vision, guiding principles and strategic programs in the form of a long-term implementation framework which is well-suited to the needs of the industry. The Master Plan includes 38 projects with an indicative cost of \$486.7 million aimed at developing human resources and tourism-related infrastructure. (Ministry of Hotel and Tourism and Asia Development Bank, 2013)

The projects in the Master Plan include five broad areas, which covers the regulations, human resources development, establishing safeguards, promotion of quality products and expansion or improvement projects for tourism-related infrastructure.

The first area for regulations include to amend investment laws, laws for gaming subsector, labor and for establishing outbound tour operations for Myanmar citizens. It also covers visa regulations of to streamline visa processes including visa-on arrival, establish e-visas and visa extension in Myanmar. Another regulation is about fee collection and revenue generation form tourism sites. Moreover, the other regulations include to remove restrictions on travelling to certain areas in Myanmar, to explore international flights to Bagan and Inle lake, to streamline licensing for foreign-owned hotels, restaurants, tour operators, tour guides and so on. And most of all the plan is to manage the Master Plan at the Vice President level.

The second area of is concerned with human resources development. It is to implement the plans to introduce classes on tourism in high schools, to partner with regional universities, to organize mobile tourism training unit and for the establishment of certification standards and certification body.

The third area is related to the safety and safeguards for international visitors. It is intended to form new tourist police units, to conduct training to impart knowledge about sex tourism and child trafficking and disaster management and evacuation plans for tourists.

The fourth area of the plan is concerned with promoting of tourism products or tourism sites. It intends to generate guidelines for eco-tourism protected sites, to plan itineraries of various type of tour programs: adventure tourism, voluntary tourism, pilgrimage, meditation, cruises, cuisine, and meetings, incentives, conferences, exhibitions (MICE) and so on. In order to encourage participation of ethnic communities in the tourism industry, pilot projects in remote places are to be implemented as well as community-based tourism. The program also covers to survey accommodation stock, tracking hotel construction, preservation of heritage stock for conversion to boutique hotels and to provide incentives for green technology and barrier-free tourism-related products.

The fifth theme is related to the expansion and improvement of tourism-related infrastructure. This include expansion of airports in Nay Pyi Taw and Mandalay, improving feeder roads to key tourism destinations, expansion of MICE facilities, improving river pier in Bagan, improving accommodations and related facilities and water treatment facilities in Kyaikhto region, improving existing roads, links and adding new roads in Ngapali village and Thandwe airport and Patheingyi-Chaungtha-Ngwesaung-Yangon roads.

Funding for the master plan comes from ADB and the government of Norway, and ADB supervises the development projects inside the country through its branch office in Nay Pyi Taw. It aims to bring 3.01 million visitors to Myanmar in 2015 and 7.48 million in 2020. The plan also aims to earn \$10.18 billion from the tourism industry in 2020, up from \$534 million in 2012. (Ministry of Hotel and Tourism and Asia Development Bank, 2013)

Based on the second broad theme to develop human resources, the number of tourism-related jobs is targeted to be raised to 1.49 million in 2020, up from 293,700 in 2013. The then Minister for Hotels and Tourism U Htay Aung marked the Master Plan as “A solid start to ensuring tourism contributes to equitable social and economic development in Myanmar. Tourism will be a pillar of Myanmar’s economy, and it has the potential to create meaningful job opportunities, including for those living in poor

communities.” The master plan aims to develop tourism-related human resources by strengthening the tourism education and training systems. (Aung Shin, 2013)

The Tourism Master Plan provided all the stakeholders a chance to foresee the magnitude of challenges ahead, and identified areas where, then, still greater effort is needed to build the tourism sectors in a sustainable and responsible manner. One of the themes _Developing Human resources _is signaling for the requirements to fulfill the gaps by redesigning the training institution and improving its facilities. As the life of the master plan is drawing near to end, it is worthwhile to review the effectiveness of the training programs, the employment conditions and to assess whether it have been supportive in realizing the Plan.

3.4 Stakeholders in Tourism Industry

Myanmar has gone through both positive and negative impacts as tourism grows, but to ensure that tourism develops in the right way through proper management, it depends on the ability to work and bring together professional competence, stakeholder perspectives and result-oriented implementation.

3.4.1 Public Sector

The national government, at the national level, is responsible to ensure that implementation mechanisms by preparing suitable frameworks for tourism development, such as investment, taxation, education, health and safety, marketing, human resource and infrastructure development. The local authorities (state and regional authorities), who takes on a leading role in environmental and land-use planning and rural development at the local level, play a crucial role in activating the action points, by facilitating participation of local communities and licensing businesses and work force in accordance with the national framework. (Ministry of Planning and Finance, 2018)

The main directing staff under the Ministry is the Directorate of Hotels and Tourism (DHT), whose main functions include planning, promotion, marketing and research, investment in tourism, facilitation and regulation of private sector. Tourism Human Resource Management is under the supervision of Directorate of Hotels and Tourism, which oversee the sub-sector of Training and Development Department and provide guidelines and plans for training programs and support the implementations. The scope covers (a) selecting candidates for meetings, workshops, seminars and

other occasions held by ministries and organizations ; (b) supervising the hotel and training schools for private sector; (c) collaborating with institutions from abroad to open capacity building training in Myanmar; (d) registering and keeping record of the trainings and participants; (e) organizing the regional training courses for hotel and tourism ;(f) managing the library of Ministry of Hotels and Tourism; (g)managing the tourism training and education department ; and (h) performing assigned tasks occasionally. (Ministry of Hotels and Tourism, 2019)

In addition, the Union of Myanmar Travels Association (UMTA) was formed in 2002 under the directive of the Ministry of Hotels and Tourism. UMTA has its regional representative committee at three most import zones of the country: Mandalay, Bagan and Inlay. It takes the responsibility for various HRD programs for capacity building in capacity building of the tourism workforce. (Union of Myanmar Travel Association (UMTA), 2002)

3.4.2 Private Sector

A number of public sector organizations, non-governmental and civil society organizations, communities, conservation institutions and organizations, and private education and training schools also play vital roles for human resource development. A summary of development partners and associations who are supporting Myanmar Tourism Industry not only in terms of funds but also providing essential project and technical support are described in the table: Development Partner Assistance, in the Appendix 1. (Schipani Steven, 2018)

3.5 Socio-Economic Contributions by Tourism

Tourist arrivals to Yangon entry point, Mandalay & Bagan gateways, Nay Pyi Taw gateway and border tourism between 2008 and 2017 November can be observed as follows:

Table (3.2) Tourist Arrivals in Myanmar (2006-2017)

Year	No. of Tourist Arrivals	% Change
2006	630,000	---
2007	716,000	+13.65
2008	731,230	+2.06
2009	762,547	+4.28
2010	791,505	+3.79
2011	816,369	+3.14
2012	1,058,995	+29.72
2013	2,044,307	+93.04
2014	3,081,412	+50.73
2015	4,681,020	+51.91
2016	2,907,207	-37.89
2017	3,443,133	+18.00

Source: Ministry of Hotel and Tourism

According to the data from the Ministry of Hotel and Tourism, during 2006 and 2018, Myanmar experienced continuous increases in the number of arrivals throughout the period, except in 2016. It has also been observed that the highest number of increment was by 93.04% in 2013 when the number soared and reached to 2,044,307 arrivals. In the following two years after 2013, the percentages show more or less similar increment with 50.73% and 51.91%. The number of arrivals peaked in 2015 with 4,681,020 arrivals which plunged back in the following year to 2,907,207 arrivals. (CEIC, 2019)

The data also depicts that until before 2012, the number of tourist arrivals showed stagnant just around and under 800,000 arrivals. This might have been due to political and social unrest within the country, including the Saffron Revolution in 2007 and Cyclone Nargis in 2008. The number started gaining its acceleration in 2012 with 29.72%, which continued to grow until 2017, except for a plunge in 2016. This

might have been due to changes in visa regulations, when the Myanmar began to practice new visa policies. Moreover, these increment was due political reforms after 2011 general election.

