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DEVELOPMENT OF THE TOURISM: SPECIAL REFERENCE TO MYANMAR

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DEVELOPMENT & COOPERATION

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ACRONYMS AND ABBREVIATIONS

ADB	Asian Development Bank
ASEAN	Agency Association for South East Asian Nations
AMTA	for Coordinating Mekong Tourism Activities
BIMSTEC	Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation
GDP	Gross Domestic Products
GMS	Greater Mekong Sub-region
HRD	Human Resources Development
ILO	International Labor Organization
MAI	Myanmar Airlines International
MDGs	Millennium Development Goals
MHA	Myanmar Hotelier Association
MMC	Myanmar Marketing Committee
MOHT	Ministry of Hotels and Tourism
MTA	Myanmar Travel Association
MTCO	Mekong Tourism Coordinating Office
NTO	National Tourism Organization
PATA	Pacific Asia Travel Association
PPT	Pro-poor Tourism
SPSS	Statistical Package for Social Sciences
TAT	Tourism Authority of Thailand
WTO	World Tourism Organization
UNDP	United Nations Development Program
UNESCAP	United Nations Economic Social Cultural Program
USD	United States Dollars
VAC	Visit ASEAN Campaign

ABSTRACT

Myanmar has been actively involved in regional as well as sub-regional cooperation efforts for the development of both intra-regional and inter-regional tourism development. However, its tourism industry development pace is still at a modest level due to existing substandard tourism infrastructures. Although primary tourism infrastructures such as travel and tour services, accommodations, restaurants, etc. are more or less in place, serious measures should be taken to significantly improve secondary and tertiary tourism infrastructures such as recreation and entertainment services, shopping centers, tourist information services, health-care services, emergency and safety services, financial services, etc. Emphasis should also be placed on human resource development in tourism sector and improving transparency and information services. Furthermore, Myanmar's attractive tourism sites and friendly people need to be promoted effectively. Measures should further be taken to improve impeding factors negatively affecting tourism businesses that are identified as weak market access, expensive telecommunication services at a substandard level of quality, electricity shortage, lack of skillful employees, frequent changes in government rules and policies, lack of information, difficulty related to money transfer and financial transaction, etc. Given that the government budget for tourism development is very limited, least cost methods for promoting tourism need to be prioritized.

The concept of pro-poor tourism development still needs to be well-understood by the concerned authorities. Tourism development should be a factor not only for economic development but also for poverty reduction. The lack of well defined policies specifically directed towards pro-poor tourism development in Myanmar did not hinder small and medium-sized businesses in some popular tourist sites benefiting more from the tourism sector. Greater emphasis should be placed on strengthening current pace of tourism development in such a way that poor people could gain significant benefit from its development.

Improvement of tourism infrastructures and elimination of impediments in the tourism sector will enhance the development of the industry and this in turn promotes the Greater Mekong Sub-region as a single tourist destination. With a view to promote intra and inter-regional travels, it is important to solve the issues of cross-border travels and improve the systems for visa-on-arrival facilities at the airports as well as border check-points. It is also essential to establish effective cooperation among the governments, travel and tourism services in private sector of GMS countries. Development of database marketing system and e-marketing system plays a pivotal role for both intra-regional and inter-regional tourism development. The government should focus on designing suitable policies and strategies, prioritizing various tourism projects on the basis of their contribution to attracting more tourists, providing appropriate incentives and creating favorable investment climate so as to be more competitive in foreign investment, and more importantly on establishing a level-playing field.

Keywords: Tourism, Demand and supply, Development

Development of GMS Tourism: Special Reference to Myanmar

1. INTRODUCTION

Myanmar has great potentials for developing cultural tourism. Cultural tourism began to be recognized as a distinct product category in the late 1970s when tourism marketers and tourism researchers realized that some people traveled specifically to gain in-depth understanding of the culture or heritage of a destination. It is recognized as a form of special interest tourism, where culture forms the basis of either attracting tourists or motivating people to travel. The World Tourism Organization (WTO) defines cultural tourism as "movements of persons essentially for cultural motivations such as study tours, performing arts and cultural tours, travel to festivals, visit to sites monuments, travel to study nature, folklore or art, and pilgrimages" (WTO 1985:6). Dann (1977) identifies that there are basically two factors in a decision to travel, the push factors and the pull factors. The push factors are those that make people want to travel and the pull factors are those that affect where they travel. Cultural heritage in Myanmar and its uniqueness can be taken as a pull factor for those who want to experience the difference.

Yangon was the capital of Myanmar until it was superseded by Naypyidaw in November 2005 and is the biggest city having a population of around 5 million. It is the place where majority of tourists arrive by various international flights. Mandalay is the second biggest city and also a major cultural site in Myanmar. Bagan is one of the most famous cultural and archeological sites where thousands of ancient temples, pagodas and studpa of 10~12 centuries located. Inlay Lake is also a major tourism site in Myanmar where tourists experience exotic floating villages and floating gardens. The Golden Rock or Kyeikhteeyoe, located around the mountain ranges in the southern part of Myanmar, is also one of the cultural sites in Myanmar.

This study focuses on impediments hindering the tourism development in Myanmar. These impediments include factors that have a negative impact on tourists' satisfaction level. Dissatisfaction arises when tourists' general expectations are not met. According to Bitner (1990), expectation is defined as the customer's frame of reference with respect to a product/service that allows anticipation of product/service performance.

Parasuraman et al. (1990) states that customers become dissatisfied if gaps or discrepancies exist between customers' expectations on one hand and service providers' perceptions of the quality of their services on the other. Such gaps or discrepancies are often not clearly noticed or ignored by service providers. Hence it is important to understand the nature of customers' expectations in tourism sector and to identify these gaps for improvement. This study undertook field survey to identify customers' expectations and whether or not these expectations are met through demand-side analysis. If expectations of customers are met, satisfaction is achieved. Tourist satisfaction is important to successful destination marketing because it influences the choice of destination, the consumption of products and services, and the decision to return (Kozark & Rimmington, 2000).

It is important that tourists' expectations be known to services providers. It should be assured that required level of services be provided and factors having adverse affect on tourism development should be improved. Then only, tourism industry in Myanmar will develop to a stage where it can effectively be linked to the regional and sub-regional level tourism development.

Attempts will also be made to find how Myanmar can improve its needy areas for the development of its tourism sector with a view to actively promote the Greater Mekong Sub-region (GMS) as a single tourist destination. The study further identifies the measures to be taken to enhance the cooperation with other GMS countries and how Myanmar tourism sector can be bridged with the other GMS countries.

2 LITERATURE REVIEW

2.1 *GMS Tourism Development Initiatives*

In 1992, the Asian Development Bank (ADB) initiated an economic cooperation program in the greater Mekong Subregion (GMS) among six countries sharing the Mekong River: Yunnan Province of the People's Republic of China (Guangxi Zhuang Autonomous Region and Yunnan Province), the Lao People's Democratic Republic, Myanmar, Thailand, Cambodia, and Vietnam. Covering 2.3 million square kilometers, or the size of Western Europe, the GMS countries are home to more than 250 million people. Its wealth of human and natural resources makes it a new frontier for economic growth in Asia (ADB Review, December 2004).

The GMS possesses vast potential for tourism development because of its rich blend of culture, nature, and history. International tourism was seen as a major growth engine for the GMS, and as such it was included as one of the 11 flagship programs in the ten-year strategic framework of the Greater Mekong Sub-region Economic Cooperation Program. According to ADB forecasts, awareness of the sub-region as a global destination could increase total international tourism arrivals to the sub-region from 14.6 million in 2004 to between 46 and 52 million by 2015 – thus more than tripling total volumes over the next decade (ADB, 2005).

Some progress has been made in sub-regional cooperation in the tourism sector during the past decade, but an ADB report reviewed that:

- most of the economic benefits of tourism are concentrated in one country and the distribution of uneven benefits, especially among the poor, women, and ethnic communities;
- the capacity to manage the cultural and national heritage of interest to tourists in the sub-region is limited; and
- the framework for ensuring that tourism is socially responsible needs to be strengthened.

Some of the factors underlying these issues are associated with tourism expenditures; weak economic linkages between tourism and other sectors of the economy, especially at the provincial and local level; low priorities in resource allocation given to the tourism sector by national and provincial governments; and the absence of appropriate enabling policies (ADB, 2005).

2.2 *Goal and Objective of Sub-regional Cooperation in Tourism Development*

The overall goal of sub-regional cooperation is to contribute towards the vision of the ten-year strategic framework of the GMS Economic Cooperation Program which can also be defined in terms of the Millennium Development Goals (MDGs) of achieving substantial poverty reduction, greater gender equality and women's empowerment, and sustainable development. The objective of the tourism sector is to address the impediments that prevent it from becoming a bigger and more potent contribution to achieving the goal. The objective includes developing and promoting the GMS as a single destination, offering a diversity of good quality and high-yielding sub-regional products that help to distribute the benefits of tourism more widely.

2.3 *Programs of the GMS Tourism Development Strategy*

To work toward the overall goal and objective for the development and management of the tourism sector, seven core strategic programs have been identified—in marketing, human resource development, heritage and social impact management, pro-poor tourism development, private sector participation, the facilitation of the movement of tourists to and within the sub-region, and the development of tourism-related infrastructure.

The sub-region will be marketed as a single destination based on culture, nature, and adventure products by

- positioning the sub-region as a cultural, nature, and adventure destination around a "Mekong brand," supported by travel trade, media, and consumer promotions in its primary source markets, including a strong internet presence and circulation of appropriately branded promotional materials;
- encouraging the development of competitive, cross-border nature, culture, and adventure tour programs in 13 priority tourism destination zones, including two that have the Mekong River as the core; and
- strengthening the capacity to manage the marketing of the sub-region by replacing the Agency for Coordinating Mekong Tourism Activities (AMTA) with the Mekong Tourism Coordinating Office (MTCO) and building partnerships and alliances with the private sector.

