

**Myanmar Tourism
FAST FACTS**

- Rapid expansion of scheduled inbound flights, progressive easing of tourist visa-on-arrival privileges at gateway airports, improving conditions for business and investment, and strong demand for international travel among regional and long-haul markets, together with ongoing reforms and Myanmar's abundance of outstanding cultural and natural tourism assets are already fueling a surge in international visitors.
- The Master Plan sets a conservative target of 1.52 million international visitors in 2015 and 2.81 million by 2020. Under the conservative scenario, tourism receipts are projected to increase from a baseline of \$534 million in 2012 to \$3.82 billion by 2020. High levels of growth could cause international visitor arrivals to rise to 3.09 million in 2015 and 7.48 million in 2020, with corresponding tourism receipts equivalent to \$3.6 billion and \$10.1 billion, respectively.
- Under the high growth scenario the tourism industry could sustain up to 1.49 million jobs by 2020.
- Taking account of direct and indirect employment, Myanmar's travel and tourism industry sustained 735,000 jobs in 2012 or 2.8% of total employment. Women are estimated to represent at least half of Myanmar's tourism workers.
- Between 2003 and 2012, the average annual increase in international visitors was 6.6%, with year-on-year growth increasing sharply to 29.7% in 2012 when Myanmar surpassed the historic milestone of 1 million annual visitors. In the same year, arrivals by air through the Yangon, Mandalay and Nay Pyi Taw gateways increased from 391,176 to 593,381 (66%).
- Key sending markets are Thailand and the People's Republic of China, accounting for 16% and 12% of the 593,381 arrivals by air in 2012, respectively. Japan (8%), the United States of America (6.3%) and the Republic of Korea (6%) round out the top five sending markets arriving by air, with France, Malaysia, Singapore, the United Kingdom and Germany each accounting for about 4%–5%.
- Overall, visitors from Asia comprise 64.1% of all arrivals by air, followed by Western Europe (21.9%), North America (7.4%) and Oceania (3.4%). Of the 465,614 visitors that entered Myanmar on a border pass through land gateways in 2012, most were citizens of Thailand that stayed less than one day.
- Market research undertaken during preparation of the Master Plan found the typical visitor was more than 35 years old (70%) and university-educated (78%). Most were travelling independently (67%) either alone or in small groups. European visitors stayed for an average of 15.1 nights. Asian visitors reported staying for an average of 6.3 nights.
- Average spending on accommodation was \$129 per night and 25% of respondents reported spending between \$200 and \$299 per night for a hotel in Yangon. Tourist's average daily spending ex-accommodations is about \$100 per day.
- Yangon and Shwedagon Pagoda, Bagan, Inle Lake, Kyaikhto, Mandalay and Ngapali Beach receive the bulk of international arrivals. Myanmar also has a wealth of emerging tourism sites and destinations including Putao, the Myeik Archipelago, Nagaland, Nat Ma Taung and Loikaw.

- Myanmar has a network of 41 airports, including three international airports that are capable of handling 747-class aircraft. There are seven national airlines that in mid-2013 were offering 32,106 scheduled annual domestic departures.
- Myanmar is also served by 23 foreign carriers which account for about 80% of total capacity to and from the country. Yangon International Airport is the main tourist gateway and handles 94% of international air traffic.
- Yangon International Airport's operating capacity is expected to expand from about 3 million to 5.4 million passengers per year. Nay Pyi Taw International Airport has an annual operational capacity of 3.5 million passengers, but currently receives only domestic flights and international charter services. Mandalay International Airport has an operating capacity of 3 million passengers.
- A fourth international airport with an operating capacity of at least 10 million passengers per year is scheduled to open in 2016 at Hanthawaddy, 80km from Yangon.
- By 2017, Myanmar's international airports are expected to have a total operating capacity of at least 20 million passengers per year, which will be sufficient to meet expected demand.
- Myanmar has 787 hotels, motels and guesthouses with 28,291 rooms spread across 48 locations. Only 5 properties are rated five-star and 18 are rated four-star.
- There are 56 new hotels due to open in 2013, most of which are being constructed in Nay Pyi Taw.
- Myanmar has a total of 36 foreign investments in hotels and commercial complexes valued at \$1.41 billion. Thirty projects have been completed and six are in the development stage including a 414 room \$300 million build-operate-transfer project approved in December 2012. Once completed, these projects will add 1,559 rooms to Myanmar's accommodation stock.
- Myanmar has 1,026 licensed tour companies including 17 joint ventures that have the capacity to arrange classic tours but most firms lack the capability to organize customized programs.
- There are 3,353 licensed tour guides, of which 2,058 are English speaking, with several hundred qualified Japanese, Thai, Chinese, French and German speakers.
- Demand for direct employment in the tourism industry is conservatively forecast to rise to 424,450 in 2015 and 836,018 by 2020, and potentially rising to 563,056 in 2015 and 1,497,801 under a high growth scenario.
- Growth in visitor spending is forecast to rise from an average of \$135 per day in 2012 to \$150 in 2015 and \$170 by 2020.

Source: Myanmar Tourism Master Plan 2013-2020