

AN ASSESSMENT ON TOURISM DEVELOPMENT IN MYANMAR

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Abstract

This paper tries to present tourism development in Myanmar from the geographical point of view. Tourism is one of the fastest growing economic sectors and it is one of the world's biggest industries. Tourism industry has increased sharply over last two decades in Myanmar. Many economic sectors are developed after 1988 in which tourism plays an important role in Myanmar. After the introduction of market - oriented economy in 1989, tourism is becoming as important sector of social and economic driver in Myanmar. Tourism industry increased sharply in year by year. The growth rate of total international tourist arrivals was one of the fastest over two decades. The main objectives of this study area are to assess on tourism development, to evaluate the tourist attraction sites and to predict future prospect on tourism development. The research uses both quantitative and qualitative methods such as field observation, secondary data analysis, mapping and unstructured interviews. Primary data conducted by interviews and discussions with tourists, visitors, local people, hotel managers, authority and responsible persons of departments concerned. Secondary data are also applied in this research; these data are obtained from Ministry of Hotel and Tourism Departments. The quantitative and qualitative mixed method will be used in analyzing data on tourism development. The development of tourism industry depends on various factors. The most tourists interested places are Bagan(55%),Inle(31%) , Mandalay (8%), Hpa-an (3%) and Ngapali (3%). Therefore, this research finding will be useful for development of tourism in Myanmar.

Keywords: Tourist arrivals, tourist attraction sites, tourism development

Introduction

Myanmar well known as a tourist destination with a rich cultural heritage blessed with a unique natural environment, snowcapped mountains, beautiful lakes and waterfalls; long navigable rivers, luxurious tropical forest unspoiled beaches and archipelagos. Myanmar has distinctive natural area and cultural heritages. Therefore, there are many attractive sites such as historic and cultural, beaches, ecotourism sites, protected area etc.

“The Ministry of Hotels and Tourism” was formed in September, 1992 which supervised the Directorate of Hotels and Tourism (DHT), Myanmar Hotels and Tourism Services (MHTS) and Food and Beverage Service. The visa was extended up to 28 days in 1994. In a move to attract more tourists, the year 1996 was confirmed as “Visit Myanmar Year 1996.” Because of such movement, the number of hotels and tourists arrival increased. In April, 1996, Tourism Development and Management Committee were formed. Foreign tourists were allowed to stay 28 days and businessmen for 70 days.

The accessibility is improved within the area and it can get easily to the destinations. Tourism in Myanmar started to develop when Myanmar first opened its doors in the late 1988. Tourism was systematically established with the formation of the Ministry of Hotels and Tourism in 1992. Tourism is not only of economic importance, but also of social, political, cultural and environmental significance. Tourist industry has become one of the most important economic activities for receiving job opportunities. Tourism is also a major source of foreign exchange

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earnings for many developing countries. The number of tourists that visited Myanmar increased from 1.5 million in 2012 to 2.4 million in 2013 and it is increased to be over three millions in 2017. Tourism is one of the fastest growing industries with an annual average growth rate about 5%, and numbers of international travel might nearly double until 2017 compared to 2006.

