



Myanmar Tourism Sector

Summary

Tourism in Myanmar has gone through a major transformation since the country opened its doors to the rest of the world with the arrival of democratization in 2011. During the year 2010, one year before democratization, there were only 800,000 foreign tourists. This number quadrupled to more than 3.4 million by the year 2017. By country and region, Thailand and China stand out the most, making up 20.1% and 15.6% respectively of all foreign tourists arriving in Myanmar by air.

As the number of foreign tourists increases, so do business opportunities, and this is having a positive effect on Myanmar's economy. In comparing data from the years 2011 and 2017, we see that the number of travel agencies experienced major growth from 759 companies to a total of 3,050 companies in operation. Meanwhile, the number of tour guides also more than doubled from 3,160 to 7,820, and the number of hotels grew from 731 to 1,590. Total domestic expenditure of foreign tourists grew dramatically, expanding by 6 times from 320 million dollars (0.5% of GDP) to 1 billion 970 million dollars (2.9% of GDP). Hotels and other tourism related facilities have attracted foreign direct investment, growing 3.8 times from 1.14 billion dollars in 2011 to 4.37 billion dollars in 2017.

Although the number of foreign tourists visiting Myanmar is growing, it is still the smallest amongst the least developed of the ASEAN countries. Myanmar is blessed with a large number of tourist attractions, and hence there is great potential growth for the tourist industry. It is not difficult to see the possibilities of future growth for the Myanmar tourist industry. All that is needed is to improve both hard and soft infrastructure, making it more convenient and comfortable to access existing tourist attractions, which can be utilized in encouraging further growth in tourism.

Growth in the tourist industry stands to benefit Myanmar, where one of the major priorities is to acquire more foreign currency reserves. Tourism is an area of future growth worthy of keeping an eye on.

Introduction

Many changes have taken place since Myanmar changed direction and opened its doors to the rest of the world with the transition to civilian rule carried out by the military regime in 2011. Tourism is one of many areas where much change has occurred. More foreigners began to visit Myanmar after its doors opened due to democratization, including politicians, businessmen, tourists, and people representing NGOs. There has been much activity associated with this development, such as the construction of additions to airports, increase in the number of commercial airplanes in use, a growing number of tour buses, and construction of hotels, offices, restaurants, and shopping centers. There is a growing number of business opportunities in the area of tourism, and the industry's contribution to the economy is growing. In this report, we discuss changes in tourism since Myanmar's democratization, and what can be expected in the future.



1. Number of Foreign Tourists Visiting Myanmar

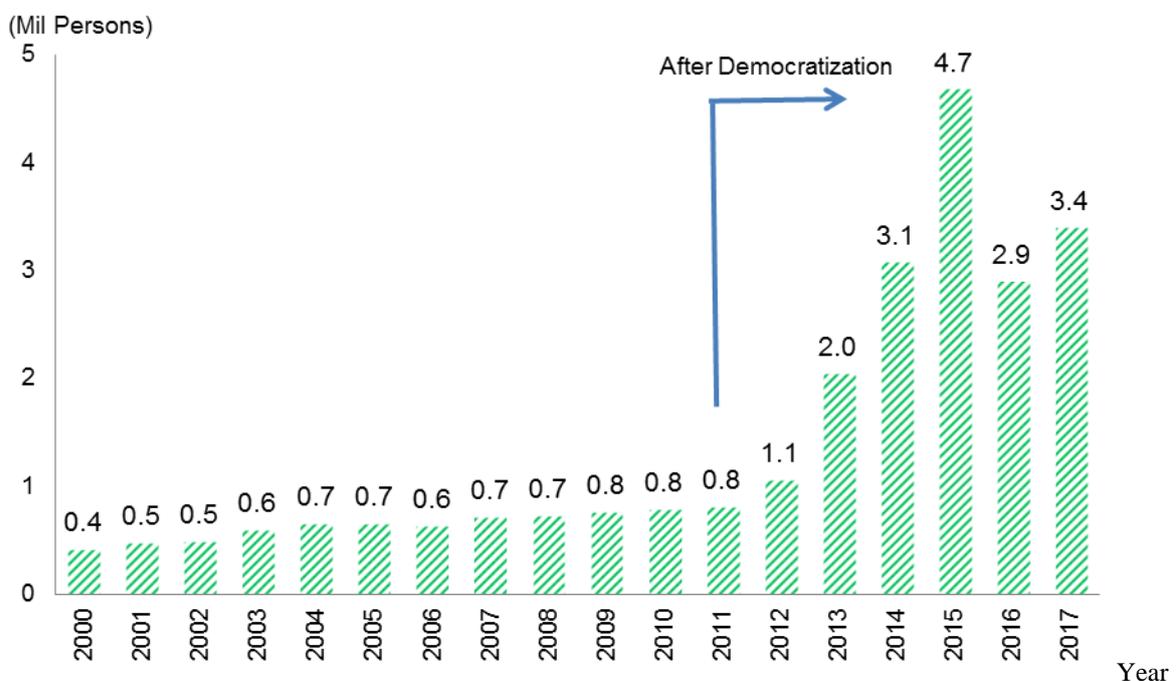
(1) Major increase in number of foreign tourists visiting Myanmar since democratization

Major differences can be seen in the number of foreign tourists visiting Myanmar since democratization in 2011 (Figure 1). Before democratization, there were only 800,000 foreign tourists visiting Myanmar per year, but this number began growing rapidly after 2011, reaching a total of 3.4 million by the year 2017.

The increase in the number of foreign tourists visiting Myanmar can be attributed to the following reasons: (1) the switch to an open-door policy made it easier for foreigners to visit, (2) many companies and individuals took advantage of the business opportunities made available by the new policy, (3) there was much interest in travel to Myanmar since it had been isolated for so long, and was an unknown country on the tour circuit, and (4) areas that were off limits to foreigners during the days of the military regime became open to visitors.

