



รายงานฉบับสมบูรณ์
(Final Research Project Report)

จุดยืนภาพลักษณ์ทางการท่องเที่ยวของกลุ่มประชาคมเศรษฐกิจอาเซียน
กรณีศึกษาประเทศพม่า



ASEAN Image Positioning:

The Case Study of Myanmar



โดย ดร. พิมพะระวี โรจน์รุ่งสัจย์



สำนักประธานงานการพัฒนาและจัดการท่องเที่ยวเชิงพื้นที่อย่างยั่งยืน
สำนักงานกองทุนสนับสนุนการวิจัย

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เสนอต่อ

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สร้างสรรค์ปัญญาเพื่อพัฒนาการท่องเที่ยวไทยให้ยั่งยืน

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EXECUTIVE SUMMARY

The Thailand Research Fund supported the project of ASEAN Image Positioning which aim to establish and strengthen collaborative networks among all tourism-related stakeholders and to create ASEAN databank to facilitate the growth of tourism in ASEAN. This project was a part of the ASEAN Image Positioning Project focusing on Myanmar. The research objectives of the study were to analyze tourism situation of Myanmar; to propose tourism image positioning of Myanmar; to create network of tourism researchers in Thailand and tourism business sectors and other stakeholders in Myanmar; and to serve information for tourism information bank of ASEAN.

There were two phrases of research methodology. Firstly the data collection and analysis was implied by using secondary data analysis from at least 20 top tourism websites informing tourism of the country, 20 travelogues of tourists who have been to the country, articles, and tourism news. Content analysis was employed to organize the data received. Interview of tourism business sectors in Thailand and key persons from the embassy was implemented. Results were used as a basis for image position development at a later stage (second phrase). In the second phrase, the focus group meeting in Myanmar was employed to collect information from different key informants on the issues and concerns of tourism in Myanmar as well as their opinions on the strength, weakness, opportunity and threat they perceived from tourism of the country. They also were asked to give recommendations on the main attractions and tourism image. Tourist interview at different attractions in Myanmar was also employed to organize and confirm the data received.

The results of the study were SWOT analysis of tourism in Myanmar, the image and themes of tourism of the country and fifteen recommended attractions. The image that the key informants voted for was "Culturally Golden Myanmar". The tourism themes were Cultural

Tourism, Nature-based Tourism and Historical Tourism orderly. Also, they added the potential themes that were: Ecotourism, Ethnic tourism, Adventure tourism, and Marine tourism. The focus group was asked to input fifteen main attractions which represent tourism in the country and to be published in ASEAN Tourism Book. From the process of brainstorming, the result of fifteen attractions were: Bagan, Mandaley, Inle + Pindaya (Combined), Yangon, Mrauk-U, Bago, Sagaing, Kyaikhti Yo (Golden Rock), Mingun, Putao, Pyinoolwin, Ngapali beach, Myeik, Natma Taung (Mt. Victoria), and Kyaing Tong.

ABSTRACT

This study examined tourism situation of Myanmar and the country's image positioning. There are two phrases of the research. First was secondary data analysis and interview Thai travel agents who arrange tour to the country to acquire initial data. Then the researcher travel to Myanmar to do a focus group with the key professionals to gain input and comments about SWOT of tourism in Myanmar and agreement on image and themes of tourism. Also, there was valuable details from the discussion which lead to the improvement of the ASEAN tourism network.