Aim and Objectives

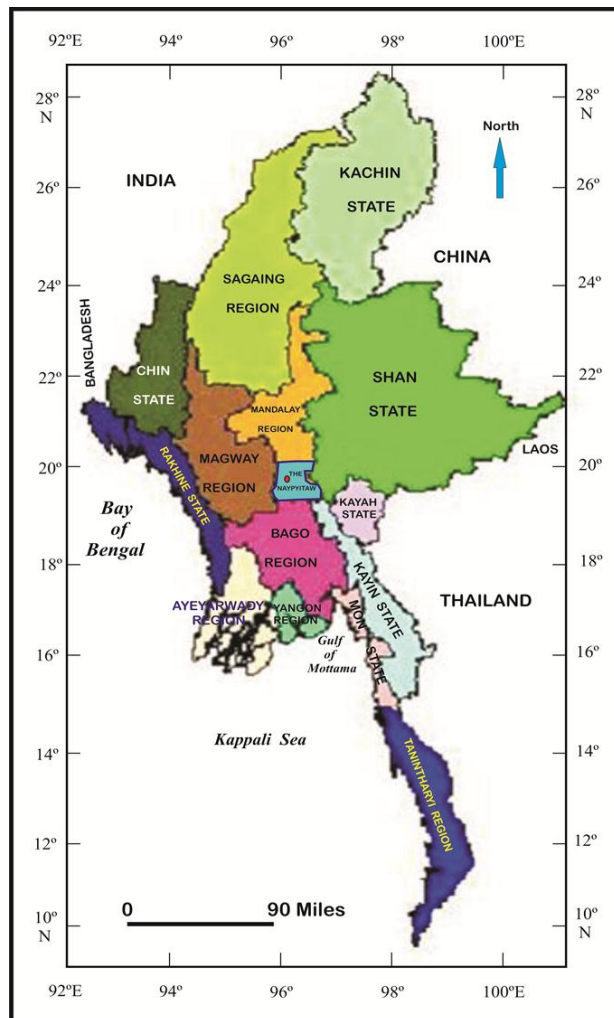
The aim and objectives are:

- to point out international tourist arrivals,
- to examine tourism development and
- to assess the tourist attraction sites in Myanmar.

Study Area

Myanmar is formerly known as Burma. It is also recognized by the world as the Golden Land. Myanmar, officially Union of Myanmar, The Republic of the Union of Myanmar also called Burma, Burmese, Myanmar, or Pyidaungzu Myanmar Naingngandaw. It is a country lying along the eastern coasts of the Bay of Bengal and the Andaman Sea in Southeast Asia. It is located between north latitudes 9°30' and 28°31' and east longitudes 92°10' and 101° 11'.

The country covers an area of 677,000 square kilometers (261,228 square miles) ranging 936 kilometers (581 miles) from east to west and 2,051 kilometers (1,275 miles) from north to south. In terms of area Myanmar is the second largest country in Southeast Asia, after Indonesia. It comprises of seven States and seven Regions and the Union territories. It is a land of hills and valleys and is rimmed in the north, east and west by mountain ranges forming a giant horseshoe. Enclosed within the mountain barriers are the flat lands of Ayeyarwaddy, Chindwin and Sittaung River valleys where most of the country's agricultural land and population are concentrated (Myanmar Travel Information, 2008). The shape of Myanmar Naing Ngan is elongated. Myanmar has both land and sea boundaries (Figure 1). Therefore, it has many tourists' attraction sites in Myanmar.



Source: Google Earth Image, 2012

Figure 1 Location of Myanmar Naing Ngan

Materials and Methods

The research focuses on the tourism development. Both primary and secondary data are used for this research. Primary data is also based on field observation, using the questionnaires with structured and unstructured interview methods. Secondary data are collected from the government departments, Ministry of Hotels and Tourism (Nay Pyi Taw), Journals, theses, newspapers, internet and Google map. This paper is approached by using both quantitative and qualitative. The total sample size is 250. The data were collected from the study area through three field trips. During these three field trips, open interviews, structure, unstructured interviews and questionnaires with local peoples, authority concerns, hotel managers, hotel staffs and tour guide, and visitors were conducted. For assessment on the tourism development, it based on 4As. The development of tourism is related to 4As such as attraction, accessibility, accommodation and administration. On the other hand, the assessment of tourists' perception and satisfaction got by using questionnaires and interviews. The total sample size is 250 for tourists. The facts and data available are tabulated, calculated and presented in diagrams.

Results and Discussions

1. Supporting Factors for the Development of Tourism

Myanmar has a great number and various places of notice worth visiting. “In Myanmar, the Ministry of Trade opened a Tourist Burma in 1965 and began handling tourism. The Burma Airways Corporation (BAC) ran a Tourist Information Service. In 1979, the activities of these two were combined and taken over by Tourism Burma. After 1988, realizing the benefits derived from tourism development, it has been encouraged with the establishment of new Tourism Ministry under the umbrella of Tourism Development and Management Committee. Under the SLORC, Ministry of Hotels and Tourism was established on September 24, 1992”. (Khin Thandar Oo, 2017)

The development of tourism is basically related to the ‘4As’ such as attraction, accessibility, accommodation and administration. Without sufficient attractive places cannot achieve success in tourism development.