Major milestones by year are as follows: in 2015 the number of tourists visiting grew dramatically to 4.7 million in comparison to the previous year when it was at 3.1 million. One of the reasons is said to be the general election which took place in November 2015. Since there was some uncertainty regarding the possible results of the election, there was a last-minute dash to visit the country and do business or travel before the change in administrations. In 2016, the number of foreign tourists visiting Myanmar declined to 2.9 million in an apparent reactionary decline after the surge of the previous year. However, the change in administrations went smoothly, and in 2017, tourism returned to its growth trend. In the future, steady growth in the number of foreign tourists visiting Myanmar is expected to continue as long as there are no political or economic developments causing uncertainty.

Figure 1: Changes in Number of Foreign Tourists Visiting Myanmar



Source: Myanmar Ministry of Hotels and Tourism; compiled by DIR.

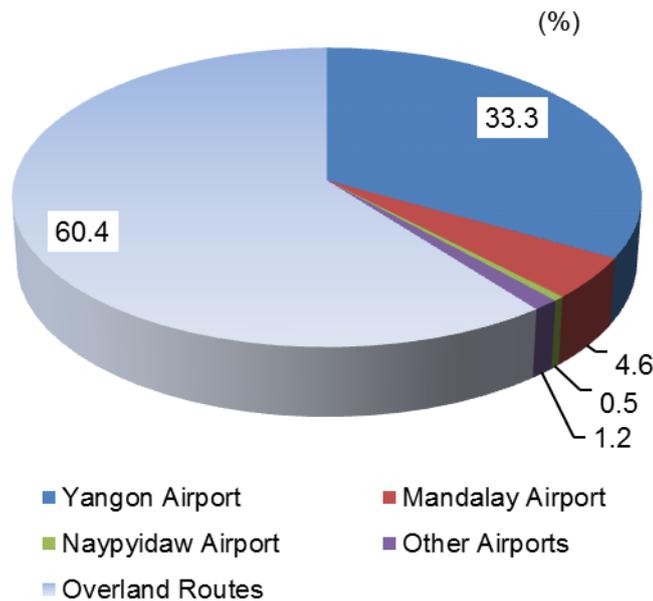


(2) Foreign tourists arriving overland in Myanmar account for 60% of total

When we look at the various means of foreign tourists arriving in Myanmar (Figure 2), we can see that 60% arrive via overland routes, while 40% arrive by air. This may be due in part to insufficient aviation infrastructure, while in addition, the fact that there are many connecting points with China and Thailand on the eastern side of Myanmar means that it is fairly easy to move across these borders on the overland route. Quite a bit of economic activity takes place along the border with China and Thailand, with much coming and going of trucks and people.

As for arrivals by air, Yangon Airport takes in by far the majority, accounting for 33.3% of all arrivals by both land and air. This is unsurprising in that Yangon International Airport is the destination of most international flights. The next largest percentage of arrivals is at Mandalay Airport, accounting for only 4.6% of the total. Meanwhile, Naypyidaw International Airport in Myanmar's capital is hardly used at all, accounting for only 0.5% of direct arrivals by air. From a purely practical point of view, most foreign tourists arrive in Myanmar via Yangon Airport passing through immigration there, and then use a domestic airline to fly the rest of the way to their final destination. The data gathered and shown in the chart below reflects this common pattern.

Figure 2: Routes Taken by Foreign Tourists Entering Myanmar (2017)



Source: Myanmar Ministry of Hotels and Tourism; compiled by DIR.

(3) Thailand and China account for the largest share of tourists

Looking at the number of foreign tourists arriving in Myanmar by air in 2017 by country and region, we see that tourists from Thailand and China are especially large in number (Figure 3). Thailand accounts for 20.1% of the total, while China accounts for 15.6%. The main reasons that the share of tourists from Thailand is so large include the following: (1) easy to visit since it only takes an hour by plane from Bangkok to Yangon, (2) a large number of airlines provide flights between Bangkok and Yangon airports, including



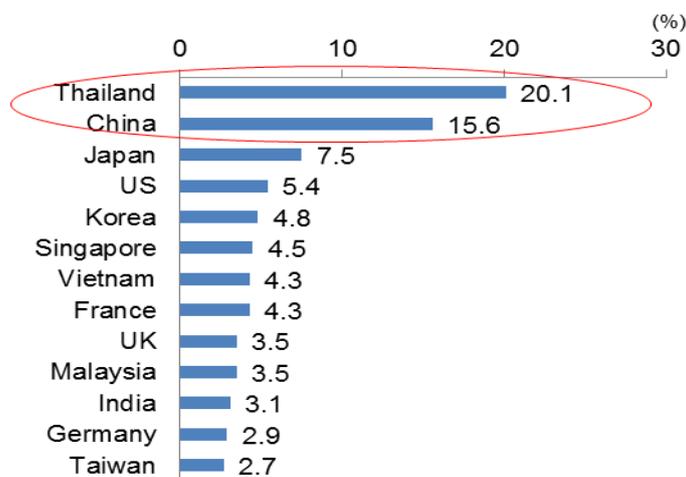
Thai Airways International and Bangkok Airways. There are a large number of flights and travel is convenient, (3) airline ticket prices between Bangkok and Yangon have declined since entry of discount airlines (LCC) such as NokScoot and AirAsia into the market, and thereby making it easier to make the trip.