Table (3.3) Tourism Receipts in Myanmar (2006 - 2017)

Year	Tourism Receipt (USD)	Growth Rate (%)
2006	59,000,000	---
2007	97,000,000	64.41
2008	80,000,000	-17.53
2009	75,000,000	-6.25
2010	91,000,000	21.33
2011	334,000,000	267.03
2012	550,000,000	64.67
2013	964,000,000	75.27
2014	1,687,000,000	75.00
2015	2,199,000,000	30.35
2016	2,289,000,000	4.09
2017	2,279,000,000	-0.44

Source: Ministry of Hotel and Tourism

Total earning data Myanmar's Tourism was reported a continuous increase during 2006-2017, except for the period of falls in 2008, 2009 and 2017. Tourism revenue in 2017 accounted for 2,279,000,000 USD. This records a decrease from the previous number of 2,289,000,000 USD for December 2016 which indicates the highest revenue. It went through the lowest earning of 59 million US dollars in 2006. (CEIC, 2019)

The influx of the number of arrivals generate job for the local work force and grants business opportunities new entrants, especially small scale enterprises and companies, to tourism business. Directly benefited organizations include the retail travel agents, airport services (shops, food and beverage outlets), immigration and customs services, local ground transportation, the hotel or apartment, tour services at the destination, and companies and individuals selling a diversity of goods and services at the destination.

3.6 Human Resource Training Institutions

The diversity of tourism activities is indicative of the range of knowledge, skills, and attributes needed by tourism workers and employees of tourism-related industries, professions, and government agencies. When the exciting workforce required to be empowered to cope with the challenges of the expansion of the tourism industry, there is also a need to train new entrants to meet of the demands in terms of quantity as well as quality.

As tourism in Myanmar grows rapidly, the industry is facing a major challenge – the lack of skilled workforce in all destinations. Organizations and managers in the tourism and hospitality industry face real challenges in recruiting, developing and maintaining a committed, competent, well-managed and well-trained workforce which is focused on offering a high-quality. (Department for International Development UK, 2016)

The Tourism Master Plan recognizes the need to invest in human resources development and has set it as one of its strategic priority programs. The MOHT and a number of development partners are offering hospitality training to address the shortage of skilled labor in the tourism industry.

The training courses offered by the private sector is also important for the human resource development. However, most of the trainings (e.g. ticketing, hospitality, sales) are of small scales and there is no common curriculum. Among many private sector trainings, on-job trainings provided by tourism companies are also vital and essential for enhancing professional qualities of tourism professionals but these chances are opened to relatively few number of tour guides and thus very competitive.

3.6.1 The Development and Role of New Regional Guide Trainings

With the development of economy, the tourism landscape is changing with the booming of the industry in the southeast Asia region. Many countries set new policies and programs in order to reap bigger shares of the world tourism market in their best efforts. This demands a lot of preparedness in the industry not just in terms of regulations and infrastructure, but also in terms of enforcing human resources in this labor intensive industry.

With the implementation of the Tourism Master Plan (2013-2020), Ministry of hotel and tourism has taken steps in providing more trainings to produce more license tour guides

and to empower human resource capacity throughout the country in many regions. Formerly, the tour guide trainings are conducted only in Yangon. This granted the chances for those residing in Yangon area and for those who can come and stay in Yangon for the pursuit of tour guide career. Human Resource Development programs for tourism sector in Myanmar ranges from Basic Certificate Courses, post- graduate diploma courses and degree courses.

3.6.2 Training Courses provided by Public Tourism Training School

Under the supervision of the Directorate of Ministry of Hotel and Tourism, Tourism Training School was first founded in 1992. Since then, it has conducted a total of 59 batches of two-month Tour Guide Training Courses (Basic) and produced a total of 9778 National Licensed tour guides to date. The tourism training school is the only body who is granting certificate and licenses throughout the nation.

Table (3.4) Types of Guide Training Courses

No	Types of Courses	Duration	Level	Started Date
1	Tour Guide (Basic)	Two month	Certificate	1992
2	Tourism Management	Two month	Certificate	2002

Source: Tourism Training School

According to the tourism training school, the entrance examinations are very competitive. The number of applicants always exceed what the training school can really host or accommodate per batch. Moreover, as the trainings are conducted only in Yangon, those who are living in other towns and cities have less chance to attend the courses. This mean that they do not also have a chance to have a share of the job opportunities generated in the tourism industry of the country.

3.6.3 Degree in Tourism and Diploma in Tourism Study and Management Courses

The four-year bachelor degree in tourism course is provided by the Ministry of Education and the Ministry of Hotel and Tourism (MOHT) and Diploma in Tourism Study and Management (DTSM) course is provided by National Management College (NMC) Yangon and Mandalay.

Table (3.5) Degree and Diploma Courses

No	Types of Courses	Duration	Level	Started Date
1	Degree	Four Year	B.A. Tourism	2012
2	Diploma	One Year	Diploma in Tourism Study and Management	2006

Source: Tourism Training School; National Management College

3.6.4 National Guide Training Courses (2013 - 2019)

Tourism Training School has conducted total 59 batches of Tour Guide Training Courses until now since its opening in 1992. During 2013-2019, a total of 17 batches were conducted and 1949 students had completed the courses and granted licenses. Currently the 59th batch is on with 87 students. Applications were opened on 8 April to 3 May 2019 and written exam was conducted on 12 May 2019 and oral test for other languages speaking guided were conducted between 13 and 15 May 2019. The class has been conducted starting from 10 June 2019 and it will be ending on 3 September 2019.

Table (3.6) National Guide Training by Tourism Training School (2013- 2019)

No	Year	Batch				Total Number of Trainees Completed				Total
1	2013	42	43	–	–	126	113	–	–	239
2	2014	44	45	46	47	115	113	123	121	472
3	2015	48	49	–	–	126	131	–	–	257
4	2016	50	51	52	–	116	117	125	–	358
5	2017	53	54	55	–	114	120	93	–	327
6	2018	56	57	–	–	108	81	–	–	189
7	2019	58	59	–	–	107	–	–	–	107
Total										1949

Source: Tourism Training School

Until before 2013, the tour guide trainings are concentrated in Yangon alone and chances to reach these trainings for those living in remote places were then

impossible. With the objectives to provide more knowledge about the tourism industry, to grant equal chances for trainings and job opportunities for those dwelling outside Yangon area and to promote the human resource of the region, Section 2: Developing Human Resources (Introducing classes on tourism in high schools; Opening up partnerships with regional universities; Mobile tourism training unit and Establishing certification standards and certification body) is included in the Tourism Master Plan. (Ministry of Hotel and Tourism and Asia Development Bank, 2013)

3.6.5 Regional Guide Training Courses (2013- 2019)

In 2013, to implement of part of the program of Developing Human Resources: Mobile Tourism Training Unit in the Tourism Master Plan (2013-2020), the Directorate of Ministry of Hotel and Tourism started to conduct Regional Guide (RG) Training Courses in the regions of most tourist visited areas outside Yangon in the country.