The strategy seeks to raise tourism management capacities in the public sector, improve service standards among tourism service providers, and meet the training needs to an estimated 2.5 million qualified staff between 2006 and 2015 (especially poor communities in pro-poor tourism areas) by

- developing a culture of human resource development (HRD) in the National Tourism Organizations (NTOs) and the private sector;
- building management and technical capacity of middle-level public NTO and related government officials;
- training a group of master hospitality skills trainers in each country based on Association of Southeast Asian Nations (ASEAN) skills standards and certification systems; and
- upgrading the capacities of deans, professors, and lecturers in academic institutions.

To ensure the sustainable management of the natural and cultural heritage resources important to tourism, and to minimize and control the adverse social impacts of tourism—especially on women, children, and ethnic communities—the strategy seeks to:

- enhance the management of historic and living cultural heritage through capacity building of heritage managers, building ethnographic databases, and enhance protection measures including the utilization of local community resources;
- better protect and manage priority heritage sites for tourism by training guides at heritage sites, setting up trans-border planning and administration arrangements for better tourism management in protected areas and increasing local community participation; and
- address the negative social impacts (trafficking; drug use; commercial sex work, especially sexual exploitation of women and children in tourism; and HIV/AIDS transmission) by advocating change at the highest levels to generate support, and by working on the community level where the impact is most immediately felt.

To ensure that tourism development in the sub-region is more pro-poor orientated, the strategy seeks to

- expand opportunities by bringing tourists to villages and towns in provinces with high incidence of poverty, or linking poor communities to the tourism industry through the supply of handicraft, agricultural, and other products;
- ensure that tourism is recognized as a major actor in the poverty reduction policies, plans, and programs of the GMS countries;

- provide the framework for local populations to engage in businesses and in direct employment in the tourism area; and
- create indirect employment opportunities from the production of tourism-related inputs.

It is imperative that Myanmar does its utmost to live up to the aspiration of tourism development in the GMS Sub-region. This is especially important in view of the fact that Myanmar's nascent tourism industry (with 273,448 tourist arrivals in 2005) still lags behind Cambodia and Lao PDR in terms of tourist arrivals: 1,089,771 and 886,034 in 2005 respectively[1]. Tourism in Myanmar contributes about 3% to 4% of total export earnings compared to over 11% for Thailand, whose export volume and earning dwarfs those of other GMS countries.

3. METHODOLOGY AND DATA

Supply and demand analyses were conducted based on interview and questionnaire surveys. The surveys were conducted in 5 major tourism sites namely - Yangon, Mandalay, Bagan, Inlay, and Kyeikhteeyoe during 4 months from September 2006 to January 2007. Random sampling method was used, and there were 50 hotels, 20 traveling and ticketing agents, 5 transport companies surveyed for supply-side analysis, and 500 tourists were surveyed for demand-side analysis. Furthermore, surveys on 60 small and medium sized businesses at a popular tourist site were also conducted to identify the level of benefit gained from tourism development. The questionnaire includes questions relating to respondent's demographic characteristics, respondent's travel behavior characteristics, and respondent's level of satisfaction compared to other tourist destinations. Results of questionnaires and interview surveys are analyzed using SPSS statistical software. Time series analysis on factors affecting the rate of change of tourist arrivals is conducted by Minitab statistical software.

4 ANALYSIS ON MYANMAR TOURISM SECTOR

4.1 *Comparison of Myanmar Tourism Sector with those of GMS Countries*

[1] According to Business Magazine (Vol. 6, No. 10 October 2005) published by UMFCCI, the number of tourist arrivals in 2004 was given as 656,910 with border tourism constituting the bulk of it (414,972).

Myanmar tourism has been a growing sector since 1989/90. The Myanmar tourism Law of 1990 was revised in 1993 to promote systematic development and encourage private sector participation. Tourism contributes about 4.3% of GDP to Myanmar economy as of 2006 and generates the receipts accounting for 3.3% of its total exports. Tourism's contribution to the economic development of Myanmar clearly lags behind other GMS countries (see Table 1). For example, the employment generated by tourism in Myanmar accounts for 4%of total employment compared to 10% in Thailand and China.

Table 1: Tourism as Percentage of GDP, Exports, Total Employment, 2006

	Myanmar	Thailand	Cambodia	Vietnam	China	Laos
Tourism Economy GDP (% of Total GDP	4.3	14.3	19.6	10.9	13.7	9.3
Tourism Exports (% of Total Exports)	3.3	10.6	19.5	3.5	3.6	20.6
Tourism Economy Jobs (% of Total Employment)	4.0	10.7	15.4	8.7	10.2	7.3

Source: World Travel and Tourism Council

Tourist arrivals in Myanmar have been growing steadily with an annual growth rate of about 11% from 2000 to 2004. Of the total tourist arrivals of approximately 17.82 millions in the GMS sub-region in 2004, tourists coming to Myanmar account for about 4% both in 2003 and 2004 (see Table 2). It is a significant growth of share compared to that of 2000 during which tourist arrivals in Myanmar accounted for only 2% of total tourist arrivals in the sub-region.

Table 2: Tourist Arrivals in the GMS Sub-region

Countries	1995	2000	2001	2002	2003	2004
Cambodia	219,680	466,365	604,919	786,524	701,014	1,055,202
Lao PDR	346,460	737,208	673,823	735,662	636,361	894,806
Myanmar	208,228	438,480	475,106	487,490	597,015	656,910
Thailand	6,951,566	9,578,826	10,132,509	10,872,976	10,082,109	11,600,000
Vietnam	1,351,296	2,150,100	2,330,050	2,627,988	2,428,735	2,927,876
Yunnan PRC	596,942	1,001,144	1,131,303	1,303,550	1,000,101	1,100,994
Total	**9,604,837**	**14,139,883**	**15,074,597**	**16,543,912**	**15,053,930**	**17,820,816**

*This includes visitors with tourist visa and multiple-journey visa
Source: PATA, TAT, ASEAN,and Country Report

Thailand is clearly ranked as the number one tourist attraction in the sub-region followed by Vietnam, Yunan province of China, Cambodia, Laos, and Myanmar (see Table 2). However, the trend of its share has declined from 72% in 1995 to 65% in 2004. Likewise, the share of tourist arrivals in Yunnan Province of China declined from 8% in 2002 to 6% in 2004 while the shares of tourist arrivals in other GMS countries have been growing steadily. It is obvious that tourist arrivals in the GMS countries have more widely distributed.

It is estimated that the volume of international tourism coming to GMS could rise to 30.6 million by 2010 and to 46.1 million by 2015[2]. The factors contributing to this potential rise in international arrivals include:

- The ASEAN agreement for visa-free travel for ASEAN nationals by 2010;
- The expansion of low-cost airline operations such as Air Asia, Bangkok Air, etc.;
- The implementation of an open-skies agreement between Cambodia, Laos, Myanmar, and Vietnam;
- The Pan-Asian Highway project, which will be fully operational by 2010;
- The Pan-Asian Railway, which will be upgraded in Vietnam and Myanmar and will make an effective semi-circular linkage in the region and further expand in Southeast Asia sometime after 2012;
- Bangkok's Suvarnabhumi International Airport which has been operational since 2006;
- The expansion of the outbound markets of China (PRC) and India to the GMS;
- The expansion of direct flights by European carriers to Kunming, China (PRC) as one possible result of the aviation and tourism agreement between China (PRC) and the European Union; and
- The opening of the new Kunming Airport, with a handling capacity of 15 million passengers, etc.

4.2 *Flow of Tourists into Myanmar*

In 2005, nearly 58% of incoming tourists to Myanmar were from Asia, whereas only 28% were from Western Europe, 8% from North America, 3% from Oceania, 1.5% from

[2] PATA Issues and Trends: GMS Tourism – A Decade Later

Eastern Europe, and 0.8% from Middle East. Thailand tourists accounted for 11.17% of the incoming tourists from Asia countries, China 8.44%, Japan 8.43%, and Taiwan 7.58%. In terms of Western Europe tourists, those from France accounted for 6.59% and Germany accounted for 5.89%[3].

The trend of Asian tourist arrivals has been more or less stable and the incoming tourists from North America, Western and Eastern Europe, and Oceania have been rising at an average growth rate of 6%, 4%, 23%, and 10% respectively from 2001 to 2005.

There are two major entry points located in Yangon and Mandalay where tourists arrive by international flights and 5 border entries where foreign visitors pay short visits from neighboring countries. Three of the five border entries at Myawaddy, Tachilake, and Kawthaung are located at the areas bordering Thailand, one at Shweli located at the area bordering China and one at Maungdaw located near Bangladeshi border. Although Myanmar is bordering to China, India, Thailand, Bangladesh, and Lao PDR, border areas closed to China and Thailand are the most active ones. As of 2004, about 33% of visitors came to Yangon, 1% of them came to Mandalay by various international flights, and about 67% of them came across borders. However, the main purpose of the majority of foreign visitors arriving at the border areas is business and trading, therefore border areas cannot be included in major tourist sites. However, these border areas can be the potential gateways for tourists going across the GMS countries, especially through Vietnam, Cambodia, Thailand, and Myanmar by road.