The reasons for the large number of Chinese tourists are thought to be that (1) China has had close relations with Myanmar since the days of the military regime, (2) China is the major investor in Myanmar and business relations are close, and (3) there is not much distance between Southern China and Myanmar, one example being Yunnan Province. The third major source of visitors after these countries is Japan, though tourists from Japan account for only a small share at 7.5%. Of course, as an explanation one could say that unlike Thailand and China, Japan is much further away, and considering this fact there are actually quite a few visitors. One major reason for the number of visitors from Japan may be Japan's Myanmar Aid Policy. Japan is providing support in a broad range of areas, including promotion of agriculture, development of industrial zones, development of capital markets, education, medical care, and regional development.

It is thought that many people working in these areas are visiting Myanmar. Meanwhile, a visa waiver system was implemented experimentally for a period of one year in October 2018 targeting tourists from Japan, Korea, Hong Kong, and Macao. It is hoped that this will help to encourage more tourism from these countries in the future. The next country with the largest share of tourists visiting Myanmar after Japan is the US at 5.4%. Growth in business between the US and Myanmar is promising now that economic sanctions against Myanmar have been lifted.

However, as of this point, the number of visitors from the US has not changed much in comparison to the time before the sanctions were lifted. There is the impression that most visitors from the US are tourists, diplomats, human rights organizations, and organizations offering medical support rather than people representing private sector business. As for the EU countries, in order of share of tourism following the US, there is France, which is eighth in line in terms of share, the UK (ninth), and Germany, which is twelfth in terms of share of tourism. The reason that France supplies a larger number of visitors than the other EU countries may have something to do with its connections to Vietnam. Many of the business relations between Myanmar and Vietnam involve France as well, since Vietnam is a former colony of France.

Figure 3: Share of Total Number of Foreign Tourists Visiting Myanmar by Country (2017)



Source: Myanmar Ministry of Hotels and Tourism; compiled by DIR.



Also noticeable in this data is the fact that there is very little coming and going between India and Myanmar despite the shared border. Possibilities for this may be religious differences and the lack of business opportunities between the two countries. As for relations with other ASEAN member states, the general lack of exchanges with certain countries, including Indonesia, the Philippines, and Laos stands out in comparison to those with which it does have much going on, including Thailand, Singapore, Vietnam, and Malaysia. Since there is not much business or other types of exchanges between Indonesia, the Philippines, and Laos, there are no direct flights between these countries and Myanmar.

2. Impact of Growth in Number of Foreign Tourists on Myanmar's Economy

Growth in the number of foreign tourists is bringing major changes to the basic structure of Myanmar's tour industry. The number of tour agencies and tour guides has increased dramatically, as well as the number of hotels. Meanwhile, contribution of domestic expenditure by foreign tourists to Myanmar's GDP has risen to around 3%. This fact has encouraged growth in foreign direct investment in hotels and other tour related facilities as foreign investors take interest in the new economic developments.

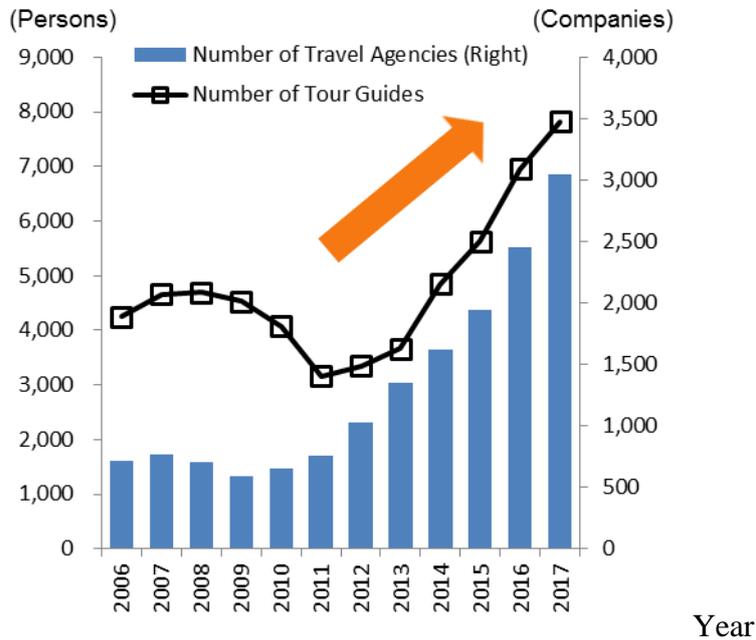
(1) Trends in the number of tour agencies, tour guides and hotels

Before democratization in 2011 there were times when the number of tour agencies and tour guides declined (Figure 4), but since that time they have been in a continuous growth trend. The number of tour agencies totaled 759 in 2011, with the number of tour guides at 3,160. These numbers have grown since then to a total of 3,050 tour agencies and 7,820 tour guides as of the year 2017. Over a period of around six years, the number of travel agencies quadrupled, while the number of tour guides more than doubled. Considering the high demand for tour guides the National League for Democracy Party (NLDP) which began its new administration in 2016 reduced the cost of applying for a tour guide license by 50%, and also made it easier to apply by making the application available on the internet.

As for the number of hotels and other accommodations, major change in the growth rate can be seen since democratization as shown in Figure 5. The average annual growth rate was at 3.5% between the years 2006 and 2010, accelerating to 12.7% between 2011 and 2017. In order to see what the trend in growth in the number of hotels and other accommodations was after democratization, we compare the years 2011 and 2017. Here we see that the number of hotels in Myanmar overall more than doubled (2.2 times) from 731 to 1,590.