บทคัดย่อ

การวิจัยเรื่อง จุดยืนภาพลักษณ์ทางการท่องเที่ยวของกลุ่มประชาคมเศรษฐกิจอาเซียน กรณีศึกษาประเทศพม่า เป็นการศึกษาด้านสถานการณ์ทางการท่องเที่ยวของประเทศพม่า และหาจุดยืนภาพลักษณ์ทางการท่องเที่ยวที่โดดเด่นของประเทศ การวิจัยครั้งนี้แบ่งเป็นสองขั้นตอนดำเนินการ คือ เริ่มต้นศึกษาค้นคว้าจากข้อมูลทุติยภูมิ และจากการสัมภาษณ์บริษัทท่องเที่ยวในประเทศไทยซึ่งมีการจัดทัวร์ไปยังประเทศพม่าเพื่อเป็นข้อมูลเบื้องต้นที่สำคัญ ในขั้นตอนที่สองนักวิจัยได้เดินทางไปยังประเทศพม่าเพื่อที่จะจัดการประชุมกลุ่มตัวแทนผู้เชี่ยวชาญทางการท่องเที่ยวของประเทศพม่า เพื่อที่จะได้ข้อเสนอแนะและความคิดเห็นเกี่ยวกับสถานการณ์ทางการท่องเที่ยวทั้ง จุดแข็ง จุดอ่อน โอกาสและภัยคุกคาม ของประเทศพม่าโดยนำข้อมูลที่ศึกษาเบื้องต้นในขั้นแรกให้ผู้เชี่ยวชาญพิจารณา นอกจากนี้จะได้ความคิดเห็นเกี่ยวกับภาพลักษณ์ทางการท่องเที่ยวและประเภทการท่องเที่ยวที่โดดเด่นของประเทศ จากผู้เชี่ยวชาญ ในการประชุมยังมีรายละเอียดเนื้อหาเกี่ยวกับการพัฒนาความสัมพันธ์ทางด้านการท่องเที่ยวในกลุ่มประเทศประชาคมเศรษฐกิจอาเซียนอีกด้วย

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INTRODUCTION

The Asia-Pacific region has exhibited strong growth rates of tourist arrivals over the last two decades due to growing number of new destinations being offered in the region. Also the continually improved air access in the region has reduced both the travel time and the cost of flying. Asia and the Pacific has been one of the fastest growing regions for tourism as destination due to the diversity and attractiveness of the natural environment and cultural heritage. Rising income and increased leisure time have been the main reasons behind increased international travel (Mill & Morrison, 1985). Since 1995, over two thirds of tourists to Asian and Pacific countries and areas were from places within the region. Intraregional tourism has clearly been a major part of the rapid expansion of the Asia and Pacific tourism industry (APEIS, 2006). Moreover, the rapid growth of Asian economies before the 1997 economic crisis has created a growing middle class in the Asian Tiger economies who have boosted intraregional tourism. However, as reported by a study undertaken by WTO, the share of world arrivals decreased slightly in 1998 compared to 1995 due to the Asian economic crisis. Consequently the average annual growth rate for the Asia-Pacific region showed down considerably in the second half of 1990s. While tourist arrivals in the region have over quadrupled since 1980, with a growth rate of more than 8.2 per cent over the period 1980-1998 (APEIS, 2006).

Many countries in the region are taking affirmative action to mitigate the impact of the financial and economic crisis and give tourism a new impetus (Singh, Timothy, & Dowling, 2003). In the context, promotional activities in the tourism sector are being intensified (Boniface & Cooper, 2005). There is also a trend towards the promotion of conservation as well as restoration of national arts and culture, and tourism resources (Boniface & Cooper, 2005; Cook, Yale & Marqua, 2002). The concept of sustainable tourism development is becoming a priority area of concern to tourism policy makers. Countries in the Asia-Pacific

region have therefore formulated their strategies to meet the emerging challenges facing their tourism sector. There was the promotion of the ASEAN initiated programme of Visit ASEAN Year 2002.

Although the economic and financial crisis in some parts of the Asian and Pacific regions has somewhat disturbed the promising trend that the tourism industry was expected to enjoy, such changes provide countries with both challenges and opportunities for strengthening further national capacities, especially in promoting regional and international tourism activities. Indeed, unexpected economic disruptions at regional and subregional levels call for remedial actions, in order to regain the continuous and uninterrupted rapid expansion that many Asian and Pacific countries, including those from ASEAN, had seen earlier in their tourism sector (Boniface & Cooper, 2005; ECTWT & TEN, 1986).

Possible course of action by ASEAN

One of the goals of these countries should therefore be to liberalize and harmonize rules and procedures governing cross-border access, paving the way for both international and intraregional tourism expansion. This can be achieved by countries through communicating and finding a mutually accepted set of rules and measures appropriate for the safe management of international and intraregional tourism.