Arrivals of eco-tourists and pilgrims through packaged tour arrangements have increased lately. For example, in 2004/05, packaged tours account for about 31% whereas FIT tours account for about 69% of total tourist arrivals[4]. Total tourist arrivals account for about 63% of total number of international visitors and the remaining 37% are to see friends or relatives. It should be noted that there is a considerable percentage of tourists holding tourist visas who come to Myanmar for business purposes (including sightseeing for some). Hence the tourist arrivals which accounted for tourists entering with tourist visas may have included those visitors coming for business purposes and sightseeing.

[3] Source: Myanmar Travel and Tours
[4] Source: Myanmar tourism statistics

With the increase of packaged tours, nature-oriented eco-tourism is getting popular in Myanmar due to its diverse forests and green landscape having a large variety of wildlife species. Eco-tourism sites are managed and controlled by the Forest Department. There are 15 Eco-tourism sites in Myanmar, and 3 sites have been leased to local private companies. Previous studies on eco-tourism market in Myanmar found that 75% of total eco-tourists are Western Europeans followed by Japanese and Americans. Hence, eco-tourism is an area which Myanmar can develop effectively. However, tourists coming to Myanmar to explore eco-tourism account for only a modest percentage (0.11%) of total tourist arrivals in 2005. It is expected that the number of eco-tourists will increase along with the development of eco-tourism in Myanmar. In addition, tourism in pilgrimage is also popular in Myanmar. Majority of the pilgrim tourists are Buddhist associations from Taiwan, Korea, China, and Japan. They come in big groups and visit cultural and religious sites and make financial contributions.

4.3 *Myanmar's Cooperation with Neighboring Countries*

Myanmar is a member of ASEAN and it cooperates with other 9 ASEAN nations to develop and promote ASEAN as a single tourism destination with world-class standards, facilities and attractions. The ASEAN Tourism Ministers, at their 7th Meeting held on 3rd February, 2004 in Vientiane, Laos, agreed to work towards advancing the integration of ASEAN tourism and adopted the Action Plan for the implementation of the ASEAN Tourism Agreement which was singed by all ASEAN member countries on 4th November, 2002 in Phnom Penh, Cambodia. The Agreement includes developing intra-ASEAN and international travel, improving transport services, promoting market access, developing quality tourism, strengthening tourism safety and security, promoting joint-marketing and promotion, and enhancing human resource development. ASEAN also cooperates with other countries such as China, Japan, Korea, and India. The tourism authorities of ASEAN and India met for the first time in October 2003 in Bagan, Myanmar to explore the areas of cooperation. Myanmar also participates in the Visit ASEAN Campaign (VAC)[5], and the tourism manpower training courses are provided by Myanmar-Singapore Joint Ministerial Working Committee under this agreement. These include tourism manpower training

[5] ASEAN Secretariat

program (SHATEC-Phase I, II, III) and short courses such as business management, destination marketing program, business communication skills, and tourism marketing and management.

On the sub-regional level, Myanmar as a member of BIMSTEC was involved in several cooperative meetings and events since 1997. BIMSTEC Expert Group on Tourism was set up and first met in August 1999. Sri Lanka being the Lead country on tourism drafted the Action Plan on Tourism Cooperation together with inputs from other member countries. It was set up to formulate strategies for tourism cooperation with the cooperation of UNESCAP, World Tourism Organization (WTO) and the Pacific Asia Travel Association (PATA). In the Second BIMSTEC Expert Group Meeting on Tourism held in Colombo in December 2000, the year 2001 was designated as the Visit BIMSTEC Year. The strategies adopted by member countries include: facilitation of travel formalities; human resource development; strengthening the transportation networks; development of new tourism products; marketing and promotional strategies; incentives for tourism investment opportunities; environment management of tourism and cultural preservation; regulatory issues; and information dissemination. The Bangkok Summit of BIMSTEC "doubling of tourism business in the region in the next five years" was adopted by the member countries on July 2004[6].

The GMS flagship initiative promotes the GMS as a single tourist destination. These include program to develop tourism-related infrastructure; program to improve human resources in the tourism sector, program to promote pro-poor community-based sustainable tourism, program to encourage private sector participation in the GMS tourism sector, and program to facilitate the movement of tourists to and within the GMS. The GMS Tourism Development flagship initiative in which Myanmar is also involved, aims to promote and strengthen sub-regional cooperation and tourism development in the GMS countries and promote to increase tourism in the GMS.

[6] Source: Myat Thein, 2006, "Toward BIMSTEC-Japan Comprehensive Economic Cooperation in Tourism Sector: Vision and Tasks Ahead"

Although Myanmar is involved in the regional and sub-regional initiatives of ASEAN, BIMSTEC, GMS, etc., the results of cooperation efforts so far have been less than impressive.

5 ANALYSIS ON PRO-POOR TOURISM (PPT) DEVELOPMENT IN MYANMAR[7]

Pro-poor tourism (PPT) is tourism that generates net economic, social, environmental or cultural benefits for the poor. It can be classified as pro-poor tourism as long as poor people reap the net benefits even though richer people may benefit more than poor people. Hence the definition of PPT is quite broad in nature and this overlaps with sustainable tourism, eco-tourism and community-based tourism. Interventions and policies to develop pro-poor tourism should aim to increase the net benefits for the poor from tourism, and ensure that tourism growth contributes to poverty reduction.

Tourism development in Myanmar is still at an infant stage and pro-poor tourism has not been promoted yet, poor people at rural tourist destinations reap different types of benefit to some extent. The economic status of local people at tourist destinations has improved significantly through small and medium sized businesses that target on tourists. For example, restaurants, making and selling handicrafts, performing traditional dance, operating small-scaled motels and inns, running different types of transportation business such as car rental, horse-cart, cattle-cart and bicycle rental, etc.

The overall tourism development in Myanmar has both positive and negative impact on the economy and social status of the poor people. On the positive side, more employment opportunities are available for local people at tourist destinations and linkages with the established private sector, policies and regulations have also been improved. Local people at rural tourist destinations have opportunities to run different types of small and medium sized businesses. The economic benefits in tourism development are partially achieved to some extent, local employment for poor people and wages have increased, local people's and enterprises' opportunities have widened, and created more collective income sources. However, the social benefits are difficult to

[7] This section is based on surveys conducted in Bagan in May 2007, Journal of GMS Development Studies, volume 3, number 1, July 2006 issue, and Pro-poor tourism report No. 1: Pro-poor tourism strategies: Making tourism work for the poor by Caroline Ashley, Dilys Roe and Harold Goodwin, issued in April 2001

measure. Local people gain opportunities to learn something related to tourism operation, however, capacity building and human resource development related to customer service and satisfaction, marketing etc. are inadequate. Since tourism in Myanmar has not been fully developed, issues related to impact on mass tourism have not been addressed. Strategies related to mitigating environmental impacts, control competing use of natural resources, improving social and cultural impacts are not yet fully in place. One of the significant non-financial benefits for poor people at tourist destinations is an increase of local access to some primary tourism infrastructure and services.

Table 3: Strategies to Achieve Pro-poor Tourism Development

Strategies to achieve Economic Benefits	Strategies to achieve Non-financial Social Benefits	Strategies to enhance Participation and Partnership
• To boost local employment and wages • To boost local people's and enterprises' opportunities • To create collective income sources (These benefits are partially achieved to some extent through current tourism development in Myanmar)	• Capacity building and training related to customer service and marketing (not yet focused) • To address competing use of natural resources (Not yet focused due to limited tourism development) • To improve social and cultural impacts (Not yet focused due to limited tourism development) • To increase local access to primary tourism infrastructure and services (partially achieved to some extent)	• To increase participation of the poor in decision-making (Not yet in place) • To build pro-poor partnerships with private sector (achieved to some extent) • To increase flows of information and communication (partially achieved to some extent)

Tourism development has been partially benefiting poor people in tourist destination areas to some extent, but more enforceable strategies need to be adopted to develop pro-poor tourism to effectively benefit poor people in Myanmar leading to poverty reduction. The strategies should focus on three main areas that will enhance economic benefits, non-financial social benefits, and to strengthen partnership relationship with local people (see Table 3). Concerned authorities should be more open and flexible to understand how poor people could be benefited through pro-poor tourism development. The task is to tilt tourism to benefit the poor. Most governments see tourism as a contributing sector to economic development. However, some do not recognize the link between tourism development and poverty reduction and have not developed proper strategies to address issues hindering pro-poor tourism development.

One issue constraining the progress in pro-poor tourism is lack of access of the poor to the market due to presence of economic elites. Authorities should create a workable environment for poor people to get involved in the sector. One example is to promote the participation of poor people in tourism especially in eco-tourism sector through the practice of home-stay whereby tourists stay together with local families to experience their day-to-day lives. However, this kind of practice cannot be materialized in Myanmar because tourists are only to stay at registered hotels, motels or inns.

Another issue is lack of commercial viability of products and services offered by poor people at local areas due to their substandard quality. The absence of mass production made these products to be a bit more expensive. Moreover, improper marketing strategies and poor marketability were conducted when promoting the products. All these factors negatively contribute to pro-poor tourism development. Private-public cooperation and initiatives are required to enhance the quality of products and services offered by local people.