Table (3.7) Regional Guide Training Courses (2013 - 2019)

No	Region	Total No. Batch	Total No. of Regional Guides	Remarks
1	Bago Division	2	218	Pyay, Bago
2	Chin State	1	101	Chin
3	Kachin State	2	286	Kathar ,Myitkyina
4	Kayah State	1	350	Loikaw
5	Kayin State	1	224	Pha-an
6	Mandalay Division	4	1109	Mandalay, Bagan, Moegoat, Shwebo
7	Mon State	1	185	Mawlamyine
8	Rakhine State	1	132	Sittway
9	Sagaing Division	2	304	Magway, Moneywar
10	Shan State	5	1212	Lashio, Nyaung Shwe, Kyaing Tone, Kalaw, Taunggyi
11	Tanindaryi Division	3	487	Kawtaung ,Myeik , Dawei
Total		23	4608	

Source: Tourism Training School; Ministry of Hotels and Tourism

To date, a total of 45 batches of RG trainings are conducted in 23 different places, including the areas of the most popular tourism destination and produced a total of 4608 trained guides.

The details of the training batches and number of students in each batch in different places of the country can be seen as in the above table. It can be observed that the training reaches to total eleven regions, including Kachin, Kayah, Kayin Chin, Mon, Shan and Rakhine states and Thanindaryi, Bago, Mandalay and Sagaing divisions, creating chances for local people for training exposure to help them include in the developing and expending tourism industry throughout the country.

CHAPTER IV

SURVEY ANALYSIS

4.1 Survey Profile

The study is based on the regional tour guide form Southern Shan State. Southern Shan State is one of the most popular tourist attractions and the most visited in the area includes Taunggyi, Kakku, Inle, Kalaw and Pindaya. The region is attractive for its diverse activities, its picturesque surroundings, unique cultural and social events and the pleasant climate. The region is easily accessible by plane or by road. This make the region to experience tourist receipts all year round, even during the rainy season.

The development of the tourism related business created many job opportunities for both male and female residents in the area, especially young people of the region. Among the many type of jobs created, tourist guide job is a very attractive one and many locals are finding chances to be able to work as tour guide.

Until 2013, all the trainings for tour guides are conducted only in Yangon at Tourism Training School. After 2013, with the implementation of Tourism Master Plan (2013-2020), new training plans: Regional Guide Trainings were designed and extended to those living in other places outside Yangon. The trainings were also conducted in three locations of Southern Shan State: Taunggyi, Nyaung Shwe and Kalaw. A total of 7 batches were conducted in these places: one in Taunggyi and three each in the second and the third ones. There are total 817 number of RGs now: 125, 360 and 332 respectively.

The survey covers the years, from the commence of the Tourism Master Plan (2013) to present (2019) and the respondents include those who attended Regional Guide Trainings in either of the above mentioned locations and who are currently working as tour guides in the region.

4.2 Survey Design

This survey is designed to study the role of the new Regional Guide Trainings and the barriers for those who try to get training chances, effectiveness of the Regional Guide Trainings, challenges and opportunities for local tourism workforce and requirements and difficulties for career development.

This survey is based on random sampling method and structured questionnaire types are used for primary data collection. Descriptive method is applied in this study. Out of the overall population of 817 trained regional guides, a sample size of 138 are surveyed.

The questionnaire is designed using quantitative research method. It includes closed questions (Yes or No questions), open-ended questions, multiple choice questions, the questionnaire about the facilities of the training by using Linkert scale questions and dichotomous questions.

The questionnaire is designed in five different sections. Section one studies the social and economic characteristics of the respondents, section two assess the barriers for the new entrants in pursuit of the chances for trainings and the effectiveness of the training, the third section studies challenges of the tour guide job, section four reflects challenges and opportunities of the job and the last section surveys regarding chances and requirements for career development.

Survey questionnaire are distributed mainly through SSTGA to Regional Guides. They are also conveyed to them through MOHT offices, Khaung Daing and Phaung Daw Seik zone fees collection offices and SSTGA EC members of different places. Moreover, survey trips were made to Kalaw, Inle, Nyaung Shwe and Taunggyi on different days.

The information obtained from the questionnaire is coded for analysis and computer software (excel) is used for analyzing the data which are presented in the form of tables, graphs and charts.

4.3 Survey Findings and Results

In this section, survey findings and results are presented in five different sections in accordance with the five different sections of the questionnaire.

4.3.1 Demographic Characteristics

This section includes the comparative findings on the demographic characteristics, geographic distribution, level of education, language for providing service and years of work experience of the respondents.

(a) Demographic Characteristics of Respondents

Table (4.1) Demographic Characteristics of Respondents

Demographic Characteristics		No. of Respondents	Percent
Gender	Male	68	49.3
	Female	70	50.7
	Total	138	100.0
Age	18-24	11	8.0
	25-34	64	46.4
	35-44	57	41.3
	45-54	6	4.3
	Total	138	100.0
Resident	Taunggyi	21	15.2
	Inlay	61	44.2
	Pindaya	56	40.6
	Total	138	100.0
Education	Passed grade 11	27	19.6
	Graduated	110	79.7
	Master	1	0.7
	Total	138	100.0

Source: Survey Data (2019)

According to the above table, with regards to the gender of respondents, they are not only males but also females. Out of 138 respondents, there are 68 males and 70 females. This shows that the share of percentage between the genders is more or less equal, with just 2% bigger share by female with 51% and the rest are males with 49% of the total sample population.

Turning now to study the ages, to show the frequency of the distribution, the respondents are classified into five groups as in the above table. It is observed that the age group between 25 and 34 accounts for the highest number with 64 respondents, followed by age groups of 35-44, 18 - 24 and 45-54 with 57, 11 and 6 respondents respectively. It is found that the majority of the respondents are between 25 and 44 years of age which accounted for 87.7% of the whole sample population.

Concerning the geographic distribution of the respondents, it is observed that the frequency of respondents from Inlay (Nyaung Shwe) is 61, while those of Kalaw (Pindaya) and Taunggyi were 56 and 21 respectively. According to the data, it is reflected that the highest ratio of the respondents which is 44% are from Inlay region, while the least portion of 15.2% is from Taunggyi region and the rest 41% are found to reside in Kalaw area.

In terms of education level, out of 138 respondents, 110 are bachelor degree holders while 27 of them have passed Grade -11 and only one respondent holds a master degree. These figure reflects 80%, 19% and 1% respectively for different education level.

(b) Respondents by Language

This section reflects survey data in number and percentages of the respondent in terms of different languages. According to the following table, 86.6% of the respondents are delivering service in English language, which accounted 136 in number. French speaking regional guides share 3.8% with 6 individuals, followed by 3.2 % of both Japanese and Spanish speaking regional guides with 5 respondents individually. Chinese language speaking guides occupied 1.9% with 3 respondents. For both Italian and German language speaking guides, they share only 0.6 % with only 1 respondent in the survey.

Table (4.2) Number of Respondents by Language

Language	No. of Responses	Percent
Chinese	3	1.9
English	136	86.6
France	6	3.8
Japanese	5	3.2
Italian	1	0.6
Spain	5	3.2
German	1	0.6

Source: Survey Data (2019)

This reflect that most of the respondents are engaged in their job mainly providing services in English language. Respondents who speak Italian and German are found to be the least in number. Excluding English language, among the other six categories of languages, there are more European language speakers: France, Spain, Italian and German than the eastern language speakers: Chinese and Japanese.

(c) Number of Year of Work Experience of the Respondents

The following table comparatively reflects number of seasons of experience the respondents have after attending the regional guide trainings. The year of experiences are described in terms of season (tourism season) of the country and it is usually referred as the high season which spans form October to March.