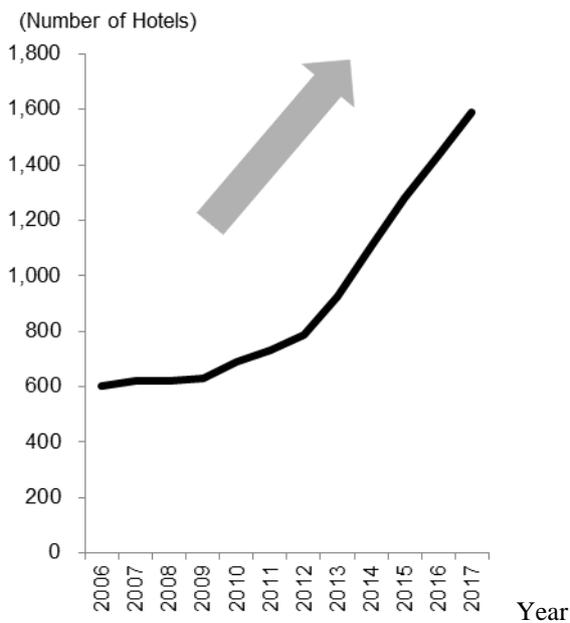
Looking at growth by major city, results are as follows: Yangon (187→387), Mandalay (75→205), Naypyidaw (27→64), Bagan (75→85), and Nyaung Shwe (Inle Lake) (42→102). In terms of growth rate, the fastest growing were as follows: Mandalay 2.7 times, Inle Lake 2.4 times, Naypyidaw 2.4 times, Yangon 2.1 times, and Bagan 1.1 times. Meanwhile, if we limit ourselves to looking only at the trend since 2015, we see that growth in the number of hotels and other accommodations is especially noticeable in the case of Yangon, Mandalay, and Inle Lake. On the other hand, we get the sense that growth in the number of hotels has been marking time in Naypyidaw. This is thought to be due to the fact that the rate of use in that city is not as high as was originally predicted according to the outlook for demand.

Figure 4: Change in Number of Travel Agents and Tour Guides



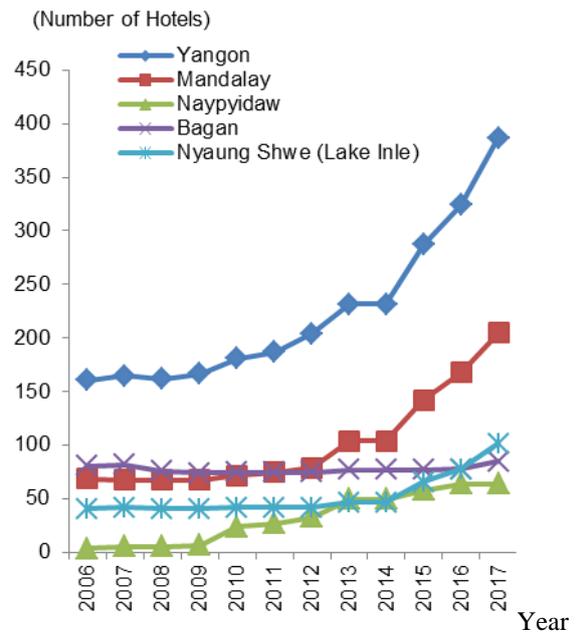
Source: Myanmar Ministry of Hotels and Tourism; compiled by DIR.

Figure 5: Change in Number of Hotels (Nationwide)



Source: Myanmar Ministry of Hotels and Tourism; compiled by DIR.

Figure 6: Change in Number of Hotels (by Major City)



Source: Myanmar Ministry of Hotels and Tourism; compiled by DIR.



Reasons for constructing new hotels by city are as follows: Mandalay (1) aiming at growth in business in hopes of becoming Myanmar's second major commercial center, (2) Mandalay is now the major base for distribution and tourism in the northern region. Lake Inle is increasing in popularity especially amongst European and American tourists as a destination for ecotourism and trekking. After democratization in 2010, the government expected demand for accommodations to grow in Naypyidaw, the country's capital, and began attracting hotels to open there.

The number of hotels grew rapidly from seven in the previous year to 24, and demand has continued to grow as international meetings and conferences are held in the capital. As for Yangon, reasons for growth are (1) it is Myanmar's biggest commercial center, (2) it is also the main location in the country from which travel within the country begins. In the case of Bagan, growth is lower than other locations because of development regulations which restrict the construction of new hotels. As is indicated here, Myanmar has experienced major growth in the number of travel agencies, tour guides, and accommodations since 2011. We can imagine the people involved in the industry and their efforts in handling the rapid growth in the number of foreign tourists.