5.1 Results of surveys on small and medium sized businesses

A survey of 60 of small and medium sized businesses at a tourist destination was conducted in May 2007 to identify the level of benefits SMEs derived from tourism. A multivariate binary logistic regression was employed to analyse whether the benefits from tourism are better achieved by smaller businesses. It also analyses whether transport and accommodation businesses gain more benefit than others. The logistic regression is given as follows:

$$\textit{Level of benefit} = \frac{1}{1 + e^{-(0.49 - 0.91\,MI - 1.99\,HI + 0.94\,TRSP + 0.00\,ACCOM - 1.10\,TRV)}} \qquad (1)$$

Where,

Level of benefits from tourism is categorized into three levels = highly benefited, moderately benefited and not benefited

Level of business income = monthly income of less than K50,000, monthly income between K50,000 and K150,000 and monthly income over K150,000

Types of business = restaurant, transport, accommodation and tour agency businesses

MI = moderate level of business income

HI = higher level of business income

TRSP = transport business

ACCOM = accommodation business

TRV = travel and tour agency business

Table 4. Levels of Benefits SME Derived from Tourism

		B	S.E.	Wald	Df	Sig.	Exp(B)
Step 1(a)	income			6.638	2	.036	
	income(1)	-.911	.688	1.751	1	.186	.402
	income(2)	-1.988	.773	6.618	1	.010	.137
	type			5.161	3	.160	
	type(1)	.942	.808	1.360	1	.244	2.565
	type(2)	.000	.800	.000	1	1.000	1.000
	type(3)	-1.103	.885	1.551	1	.213	.332
	Constant	.491	.685	.514	1	.473	1.635

a Variable(s) entered on step 1: income, type.

The chi-square analysis in Table 4 shows that the association between level of benefits from tourism and types of business is not significant at 95% confidence level. Although statistical significance is not found, the multivariate binary logistic analysis shows that transport businesses have benefited more from tourism, followed by accommodation businesses operated by local people. The results also show that the association between level of benefits from tourism and business income level of respondents is significant at 95% confidence level.

The multivariate binary logistic regression analysis shows that at least at a tourist destination, local-owned small businesses with lower business income level have benefited more from tourism than medium-sized businesses with higher business income. The pro-poor tourism development is partially achieved to some extent in Myanmar since small businesses run by poorer local people tend to reap more net benefits. However, such development may not be sustainable in the longer term due to the lack of proper master plan and strategies specifically dedicated to pro-poor tourism development. Thus, more effective strategies and measure should be adopted to make tourism benefits sustainable for poor people across the whole country. Strategies to promote tourism should also aim at different target groups of tourists. For example, the poor can provide services in their own homes and communities to backpackers.

6 ANALYSIS ON TOURISM INFRASTRUCTURE IN MYANMAR

6.1 *Human Resource Development (HRD)*

Tourism is dependent on qualified people to deliver the service as visitors expect of a quality destination, but it is the service aspect of the industry which is most often neglected. For example, GMS-wide direct employment generated from international inbound tourism (excluding Myanmar) was more than 2.8 million in 2003. By 2010, the tourism industry will require over 1.2 million more qualified people to work in various sectors of the industry and 1.5 million by 2015. HRD is more than just education and training; it involves knowledge, skills and attitudes. The industry needs clear policies in the workplace including budgets for the development of people on a continuous basis. It involves a comprehensive approach involving the national, provincial and local governments, the educational and training institutions, the owners of hotels, restaurants, travel agencies, tourist transportation, and the hotel and travel agency associations working together to address the challenges posed by a fast-growing industry[8].

HRD in the Myanmar tourism sector has not reached the satisfactory level. The two training schools run by the Ministry of Hotel and Tourism and a foreign-owned hotel in cooperation with the Ministry, have trained around 10,000 people in 2006. The trainings range from front office operations to house keeping operations, F & B production and services, hotel management, hotel accounting, oriental food cooking, etc. (see Table 5). There also are some private training schools providing hospitality management trainings. Tourist guide training under the Ministry has been providing guide trainings in different languages, 70% of the tour guides are specialized in English, and followed by Japanese, Chinese, French, German, Thai, Italian, Russian, and Korean languages. However, out of all the licensed tourist guides, only a minority of them have been active (see Table 6). There also are some short-term training courses such as certificate courses that are jointly conducted by Singapore Tourism Board and the Ministry, and diploma courses conducted by the Ministry of Education.

Table 5. Number of Trained Persons by a Hotel Training School (as of June, 2006)

[8] PATA Issues and Trends: GMS Tourism – A Decade Later

Types of Courses	Trainees		Courses	
	No.	%	No.	%
Front Office Operations	2597	21.98	63	23.16
House Keeping Operations	1789	15.25	63	23.16
Food and Beverage Services	2510	21.39	58	21.32
Food and Beverage Production	4083	34.8	58	21.32
Hotel Management	156	1.33	6	2.2
Hotel Accounting	376	3.21	15	5.51
Oriental Food Cooking	223	1.9	9	3.31
Total	11734	100	272	100

Source: Kandawgyi Hotel Training School

Table 6. Number of Licensed Tourist Guides (as of 2005)

Language Specialized	Number of Guides (2004)	Number of Guides (2005)
English language	4411	2733
Japanese language	795	558
Chinese language	341	208
French language	282	220
German language	188	181
Thai language	150	110
Italian language	40	35
Russian language	27	22
Korean language	16	12

Source: Myanmar Tourism Statistics

Key issues confronting the development of a more effective approach to tourism HRD in the GMS are:[9]

- A weak HRD culture in the tourism industry
- Poorly integrated HRD policy-making at the national level
- Insufficient training of public sector officials at the national and local levels in sustainable tourism planning, development and management
- Weak standards of service in lodging establishments and restaurants
- Weak standards of service provided by tour operators, travel agencies, airline companies and other tourist transport
- Low sense of customer service among tourism front liners, such as customs and immigration personnel, police and security officers and tourism information officers

[9] Source: GMS Tourism Sector Strategy, June 2005

- A lack of urgency in ensuring that the quality of workers in the tourism industry is competitive with those in other destinations
- The gap between the demand for qualified tourism workers and their supply
- Weak tourism education and training capacities, particularly in the public-sector
- Lack of support for private-sector participation in education and training in some GMS countries

6.2 *Airline Transport and Facilities*

Myanmar Airlines International (MAI), joint-venture entity with Singapore and Hong Kong has been operating with two aircrafts (Boeing 737-300) and Airbus (A-321). It flies to some Asian cities such as Singapore, Bangkok, Hong Kong, Kuala Lumpur and New Delhi. During the promotional periods, it flies to Chiang-Mai with special discount rates. Foreign flights currently flying to Myanmar include Thai Airways (TG), Bangkok Air (PG), Phuket Air (9R), Thai Air Asia, PB Air, Druk Air, Singapore Silk Air (MI), Malaysian Air (MH), China Air (CA), Mandarin Air (AE), Indian Air (IC), Biman Bangladesh (BG), Austrian Lauda Air, Qatar Airways, and Air Mandalay (Domestic Airline flying to Chiang Mai). A domestic airline called Bagan Air is also expected to fly to Bangkok and Singapore by the middle of 2007. There are also special charter flight tours coming to Myanmar. The number of flights has increased year by year but it decreased to nearly seven times to only 8 flights in 2005.

There are 4 International Airports in Myanmar which are situated in famous tour centers of Myanmar (Yangon, Mandalay, Heho close to Taunggyi and Nyaung-Oo close to Bagan). In addition, there is a new international airport project at Hanthawaddy near Yangon, which is under construction. For the domestic flights, there are 50 airports which are currently operative in Myanmar. Myanmar Airways, Bagan Air, Air Mandalay and Yangon Air fly to many domestic destinations (see Table 7). Air Mandalay has some international flights and Bagan Air is expected to have some international flights too in 2007.

Table 7. Domestic Airlines in Myanmar

Airlines	Ownership	Aircrafts	
		Types	Number

Airlines	Ownership	Aircrafts	
		Types	Number
Air Mandalay	Joint-Venture with Singapore and Malaysia	ATR - 72	2
		ATR – 42	1
Yangon Air-ways	Joint-Venture with Hong Kong	ATR - 72	2
Myanmar Airways	Government	F28	2
		F27	2
Air-Pagan	Local-private owned	F - 100	1
		ATR 72	2
		ATR - 42	2

Source: Myanmar Tourism Statistics

6.3 *Road and Rail Transport Facilities*

The road transport is substandard condition. However, it is one of the cheapest ways to travel in Myanmar, especially for tourists taking coaches plying between Yangon and different domestic destinations. Renting private cars to go to other domestic destinations has become less popular since the 800% rise of domestic gasoline prices in 2006. Tour agencies arrange special coaches for packaged tours through several transport companies. As of 2005, there are 105 numbers of 26- to 50-seater coaches, 19 numbers of 21- to 25-seater mini-buses, 45 numbers of 7- to 20-seater vans and 38 numbers of 3- to 5-seater saloons registered under the Ministry of Hotel and Tourism. Individual tourists normally take public coach transports to their preferred domestic sites.

The railway transport is operated by Myanmar Railway, a state-owned enterprise. There are six-daily schedules trains between Yangon and Mandalay, two-daily trains between Yangon and Bagan, and one-daily train between Mandalay and Bagan. Myanmar Railway Transport also hires and arranges special coaches for round-trips between tour-centers. However, the rail transport is less popular to the tourists because of poor rail roads and expensive fares compared to coach transports.

6.4 *Water and Cruise Transport Facilities*

There are a few international cruises arriving at Yangon and Thilawa Ports. For example, 1536 tourists arrived at Yangon through six international cruises in 2005 (see Table 8). There are ten private companies operating cruise tours out of which two are joint-venture operation with the government and the other 8 are local-private operated owned.