(a) Attractions

Myanmar is documented as a tourist destination with a rich culture heritage blessed with a unique natural environment. The major supporting factors of Myanmar’s tourism are essential both on natural and historic cultural tourism. The study area not only has natural heritages, but also cultural heritages sites which are important in attracting visitors. Attractions are the most important in development of tourism industry. There are 55% of tourist arrivals interested in Bagan for heritage tourism. Bagan is not only one of the richest archaeological sites in the South-East Asia but also is endowed with cultural heritage attractions, natural attractions and recreational attractions (Naw Mar Lar and etal.2018).Tourists are greatly attracted by the well preserved and magnificent temples of Ananda, Shwezigon, Thatbyinnyu, Dhammanyangyi, Sulamuni, Gawdawpalin, Buphaya and so on. The new museum, Nann Myint Viewing Tower is also attracted by tourists (Soe Tint, 2010). Thirty one percent of total tourists go to Inle for ecotourism and natural tourism, eight percent of respondents visit Mandalay Region as religious tourism, 3 percent of people are interested in Hpa-an for lime stone caves andthree percent of total tourists go to Ngapali Beach for recreation tourism. According to these results, they visit the study area because of main interest in cultural heritage and ecotourism sites. In 2019, the tourist arrival of these following three destinations is currently increasing: Inle (80% increase), Bagan (59% increase) and Mandalay (40% increase).

(b) Accessibility

Accessibility is importance for the local development and social welfare. Tourists’ arrival depends on the easy access to the destination sites. Transportation is one of the basic infrastructures for the improvement of tourism. Accessibility includes not only the ease to travel between origin and destination but also the easiness to get entry-visa or visa on arrival. Travel time and travel cost need to be reasonable, when compared to other challenging destinations. In this respect, the roles of marketing effectiveness of Tour Agency or Agencies are very significant. Systematic program or itinerary should be organized for each mode of transport to the place that is to be visited. In this way, the tourist from origin can compare the accessibility, time and cost among challenging destinations.

No.	Attraction Sites	Photo	Location
1.	Shwedagon Pagoda		Yangon
2.	Bagan		Mandalay Region
3.	Inle		Shan State
4.	Hpa-an		Kayin State
5.	Ngapali Beach		Rakhine State

Source: Field Observation

Figure 2 Tourist Attraction Sites in Myanmar Naing Ngan

Comprehensively, air transport dominates the movement of international tourists. Airline service is an essential part of the tourism industry. The major requirements for tourist access include: safe and convenient public transport especially for international visitors.

In 1962, the entrance visa was issued to foreign tourists who are permitted to stay only for only 24 hours within Myanmar. It was prolonged to three days in 1969, a week in 1970 and 14 days in 1989. To be able to accelerate the pace of development in tourism, the stay visa was extended to 28 days in 1994. Today an increasing number of tourists enter Myanmar through the gates at certain border areas, and leave the country from Mandalay and Yangon by airlines. The entrance gates along the Myanmar-Yunan border are Minelar, Muse, Lwegel, Kyukok and Nankhan. Tourists can also enter through Tachileik, Myawaddy, Phayarthonesu and Kawthaung

along the Myanmar-Thailand border. (Ni Ni Aung, 2010). A valid passport with Entry Visa is required for all tourists. The entry visa to Myanmar is applicable at Myanmar Embassies and Consulate General Offices abroad and it is valid for 28 days. Overland entry is permitted to Thai, Chinese and Indian tourists with border passes and to third party tourists with visa at designated check points along Myanmar-Thailand, Myanmar-China and Myanmar-India borders. Tourists with valid passports and visa can leave by air from Yangon. According to result, most tourists (45%) enjoy the trip by motor road and some travelers (25%) prefer using train for comfortable ride and enjoying the scenic beauty of the waysides. The use of airway line is 28 percent of total tourists and only few visitors (2%) like water way some respondents gave negative answer concerning with transportation. At the present telephone and internet services the whole Myanmar is fairly good.