(2) Trends in domestic expenditure by foreign tourists

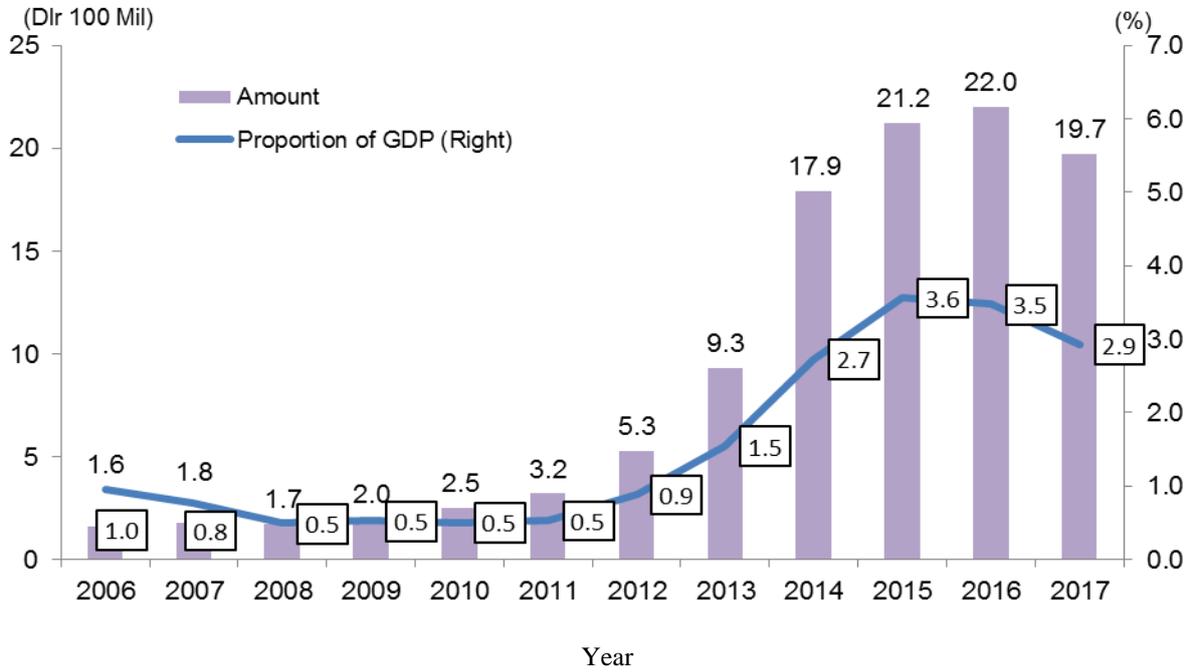
Looking at amounts in domestic expenditure by foreign tourists, there has been a growth trend ever since democratization was implemented in 2011. In comparison, the period before democratization was sluggish and remained at low levels due to the effects of US economic sanctions and the rarity of visits by foreign tourists. One look at Figure 7 will make this tendency quite obvious. When we compare domestic expenditure by foreign tourists in 2011 and 2017, we can see how major growth has been achieved during those years, at 320 million dollars in 2011 (a proportion of GDP of 0.5%), jumping to 1.97 billion dollars in 2017 (a proportion of GDP of 2.9%). Activity between 2013 and 2014 is especially notable. During this period tourist expenditure won major growth from 930 million dollars to 1.79 billion dollars. It was during this time that democratization could be seen as coming along smoothly, while in addition, Myanmar was the host country for the 2014 meeting of the ASEAN.

Average daily amount of expenditure per person by foreign tourists has been in a growth trend on a yearly basis (Figure 8), with a total of 120 dollars in 2011, and growing to 153 dollars in 2017. Behind this development lies two major factors: (1) the rising cost of accommodation, and (2) growing demand for relatively costly tours, such as the Irrawaddy River cruise, and hot air balloon rides in Bagan, Mandalay, and Inle Lake.

The average number of hotel stay days (Figure 8) between 2006 and 2010 was 8-days, and grew moderately to 8.6-days between 2011 and 2017. The increase in the number of locations where tourists can freely go has been on the increase since democratization, and this is thought to be the main reason for growth in the average number of stay days. Tourism in Myanmar tends to encompass shorter stays in two or three locations rather than long stays in one spot. Considering this factor, the current stay day average of 8.6 days seems to be an appropriate figure.

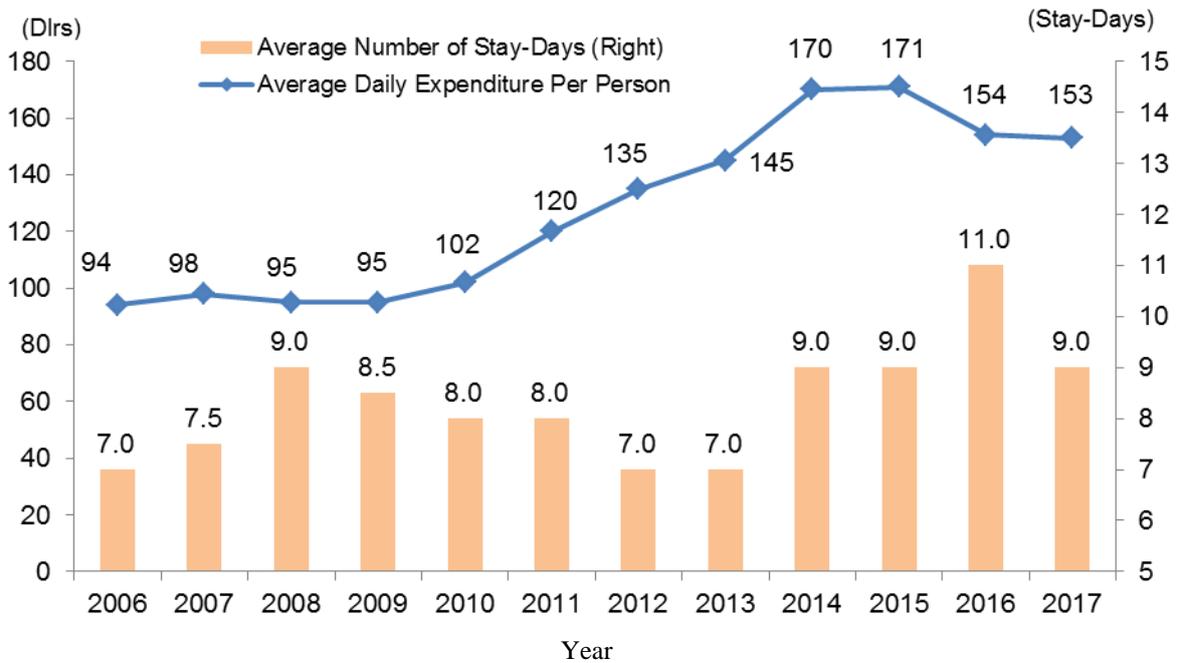
In the future, once time required to move around the country is shortened by advances in transport infrastructure, the average number of stay-days may decline somewhat. However, once development of beach resorts advances, long-term tourism should achieve growth, thereby possibly increasing the average number of stay-days. In other words, the number of stay-days could either increase or decrease depending on the type of tourism infrastructure developed in the future. Both of these are equal possibilities at this time.