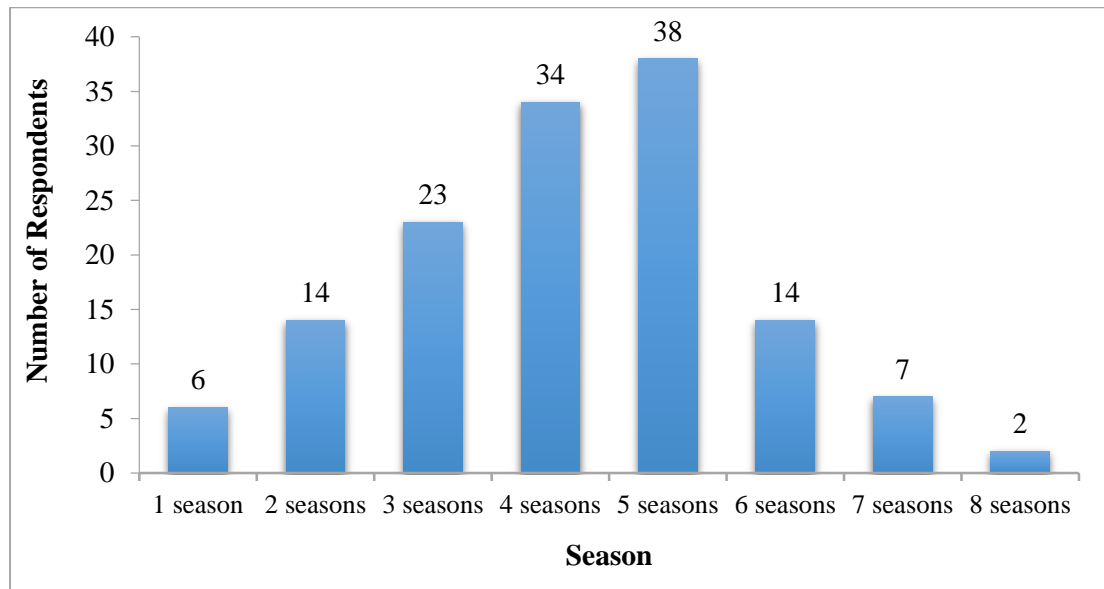
Table (4.3) Distribution of Respondents by Year of Work Experience

Seasons	No. of Respondents	Percent
1 Season	6	4.3
2 Seasons	14	10.1
3 Seasons	23	16.7
4 Seasons	34	24.6
5 Seasons	38	27.5
6 Seasons	14	10.1
7 Seasons	7	5.1
8 Seasons	2	1.4
Total	138	100.0

Source: Survey Data (2019)

Among them all, regional guides with 5 seasons of work experience occupied the highest ratio with 24.6 %. And the rest, in decreasing order percentages, are 24.6 % for 4 seasons, 16.7 % for 3 seasons, 10.1 % for 2 seasons, 10.1 % for 6 seasons, 5.1 % for 7 seasons, 4.3% for 1 season and 1.4% for 2 seasons respectively.

Figure (4.1) Years (Seasons) of Experience



Source: Survey Data (2019)

This distribution can be reflected in number as in the above Figure. The highest number of 38 respondents have 5 – year experience, whereas there are only 2 respondents with 8-year experience. Majority of the respondents’ experience ranges between 3 to 5 years.

4.3.2 Survey Reflection on Trainings and Facilities

In this section, the findings and results from the second part of the survey questionnaire are reflected. These include findings from survey on trainings, whether the trainings match with the requirements of the regional guides, and efficiency and effectiveness of the training resources.

(a) Response about Trainings

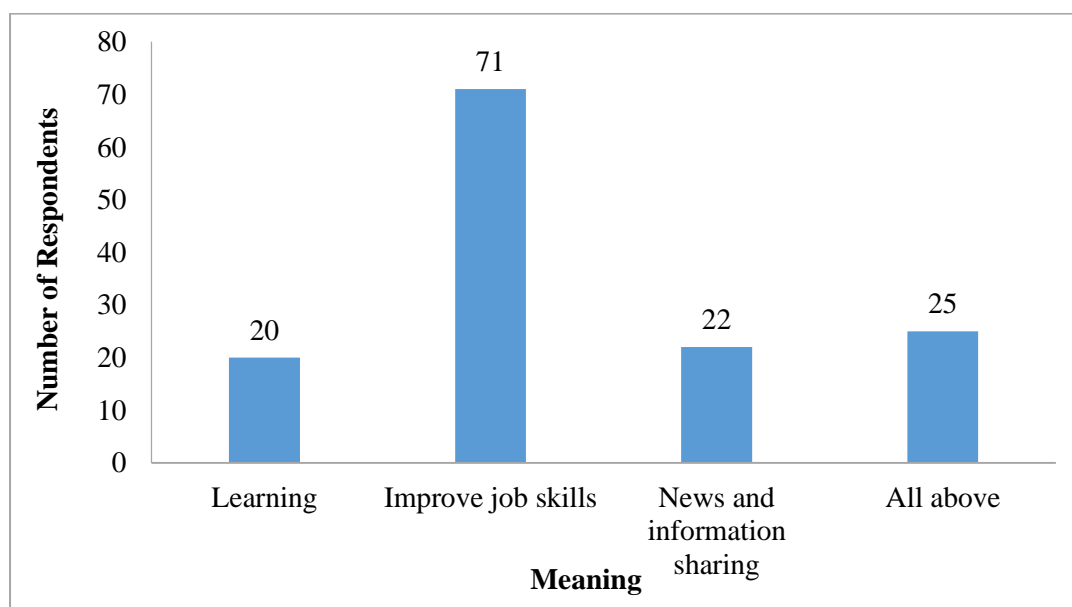
Table (4.4) Responses about Trainings

Particular	No. of Respondents	Percent
Learning	20	14.5
Improve job skills	71	51.4
News and information sharing	22	15.9
All above	25	18.1
Total	138	100.0

Source: Survey Data (2019)

The above table reflects the respondents view about the regional guide trainings. Just over half of the respondents, 51.4%, answer the training is to improve job skills, while 15.9% regards them as a ground for sharing news and information and 14.5% views as for learning. 18.1 % answers that the training is for all the above mentioned purposes.

Figure (4.2) Response about Trainings



Source: Survey Data (2019)

According to the above figure, 71 respondents consider training as a requirement for improving job skills to enable them to get employment changes in the tourism industry.

Table (4.5) Training Match with Requirements of Regional Guide

Training	No. of Respondents	Percent
Yes	131	94.9
No	1	.7
Don't Know	6	4.3
Total	138	100.0

Source: Survey Data (2019)

Respondents were also asked about their view whether the trainings match with the requirements to be able to work as tour guides. According to the above table, 94.9% of respondents also view that the trainings match with what they need for their career. Only 0.7 % responded that the trainings and requirements are miss-matched.

(b) Requirements and Barriers for Training Exposure

One of the requirements for the applicants for the training is to sit for entrance tests, either as written test or personal interview or both. The data regarding these requirements are also surveyed in the questionnaire. The survey results are reflected as in the following tables.

Table (4.6) Entrance Examination

Entrance Examination	No. of Respondents	Percent
Yes	124	89.9
No	14	10.1
Total	138	100.0

Source: Survey Data (2019)

The above table deflects data regarding the requirement to pass entrance examination. It is seen that 89.9 %of the respondents have to sit for entrance examination before grabbing chances for training exposure.