At the ASEAN Transport Ministers Meeting (ATM) held in Thailand in February 1997, it was agreed in principle that ASEAN's member countries should develop an integrated and harmonized trans-ASEAN transportation network within the subregion (ACD, 2003; Yue, 2006). The main objectives of the proposed ASEAN Highway Network Development are to link capitals of the respective ASEAN's member countries, major industrial and agricultural areas, main sea ports, and border crossing points with significant trade and tourism

potential. With that understanding, the Ministerial Understanding on the development of the ASEAN Highway Network Project was then signed in Hanoi, Viet Nam, on 15-16 September 1999 and the following time table for its implementation was agreed upon:

- Year 2000: completion of the Network configuration and designation of national routes;
- Year 2004: installation of road signs on all designated national routes, which are to be upgraded to high standard, construction of missing links and rendering all designated cross-border points operational;
- Year 2020: upgrading all designated national routes to primary road standards.

The Network of Asia-Pacific Education and Training Institutes (APETIT) was thus established at Meeting for the Establishment of a Network of Tourism Training Institutes and Organizations in the Asian and Pacific Region organized by the United Nations Economic and Social Commission for Asia and the Pacific (ESCAP) at Tehran from 22 to 25 September 1997. Now APETIT comprises 58 member institutes in 25 countries (Rahmatullah, 2000).

ESCAP Plan of Action for Sustainable Tourism Development

ESCAP did carry out several activities in tourism development and one of them is to formulate a Plan of Action for Sustainable Tourism Development in the Asian and Pacific Region. It sets forth proposals for action in six distinct theme areas. These are: human resources development in the tourism sector; economic impact of tourism; environmental management of tourism; infrastructure development and investment for the tourism sector; facilitation of travel; regional and subregional cooperation in tourism development (Rahmatullah, 2000).

Promotion of tourism in the Great Mekong Subregion

The Mekong River, one of the world's longest rivers, runs south from its source in Tibetan Plateau, passing through China's Yunnan province, along the borders of Myanmar and Thailand, through the Lao People's Democratic Republic and Cambodia, and eventually to reach the sea through the Vietnamese delta. Tourism in the Greater Mekong subregion (GMS) offers the world's most promising growth prospects for the early 21st century (Yue, 2006). All countries in the GMS are endowed with abundant historical and cultural heritage, and unspoiled natural beauty, which combine to make the subregion an attractive tourism destination (Boniface & Cooper, 2005). With the recent developments in this subregion and the trend towards policy liberalization, the prospects for tourism in the countries along the Mekong River are considerable.

When focusing in Myanmar, there is also ASEAN tourism networking. For instance, the three countries in the Mekong region, the Lao People's Democratic Republic, Cambodia and Myanmar, are all seeking to establish their tourism sectors after decades of political instability (ACD, 2003). The Lao People's Democratic Republic is opening new border points. Cambodia has established a US\$ 1 million promotional fund to support the promising growth in tourism as evidenced by a 22 per cent increase in tourist arrivals recorded during the first quarter of 1999. In Myanmar at the end of May 1998 some 40 projects in the hotel and tourism sector have been launched through foreign investment amounting to US\$ 1.03 billion. Currently Myanmar has 523 hotels with over 14,000 rooms, which represents a 12 fold increase over the previous decade (UN, 1995).

This research also supports the ASEAN networking of tourism. It is a part of ASEAN image tourism study that focuses on Myanmar. The ASEAN countries will be explored their SWOT of tourism and tourism images as the core. The results will be a database for tourism information of ASEAN countries and help promoting tourism in each particular country in the

right direction after clarifying their image positioning which will be agreed by the tourism experts of the country.