Table 8. Tourist Arrivals by Cruise

Year	No. of Cruises	No. of Pax
1999	6	1533
2000	5	1422
2001	5	2869
2002	9	1927
2003	12	2535
2004	6	1758
2005	6	1536

Source: Myanmar Tourism Statistics

There also are a few river cruises running between main tour centers of Mandalay and Bagan. For example, popular river cruises include "Road to Mandalay" cruise, "RV Pandaw" cruise, "Amara" cruise, and "Irrawaddy Princess" cruise to provide exotic experiences through a journey along the Ayeyarwady and Chindwin Rivers, Shwekenneri transports and Padonmar transports plying between Mandalay and Bagan. As of 2004, there are 181 motor boats, 4 boats and 47 Yachts registered under the Ministry of Hotel and Tourism for tourist transportation. Some yachts are foreign-owned having licenses to enter into Myanmar waters especially around Myeik Archipelago, the southern part of Myanmar. Some tourists from Phuket, Thailand, come to Myanmar by yachts for diving around these areas.

Transportation by river is not very popular among tourists in Myanmar because most river transports for tourists plying between major tour sites are time-consuming and some luxurious river cruises are expensive. The quality of other river transports plying between non-major-tour-sites is not up to international standard compared to air and road transports, which are more popular among the tourists in Myanmar.

6.5 *Travel Agencies*

There are about 657 tour agencies in Myanmar in 2005 and majority is local-owned operated companies (see Table 9). Most of the companies that partly or fully owned by foreign entities are bigger in size and larger in terms of capital. They have competitive advantages over local-owned companies because they have established foreign networks.

Majority of local-owned tour agencies are mostly small and fragmented. Some small-sized tour agencies are found to be relying on bigger agencies due to the lack of their own networks. Most tour agencies especially the smaller ones do not have any strong contractual relationship with any tour operators outside Myanmar. They do not have any connections or expertise to market internationally other than posting a website which is usually not updated.

Table 9: Licensed Tour Companies in Myanmar

Sr.	Types of Ownership of Tour Agencies	2000	2003	2005
1	Foreign Company	1	1	1
2	J.V Company	14	18	18
3	Local Company	586	557	638
4	Total	601	576	657

Source: Myanmar Tourism Statistics (2000-2005)

The results from our interview surveys with 20 travel and tour agencies reveal that majority of local agents do not have any connection with foreign travel agents outside Myanmar. Most of them are confused about international marketing. There has not been any international promotion and marketing activities apart from some limited activities initiated by Myanmar Marketing Committee (MMC), which participates in international and regional travel trade fairs. Other trade associations that are fully organized by the government include Myanmar Travel Association (MTA) and Myanmar Hotelier Association (MHA) in the tourism industry.

6.6 *Hotels and Accommodations*

Hotels, motels, and inns in Myanmar can be divided into 4 types of ownership: 100% foreign-owned, foreign and local joint-venture, stated-owned, and locally private-owned. There are about 4% (23 hotels) foreign-owned hotels, 90% (over 500 hotels) locally private-owned hotels and a small percentage of joint-venture and state-owned hotels (see Table 10). Sixty percent of hotels are located in four major tourist sites, namely Yangon, Mandalay, Bagan, and Inlay. The rest 40% of hotels are distributed unevenly across the country.

Table 10: Hotels, Motels and Inns in Myanmar by Ownership (2005)

Types of ownership	Hotels		Rooms	
	No.	%	No.	%
Local-owned Hotels/Motels and Inns	542	90	11757	62
Joint-Venture Hotels (Government and Foreign)	6	1	631	3
Foreign Investment Hotels	23	4	4085	21
Leased Hotels	32	5	2567	14
Total	603	100	19040	100

Source: Ministry of Hotel and Tourism

Most local-owned smaller hotels are striving for survival due to lower occupancy rates, especially in the off-season and high operating costs (see Table 11). This in turn impacts the standard of maintenance, and the quality of their services and human resources.

Table 11: Occupancy Rates of Selected Hotels in Yangon City

Hotel Names	Approx. Star Rating	No. of Rooms	Occupancy Rate (%)						Avg. Occu-pancy (%)	Avg. Length of Stay
			1999	2000	2001	2002	2003	2004		
FDI Hotels										
Strand	5	32	70	80	85	60	78	80	76	1.8
Pansea	4	48	55	60	64	65	70	71	64	5
Traders	5	500	40	45	45	45	50	60	48	7
Summit Parkview	4	140	45	45	45	45	45	45	45	-
Hotel Nikko	5	256	38	40	38	43	40	42	40	3
Central	3	82	-	-	-	-	-	-	40	6
Sedona	5	366	30	35	40	40	45	-	38	7
Grand Plaza	5	359		49	39	25	29	39	36	-
Savoy	3	24	28	28	28	28	28	28	28	3
Dusit Inya Lake	5	159	-	-	-	-	23	28	25	4
Local-owned Hotels										
Olympic	3	60	-	-	-	-	34	80	57	-
Panorama	3	104	55	57	60	62	40	50	54	5
Royal White Elephant	3	63		27	35	58	64	70	51	5
Asia Plaza	3	150	20	35	48	59	62	65	48	3
Liberty	3	40	45	42	40	40	41	42	47	3
Hotel Paradise	3	96	28	28	30	24	25	35	33	1.5
Summer Palace	3	56	20	18	18	20	21	20	16	1.2

Source: Survey conducted in 2006-07

According to our interview surveys with 50 hotels during the study period, it revealed that the average occupancy rates from 1999 to 2004 are approximately 50%. During the peak season, the average occupancy rate of the hotels in popular tourist sites may reach 70 to 90% depending on their respective quality and popularity. Foreign-managed hotels and medium and larger sized locally owned hotels rely more on sales through local travel agents and corporate sales while smaller local-owned hotels have more direct sales.

6.7 *Restaurants*

Some medium and large-sized restaurants particularly in some major tourist sites have contractual relationship with tour agents/operators whereas most restaurants do not. However, restaurants along major tourist sites are still at the substandard level. There is no adequate number of restaurants in some major tourist areas including Inlay where tourists rely on the in-house restaurants in their respective hotels in most cases.

Quality of services provided by the restaurants varies extensively. Due to insufficient restaurants in some major tourist sites, some popular restaurants are getting very crowded in peak season and as a result quality of services has fallen to some extent. Some restaurants in major tourist sites have adapted to the situation such as cultural shows to attract tourists.

6.8 *Other Tourist Facilities*

Secondary tourist facilities such as shopping, recreation, entertainment, and visitor information services, and tertiary tourist facilities such as health-care services, emergency and safety services, financial services, and telecommunication services are still inadequate and most are at the substandard level.

Shopping places are widely available in city areas and most tourist sites, which sell cultural and traditional related products such as tapestries, lacquer wares, bamboo wares, cane wares, etc. However, the practice of price discrimination still prevails in tourist sites. Recreation and entertainment places are still inadequate. The major tourist attraction of Myanmar is its cultural heritage and most tour agents do not emphasize recreation and entertainment programs. However, some tour agents have started to learn the necessity of recreation and entertainment programs for their clients.

Visitor information service is still poor in Myanmar. It is difficult to acquire required information especially for independent travelers without hiring tourist guides. Tourist information centers are not adequately available even in major cities and tourist sites. Due to major budget constraints, it has difficulty to establish tourist information centers throughout the country equipped with English-speaking assistants and information materials.

Health-care services are available mostly in the city areas. Private hospitals and clinics are available in only city areas. However, in major tourist sites, tourist guides or hotels can call for medical doctors in the case of emergency on behalf of their guests. Price discrimination is prominent in health care services for the tourists.

Financial services are not widely available. It is not possible to use major credit cards widely. Traveler's checks can be converted into USD only at the designated state's bank in Yangon. Limited government authorized money changers are available in some areas, but most tourists rely on the black market due to uncompetitive exchange rate offered by the authorized centers. However, the black market for currency exchange is widely available only in Yangon and only USD can be exchanged in most cases. Black markets for currency exchange of Chinese Yuan and Thai Baht are widely available mostly along the border areas.

IDD telecommunication services are available only at medium and large-sized hotels and they are expensive. Public telephones are not widely available even in the city areas. International roaming is not available for GSM telephones dead. Limited internet cafes are available only in Yangon and Mandalay.

6.9 *Necessity for Sustaining Quality*

It is necessary to ensure high quality standards in the key areas of public facilities, food and beverage, lodging and natural cultural heritage attractions. Cleanliness and hygiene are also major concerns of tourists. Quality of public toilet facilities is the worst in

Myanmar especially along the highways linking major tourist sites. Food safety standards also need to be addressed in order to enhance safety and sanitation of food services, especially in tourist areas to create a positive image of food providers and build confidence among tourists. Majority of tourists in Myanmar complains that some cultural sites are not properly maintained. For example, cobwebs can be seen in most pagodas including the famous culturally rich Bagan tourist site.

7. ANALYSIS ON ECONOMIC AND SOCIAL IMPACTS[10]

Total expenditure by tourists within the GMS in 2004 was estimated at just over US$ 12.1 billion, excluding air-fares, airport taxes, and visa fees. If these are included, total receipts from international tourism rise to US$ 14.78 billion. In Myanmar, income from the tourism sector is just 3.3% of its total exports and it is quite modest compared to those of Laos, Cambodia, and Thailand that are 20.6%, 19.5%, and 10.6% respectively. A key element of the tourism strategy is to help reduce the high level of leakages, especially in Cambodia, Loas, Myanmar, and Vietnam by increasing economic linkages through pro-poor tourism development and encouraging greater private-sector participation in the supply chain. Thailand strong and broad-based economy enables the country to meet tourism supplies such as food, beverage, commodities, materials, transport, and other goods and services. However, Cambodia, Loas, Myanmar, and Vietnam have weaker economies and higher rates of dependency on imported products. Much of the tourism resources are located outside urban areas and there is a significant imbalance in the distribution of tourism income between urban and rural areas. The type and location of activities being undertaken by international tourists continue to be highly concentrated on resorts, major urban centers, and major tourist sites.