Table (4.7) Types of Entrance Examination

Entry Form	No. of Respondents	Percent
No Answer	14	0
Written	67	48.6
Interview	3	2.2
Both	54	39.1
Total	138	100.0

Source: Survey Data (2019)

Out of the total number of respondents, 48.6% or 67 individuals have taken written tests, while only 2.2 % or 3 individual responses that they have taken entrance interview. 39.1 % or 54 individual have to sit for both written tests and interview to become eligible for the trainings as shown in the following table.

Table (4.8) Number of Attempts

Time	No. of Respondents	Percent
None	0	0
Once	101	73.2
Two	20	14.5
Three	3	2.2
Total	138	100.0

Source: Survey Data (2019)

The above table reflects about the number of attempts the respondents tried to pass the entrance examination. Most students passed the test after one time attempt which accounted for 73.2 %, while 14.5% of them had to attempt for 2 times and 2.2 % for 3 times respectively.

(c) Assessment about Learning Environments

The following table and figure reflects a combination of data about the teaching style and medium of instructions.

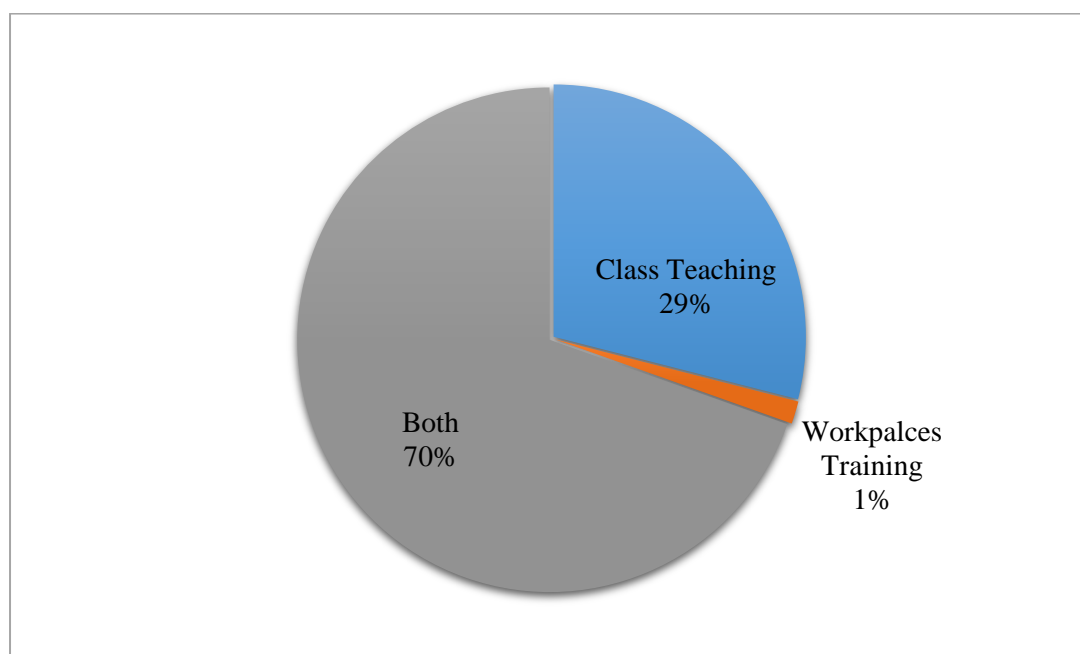
Table (4.9) Teaching Approach and Medium of Instruction

Teaching Style	No. of Respondents	Percent	Language Medium	No. of Respondents	Percent
Class Teaching	40	29.0	Myanmar	19	13.8
Practical Training	2	1.4	English	2	1.4
Both	96	69.6	Both	117	84.8
Total	138	100.0	Total	138	100.0

Source: Survey Data (2019)

According to the survey data in the above table, most of the respondents, 96 respondents had exposure to both in class and practical training, while 40 respondents answers that they learned only in class.

Figure (4.3) Response about Training Exposure



Source: Survey Data (2019)

According to the above figure, most of the students received both in class and practical trainings which accounted for 69.6 %, while 29 % of them had only in class teaching. Most respondents answer that both Myanmar and English languages were used as the medium of instruction during the courses.

(d) Assessment on Material Sources

To be able to work as a professional tour guide demand a lot of skills, knowledge and experience. Mastering a second language requires plenty of time and effort. To be able to depart local or regional knowledge, reading is the key to it. Thus, material resources are very important for the regional guides. The following table reflects the data about material sources for the required knowledge, facts and figures in pursuit of study.

Table (4.10) Material Sources

Particular	No. of Responses	Percent
Social Media (Facebook Page)	65	15.85
Internet Web Page	103	25.12
Training School Library	51	12.44
Educational Talk or Seminar	39	9.51
Television Program	16	3.90
Radio Program	10	2.44
Newspaper and Journal	77	18.78
Sharing by Experienced Guides	1	0.24
Information by Villagers	1	0.24
Private Books	31	7.56
Culture/ Tradition and General Knowledge Books	1	0.24
Field or Practical Study	2	0.49
History Books	2	0.49
Sharing by Teachers	1	0.24
Practical Training by Teachers	4	0.98
On Job Experience	1	0.24
Senior Guide	2	0.49
Through experienced senior guides	2	0.49
Other training	1	0.24

Source: Survey Data (2019)

According to survey data, it is found that respondents mostly rely on the Internet web pages which accounts for 25.12 %. Second largest sources for study are from newspaper and journals with 18.78%, followed by social media sources with 15.85%, school library with 12.44% and buying own books with 7.56 % respectively. In addition to these, additional sources include not only from people: teachers; villagers and senior guides but also from events and programs: seminar, public talks, television, radio programs and so on.

(e) Assessment on the Training Facilities

The following table reflects the survey about the training facilities to reflect the level of efficiency for the effectiveness of trainings.

Table (4.11) Training Facilities

Particular	No.	Minimum	Maximum	Mean	Std. Deviation
Inclusion of language course in the training module	138	1	5	2.82	0.92
Preparation of teacher for training	138	1	4	2.09	0.77
Practical Learning	138	1	5	3.22	1.29
Duration	138	1	5	3.13	1.20
Examination	138	1	5	2.33	0.78
Overall	138	1	4	2.72	0.62

Source: Survey Data (2019)

This is calculated by using Likert scale method with 1 for Maximum; 2 for Enough; 3 for Moderate; 4 for Minimum and 5 for Insufficient. The effectiveness is evaluated by Mean Value of each item. It is found that preparation of teacher for training has Mean value of 2.09 and examination has Mean value of 2.33 and with only 0.77 and 0.78 Standard Deviations thus enough and effective.

However, it is observed that inclusion of language course in the training module, learning in practical fields and duration of the courses are found to be still moderate and thus require for upgrade.

(f) Training Year

The year in which the respondents received training are also surveyed in the questionnaire to find out the pattern of distribution of respondents.

Table (4.12) Data for Training Year

Year	No. of Respondents	Percent
2013	54	39.1
2014	24	17.4
2015	39	28.3
2016	7	5.1
2017	7	5.1
2018	7	5.1
Total	138	100.0

Source: Survey Data (2019)

The above table reflect data about analysis of the number of respondents in terms of year they attended trainings. It is found that the highest percentage of respondents 39.1% received training in 2013, followed by 28.3% in 2015, 17.4 % in 2014 and 5.1 percentages in the rest three years. These account for 54, 39, 24 and 7 respondents respectively as shown in the following line graph.

From the above data, it is reflected that most of the respondents completed trainings in the first three years while only fewer guides who get trained after 2016 are found. This reflects that senior guides are getting job opportunities but there are lesser chances for late comers.