REVIEW OF LITERATURE

Travel and tourism is one of the world's largest industries, responsible for more than 10 per cent of global GDP (Boniface & Cooper, 2005; Mill, 1990). About 694 million international arrivals were registered in 2003, a figure estimated to double by 2020. Currently, developing countries receive about one third of the tourism trade, a number sharply rising (Rahman, 2005). Ten per cent of export earnings in developing countries come from tourism. The industry is one of the biggest global employers with more than 250 million jobs depending directly or indirectly on tourism. Sixty-five per cent of those jobs are in developing countries (APEIS, 2006).

The region in focus are Asia and the Pacific region which are the fastest growing regions, with a growth rate in international tourist arrivals of 8.4 percent between 2001 and 2002 (APEIS, 2006). The rapid increase in tourist arrivals and income from international tourism has encouraged ASEAN (Association of Southeast Asian Nations) governments to label the tourism industry the most important foreign exchange earner and provider of employment (Mill & Morrison, 1985; Mill, 1990; O' Grady, 1990; Boniface & Cooper, 2005; ACD, 2003; APEIS, 2006).

To develop tourism, it is necessary to understand tourism situation and potential of the country. Therefore, the SWOT (strength, weakness, opportunity, and threat) analysis is important before the further development. The analysis is based on the understanding that tourism has both positive and negative effects on destination countries (Mill & Morrison, 1985; Murphy & Murphy, 2004). The positive effects are such as economic growth, generation of foreign exchange, expansion of the service sector, creation of employment opportunities, diversification of the economy, and transportation and infrastructure

development (Withington, 1985). But it has led to negative environmental, social, and cultural effects as well (Singh, Timothy, & Dowling, 2003; Rosenow & Pulsipher, 1979).

Negatively, it is one of the least regulated industries in the world and big travel corporations dominate the market. It is estimated that currently up to 50 per cent of revenues from tourism leave the country through foreign-owned businesses, imported goods, and promotional spending (O'Grady, 1990). In particular, the popular "all-inclusive" packages and the cruise industry leave hardly any profits for destination countries (APIES, 2006). Additionally, tourism is a very volatile industry, susceptible to political unrest, exchange rate fluctuations and natural disasters. This makes it a dangerous path to development, in particular, for the poorest of the community. Conversely, the exchange of values, which is encouraged by tourism, is generally seen as a positive trend (ECTWT, 1988; Mill, 1990). Tourist money can help sustain indigenous culture, language or religion (O'Grady, 1990).

As tourism spreads quickly around the world, always in search of new, untouched destinations, looking for a sustainable path to tourism becomes more urgent. Some tour operators realize that the industry relies on natural and cultural diversity as well as security of the destination to attract customers. Several tourism themes initiated by government sectors and business sectors were arisen to find the particular country's image position and also attract tourists to visit. In Asia the key-concepts that shed light on the image position are mainly ethnic identity and authenticity (Boniface & Cooper, 2005; ACD, 2003). Reconstructed ethnicity and ethnic identity invariably involve the objectification and reification of ethnic images and are produced particularly during the process that engenders a global network of interaction.

Asia is the focus of this research project. The region is home to over half of the world's population, possesses tremendous tourism potential with a broader range of tourism

resources compared to other regions. As for the world's oldest cultures and civilizations, Asia is attracting a growing number of visitor arrivals (Boniface & Cooper, 2005; ACD, 2003). Every Asian country recognizes the importance of tourism as a major social and economic development instrument. Tourism cooperation in Asia will allow member countries to bring together their tourism products and jointly promote them for mutual benefit. This will boost the industry's competitiveness, increase the region's negotiating power against other competing destinations and develop a more sustainable tourism industry (Boniface & Cooper, 2005; ACD, 2003, APEIS, 2005).

Based on the information provided by ACD (2003), in 2000, global visitors totaled 698.8 million (an increase of 7.4% over 1999), generating tourism receipts of US\$476 billion (up 4.5%). Europe has maintained its position as the most popular region with the biggest market share of 57.7% of total arrivals (403.3 million visitors). This was followed by the Americas (market share of 18.5%) and Asia Pacific (16.0%).