Figure 7: Average Amount of Expenditure of Foreign Tourists in Myanmar



Source: Myanmar Ministry of Hotels and Tourism; compiled by DIR.

Figure 8: Average Daily Amount of Expenditure Per Person of Foreign Tourists in Myanmar



Source: Myanmar Ministry of Hotels and Tourism; compiled by DIR.



(3) Foreign direct investment in hotels and composite facilities

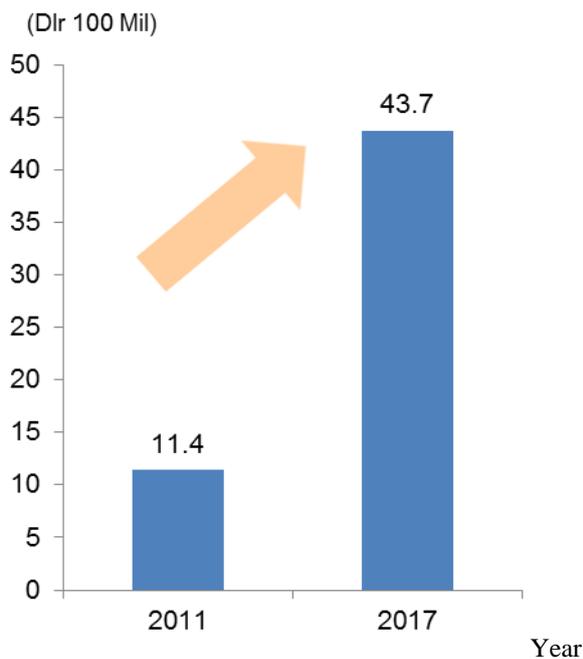
In a comparison of foreign direct investment in hotels and composite facilities (buildings and structures which house shopping centers, offices, and residences) in 2011 and 2017, we see major growth of 3.8 times to a total of 4.37 billion dollars. Myanmar’s GDP is less than USD 70 billion, hence the addition of an amount of investment of this scale is huge. It contributes greatly to domestic investment and employment.

Looking at the balance of foreign direct investment in order of the greatest amount in 2017, we see that the source of investments in order of size came from Singapore, Thailand, Vietnam, Japan, Hong Kong, and Korea. Singapore especially has shown serious interest in investing in Myanmar, with a balance of USD 2.72 billion or approximately 60% of overall foreign direct investment.

Major facilities by country providing investment are as follows: Golden City (a large-scale residence including commercial facilities and office buildings) being developed by Singapore in the Yankin Township of Yangon. Japan is developing a composite facility in downtown Yangon called Yoma Central, which includes commercial facilities, office buildings and a luxury hotel. Meanwhile, Vietnam and Korea are each investing in one development project. Vietnam is developing the HAGL Myanmar Center in the Bahan Township of Yangon, while Korea is developing the Lotte Hotel & Resort in the Hlaing Township of Yangon.

The HAGL Myanmar Center includes the Myanmar Plaza commercial facility, as well as an office building and the Melia Hotel. There are multiple facilities in this development, including locations in Yangon. Meanwhile, the Lotte Hotel & Resort is in the same district, and includes the first combination hotel and serviced apartment complex in Yangon. A large number of Korean engineers were brought to Myanmar during the design phase, hence this project has the highest level of construction expertise in Yangon.

Figure 9: Comparison of Balance of Foreign Direct Investment in Myanmar Hotels & Composite Facilities



Source: Myanmar Ministry of Hotels and Tourism; compiled by DIR.

Table 1: Number of Myanmar Hotels & Composite Facilities Financed with Foreign Direct Investment and Balance of Investment

Country/Region	Number	Amount (Dlrs 100 Mil)
Singapore	32	27.2
Thailand	12	4.9
Vietnam	1	4.4
Japan	6	3.9
Hong Kong	5	1.9
Korea	1	1.0
Malaysia	3	0.2
UK	3	0.1
Luxembourg	1	0.1
	64	43.7

Source: Myanmar Ministry of Hotels and Tourism; compiled by DIR.



3. Myanmar Tourist Industry Late Developer Amongst ASEAN Members

The approach to tourism tends to differ between individual ASEAN member states. Some are very active in promoting tourism, giving it an important position in the local economy, while others, especially those that would be counted amongst the still-developing countries, do not give such a high priority to tourism. The former include Thailand, Malaysia, and Singapore, while the latter include Indonesia, Vietnam, The Philippines, Cambodia, Laos, and Myanmar.

In 2016, the number of foreign tourists visiting ASEAN countries (Figure 10) was largest for Thailand which had a total of 32.5 million. Thailand is the home of a large number of tourist attractions, including world heritage sites such as the Ayutthaya ruins, and beach resorts in Phuket, Pattaya, and Ko Samui Island. Meanwhile, the city of Bangkok has a host of entertainment offerings, including the New Half Show, Thai boxing, and classical Thai dance. It is also easy to access Thailand with a large number of direct flights arriving at Suvarnabhumi International Airport from Europe and the Middle East, as well as various locations in Asia. A construction project is now underway to expand Suvarnabhumi International Airport. Hence we can expect more growth in the number of foreign tourists in the future.

The country with the next largest number of foreign tourists after Thailand is Malaysia with a total of 26.8 million. Malaysia hosts a large number of tourists from the Middle East, with its famous Arab Street in the Bukit Bintang district of the capital, Kuala Lumpur. Malaysia boasts a large number of tourist attractions, including world heritage sites in Malacca, and beach resorts in Kota Kinabalu, Penang Island, and Langkawi Island. In addition, the country provides tours such as the firefly viewing tour, ecotourism including nature activity tours, and with its highly advanced hospital facilities, also attracts foreign visitors with medical tourism. It is a popular destination for retirees, including Japanese tourists, due to its affordable living expenses and high quality medical services. Meanwhile, Kuala Lumpur International Airport functions as a hub in Asia and gives a push to tourism, despite its being smaller than Singapore and Thailand airports.

