

ANALYSES ON THE SUSTAINABLE DEVELOPMENT OF HOTEL INDUSTRY IN MYANMAR

(A Case of Hotels in Yangon)

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Abstract

The development of the hotel industry is an essential part of the hospitality industry, which is an important sector to accelerate a country's economic development. The purpose of this study was to analyze the sustainable development of hotel industry in Myanmar with a special reference of hotels in Yangon. To fulfill the purpose, 100 respondents of hotel employees and 30 guests have been collected by questionnaire survey and two managers have been asked by interview question. The findings of the study indicated that the most important factors for sustainable development are human capital and information technology. Then the knowledge management system is the best suitable system to develop and connect firmly within the two factors. Also the level of service quality is good so far but not pretty impressed and persuaded to the guests. Most of the issues are appeared due to those essential factors; human capital and technological system. Thus all hotel industries should more emphasize on those essential factors and critical issues for the excellent level of customer service to take competitive advantage.

Introduction

The hospitality industry is one of the burgeoning sectors in the world. Hospitality businesses are much more significant concerning other companies. As in new areas, there are only a small number of industries, but the umbrella of the hospitality business contains a wide variety of

industries. It plays a crucial role in society's economic strength, sustainability, and profitability. The travel & tourism sector currently accounts for 10.4% of global GDP and tourism grew from a \$563 billion market in 2015 to \$639 billion in 2017 (Yeung, 2018).

The hotel industry's development plays a crucial role in developing the tourism sector and a significant part of the hospitality industry. According to Dharmaraj (2008), approximately 50% of tourism sector incomes are received from hotel businesses' revenue. The hotel industry had played a significant role in inspiring a country's economic activity, generating foreign exchange earnings, and providing employment opportunities accordingly. The hotel businesses are a basis for local economic activity, providing increased tax revenue, capital investment, tourism-related development and promotion, civil leadership, charitable contributions (Lugar, 2019). Hotels are considered an essential economic factor for any community (Shyam & Thakkar, 2019).

Myanmar is the largest country in Southeast Asia, with a population of 53 million (ADB, 2018). The roles of geographically, economically, and politically are significantly played and the most rapidly changing region in the world. As Myanmar opens up, foreign investment and trade have developed reasonably. The Ministry of Hotels and Tourism was set up on 28 September 1992 under the notification No 54/92 (Yeung, 2018). From 2011 onwards, visitor numbers started to increase, and during high season there was a hotel room shortage (Asian Development Bank, 2018). Also, the direct contribution of Travel & Tourism to GDP was 5.5% of the total GDP in 2014 and increased up to 7.1% in 2015. Travel and Tourism within Myanmar generate more than 800,000 direct employment opportunities in 2016. That accounted for 2.7% of total employment (Lugar, 2019).

The hotel market is growing steadily due to demand and more competition from both local and foreign brands, which is targeting future growth prospects. Developers and operators face challenges in inflowing the Myanmar market, several hotel executives. All emerging markets face specific problems, but Myanmar is developing with such a step that it is facing several bottlenecks and noted that the workforce is a problem (Koumelis, 2012). As an international hotel company, need to maintain service values, and this might be more interesting in Myanmar. Hence one considerable effort is needed to analyze the sustainable development of hotel industry in Myanmar such as some of the factors affecting, current level of service quality, and critical issues for the sustainable development within the hotel industry (Ei Ei Thu, 2018). To fulfill the

research focuses, the research questions have been set based on the following details through 100 respondents of hotel employees and hotel managers of respondents as well as the guests. These are:

- 1) What significant factor are affecting the sustainable development of the Hotel Industry in Myanmar?
- 2) Which current issues occur in the daily work life of the hotel industry?
- 3) What are the levels of service quality, for the guests' satisfaction?

A set of these question style is acknowledged, and each part was responsible for achieving the goals of objectives study are shown. Thus, is needed to analyze the critical issues, to identify factors affecting, and to assess the level of service quality for the sustainable development the hotel industry.

Objectives of the study

This research aims to analyze the sustainable development of hotel industry in Myanmar, with a special reference of hotels in Yangon.

- 1) To identify factors affecting the sustainable development of hotel industry
- 2) To analyze the current issues which occur in the hotel industry for generating the smooth operation
- 3) To assess the level of service quality in the hotel industry

Literature Review

The tourism sector is one of five top export earners over 150 countries, and it is the number one export in 60 according to a United Nations Report. (UN, 2007). Hotels contribute to the production of goods and related services, which build the well-being of their nations and communities (Howarth, 2012).