Current trends indicate that a rapid growing number of tourists within GMS are and will continue to be border tourists. This category of tourists creates the most significant negative social impact on the area, because the targeted destinations are expanding the number of resorts and entertainment venues that are under development or being planned for the border regions. This category may also include business travelers who frequently visit entertainment venues wherever they go. In Myanmar, this category of border tourists

[10] Based on PATA Issues and Trends: GMS Tourism – A Decade Later

accounts for more than 65% of total number of tourist arrivals. This category also includes businessmen coming with tourist visa.

The category of "passport holders" includes regional businessmen traveling to capitals and important towns and cities in the GMS. Many of them tend to be steady users of the night entertainment venues. There is also a sub-group known to have a sexual preference for children under the age of 18. Thus, given the assumption that the volume of this type of visitors will increase significantly during the coming years, the negative social impacts from tourism in the region could well shift from medium to high. In Myanmar, in addition to expansion of entertainment venues at least in Yangon, mentality of minors especially in major tourist sites are corrupted. If such social impacts are not managed and acted upon taken by the GMS governments, the increase in commercial sex venues at priority tourist sites will also contribute to the increase of HIV/AIDS infections. If these trends are left unchecked, the image of the region as a "sex destination" will not only continue, but grow.

8. ANALYSIS ON ENVIRONMENTAL IMPACTS

The impact of tourism on the environment includes depletion of natural resource, pollution, soil erosion, natural habitat loss, increased pressure on endangered species and heightened vulnerability to forest fires. Negative impacts from tourism occur when the level of visitor use is greater than the environment's ability to cope with this use within the acceptable limits of change. Uncontrolled conventional tourism poses potential threats to many natural areas. It often puts a strain on water resources and forces local population to compete for the use of critical resources. In areas with high concentrations of tourist activities and appealing natural attractions, waste disposal is normally a serious problem and improper disposal can be a major despoiler of the natural environment such as rivers, scenic areas, and roadsides. Furthermore, physical impacts of tourism in most areas include the degradation of eco-system of geographic area including all the living organisms, their physical surroundings and the natural cycles that sustain them. Tourism development in a country that includes construction activities, infrastructure development, deforestation and intensified use of land, marina development, etc., tends to have negative physical impacts on the environment. Likewise, tourist activities such as trampling, anchoring and other marine activities also tend to have negative physical impacts on the environment.

The negative impact of tourism on Myanmar environment is low since the number of tourists arrival is still at the modest level and tourist density per square meter area is 0.37 compared to tourist density in Thailand which is found to be the highest at 22.97 followed by Vietnam and Cambodia at 9.0 and 5.98 and Laos at 1.02 respectively as of 2004[11]. However, Myanmar should take precautionary measures to protect its environment in future when tourist number increases.

Myanmar embraces over 135 numbers of ethnic minorities some of whom are living in the remote areas where eco-tourism can be developed. Hence the development of effective eco-tourism and mass tourism may well have negative impact on the ecosystem of these areas and minority tribes in those areas may get affected to some extent. Thus an effective balance should be adopted in developing tourism without having adverse affect on the ethnic minorities.

9. ANALYSIS ON FACTORS AFFECTING MYANMAR TOURISM SECTOR

Myanmar has a reasonable level of primary tourist facilities such as hotel accommodations, travel and tour services, restaurants, etc., but its secondary and tertiary facilities such as shopping, recreation, entertainment, visitor information services, health-care services, emergency and safety services, financial services, and telecommunication services are still not well developed. Other infrastructures such as road transports, rail transports, and human resource development are also below international standard. These substandard facilities and poor tourism infrastructure are negative factors in developing Myanmar tourism sector.

The US economic sanction on Myanmar has a negative impact to some extent on the tourism development. The multiple linear result *($dTA = 0.48 - 0.07\ CPI - 0.42\ D$)*[12] suggests that US economic sanction imposed against Myanmar in 1997 has a significant negative impact on the rate of change of tourist arrival at 95% confidence level.

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[11] Source: World Bank

[12] dTA stands for the rate of change of tourist arrival, CPI is the growth of consumer price index and D is the dummy variable taken as a proxy of US economic sanction firstly imposed in 1997. In this regression analysis, R-square = 0.82, P-value of the beta of US sanction dummy = 0.002, P-value of the beta of CPI variable = 0.64. Source of data = World Bank. Data from 1995 to 2004 are used in the analysis.

10 SURVEY RESULTS

The survey results conducted on 50 hotels, 20 travel and ticketing agents, and 2 transport companies show 46% of the respondents think weak market access has a strong negative effect and 54% think that it has moderate effect on business development in the tourism sector (see Table 12). Similarly, 53% of the respondents suggest that electricity shortage has a strong negative effect and 29% says it has moderate effect on their businesses. In addition, 54% of the respondents also suggest that lack of skillful employees has serious effect on their businesses while 31% thinks it has moderate effect (see Table 12).

Table 12. Factors Affecting the Businesses in Myanmar Tourism Sector

Sr.	Factors	Frequency	Percentage
1	**Weak Market Access**		
	Total Respondents	**72**	**100.0**
	Strong effect	33	46.2
	Moderate effect	39	53.8
2	**Poor and Expansive Telecommunication Services**		
	Total Respondents	**72**	**100.0**
	Strong effect	31	42.9
	Moderate effect	15	21.4
3	**Electricity Shortage**		
	Total Respondents	**72**	**100.0**
	Strong effect	38	52.9
	Moderate effect	21	29.4
4	**Lack of Skillful Employees**		
	Total Respondents	**72**	**100.0**
	Strong effect	39	53.8
	Moderate effect	22	30.8
5	**Frequent Changes of Government Rules and Policies**		
	Total Respondents	**72**	**100.0**
	Strong effect	22	30.8
	Moderate effect	17	23.1
6	**Lack of Information**		
	Total Respondents	**72**	**100.0**
	Strong effect	5	7.1
	Moderate effect	51	71.4
7	**Difficulty Related to Money Transfer**		

Sr.	Factors	Frequency	Percentage
	Total Respondents	**72**	**100.0**
	Strong effect	31	42.9
	Moderate effect	10	14.3
8	**Economic Sanction**		
	Total Respondents	**72**	**100.0**
	Strong effect	17	23.1
	Moderate effect	28	38.5

Source: Questionnaire Surveys

Results from the first section of survey questionnaires show that 50% of the respondents are from Western Europe, 30% from ASEAN and Asia Pacific region, and 10% from North America. Approximately 57% of the respondents are male; 70% of the respondents are between the age of 21 and 50; and majority has a monthly income level of less than US$ 1000 (see Table 13).

Table 13: Demographic Characteristics of the Respondents

Sr	Variables	Frequency	Percentage
1	**Nationality**		
	Total Respondents	**500**	**100.0**
	ASEAN	**48**	**9.6**
	Thailand	16	3.2
	Singapore	8	1.6
	Others	24	4.8
	Asia and Pacific (Excluding ASEAN)	**104**	**20.8**
	Japan	35	7
	China	12	2.4
	Korea	12	2.4
	India	3	0.6
	Others	42	8.4
	North America	**50**	**10**
	USA	36	7.2
	Canada	14	2.8
	West Europe	**297**	**59.4**
	France	53	10.6
	Germany	77	15.4
	UK	31	6.2
	Others	118	23.6
	Others	**13**	**2.6**
2	**Gender**		
	Total Respondents	**500**	**100.0**
	Male	287	57.4
	Female	213	42.6

Sr	Variables	Frequency	Percentage
3	**Age**		
	Total Respondents	**500**	**100.0**
	15-20	17	3.4
	21-30	119	23.8
	31-50	231	46.2
	Above 50	133	26.6
4	**Monthly Income Level (US$)**		
	Total Respondents	**400**	**100.0**
	Under1000	211	52.8
	1001-2500	56	14.0
	2501-4000	70	17.5
	4,001-5500	27	6.8
	55001-7000	11	2.8
	7001-10.000	12	3.0
	Over 10001	13	3.3
5	**Occupational Level**		
	Total Respondents	**459**	**100.0**
	Professional and Technical	98	21.4
	Managers, Officials, Proprietors	162	35.3
	Clerical and Sales	34	7.4
	Craftsman, Foreman	38	8.3
	Operatives	38	8.3
	Retired	34	7.4
	Students	41	8.9
	Housewife	14	3.1

Source: Questionnaire Surveys

Results from the survey questionnaires reveal that 30% of the respondents who visited Myanmar come alone and 33% come with friends. Majority of respondents make all the arrangements by themselves without going through foreign travel agents because there are only a limited number of foreign travel agents having contractual connection with local travel agents. Most the respondents are first time visitors to Myanmar and only a few percentage visited Myanmar more than one time. Furthermore, most of the respondents who visited Myanmar also visited neighboring countries such as Thailand (see Table 13).

Most of the respondents stayed between 8 to 14 days in Myanmar. The results also showed that majority of the respondents spend less than US$500 during the trip (see Table 14). This is because after paying for all travel expenses such as air fare, accommodations, etc. to the travel agents, the tourists do not spend much money because of the lack of major financial services. For example, tourists cannot use any major credit cards, cannot exchange their traveler checks in most areas, and cannot easily convert USD into local currency at the market rate. As a result, tourists spend more money on primary facilities especially air fares since there is less limited choice of other modes of transportations such as road and river (Table 14).