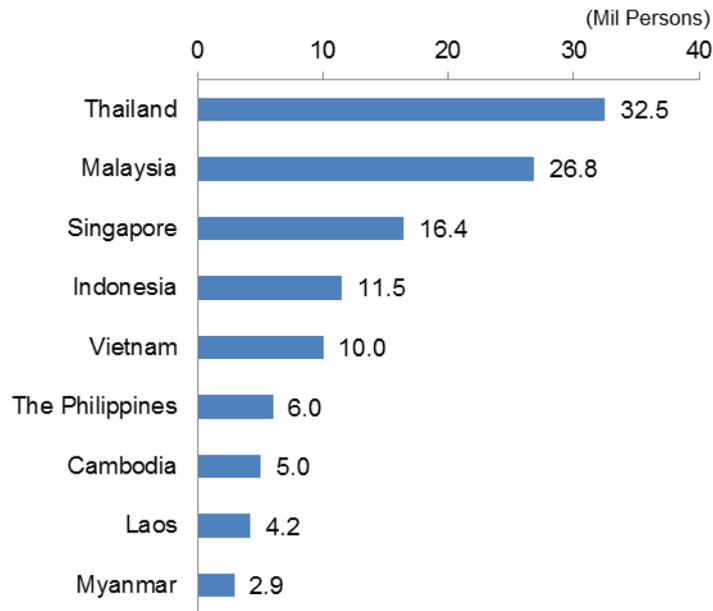
Next to Malaysia, the country with the most foreign tourists visiting is Singapore at 16.4 million. Singapore's population is approximately 5.6 million, meaning that the number of tourists visiting the country is three times more than its population. Tourist sites in Singapore include shopping centers and Orchard Road, which is lined with hotels. Then there is the integrated resort, Marina Bay Sands, which was built as part of the basic concept "Your Singapore", and Resort World Sentosa, which owns Universal Studios Singapore. Singapore also boasts high quality medical institutions, state-of-the-art research facilities, and international conference centers. These facilities are also major factors in attracting visitors. Changi International Airport, which serves the largest number of travelers of any of the ASEAN countries, as well as the high quality of facilities and services that Singapore provides, are of course major reasons that Singapore is able to attract tourists from all over the world.

Compared to these countries, all of which can boast of strength in the field of tourism, The Philippines, Cambodia, Laos, and Myanmar have relatively few foreign tourists. The Philippines has the most at six million, while next in line there is Cambodia with five million, Laos with 4.2 million, and Myanmar with 2.9 million. Myanmar has the smallest number of foreign tourists visiting of all of the ASEAN countries. As for the reasons that tourism has not grown larger in these countries, in the case of The Philippines there is the problem of safety, which cannot be guaranteed in all parts of the country. There is also the problem of frequent natural disasters. Access to tourist attractions, including both



immigration procedures at airports and existence of good roads for transportation, is not very good in Cambodia, Laos, and Myanmar. These factors, along with the quality of hotel facilities and service, can be causes of stress for tourists.

Figure 10: Number of Foreign Tourists Visiting ASEAN Countries (2016)

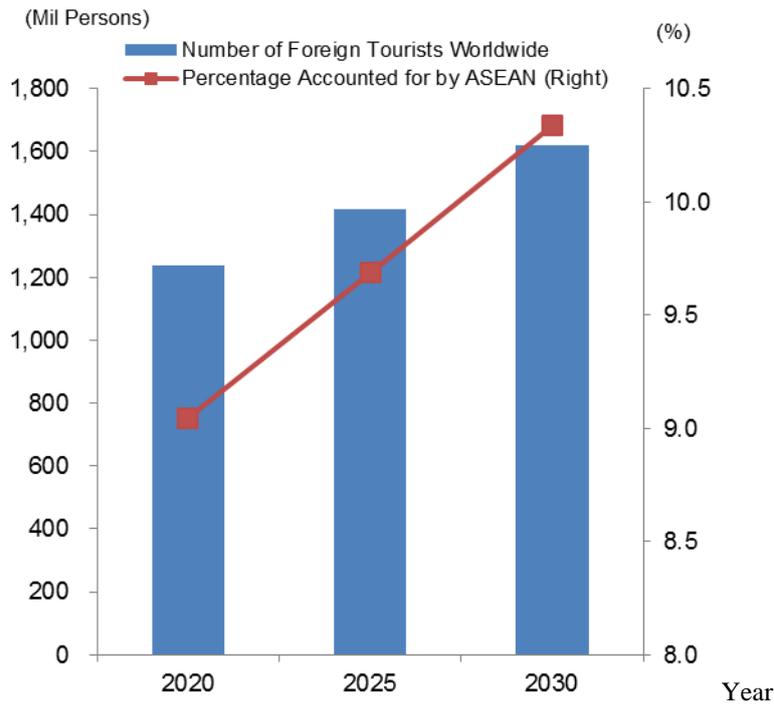


Source: The ASEAN Secretariat; compiled by DIR.
Note: Data from Brunei is not available.

Until recently the ASEAN countries including Myanmar have attracted attention because of their low cost of labor. This made them attractive to foreign manufacturers as locations for production facilities. Tourism has tended not to be an area of focus in promoting economic development in these countries. This is the reason one gets the impression that the tour industry in these countries is less developed than the US and Europe. Much work is needed to develop the industry further in the future.