Factors Affecting on Sustainable Development of the Hotel Industry

Every business faces industry-specific challenges that make it hard to operate in a particular sector. These are some factors affected: competition, reputation management, staff retention and

recruitment, sustainability, and technology. There are mostly three main issues summarized under those challenges area: human capital (people), technology, and system or process.

Human Capital

Firstly the hotel industry reflects the increase of employment opportunities obviously because the hotel industry is labor intensive job, going from low-wages entry level to high-paying professional positions in management levels. An organization cannot survive without employees. Mostly, their time has been invested in their work-life to reach the goals and objectives of the organization. Every employee has their skills, experiences, exposures, and training, which can produce or improve the organization's revenue. Customer service is essential in the hospitality industry. Thus the more well-trained staff employed, the better the service establishment is likely to provide, the higher the occupancy rate will tend to be, and the more team able to hire and train (Satpathy, 2017).

Employee Value proposition (EVP) model

It is the balance of the rewards and benefits which are received by employees in response to their performance in the workplace (Ingham, 2008). It is the aggregate value of the capabilities, knowledge, skills, life experiences, and motivation of a corporate workforce (Lewis, 2008).

Information Technology

Secondly, the technology, economic, and social developments in the 19th and mainly the 20th century lead to considerable changes in the hotel industry (Levy-Bonvin, 2003). Rapid technological advances have made a significant effect. Traditional ways of doing things remained the same for centuries, then decades and, finally, years (Szydlo, 2017). In step with modern technology, trends are crucial for those operating in the hospitality industry, because the industry itself is extremely competitive. Thus the central business of the hotel industry needs to be changed significantly to face the challenges of the technological era. Innovation has become the new imperative, although the need for organizations to control costs in today's economy (Madan, 2017).

Knowledge Management System

Finally, managing a hotel now requires extensive knowledge-based hotel and hospitality management system or process. Professional review management is dynamic if firms do not want to fall behind in the competition with other hotels and online travel agencies. As this industry is exceedingly competitive, all skilled and knowledgeable employees will be influenced easily by others if neglect to retain all those employees (Subramaniam, 2015). To be expected, the best suitable system or way to manage in the hotel industry is Knowledge Management System. KM system is to prevent the consequence that when people leave the organization, they take their knowledge with them, causing the loss of valuable organizational assets and resources (Kimiz Dalkir, 2011). The consequence of this is when people leave the organization, they take their knowledge with them, ensuing in the loss of valuable organizational assets and resources (Pettinger, 2017). The SECI model of Nonaka and Takeuchi theory is the best well known to measure the knowledge management system.

Nonaka and Takeuchi's theory (SECI Model)

According to Nonaka and Takeuchi's theory, they focus on two basic concepts: Tacit Knowledge is personal, and it is stored in the heads of people and accumulated through study and experiences. Explicit knowledge is codified. It is stored in documents, databases, websites, and emails, etc. It can be made available to others and transmitted or shared in the form of explicit and formal languages. Nonaka and Takeuchi introduced the SECI (Socialization, Externalization, Combination, and Internalization) model (Lytras , 2008).

Review on the Previous Studies

Jayawardena Chandana proved that the case of Canada hotel industry. It is a significant employer, an essential contributor to Canada's economy and trade with good growth prospects. According to the Corporate Leadership Council, the top three workplace attraction drivers in Canada are Compensation; Work-Life Balance; and Respect. This would suggest that the hospitality industry should be developing an EVP model, Employee Value Proposition, based on these most critical drivers (Chandana, 2017).

Aurecon Group mentioned that many hotels have started installing Wi-Fi hotspots to assist and attract more and more customers now. It is recommended to Four Seasons hotel that digital check-in experience can be provided to the guests who prefer digital communications (OBG,

2019). Stephen J Page also explained about the case of The Scottish Borders Tourist Board (SBTB). One of the corporate objectives of SBTB is recognizing that staff training and development are essential for organization growth and in the management change. After 18 months, the SBTB transformed the way it planned and implemented human resource functions. After evaluation of SBTB in February 1996, SBTB was the first area tourist board to gain IIP status. This has significantly sharpened the human resource capital and led to a more people focused business plan with improved training of its staff (OBG, 2019).