(c) Accommodation

Accommodation is necessary for the development of tourism, including hotels, motels and guest houses. Hotels are graded as 1 star, 2 stars, 3 stars, 4 stars and 5 stars. The higher is charge more. Hotels are main business related to tourism industry. In 2001, the number of hotels was 531 and it increased to 691 in 2010 and 1590 in 2017, respectively (Table 1). As regard with accommodation, all the hotels are well facilitated with modern accessories and kept clean for the comfort of the guests. However, the fees charged for lodging are high, much higher than neighboring countries. For those who can afford, the attractiveness is the main factor in determining the choice for destination. However, the majority usually choose the places which may cost them less. 70 percent of total tourists expensive accommodation than other countries. Electricity and water supply are also inadequate. With the increasing number of hotel and rooms, the water demand for the tourism related business will rise in rural area. Myanmar cannot produce sufficient electricity and many rural areas of the country have no access to it even for street lighting.

Table 1 Number of hotels

Year	Number
2001	531
2005	603
2010	691
2015	1279
2017	1590

Source: Ministry of Hotels and Tourism, Nay Pyi Taw

(d) Administration

Without strict security arrangements, tourists who do not know the local situation of the place they visit may be exposed to some harm. This would create negative perception in the minds of the potential visitors.

Myanmar is rich in cultural and historical heritage potentials. To protect the cultural and historical heritage, ancient area and ancient zone "The Protection and Preservation of Cultural Heritage Region Law" (1998), was enacted. The law intends, inter alia, to protect the heritage from the adverse impacts caused by industrialization, urbanization, agricultural expansion and

tourism. In 2011, the Tourism Development and Management Committee (TDMC) is taking efforts nationwide to have smooth and convenient pass-through at the airports, to keep high quality bus with reasonable fares in ferrying the foreign tourists, modern quality hotels with good services, the upgrading of infrastructures along the itineraries and the creation of new attractive potentials, so as to increase the number of tourist arrival. (Khin Thandar Oo, 2017)