4.3.3 Analysis on Opportunities and Challenges of Regional Guides

This section reflects the section three of the survey questionnaire. This covers data and findings about the challenges and opportunities faced by the respondents in their career life.

(a) Language and Knowledge Barriers

Table (4.13) Challenges for Language and Knowledge Requirements

Time	Language		Knowledge	
	No. of Respondents	Percent	No. of Respondents	Percent
1-3 month	24	17.4	23	16.7
4-6 month	16	11.6	22	15.9
6-1 year	41	29.7	40	29.0
2 years	21	15.2	9	6.5
3 years	8	5.8	6	4.3
No	28	20.3	38	27.5
Total	138	100.0	138	100.0

Source: Survey Data (2019)

According to the table above, it is clear that most of the respondents faced the demands of language and knowledge. It can be seen that just over 20% of the respondents do not face language difficulties and only 27.5% of them are not challenged by knowledge. The rest of the population has to prepare for at least one to three months to three years (and above) to overcome these challenges.

(b) Condition of Tour Assignments and Income Status

In the survey, to measure respondents' conditions of receiving tour assignments and income status throughout the whole year round, questions are included in the survey forms.

Table (4.14) Condition of Tour Assignments

Employment	No. of Respondents	Percent
Yes	15	10.9
No	123	89.1
Total	138	100.0

Source: Survey Data (2019)

According to the table above, it can be seen that most of the respondents are facing difficulties as they do not receive any tour assignment during the low season (March to August) which accounted for 89.1 % and 123 individuals of the total population. Only 10.9 % or just 15 respondents do not suffer that problem.

Table (4.15) Condition of Income Generation

Particular	Yes		No	
	No. of Respondents	Percent	No. of Respondents	Percent
Enough income	35	25.4	103	74.6
Do other job	68	49.3	70	50.7
Job Security	24	17.4	114	82.6

Source: Survey Data (2019)

According to the above table, only 35 of the total respondents (25.4%) reflects that they have enough income form their job, while103 of them respond that their income is not sufficient for the whole year round which accounted for 74.6%. About half of them find or do other jobs during the low season and 114 respondents or 82.6 % of them answers that they have no job security.

4.3.4 Analysis on Opportunities Form Regional Guide Career

The data in this section reflects the findings form the section four of the survey questions. These include data about time taken to grab a job, employment conditions, type of employment, service charges range and so on.

(a) Employment Conditions and Job Assignment

Table (4.16) Lead Time to Grab Job

Time	No. of Respondents	Percent
1-3 month	70	50.7
4-6 month	16	11.6
6- 1 year	39	28.3
2 year	7	5.1
3 year	6	4.3
Total	138	100.0

Source: Survey Data (2019)

The above table reflects the time taken to get a job. It is found that most of the respondent's grab jobs within 6 months which accounted for 62.3% of the total population and 28.3% of them get jobs only after 6 months to one year. For 5.1 % and 4.3% of them, it takes 2 or 3-year time to get on the career path.

Respondents are also surveyed to define reasons for poor job conditions and the following is reflected.

Table (4.17) Job Assignment Condition

Particular	No. of Responses	Percent
Language weakness	37	15.55
General knowledge weakness	26	10.92
Work experience	42	17.65
Connection with tour companies	52	21.85
Lack of self-confidence	5	2.10
Low arrivals in region	70	29.41
Health issue	1	0.42
Political Crisis	1	0.42
Weak Promotion	2	0.84
Unrest in the region	2	0.84

Source: Survey Data (2019)

According to the table above about conditions of receiving tour assignment, it can be seen that 138 respondents provide a total of 238 reasons for getting less tour assignments.

From which, top five reasons are generated. Among them, the most frequent reason is due to low arrivals in regions which accounted for 29.41%. The rest of the reasons, in decreasing order of percentages, were connection with tour companies, work experience, language weakness, general knowledge weakness which accounted for 21.85, 17.65%, 15.55% and 10.92% respectively.

(b) Analysis on Type of Job and On-Job Training Exposure

There are only two types of employment for the tour guides. One is to work for a tour company as a permanent contract guide or the other is to work as a freelance guide. This employment type is surveyed as well.

Table (4.18) Job Type and Chances for Training

Type of Job and On-Job Training Exposure		No. of Respondents	Percent
Type of Job	Freelance	127	92.0
	Contract	11	7.9
	Total	138	100.0
Access to Training	Yes	65	47.1
	No	73	52.9
	Total	138	100.0

Source: Survey Data (2019)

The above data reflects the survey result about job type and training exposure. It can be seen that 92 % of the respondents are working as freelance regional guides while only 7.9% are working as contract guides with tour companies.

With regards to the chances for on-job trainings, it is seen that the percentages show only slight differences between those who have exposure and those who do not, which are reflected by 47.1% of the former and 52.9% for the latter.

(c) Analysis on Rates of Earning

Table (4.19) Assessment on Rates of Earning

Wages per day (\$)	No. of Respondent	Percent
15-20	40	29.0
21-30	27	19.6
31-40	57	41.3
41 and above	14	10.1
Total	138	100.0

Source: Survey Data (2019)

Turning now to study the rates of earning, to show the frequency of the distribution, the respondents are classified into four groups as in the above table. It is observed that 31-40 dollar accounted for the highest number with 57 respondents, followed by 15-20, 21-30 and 41 and above with 40, 27 and 14 respondents respectively as in the above table.

The following tables reflect Paired Sample t-test for 2017 and 2018. Income is analyzed by using inferential statistics in terms of mean and standard deviation and Paired sample t-test, which test whether there are significant differences of income levels for the given 2 years.

Table (4.20) Paired Sample Statistics

Paired Samples Statistics

Year	Mean	Std. Deviation	Std. Error Mean
2017	1993.59	1530.402	245.060
2018	1809.23	1359.929	217.763

Source: Survey Data (2019)

Table (4.21) Paired Sample Test

Year	Paired Differences				t	df	Sig. (2-tailed)
	Mean	Std. Deviation	Std. Error Mean	95% Confidence Interval of the Difference			
2017 - 2018	184.359	734.592	117.629	-53.768 422.486	1.567	38	.125

Source: Survey Data (2019)

The above Paired Sample Statistics table reflects that Mean of 2017 is 1993.59 and that of 2018 is 1809.23. This reflects that 2018 income level is lower than that in 2017. According to Paired Samples Test table, it reflects the assessment on whether the income amounts in 2 years are equal or not. It is found that 2018 and 2017's mean value is the same, since the p-value (probability value) of 0.125 is greater than 0.05 at 95% level of significant with t-value of 1.567.

4.3.5 Analysis on Conditions for Career Development

Chances for career development is one of the most vital reasons when choosing a job. The last section of the survey assesses conditions for career development.

(a) Analysis on Requirements for Career Development

Table (4.22) Requirements for Career Development

Particular	No. of Responses	Percent
Language	97	24.94
General knowledge	72	18.51
Training by experience guide	62	15.94
Connection with tour companies	68	17.48
National License (G License)	48	12.34
More trainings	37	9.51
Government's plans/ policy to improve tourism	1	0.26
Need outbound exposure	1	0.26
Safety and political stability	1	0.26
Personal effort	2	0.51

Source: Survey Data (2019)

The table reflects the survey data and findings about requirements for career development. The respondents provide a total of 389 views as factors required for the career development. Among all the responses, top five responses include Language, General knowledge, Connection with tour companies, Training by experience guide and to get National License (G License) with 97, 72,68, 62 and 48 responses respectively.