Table 14. Travel Behavior/ Characteristics of the Respondents

Sr.	Variables	Frequency	Percentage
1	**Travel Partners**		
	Total Respondents	496	**100.0**
	Alone	151	30.4
	With Friends	163	32.8
	With Wife/husband	139	28
	With Family	43	8.7
2	**Travel Arrangement**		
	Total Respondents	491	**100.0**
	Self-arrangement	303	61.71
	Through Travel Operators/Agents out of Myanmar	188	38.28
3	**Sources of Information Used**		
	Total Respondents	381	**100.0**
	Word-of-Mouth	145	38.05
	Through Publication (Journals, Guide-Books, CD ROM, Photo Exposition Etc.)	138	36.22
	Internet	76	19.95
	Through Travel Businesses	22	5.77
4	**Frequency of Visit**		
	Total Respondents	500	**100.0**
	First-time Visitor	397	79.4
	1-3 times	89	17.8
	4-5 times	14	2.8
5	**Other Countries Included in Travel Package**		
	Total Respondents	496	**100.0**
	Only Myanmar	267	54.0
	Including Others	229	46.0
6	**Countries Included in this Travel Package**		
	Total Respondents	229	**100.0**
	Thailand	115	50.2
	Cambodia	54	23.6
	Lao	36	15.7
	China	17	7.4

Sr.	Variables	Frequency	Percentage
	Vietnam	7	3.1
7	**Total Number of Days Spent in Myanmar by Tourists**		
	Total Respondents	**500**	**100.0**
	≤ 7 days	148	29.6
	8 - 14 days	161	32.2
	15 - 21 days	110	22.0
	22 - 28 days	76	15.2
	29 days and above	5	1.0
8	**Amount of Money Spent (Excluding total trip payment to local agent)**		
	Total Respondents	**289**	**100.0**
	≤ 500	182	63.0
	501 - 1000	52	18.0
	1001 - 2000	27	9.3
	2001 - 3000	14	4.8
	3001 - 5000	11	3.8
	5001 and above	3	1.0

Source: Questionnaire Surveys

The survey results show majority of respondents are quite satisfied with the exotic experiences in Myanmar (see Table 15). Furthermore, majority of the respondents (around 58%) find Myanmar friendly and 20% respondents perceive Myanmar as a country of many pagodas and 10% respondents think Myanmar as a country of unique culture and tradition (see Table 15).

Table 15: Level of Satisfaction of the Respondents and their Perception on Myanmar

Sr.	Variables	Frequency	Percentage
1	**Level of Satisfaction**		
	Total Respondents	**288**	**100.0**
	Very much	85	29.5
	Good	148	51.4
	Moderate	49	17.0
	Not much	4	1.4
	Not at all	2	0.7
2	**Unique Factors of Myanmar Compared to Other Countries**		
	Total Respondents	**217**	**100.0**
	Country of friendly people	126	58.1
	Country of many pagodas	43	19.8
	Country of unique culture and tradition	22	10.1
	Country different from others and good experience	13	6.0
	Safe country	10	4.6
	Country of many entrance fees	3	1.4

Source: Questionnaire Surveys

Table 16 shows majority of respondents suggest the need for better transportation (33%), more advertisement and promotional activities (15%), and preservation of culture

(12%). Other suggestions include the need to expand direct flights with more countries, to improve credit card payment system, to develop better communication, etc (see Table 16).

Table 16. Suggestions of the Respondents

Tourists' Suggestions	Frequency	Percentage
Total Respondents	**680**	**100.0**
Need better transportation	225	33.1
Need more advertisement	102	15.0
Need to preserve culture	83	12.2
Need to have direct flights with more countries	60	8.8
Need to improve credit card payment system	54	7.9
Need to have better communication	40	5.9
Need to have more transparency of Information	40	5.9
Need to create more new interesting sites	35	5.1
Need to improve clean water facility	23	3.4
Need to have meter taxi	18	2.6

Source: Questionnaire Surveys

The survey results further reveal that majority of tourists (54% of the respondents) come to Myanmar only because Myanmar is one of the destinations in their packaged trip from the region. Out of those who are traveling more than one destination, it is further found that majority (50.2% of respondents) included Thailand in their packaged trips and others (23.6%) included Cambodian and Laos (15.7%) when visiting Myanmar. The average expenditure by each tourist is less than US$500 for the whole trip due to the lack many amenities and services.

11. ANALYSIS ON TOURISM PROMOTION IN MYANMAR

11.1 *Earlier Efforts*

The first project for tourism development in Myanmar was initiated in 1980 by UNDP called the Hotel and Tourism Training Project. The main objective was to establish a center for Hotel and Tourism training for upgrading the skills of existing manpower and training for new entrants to the industry. The project also included training abroad for 16 national counterparts for the operation of the Training Center. The financial assistance was provided by UNDP and technical assistance by International Labor Organization (ILO). The UNDP funds amounted to over US$ 1.2 million covering expenses for ILO technical expertise, equipment and fellowships. The Italian, Danish and Finnish Governments also participated in the project through bilateral arrangements and the total offshore funding reached US$ 2.5 million. The Training Center was formally opened in January 1982 and the project completed in 1985. A Modern Operational Center for hotel and tourism training has been fully achieved and about 400 personnel have been trained each year.

The second project, Myanmar Tourism Development Study Project, was also funded by UNDP with the World Tourism Organization (WTO) as the Executing Agency. The Project consisted of two phases beginning in 1982. Phase One included preparation of a Master Plan for Tourism Development for the period 1981~1986, evaluation of the investment program required to develop the selected sites with regard to accommodation, transportation and other facilities and preparation of pre-feasibility studies of the main investment. Phase Two included preparation of feasibility studies for the tourist development of Yangon, Bagan, and Mandalay with a target to attract financial investment in hotel construction and other tourism facilities. The project included a Master Plan for the Bagan area which was completed in 1985 with a total investment of US$ 0.6 million.

Other tourism-related projects include Yangon-Mandalay Expressway Project, Yangon International Airport Extension Project, Tanyin Bridge Project and Thilawa Port Project are in progress and will greatly contribute to the development of tourism in Myanmar.

The economic and technical cooperation from international organizations and other donor includes the following:

- Development of transport facilities, i.e. railways, roads, domestic air transport, airport and civil aviation facilities, inland waterways and riverine craft, etc.
- Upgrade existing Hotel and Tourism Training Center with modern technology equipments and development of tourism-related vocational training schools
- Fellowship awards for teaching staff and new recruits for various subjects in hotel and tourism industry
- Development of tourism-related services and industries such as handicrafts and souvenirs
- Technical assistance and fellowships for development of Institute of Tourism Administration

- Financial and technical assistance for development and promotion of Convention Tourism

11.2 *Recent Efforts*

Myanmar tourism Law was implemented in June 1990 to develop the tourism sector. The basic principles of the law include contribution to national economy by generating foreign exchange earnings, regional development, creation of employment, preservation and protection of cultural heritage and natural environment.

Following this, the Ministry of Hotels and Tourism (MOHT) was formed in September 1992 with the responsibility for policy implementation, planning, marketing, and facilitating travel and regulation of the private sector. The National Tourism Authority (NTA) is embodied in the Tourism Development Management Committee (TDMC) headed by the Secretary-1 of the State Peace and Development Council and the Ministers and Deputy Ministers of tourism-related ministries. It aims at providing policy guidelines and coordinating for accomplishing the action plans.

Myanmar tourism promotion strategies must be effective and clearly identified. This includes devising and implementing promotional programs to communicate destination images and key messages to targeted segments of visitors. To enhance the awareness of Myanmar, MOHT is promoting world-wide publicity through media, satellite television, CD ROM, VCD, DVD, videotapes and brochures. In addition, travel writers and tour agents have been invited on familiarization tours and briefed on the current developments of tourism industry. For overseas promotion, the MOHT cooperates with the private sector, including airlines and hotels to participate in major international travel fairs like ITB Berlin, PATA Travel Mart, ASEAN Travel Mart and International Travel Show. Myanmar has also joined the World Tourism Organization (WTO) and Pacific Asia Travel Association (PATA).

12. POLICY RECOMMENDATIONS AND STRATEGIC OPTIONS

This study shows that tourism infrastructures in Myanmar are still at the substandard level. It has been difficult for Myanmar to effectively cooperate with tourism sectors of other GMS countries unless proper HRD and major infrastructure related to information technology could be improved. In order to effectively promote tourism sector in Myanmar, focus should be placed not only on the development of primary tourism facilities such as hotel accommodations, travel agencies, restaurants, etc., but also on secondary and tertiary facilities such as shopping, recreation and entertainment, visitor information services, health-care services, emergency and safety services, and financial services, etc. The primary tourist facilities in Myanmar are fairly well developed but most of the secondary and tertiary facilities are still underdeveloped.

Initiatives are necessary to maintain acceptable level of both services and products quality for primary tourist facilities. For example, small and medium sized private sector businesses such as hotels are in the vicious cycle of low quality and low demand. They provide low quality services leading to low demand and they do not find the need to enhance their quality of services. This should end through proper education and human resource development.

The improvement of tourist facilities and infrastructures will lead to increase of Myanmar's market share of world total demand and average spending per tourist. According to the survey results, majority of tourists spend less than US$500 per trip. After paying basic charges for accommodations, air fare, etc. to their travel agents, they spend less money on the trip due to limited amenities and services in Myanmar.