2. Tourism Development in Myanmar

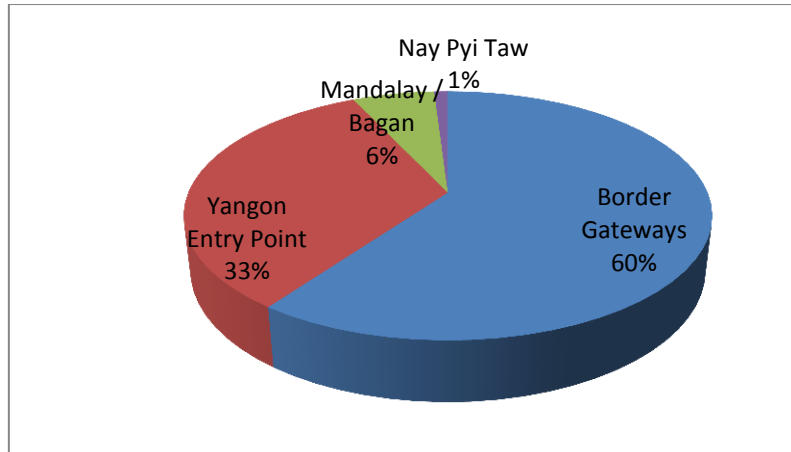
(a) Tourist Arrival in Myanmar

The development of tourism is largely concerned with the number of tourist arrival. In 2017, the number of tourists visiting to Thailand was 35.35 million, Laos was 3.8 million, India was 10 million, Cambodia was 5.6 million and Vietnam was 15.5 million, respectively. (<https://www.ceicdata.com/en/indicator/laos/visitor-arrivals>). Foreign Tourist entered to Myanmar through Yangon, Mandalay, Bagan and Nay Pyi Taw airports and across the border through land route during the period from 2001 to 2017. The number of foreign tourist arrival increased year by year. The number of tourists arrival slightly decrease in 2006 and has been increasing consecutively since 2012. In 2015, 4681,020 foreign tourists visited to Myanmar, it was highest within 17 years. The number of tourists arrival slightly decrease in 2016 and 2017 (Table 2). Sixty percent of foreign tourist arrived in Myanmar through border gates. Thirty three percent of foreign tourist arrived through Yangon airports. Tourist arrival from Mandalay/ Bagan gateways was 6 percent and Nay Pyi Taw was only one percent, it was very low (Figure 3). Nay Pyi Taw entrance began since 2011.

Table 2 Number of Tourist Arrival in Myanmar (from 2001 to 2017)

Year	Yangon entry Point	Mandalay Bagan Gateways	Border Gateways	Nay Pyi Taw	Total
2001	203200	1666	270244	-	475160
2002	212468	4744	270278	-	487490
2003	198435	7175	391465	-	597015
2004	236370	5568	414972	-	656910
2005	227300	4918	427988	-	660206
2006	257594	5920	366547	-	630061
2007	242535	5541	468358	-	716434
2008	18766	5553	537911	-	731230
2009	234417	8861	519269	-	762547
2010	297246	13442	480817	-	791505
2011	364743	20912	425193	5521	816369
2012	559610	32521	465614	1250	1058995
2013	817699	70620	11444146	11842	2044307
2014	1022081	90282	1949788	19261	3081412
2015	1180682	107066	3379437	13835	4681020
2016	1080144	176228	1634611	16224	2907207
2017	1146069	199802	2080185	17077	3443133

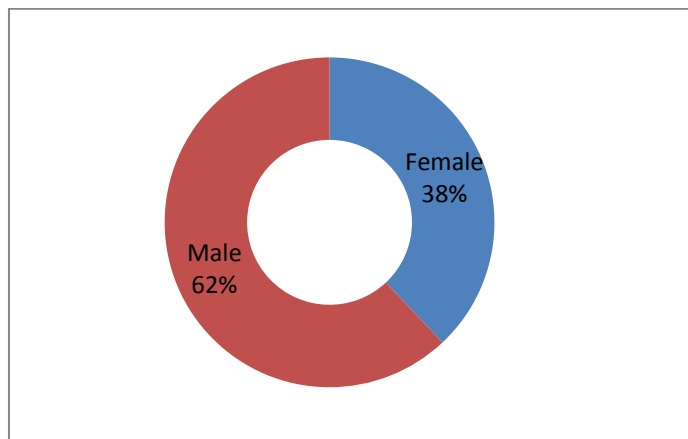
Source: Ministry of Hotels and Tourism, Nay Pyi Taw



Source: Based on table 1

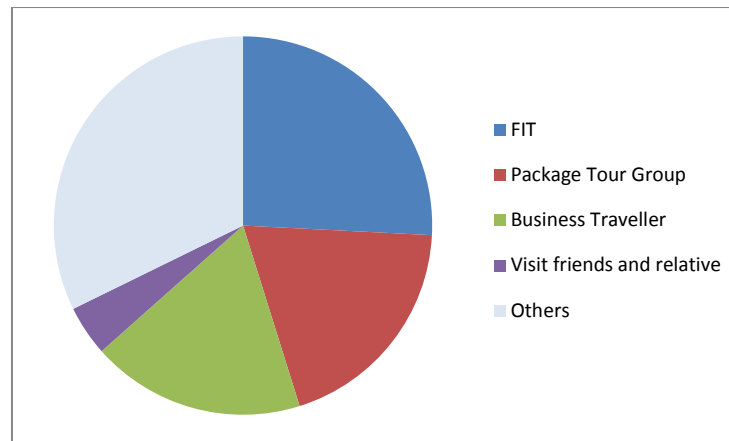
Figure 3 Tourist Arrivals through Entry Points

The demographic factors for respondents are collected in order to know which age group is interested to come, which gender is more likely to visit Myanmar. According to figure 4, male was 62 percent compared with 38 percent female respondents. The types of tourist include 27 percent were foreign independent travelers, 18 percent were package tour groups, 17 percent were business travelers, 8 percent were visit friends and relative and 30 percent were others (Figure 5). According to the tourist arrival by age group, the age group between 1 - 20 year hold 5 percent, age group from 21 to 50 are 60 percent, it the most dominant, 51 and above are only 35 percent. According to this result, more than the halves of the total visitors were middle age groups.