(b) Pursuit of Language Skills and Reasons

The respondents are asked to mention the language they want to study for further career development.

Table (4.23) Pursuit of Language Skills and Reasons

Language	No. of Response	Percent
Chinese	33	16.9
English	13	6.7
France	55	28.2
Japanese	14	7.2
Korean	5	2.6
Italian	13	6.7
Spanish	44	22.6
Thai	11	5.6
German	7	3.6

Source: Survey Data (2019)

According to the above table, French, Spanish and Chinese languages are the most common language which are mentioned as required to study with 28.2%, 22.6% and 16.9% respectively. Reasons for selection ranges a wide varieties and the most common reasons are related to the pattern of arrivals from different countries, non-seasonal arrivals and current tourism market conditions.

(a) Career Development Plans

Regional guide licenses are issued to those respondents who have succeeded in tests and examinations during and after the regional guide trainings. After three years, from the date of the license issued, they are eligible to apply to upgrade their license to National Guide License. In addition, additional language or languages can be added in their licenses.

Table (4.24) Career Development

Career Development		No. of Respondents	Percent
National Guide License	Yes	69	50.0
	No	69	50.0
	Total	138	100.0
Condition after receiving National License	Get better	34	49.3
	No Significant	35	50.7
	Total	69	100.0
Need for more trainings	Yes	130	94.2
	No	8	5.8
	Total	138	100.0

Source: Survey Data (2019)

According to the above table of career development plans, it can be found that 50% of the sample population had already received National Guide License. And 49.3 % of those who get National Guide License respond that they gain more chances and tour assignments.

Table (4.25) Future Plans for Trainings

Need for more trainings		
Yes	130	94.2
No	8	5.8
Total	138	100.0

Source: Survey Data (2019)

The above table reflects data about future plans for trainings. It can clearly be seen that 94.2% of the respondents indicates the need for more exposure to trainings.

Table (4.26) Types of Training

Types of Training	No. of Responses	Percent
Language	94	44.34
General knowledge	65	30.66
Tourism Management	50	23.58
Discussion and Presentations	1	0.47
Field survey	1	0.47
General knowledge	1	0.47

Source: Survey Data (2019)

According to the above table, among the various types of training, over 44% of the respondents indicate the requirement for language training, while 65 percent seek for training to gain general knowledge and 50 percent want to pursue to study tourism management courses for their career development.

CHAPTER V

CONCLUSION

5.1 Findings

In the study, the share of percentage between the genders is more or less equal, with just 2% bigger share by female with 51% and the rest are males with 49% of the sample population. The age group between 25 and 34 accounted for the highest number with 64 respondents and the majority of the respondents were between 25 and 44 years of age which accounted for 87.7% of the whole sample population. The frequency of respondents by region is 44 percentages, 41 percentages and 15 percentages from Inlay (Nyaung Shwe), Kalaw (Pindaya) and Taunggyi respectively. Most of the respondents are graduates who occupies the biggest portion with 80 % (110 guides). 86.6% of the respondents are delivering service in English language, which accounted 136 in number. Among the respondents, those with 5 seasons of work experience occupied the highest number with 38 respondents and 24.6 %.

According to the survey data, 51.4%, of respondents view the training is to improve job skills. 94.9% of respondents also view that the trainings are match with what they need for their career. 89.9 % of the respondents have to sit for entrance examination before grabbing chances for training exposure. Out of the total number of respondents, 48.6% or 67 individuals have taken written tests. Most students passed the test at one-time attempt which accounted for 73.2 %.

Most of the students received both in class and practical trainings which accounted for 69.6 %. Most respondents answer that both Myanmar and English languages were used as the medium of instruction during the courses. It is found that respondents mostly rely on the Internet web pages which accounts for 25.12 %. Second largest sources for study are from newspaper and journals with 18.78%. It is found that preparation of teacher for training has Mean value of 2.09 and examination has Mean value of 2.33 and with only 0.77 and 0.78 Standard Deviations thus enough and effective. However, inclusion of language course in the training module, learning in practical fields and duration of the courses are found to be still moderate

and thus require for upgrade. It is found that the highest percentage of respondents 39.1% received training in 2013.

Most of the respondents completed trainings in the first three years while only fewer guides who get trained after 2016 are found. This reflects that senior guides are getting job opportunities but lesser chances for late comers.

According to the survey data, it can be seen that just over 20% of the respondents do not face language difficulties and only 27.5% of them are not challenged by knowledge. For most of the population, they took at least one to three months to three years (and above) to overcome these challenges. 89.1 % or 123 out of 138 respondents are facing shortage of tour assignments, especially during March to August. 103 individuals respond of being insufficient income to the whole year round, 70 individuals find or do other jobs during the low season and 114 respondents answered that their work has no guarantee. It is found that most of the respondent's grab jobs within 6 months which accounted for 62.3% of the total population and 28.3% of them get jobs only after 6 months to one year. The survey data reflects that the most frequent reason for getting less tour assignments is due to low arrivals in regions which accounted for 29.41%. The rest of the reasons, in decreasing order of percentages, were connection with tour companies, work experience, language weakness, general knowledge weakness which accounted for 21.85, 17.65%, 15.55% and 10.92% respectively. 92 % of the respondents are working as freelance regional guides while only 7.9% are working as contract guides with tour companies. With regards to the chances for on-job trainings, it is seen that the percentages show only slight differences between those who have exposure and those who do not, which are reflected by 47.1% of the former and 52.9% for the latter. With regard to the rates of earning, it is observed that 31-40 dollar accounted for the highest number with 57 respondents, followed by 15-20, 21-30 and 41 and above with 40, 27 and 14 respondents respectively . The result of Paired Sample Statistics test reflects comparative income in average in 2017 and 2018 conveys that Mean of 2017 is 1993.59 and that of 2018 is 1809.23. This reflect that 2018 income level is lower than that in 2017.

According to the survey data, top five requirements for career developments were improvement in language skills, general knowledge, connection with tour companies, training by experience guide and to get National License. French, Spanish and Chinese languages are the most common language which are mentioned as

required to study. Reasons for selection ranges a wide varieties and the most common reasons are related to the pattern of arrivals from different countries, non-seasonal arrivals and current tourism market.

5.2 Recommendations

Comparing to the number of training providers in the CLMV, Myanmar is experiencing lower number of tourism training institutions and schools. Currently, primary or secondary schools do not teach tourism. After the implementation of the Regional Guide Trainings (Basic) programs, advance training programs to help the RGs in their study too get National License is still lacking. Thus it is highly recommended that additional support or expansion of training schemes are in urgent need to enhance the career development of host communities in tourism skills training, planning, and management.

It has been noticed that, due to lack of creation of job in other sectors, young people of the region is always in demand of getting a job and working as a tour guide to earn good income has been a growing interest. This is reflected in the number of registered students in every batch. The problem here to take into consideration is the class size (teacher-student ratio) which also accounted for the effectiveness of the training program where students will have less chances for active participation in the program either in class or filed trainings.

In the time of low arrivals, the juniors are stuck in line waiting for their terms to get assigned while preparing and studying and some are even working as volunteers without being paid but survive on small tips to get on the tour guide career trend. This lend an indication the need to take into consideration in future how to help new guides to get on the career trends. While it is true that experience in service industry is the key factors, it is also essential to generate ideas about how to help the newer entrants to get into the field, or else all the efforts of training would be wasted.