Lelouche explained about the Accor Hotels group as one of the earliest hotel companies to embrace sustainable development. It encourages actions by its 170,000 employees through the idea that one employee can make a difference (Lelouche, 2011). Hilton Hotels Corporation outlined modern target technology and updated all orders by the time being for improvement in the company's sustainability performance system-wide (Bain, 2008). The Shangri-La Hotels Group also emphasized the people which in both internal and external customers and their slogan is Caring People. They noted on the knowledge-based management system as well (Bain, 2008). Therefore hotel management needs to emphasize employee individualized talent development and skill improve (Basset, 2017).

Didier Belmonte, General Manager at Strand Hotel said the growth potential in Myanmar is beyond huge, but even as the room supply increases, it's still a significant hurdle, with only 1,800 rooms of international standard. For Gary Franklin, Managing Director for trains and cruises at Orient-Express offers that hotels, river cruises and tour operators to see the sights, upgrade the utilizing technology, and monitor the productive system and need to change if needed (Taylor and Davies, 2004). So that Myanmar needs to prepare and upgrade all the stages to be internationalized people skills, technology, and procedure (AH&LAJ, 2012)..

Survey Profile

Survey data has been collected by 100 respondents of hotel staffs from six international five-star hotels in Yangon. It is based on questionnaires and the survey collected area are four different departments; Front Office, Food and Beverage, Human Resources, and Information Technology. The second questionnaire is aimed to investigate the dimensions of service quality, satisfaction, and loyalty. Personal interview survey also has been done by two hotel managers, Director of Rooms, and Reservation Manager for the current issues and the influencing factors. They are

from the Grand Mercure Hotel Yangon Golden Empire which under The Accor Group. The reason to choose the hotel is a No.1 rank of trip advisor list out of 208 hotels. Also in the first part of questionnaire form of the hotel guests is demographic profile. It includes gender, age, marital status, education, occupation, and expense to stay.

Survey Design

The survey design also including the design of survey questionnaires and the sampling method. The survey design is mainly provided by qualitative & quantitative methods based on interviews and questionnaire surveys. Each questionnaire including 15 questions by using a 5-point Likert scale, which represented 1 is for disagreeing, and five is for agreeing. Another one is for the guests regarding the customers' perceptions of their experiences by using SERVQUEL model which divided into five sections: Tangibility, Reliability, Responsiveness, Assurance, and Empathy. Each part including five questions by using a 5-point Likert scale, which represented 1 is for highly satisfying, and five is for highly dissatisfying. The sample size was 100 hotel employees from six international chains and five-star hotels in Yangon based on Slovan's method;

$$n = \frac{N}{1 + Ne^2}$$

For the sample size of selected total number of hotel, there are six international chain five-star hotels in Yangon. For the sample size of selected total number of respondents of hotel employees, there are 1910 of all selected six hotels according to the information of human resources departments respectively. Where;

n=sample size

n=sample size

N=6 (Total Population of hotels)

N=1910 (Total Population of employees)

“e” is a standard error taken at 90% confidence level (e = 10% = 0.1). Therefore;

$$n = \frac{6}{1 + 6 * 0.1 * 0.1} = 5.66 = 6 \text{ Hotels}$$

$$n = \frac{1910}{1 + 1910 * 0.1 * 0.1} = 95.0 = 100 \text{ respondents of hotel employees}$$

The Survey Results

The survey results will be presented in two parts separately; the respondents of hotel employees, each related factors: human capital, information technology, and knowledge management and the current issues of daily basic work environments.

(1) *Human Capital – Related Factors*

Table 4.4 Human Capital – Related Factors

Human Capital	Mean	Std. Deviation
Hotel business can generate per capita income and raise personal standards of living in the country.	4.19	.787
Human capital is the aggregate value of the knowledge, skills, and motivation of a corporate workforce.	4.14	.697
The measure of skills, education, and capacity influence their productivity and potential.	4.21	.715
The rewards and benefits must be in balance with their productivity and performance level.	4.09	.753
Rewards and benefits are required to motivate employees' performance.	4.52	.522
Specific goals of the training to improve one's capability, productivity, and performance.	4.40	.569
Internal training gives better interrelationships within internal customers and services to external customers.	4.40	.636
The hotel organizes specific training often.	4.11	.709
Employee loyalty will lead to enhance performance.	4.14	.711
The development of employees' skills has to be a positive effect for the whole organization.	4.23	.601
Challenging working environment motivates and stimulates to perform well in the organization.	4.00	.725
Investing in human capital is a crucial role in a successful business.	4.25	.687
Employees are invited to participate and consider some of the crucial issues within the organization often.	3.70	.969

The work environment makes us feel happy, safe, and motivated.	3.85	.809
Employees are aware of any formal policies and procedures of our organization.	4.26	.661