Source: Field Survey (2017)

Figure 4 Tourist arrivals by gender group



Source: Field Survey (2017)

Figure 5 Tourist arrivals by types of tourist

(b) Licensed Tour Guides

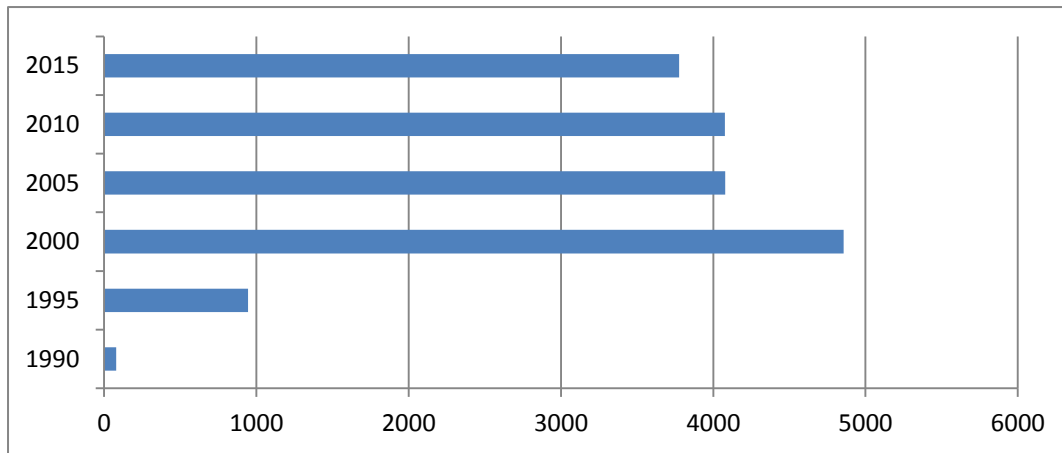
Tour guide, especially well experienced ones are very much important for the tourism development. They may be well ability guide because of they have to accompany the tourists all along the trip and their explanation of the natural and cultural attributes of the area concerned can reflect the true nature of the images of the study areas. The tour guide needs to recognize geographical features, climate conditions, tradition of Myanmar nationals and languages. They need more knowledge to explain the background history and then tour guides trainings were given to them.

Table 3 shows the number of licensed tour guides of each language such as English, Spanish, Japanese, French, Chinese, Thai, German, Russian, Italian and Korea. The data on number of tour guides by gender are also shown in the table 3. The number of licensed tour guides in 1990 was 78 and it peaked in 2000 with 4856, but decrease notably to 3776 in 2017. Then it gradually increased from 1990 and it was 4856 in 2000 and then it decreased 2017. Most of the well skilled guides are engaged in the offices of tourism under different Ministries or private tourism companies. A few of them are working in foreign countries.

Table 3 Licensed Tour Guides in Myanmar

Year	Male	Female	Total
1990	43	53	78
1995	424	521	945
2000	1962	2894	4856
2005	1646	2433	4079
2010	1914	2163	4077
2017	1715	2061	3776