Whilst the quantity of licensed guides is unquestionable, the quality of many of them is of great concern to academics and policy-makers alike. There is a need of tourism training curriculum for quality assurance and training-of-trainers (TOT) for more effective delivery of course and thus to enhance student employability. Adding to these is the length of the training course which is marked as not enough and practical training program need to be stronger.

Despite the common knowledge and acceptance that people are the most important assets of the tourism industry, human resource development programs and the investments are still found to be weak. In addition, the tourism work force should be trained to be able to work in other countries as well, instead of confining their potential for local tourism market alone. This will help to solve the problem of imbalance between supply and demand for tourism jobs in the region and chances for the free movement of skilled and certified tourism labor in other countries.

The Ministry of Hotel and Tourism (MOHT) should establish a mechanism to get involve in ASEAN Mutual Recognition Arrangement on Tourism Professionals (MRA – TP) to enhance the opportunities for local tourism work force. This will not only facilitate mobility of Tourism Professionals but also benefit from exchange of information on best practices in competency based education and training for Tourism Professionals and enhance opportunities for cooperation and capacity building across ASEAN Member States.

Education and training providers need to review the curriculum and qualifications to ensure it matches or can be mapped to the Common Asian Tourism Curriculum in order to provide relevant qualifications to students or trainees. Existing qualifications or programs need to be adapted or changed to meet the requirements of ASEAN for mutual recognition of tourism qualifications.

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APPENDIX 1

Development Partner Assistance

Development Partner	Project/Technical Assistance	Duration	Cost Estimate (\$ million)
Luxembourg	Human Resources Development in the Hospitality and Tourism Sector	2015-2020	6.2
Swiss Contact, SDC	Vocational Skills Development Project (Hotel Training Initiative)	2014-2018	19.6
WCS	Ayeyarwady Dolphin Protected Area—Community Based Ecotourism	2014-2018	0.3
JICA	Establishment of the Pilot Model for Regional Tourism Development	2014-2017	---
CBI,ITC	Inclusive Tourism Focusing on Kayah State	2014-2017	1.9
Darwin Initiative, UK Government	Enhancing Rural Livelihoods and Biodiversity Conservation through Responsible Tourism, Myanmar	2014-2017	---
ICIMOD	Ecotourism Policy and Management Strategy	2014-2015	---
GIZ/CIM,ILO	Institutional Strengthening of Myanmar Tourism Federation and Member Organization	2014-2015	---
UNDP	Inle Lake Conservation Five Year Action Plan (2015–2016 to 2019–2020)	2014-2015	---
ADB	Promoting Women-Led Micro-Enterprises in the East-West Economic Corridor	2015-2018	3.0

Continued ...

ICIMOD and Luxembourg	Destination Management Plan for the Inlay Lake Region	2014	---
Government of Italy	Implementation of the Tourism Master Plan and Update of the Tourism Sector Legal and Regulatory Framework	2013-2014	0.2
MIID,ICIMOD	Destination Development Plan for the Inlay Lake Region	2013-2014	---
ADB, Norway	Myanmar Tourism Master Plan	2013	0.2
HSF	Supporting Responsible Tourism Development in Myanmar	2012	---

Source: ADB (2016-2018)

7. What is the highest level of formal education you have completed? (Please check only one) *
- Graduated High School
 - Bachelor Degree
 - Master Degree
8. What is the language of your license? *
- Chinese English French German Japan
 - Korea Italy Spanish Thai Others
9. How many year (number of tour season) have you been working as a tour guide? *
- One season Two season Three season
 - Four season Five season or more

Section (2) Questions about the Regional Tour Guide Trainings

10. The Regional Tour Guide Training is for
- Learning
 - Enhancement
 - Sharing Information
 - All the above
11. Did you sit for any entrance test or examination? *
- Yes No
12. If yes, the exam is.....
- Written exam
 - Interview
 - Both
13. How many times did you attempt to be qualified for enrolment?
- One time
 - Two times
 - Three times
14. Whether training is relevant to the needs for working as a tour guide?
- Yes No

15. Do you feel training program is essential (compulsory) for the tour guide?

- Yes
- No
- Can't say

16. From the following training methods under which training method you have been trained? *

- Practical
- In class
- Both

17. What was the medium (language) of instructions in the Regional Guide Training?*

- Myanmar
- English
- Both

18. From which source do you gain the knowledge and information required for the work?

(please choose 3 most effective source) *

Source	Code No.
Social Network (facebook)	1
Internet Web Page	2
Training School Library	3
Public Talk and Seminar	4
TV Program	5
Radio	6
Pamphlet	7
Journal and Newspaper	8
Others (To be described)	9
.....	

19. Do you think that the following training facilities are enough for the course?

No	Learning Aids	Maximum	Enough	Moderate	Minimum	Insufficient
(1)	Training materials					
(2)	Teachers' preparation for lessons					
(3)	Practical training					
(4)	Duration of training					
(5)	Exams					

20. When did you completed the Regional Guide Training?

- 2013 2014 2015 2016
 2017 2018 2019

Section (3) Questions about chances to get job and challenges and opportunities in current job.

21. Do you face language difficulties to begin the job?

- Yes No

22. If YES, how long did it take to prepare for job?

- 1-3 month 4-6 month 6 month-1 Year
 2 Years 3 Years and above

23. Do you face difficulties regarding the regional knowledge to begin the job?

- Yes No

24. If YES, how long did it take to prepare for job?

- 1-3 month 4-6 month 6 month-1 Year
 2 Years 3 Years and above

25. Do you receive tour assignments all year round (including the low or green season)?

- Yes No

26. Describe the months when you do NOT receive tour assignment.
- September - February
 - March – August
27. Is your income during the high season enough for the whole year?
- Yes No
28. If you do not receive tour assignments during the low or green season (March- August), do you have to find another job?
- Yes No
29. Do you think that Tour Guide Job has job security?
- Yes No

Section (4) Conditions for Job Opportunities After Training

30. How soon did you get a job after the training completion?
- 1-3 months 4-6 months 6 months -1 year
 - 2 -year 3- year No get job yet
31. If you still have less tour assignments, what might be the reason or reasons? (you may choose more than once)

Reasons	Code No.
Language	1
Knowledge	2
Work experience	3
Connection / Recommendations to tour companies	4
Self Confidence	5
Low number of arrivals in the region	6
Health condition	7
Others (To be described)	8

32. Are you currently working as a tour guide?
- Yes No
33. If Yes, are you working as a freelance guide or as a contract guide?
- Freelance Contract Guide (Company Guide)

34. Do you receive any trainings from any tour companies?

- Yes No

35. Your daily service rate, in UDS, is ...

- 15-20 21-30
 31-40 41 and above

36. Your estimate income in 2018 is ...

37. Your estimate income in 2017 is ...

Section (5) Career Development Plans

38. What area do you think you need to improve to enhance your career?

(please choose 3 most important facts)*

Reasons	Code No.
Language	1
Knowledge	2
Training by experience guides	3
Connection / Recommendations to tour companies	4
National License	5
More training exposure	6
Others (To be described)	7

39. If you want to pursuit to study more language or languages, what it or they would be?

- Chinese English French German Japan
 Korea Italy Spanish Thai Others

40. Why do you want to study that or those language or languages?

41. Do you get for National Guide License?

- Yes No

42. If yes, when did you get the National Guide License?

- 2013 2014 2015 2016
 2017 2018 2019

43. After getting National Guide License, do you get more job assignments?

- Yes No

44. Do you think that you need to attend more trainings?

- Yes No

45. If YES, what type of training or trainings do you need?

- Language Knowledge
 Tour Operation Others (To be described)

46. Please add any ideas you have regarding the improvement of Regional Tour Guide Training.