This also means that there is much room for growth. The United Nations World Tourism Organization (UNWTO) sees awareness of the ASEAN countries as tourist destinations increasing. According to the UNWTO outlook, the percentage of world tourism in terms of numbers of foreign tourists accounted for by visitors to ASEAN countries is growing yearly, and is expected to reach around 1.6 billion, or 10% of all world travel by the year 2030. The latecomers to the ASEAN tourist industry including Myanmar now have plenty of opportunity to catch this new wave of development.

Figure 11: Number of Foreign Tourists Worldwide Accounted for by ASEAN



Source: United Nations World Tourism Organization; compiled by DIR.

4. Issues Facing Myanmar’s Tourist Industry, and Policies to Resolve Them

Myanmar’s tourist industry is behind in development in comparison to the other ASEAN countries, but it has great potential considering its many tourist attractions. Major attractions include the Shwedagon Pagoda in Yangon, Golden Rock (a pagoda sitting on top of a huge granite boulder covered in gold leaf), the ancient city of Bagan containing numerous Buddhist monuments, Inle Lake in Shan state, Pyin Oo Lwin spa and wellness center, and Ngapali beach resort. The Shwedagon Pagoda in the center of Yangon is a major spiritual site visited by citizens of Myanmar. With its overwhelming presence, it is one of the major defining sights in Yangon.

Meanwhile, Bagan has over 2,000 pagodas, and is an impressive historical site with beautiful views. Bagan is visited by many tourists annually. Inle Lake in Shan State is another area attracting many tourists with its natural beauty. Myanmar has as many valuable tourist attractions as any of the other ASEAN countries, or possibly more. The only problem is that they have not yet been utilized sufficiently. Myanmar is still not completely aware of the value of these attractions as tourist resources, and this has made conservation of historical sites, as well as development of tourist attractions difficult. Since few foreigners visited these sites in the past the country did not develop much awareness of them as tourist attractions, and hence infrastructure which would encourage more tourism has much to be desired.

Since its democratization and opening up in 2011, many foreigners have begun to visit Myanmar, and the lack of sufficient tourist infrastructure is now being sorely felt. Difficulty of access to tourist attractions is one of the strongest impressions one gets, as well as the poor quality of hotels and other tourist facilities located at these sites. A good example is the beach resorts on the Bay of Bengal. Major resorts along the coast include Ngapali,



Chuang Tha, and Ngwe Saung. Of these, only Ngapali has an airport. The only way to reach the other resorts is a five-hour drive by car from Yangon along poorly maintained country roads.

This is a major inconvenience when compared to beach resorts in other countries, such as Indonesia's Bali, Phuket in Thailand, and Penang in Malaysia. Few foreign tourists will be willing to put up with this level of difficulty of access. Hotel facilities in the area have much to be desired. These below standard hotels have low water pressure and many rooms have no hot water. Some locations lack sufficient electricity and hence have rolling blackouts during the day. The purpose of visiting a beach resort is to rest, yet in many cases visits to these areas end up being stressful. Similar problems are experienced to some degree or the other at other tourist destinations as well.

In order to attract more foreign tourists, what is needed is a policy based on the viewpoint of the foreign tourist. Serious consideration should be made regarding how to increase the satisfaction of the customer from all different aspects, including traveling conditions to the tourist destination. Being that Myanmar has a limited budget, what it should do is select a small number of the most valuable tourist attractions from existing tourist destinations, and focus on development of both tangible and intangible infrastructure in order to improve convenience and comfort.

As for a fundamental approach to concrete policy measures, a good reference to make use of is the ASEAN Secretariat's publication "ASEAN Tourism Strategic Plan 2016-2025." The policy to raise the level of competitiveness of ASEAN tourist destinations calls for the following actions to be implemented between 2016 and 2025: (1) Promotion and marketing for tourism, (2) Diversification of travel products, (3) Promotion of investment in the tourism sector, (4) Human resources development in the tourism sector, (5) Expand the set of uniform standards for tourist facilities and tourism services, (6) Develop infrastructure to improve access to tourist destinations and movement between tourist attractions, and (7) Expansion of means of transportation, and simplification of border-crossing (immigration) procedures. Myanmar should work towards the realization of all of these suggestions. By implementing these standards, improvements in convenience and comfort of tourist attractions will progress, and the way toward resolving Myanmar's tourism issues will be opened.

Conclusions

Myanmar's tourist industry experienced a major transformation after the country's democratization in 2011, and has been in a growth trend ever since. This has also brought an increase in business opportunities. The number of travel agents, tour guides, and hotel facilities is also growing, along with the amount of domestic expenditure on the part of foreigners. Meanwhile, with growth in demand seen in the future, direct investment from overseas in hotels and composite tourist facilities is also taking place. In the current environment, the tourist industry is increasing its presence year by year, and the number of people involved in tourism related businesses is growing. Even so, compared to the other ASEAN countries, Myanmar's tourism is still relatively undeveloped.

Targeting further growth in the future, as well as sustainable growth for the tourist industry, there is a need for further development of tourist attractions, including improvement of convenience and comfort. This will come not only from efforts within Myanmar, but with ASEAN cooperation as well. Cooperation from other industries will be essential, such as in the development of transportation infrastructure, including railways, bus routes, and airways. Communications infrastructure which can accommodate foreign tourists is also required. Doing so will be beneficial to Myanmar's overall economy.



Myanmar is blessed with a large number of tourist attractions, and hence there is great potential growth for the tourist industry. It is not difficult to see the possibilities of future growth for the Myanmar tourist industry. If the tourist industry is positioned as a strategic industry as a means of acquiring more foreign currency reserves, and better infrastructure is built from the viewpoint of the needs of foreign tourists, increasing the number of foreign tourists visiting Myanmar from the current three million or more per year to 10 million would not be an impossible feat. Growth in the tourist industry stands to benefit Myanmar, where one of the major priorities is to acquire more foreign currency reserves. Tourism is an area of future growth worthy of keeping an eye on.