Source: Survey Data, July 2019

(2) *Knowledge Management System– Related Factors*

Table 4.5 Knowledge Management System– Related Factors

Knowledge Management System	Mean	Std. Deviation
Each employee's skill and knowledge has an essential role in a hospitality organization's achievement.	4.33	.637
We are sharing knowledge to improve the learning and performance of an organization.	4.31	.598
The employee needs to have the willingness to participate and share their knowledge.	4.50	.560
Employees' knowledge and experiences should be well documented in databases, websites, and emails, etc.	4.11	.875
I enjoy attending meetings, workshops, courses that are organized by your organization.	3.76	.842
Knowledge can build an operation that sustainable development the hotel business.	4.12	.742
We can attain benefits by sharing individual knowledge and skill during internal meetings and training.	4.30	.560
I agree that knowledge is power, which is essential for the business development department of the hotel brand.	4.12	.769
Educating employees is one of the primary responsibilities of all department heads.	4.34	.639
In the knowledge-based economic sector, the support on intellectual capital is higher than on physical inputs.	4.07	.685
Intranets and databases are very useful in my daily work life.	4.31	.647
Knowledge sharing is the key to competitiveness in the information age rather than financial resources.	4.10	.745
Keeping the right people at the right time is an efficient way to create value for the organization.	4.46	.540

Knowledge should be a fundamental concept through which businesses can build sustainable operations.	4.15	.642
The departure of experienced and qualified employees could have resulted in a loss of the organization as they take all the knowledge they gained.	4.60	.550

Source: Survey Data, July 2019

(3) *Information Technology – Related Factors*

Table 4.6 Information Technology – Related Factors

Information Technology	Mean	Std. Deviation
IT plays an essential role in all organizations.	4.46	.577
Technology often needs to be updated and which requires an enormous amount of investment in the hotels' industry.	4.48	.559
Utilizing IT in the workplace is more convenient and active rather than manual.	4.18	.809
The use of high-tech processes is usually more complicated, and often waste of time.	2.12	1.148
Need to conduct training to get more familiar and improve IT skill.	4.20	.752
The use of IT helps to reduce labor costs and also helps to minimize customer service related problems and issues.	3.53	.958
IT is not useful in enhancing the business and to increase the organization's profits.	1.93	.998
The technological upgrading process could satisfy employees.	3.78	.773
Enhancement of IT can help employees to save more time in all front office operations.	4.16	.662
The hotel provides ATM service, in-room safety deposit box, credit card payment, and electronic key cards system for the convenience and safety of our in house guests.	4.38	.616
Guests are delighted with your hotel Wi-Fi.	4.14	.586
Mostly, in house guests were satisfied and very fewer complaints regarding in-room modern facilities.	4.17	.667
I strongly recommend to upgrade and enhance all the internal technical support.	4.23	.584
I am glad and convenient by using modern information technology.	4.22	.561

I always believe that all latest information technology system enhances the organization image and increase more benefits.	4.19	.581
Valid N (listwise)		

Source: Survey Data, July 2019

The last survey part divided into two questions; one is representing that all of the hotel employees' issues which are facing in their daily work, and another thing is their suggestion for sustainable development in the hotel industry in Myanmar, respectively.

According to the results, all of the issues could be divided into three kinds of problems. The first maximum issues are regarding training, meetings, and seminars arranged by organizations are not too much attracted to the trainees and useful to their daily operation. Meetings were also taken too long hours that caused bored and disappointed and too many burdens upon the rest of employees who left to cover the operation. The second issue is the high turnover rate and manpower shortage. The last one is over workload due to use so much paperwork instead of utilizing the existing modern technology or software. The next section is regarding all the hotel employees' suggestions for the key factors affecting the sustainable development of the hotel industry in Myanmar. They advised caring for the existing employees by providing awards and benefits as well as given effective training to enhance their skill and performance and IT enhancement program.

Also two hotel managers of the management level from Grand Mecure Hotel Yangon which one of the branch of The Accor Group for the current issues and the affecting factors in their working life. With regards to the survey questions of customer satisfaction on service quality at a five-star hotel in Yangon, divided into five sections: Tangibility, Reliability, Responsiveness, Assurance, and Empathy. Each part including five questions by using a 5-point Likert scale, which represented 1 is for highly dissatisfying, and five is for highly satisfying.