Table 17: Length of Stay and Expenditure of International Visitors to GMS Countries (2004)

GMS Country	Volume of Int'l Tourists	Avg Length of Stay (Days)	Total Expenditure in Country (US$ mil)	Avg Expenditure per Person per Day (US$)
Cambodia	1,055,202	6.3	578.4	87.0
Yunnan PRC	500,000	3.8	161.5	85.0
Lao PDR	238,000	6.5	91.3	59.0
Myanmar*	241,938	7	136.0	80.3
Thailand	11,277,000	8	9021.6	100.0
Vietnam	2,554,000	8	1634.6	80.0
GMS	15,866,140	6.6	11623.4	95.0

* The arrivals include the visitors with tourist visas only
Source: NTOs and immigration authorities of GMS

Tourist spending in Myanmar is more or less similar to other GMS countries although it is lower than that of Thailand (see Table 17). Comparing the patterns of tourists between Myanmar and Thailand, tourists spend much more on transportation in Myanmar than in Thailand, 32% of their total expenditure was on transportation compared to only 5% in Thailand (see Table 18). Moreover, tourists spend about 37% of their expenditure on shopping in Thailand while only 4% in Myanmar.

Table 18: Comparison between Patterns of Tourist Expenditure in Myanmar and Thailand

Country	Pax (000)	Accomm-odations	Transp-ortation	Food & Beverage	Guide, Sightseeing, Entrance Fees, etc.	Shopping	Total Percentage
Myanmar	206	26%	32%	20%	18%	4%	100%
Thailand	10,820	27%	5%	15%	16%	37%	100%

Source: Country Report, 2003

Despite Myanmar's unique tourist attraction places, tourist flow into the country is still at a modest level. The study found that it might be attributed to several factors hindering the full-fledged development of the tourism sector in Myanmar. These include lack of proper tourism infrastructure, substandard quality of tourism facilities especially secondary and tertiary facilities, limited level of effective international marketing and promotional activities. For example, the links between Myanmar travel agencies and hotels with other GMS countries are still weak. Travel information about Myanmar has not been quite transparent except for some popular tourist sites. The image of Myanmar as a country with attractive tourism sites and friendly people had not been promoted effectively. It is important to compile important data and information among not only the public but also the private entities of GMS countries to ensure the required level of transparency. This can partly be achieved through the development of database marketing system. International marketing and promotion activities could be enhanced through e-marketing system and link with international organizations such as NTOs, PATA, ADB, UNESCAP, etc.

It is also important to foster intra-regional travel within the GMS and also inter-regional travel between the regions. In order to promote intra- and inter-regional travels, it is important to resolve the issues of cross-border travels and improve the systems for visa-on-arrival facilities at the airports and border check-points. In Myanmar, visa-on-arrival system still requires prior approval from the relevant Ministry and this deters potential tourists without having prior plan or arrangement from neighboring countries both through international airports and border crossings. Hence, public sector and private sector participation is necessary to develop tourism cooperation among the GMS countries.

The budget of most governments in the GMS region especially Myanmar, Cambodia, and Laos are limited and the prospects for mobilization of domestic capital are scarce. Hence outside efforts need to entice economic and technical cooperation from major developed countries and to attract foreign direct investment[13]. Given that the government budget for tourism development is very limited, least cost methods for promoting tourism need to be prioritized.

[13] The source of this paragraph is Myat Thein, 2006, "Toward BIMSTEC-Japan Comprehensive Economic Cooperation in Tourism Sector: Vision and Tasks Ahead"

13. CONCLUSION

The survey results reveal that although Myanmar has been actively involved in regional and sub-regional cooperation, the pace of tourism development in Myanmar is still at a modest level due to substandard tourism infrastructures. Emphasis should be placed on developing policies or master plan to strengthen pro-poor tourism development. Poor people or small businesses at some popular tourist sites tend to gain more benefit from tourism development, however, the level of benefits may reduced through time by large monopolizing businesses. Pro-poor tourism can be incorporated into tourism development strategies of government or businesses with or without explicit pro-poor language. These strategies should involve the development of new products, particularly based on local culture and should be integrated with mainstream products if they are to find markets. Simultaneously, commercial viability of these products should be ensured. Strategies on HRD and capacity building should also be equally focused. It cannot be achieved within days but it is aimed to achieve faster development. Pro-poor tourism is a long-term investment.

Measures should be taken to improve existing primary infrastructures such as hotel, travel agents, restaurants, etc. Emphasis should also be placed on the development of secondary and tertiary infrastructures depending on their respective levels of priority. It is important to make tourism information services more transparent and available at many places. Price discriminations on tourists should be minimized. Level playing field should be restored as much as possible. Reliable health-care services for tourists should be easily accessible at many places.

Tourism development gaps between Myanmar and other major tourist destinations in the GMS region such as Thailand are getting bigger. Measures should be taken to build up the links between Myanmar and other GMS countries to promote the sub-region as a single tourist destination. Transparent, affordable, and effective policies should be developed to strengthen the cooperation between public and private sectors among the GMS countries.

It is important to create favorable and transparent policies in the country. While favorable policies are adopted to meet general expectations of tourists, favorable investment circumstances should be created to welcome potential investors to Myanmar tourism industry. Appropriate educational training should be provided to all relevant public as well as private entities that include immigration officers, customs, travel agents, hotels, etc. in order to enhance their knowledge of guest-care services and customer satisfaction. Myanmar has signed several regional as well as sub-regional agreements to promote tourism. It is important to actively participate in implementing activities as the action plans set out by each regional agreement.

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APPENDIX

SURVEY QUESTIONNAIRE

Welcome to Myanmar. The objective of this questionnaire survey is mainly concerned with development of tourism in Greater Mekong Sub-region (GMS) which includes Myanmar, Thailand, China (Yunan province), Vietnam, Cambodia & Lao PDR

1 This trip to Myanmar is ☐ 1st time ☐ 2nd time ☐ 3rd time ☐ 4th time & above

2 Please indicate your main reasons for visiting Myanmar

	1st priority	2nd priority	3rd priority
Natural attraction			
Cultural attraction			
Historical sites			
Religious spots			
To see relatives & friends			
Business / job purpose			
Handicrafts & gems			
Others ______________			

3 Please tell us about your impression on the following

Transport quality	☐ Good	☐ Fair	☐ Bad
Travel cost	☐ Too high	☐ Fair	☐ Cheap
Accommodation quality	☐ Good	☐ Fair	☐ Bad
Accommodation cost	☐ Too high	☐ Fair	☐ Cheap
Guide quality	☐ Good	☐ Fair	☐ Bad
Security Conditions	☐ Good	☐ Fair	☐ Bad

Problems encountered ____________________

4 What places did you or will you visit this time?

☐ Yangon	☐ Pagan / Nyaung Oo	☐ Ngapali/Ngwesaung/Chaungtha beach
☐ Mandalay	☐ Inlay / Shwe Nyaung	☐ Myitkyina
☐ Sagaing	☐ Taunggyi	☐ Kawthaung
☐ Pyin Oo Lwin	☐ Pindaya	☐ Other border areas __________
☐ Mingun	☐ Golden Rock	☐ Others ___________________

5 Please tell us about your accommodation

	Hotel name	Single/Double	Price per night
1 Yangon			
2 Mandalay			
3 Pyin Oo Lwin			

4 Pagan / Nyaung Oo			
5 Inlay / Shwe Nyaung			
6 Taunggyi			
7 Golden Rock			
8 _______________			

6 Please state how well you were satisfied with the following places/sites

	Satisfied	Medium	Not satisfied	Not yet visited
1 Yangon				
2 Mandalay				
3 Pyin Oo Lwin				
4 Pagan / Nyaung Oo				
5 Inlay / Shwe Nyaung				
6 Taunggyi				
7 Golden Rock				
8 Beach (Specify)				
9 __________________				

7 Overall, how satisfied are you with your visiting to Myanmar ?(Please circle)

Exteremely Satisfied   Exteremely Dissatisfied

1   2   3   4   5   6

8 How do you know about Myanmar?

- [ ] Magazines
- [ ] Newspapers
- [ ] Internets
- [ ] Television
- [ ] Words of month
- [ ] Others_________________

9 Your travel party (check the most appropriate one)

- [ ] Alone
- [ ] Couple
- [ ] Family members
- [ ] Friends & relatives

10 Did you or will you visit any of the following countries before or after your trip to Myanmar?

- [ ] Thailand
- [ ] Vietnam
- [ ] China (Yunan province)
- [ ] Cambodia
- [ ] Lao PDR

11 How long is your trip this time to Myanmar

- [ ] Less than one week
- [ ] 1 to 2 weeks
- [ ] 2 to 3 weeks
- [ ] About 1 month
- [ ] 1 to 2 months
- [ ] Over 2 months

12 Please state any problems you have encountered in Myanmar.

____

____

____

____

Tourist's Demographic Characteristics

1 Nationality ____________________________

2 Gender

- [ ] Male
- [ ] Female

3 Age level

- [ ] Under 20
- [ ] 21 ~ 30
- [ ] 31 ~ 40
- [ ] 41 ~ 50
- [ ] 51 ~ 60
- [ ] Over 60

4 Education level

- [ ] Primary level
- [ ] Secondary level
- [ ] High school level
- [ ] Vocational school level
- [ ] University level (undergraduate: uncompleted)
- [ ] University level (undergraduate: completed
- [ ] University level (graduate)
- [ ] University level (post-graduate)

5 Occupation

- [ ] Self-employed
- [ ] Job in private business
- [ ] Government staff
- [ ] Retired

6 Total monthly income after tax (approximately)

- [ ] Less than US$ 1000
- [ ] US$ 1001 ~ 2000
- [ ] US$ 2001 ~ 3000
- [ ] US$ 3001 ~ 4000
- [ ] US$ 4000 ~ 5000
- [ ] US$ 5001 and above

"Thank you for your cooperation"

Mekong Institute
DEVELOPMENT & COOPERATION

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