Source: Directorate of Hotels and Tourism



Source: Based on Table 3

Figure 6 Licensed Tour Guides in Myanmar

3. Assessment of Tourist Perception and Satisfaction

Tourist satisfaction is important to successful destination marketing because it influences the choice of destination, the consumption of products and services, and the destination to return (Kozak & Rimmington, 2000). Based on the distribution of questionnaire to tourists, an exploration and analysis of the tourist perception and satisfaction can be made. This response may support for further development of tourism industry of Myanmar. The demographic characteristics of the respondents are shown in figure 4. The number of males exceeds females among tourists. Most of the respondents were in the middle age group, 21 – 50 years of age with 60 percent of the respondents. 49 percent are graduated and 51 percent are post-graduates. This result shows the relatively high educational attainment of the respondents. Most of Europeans are educated. Of the foreign tourist 69.98 percent from Asia, 17.56 percent from West Europe, 6.39 percent from North America, 2.76 percent from Oceania, 1.48 percent from East Europe, 0.92 percent from other America, 0.48 percent from Middle East and Africa (0.43 percent) is lowest in percentage. Among them 58 percent have never been to Myanmar, it was the first time and the remaining 42 percent have been two times or more times.

Apart from government policies, supporting factors such as weather conditions, the attitude of native people to the visitors, transportation, hotel services and communication facilities are offered to the visitors are important for the development of tourist industry. Eighty-five percent of the respondents were satisfied while 15 percent gave no response with attitude of native people. More than two-thirds are satisfied with hotel services and communication facilities, and weather conditions. Eighty-five percent of visitors are satisfied with attitude of native people and transportation (Table 4).

Table 4 Percentage of Tourists Satisfaction

No.	Type of Activity	Satisfaction (%)	Unsatisfaction(%)
1	Attitude of Native people	85	15
2	Hotel services	64	36
3	Weather condition	76	24
4	Hygiene and Freshness of food	66	24
5.	Communication	63	37
6.	Transportation	85	15

Source: Field Survey and interviews (2017)

Although the hotels are furnished with hotel facilities, charges of services and stay at hotels are costly. Traditionally, Myanmar people are hospitable, kind and nice and extend a warm welcome to the visitors. Thus, a great majority is satisfied with the attitudes of local people. As, mentioned earlier, there are some weaknesses concerning hygiene and freshness of food especially in tourism sites of rural area (apart from the urban area). However, 66 percent of the respondents were satisfied with the existing hygiene and freshness of food. The high percentage of the respondents were not satisfied with the existing communication facilities due to extremely high rates charged for internet used, and slow Internet connections. Those concerned with these factors should take effort to improve the situation, particularly to provide good services.

Findings and Conclusion

This research is an attempt to highlight worldwide conditions of tourist industry in Myanmar from the geographical point of view. The main aim of this paper is for development of the tourism industry in Myanmar. Asia countries rank first among the tourist generating areas for Myanmar, while Middle East and Africa are listed at the lowest. The variations in the number of tourists from different tourist generating zones reflect the differing preferences, like and dislikes of different nationalities. Generally, the westerners take interest in local traditional culture and in nature whereas the easterners enjoy viewing urban life styles and religious structures.

With a view to promoting tourist industry of Myanmar in future, random questionnaires have been made to 250, whether there in satisfaction with services, the interest in the attraction sites and friendliness and hospitality of the local people. The perceptions of domestic and foreign tourist on the well-known sites are mostly positive. The tourism potential of Myanmar would remain high in the future, because of its excellent beauty scene, ancient cultural, trait and religious structures.

The following suggestions are based on the responses of tourists. About 60 percent of foreign tourists have noticed the solid wastes, particularly plastic wastes scattered within the study area and thus they recommended the solid wastes should be systematically disposed to improve hygienic conditions and environmental quality of the study area. Some places of Ayeyarwady River are polluted with garbage, thereby causing exasperation to tourists. According to 80 percent of the respondents, there is a need do sanitation tasks to the riverside along the River. Seventy-five percent of the foreigners suggested that, as the majority of the foreign tourists cannot read the words written no notice-boards and sign-boards in Myanmar; these should be transcribed in English together with Myanmar language.

Tourism has become an important economic sector overall for earning foreign exchange and creation of job opportunities. Therefore, government, NGO, public and private sector, responsible stake holders and local people should together undertake the necessary measures to become responsible tourism and sustainable tourism. The sustainable development of tourism industry depends on many factors. Therefore, this research finding will be useful for development of tourism in Myanmar.

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