Table 4.8 Customer Satisfaction on Tangibility

Tangibility	Mean	Std. Deviation
Quality of Food & Beverages.	3.03	.890
Wi-Fi access / ATM status / Credit card transaction	4.60	.814

Room amenities (Safety deposit box, electronic room key –card, etc.)	4.57	.568
Smart appearance and outfits of staffs.	4.53	.660
Provided amenities (Restaurants, Public toilets, Public area & function rooms) & cleanliness	4.03	.868

Source: Survey Data, July 2019

Table 4.9 Customer Satisfaction on Reliability

Reliability	Mean	Std. Deviation
Standard check-in / out process.	4.60	.498
Quick respond from the hotel staff to your requests.	3.13	.819
Delivers customer services at the exact time as promised.	3.30	.837
The way of problem solving.	3.50	.820
Keep confidential all of your personal profile / records.	4.67	.499

Source: Survey Data, July 2019

Table 4.10 Customer Satisfaction on Responsiveness

Responsiveness	Mean	Std. Deviation
Staffs pay attention to customers' needs/ difficulties.	3.10	.995
Provides speedy services to customers.	3.21	.861
Prompt recovery process	3.03	1.033
Good communication skill.	4.30	.794
Handling the way of customer complaints is consistent and fairness.	3.93	.960

Source: Survey Data, July 2019

Table 4.11 Customer Satisfaction on Assurance

Assurance	Mean	Std. Deviation
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Keep loyalty to all their guests.	3.00	.788
Fluent in technological skill and language skill.	4.70	.466
Honest and endurance in solving customers' complaint/ problem.	3.20	.805
Promise on time	4.73	.468
Staffs have enough knowledge to answer customers' queries.	4.30	.551

Source: Survey Data, July 2019

Table 4.12 Customer Satisfaction on Empathy

Empathy	Mean	Std. Deviation
Customer service handling is consistent at all time	3.90	.859
Staffs' Patience	3.33	1.213
Individualized attention	3.23	.907
They always try hard to know the exact needs of the customers.	3.47	.802
Ready to serve and assist always	3.70	.837

Source: Survey Data, July 2019

Findings

Findings	Conclusion
<ul style="list-style-type: none"> ❖ For research objective 1, to identify factors affecting the sustainable development of hotel industry 	<ul style="list-style-type: none"> ❖ It is reveal that 100% correct the essential factors; human capital, technical, and knowledge management system are affecting the sustainable hotel industry after the survey research of every point of views.
<ul style="list-style-type: none"> ❖ For research objective 2, to analyze the current issues which occur in the 	<ul style="list-style-type: none"> ❖ Research proved that all of the current facing issues are due to the factors

<p>hotel industry for generating the smooth operation</p> <p>❖ For research objective 3, to assess the level of service quality in the hotel industry</p>	<p>affecting of the survey results 1.</p> <p>❖ The results verified that the level of service quality is good so far but not pretty impressed and persuaded by the guests.</p>
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Suggestions

Based on the findings of the survey results, the following recommendations for the hotel management or business owners, managers, and supervisors. It is suggested that an organization needs to conduct continuously training internally, but it should be effective, and all of those training should not be too long or formally always. Department Heads or managers have to educate their staff on the advantage and disadvantages of the training, meetings, and workshops also. Sometimes need to hire or invite the external speakers to hold internal seminars for the employees.

For the staffs’ motivation, superiors should consider employees’ policies for their benefits or rewards. It is essential to create a happy and safe life in the work environment for the staff, pay attention to the staffs’ requirements or difficulties individually. Superiors should arrange to participate in all of their staff in the training, workshops, meetings, and seminars, respectively. There is a need to be careful with consistency attention to all employees.

To solve the problem of manpower shortage, we should prepare all staffs to have to be multi-skills such as cross training, sharing knowledge, etc. There should be documented or recorded all of the staffs’ experiences, skills, and abilities in the database, websites, and email if needed to avoid the difficulties when some employees quit suddenly. Managers need to make refresh or new training to familiar with modern technical systems or software because of reducing the manual paper workload as well as to consider upgrading and updating all technical system.

There should be more concentrate to qualify and enhancement of existing employees rather than seeking qualified staff from the market. Especially all organization try to consider for Knowledge Management system for smooth operation procedures.

The future researcher should study to investigate other factors such as government policies, interventions of state-level into Hotels & Tourism sectors, tax reduction, etc. And also to expand more surveys on the other hotels which different star ratings as well as the rest regions of the country. It is believed that suggesting potential effort on this subject that would include investigating the role of these factors not only in the hotel industry but also by other industries as well as government officials.

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