The WTO forecast that in 2010 and 2020, Asia (including the Asia-Pacific, South Asia and the Middle East) would become the world's second most popular destination. Europe will remain the top destination with a projected total of 242 million in 2010 and 485 million in 2020. These projections clearly show that the future of tourism to Asia will be strong. The region will attract an increasing number of visitors and revenue from other regions. However, intra-regional tourism is also a major force to boost tourism revenue flows and strengthen regional economies (Boniface & Cooper, 2005; ACD, 2003). In order to efficiently promote tourism growth, all Asian countries will have to work closely to ensure mutual benefits (ACD, 2003; Rahman, 2005; TRF, 2006). The clear example is ASEAN member countries that endeavor to foster tourism in the regions through cooperation and networking.

Tourism Cooperation Strategy in Asia are:

- Expand tourism cooperation while decrease competitiveness among all countries in Asia and promote intra-regional travel and tourism;
- Strengthen regional tourism by jointly developing tourism-related resources sustainable and promoting them in global markets;
- Cooperate in and implement tourism security measures around the Asian region;
- Boost the potential of regional tourism by increasing its competitiveness and bargaining power against other regions in order to create jobs and income in the countries of the region;
- Promote stronger partnership between public and private sectors as well as people in the Asia Cooperation Dialogue group;
- Promote mutual assistance among member countries to eliminate travel-and tourism-related obstacles, expand transportation networks, exchange of knowledge and technology as well as encourage more tourism-related investment within the region; and
- Highlight the principle of mutual gain around the region. (ACD, 2003)

According to the ACD study, the new niche tourism products and services in Asia have become increasingly popular. These include cultural tourism to experience the ways of life of local people, multi-cities trip (joint tourism packages linking various region destinations), health and spa tourism, sports activities, cruising and adventure tourism. This leads to the importance of image position of each country and also the overall region in order to be able to compete with the fastest growing of tourism in other regions and tourist changing demand.

Table 1: Tourism strengths of Asian countries categorized by market interests

Countries			Strengths									
			Culture	Multi-Cities Trip	Health and Spa	Sports		Cruise	Eco and soft Adventure	MICE	Pilgrimage	Special Events
						Golf	Diving					
ASEAN	GMS	Thailand	X	X	X	X	X	X	X	X	X	X
		Lao	X					X			X	X
		Myanmar	X	X				X	X		X	X
		Cambodia	X	X	X	X		X	X		X	X
		Vietnam	X	X				X	X		X	
		Singapore		X				X		X		
	IMTGT	Malaysia		X		X	X	X	X	X	X	
		Indonesia	X		X		X		X		X	
		Philippines		X			X	X	X			
		Brunei							X			
		China	X	X		X				X		X
		Japan	X	X				X		X		X
		South Korea	X	X				X		X		
	BIMSTEC	India	X					X	X	X	X	
		Pakistan									X	
		Bangladesh									X	
		Qatar							X			X

As shown in the table, products which are of interest in the markets are:

- Cultural tourism
- Ecotourism and soft adventure tourism
- Multi-cities trips / combination packages offering highlighted products of each member country
- Health and spa tourism
- Sports tourism e.g. golf and diving
- Cruises

In overall, ASEAN direction for cooperation according to those similar tourism themes and neighborhood emphasizes the following implementations:

- General more integrated tourism magnets within the region by initiating cooperation in tourism products and services development and management (physical or environment and services) as well as marketing cooperation to increase the region's competitiveness and boost visitor arrivals to/from and within the region;
- Encourage the private sector to coordinate with the public sector and act as a mechanism to generate commercial outcome in product improvement. (ACD, 2003)

To support the cooperation of tourism among the ASEAN countries, Thai Research Foundation has initiated the ASEAN Image Positioning Project. This project mainly examines tourism in Indonesia (Partly the project of ASEAN Image Position Project). This project is to support the ASEAN Collaborative Tourism Research Databank via ASEAN Tourism Stakeholder Network (TRF, 2006) that emphasize the collaboration among ASEAN countries for better development in tourism industry.

This project mainly examines tourism situation in Myanmar (Partly the project of ASEAN Image Position Project) as the research first phrase. This is to gain insight understanding of strengths, weaknesses, opportunities, and threats of tourism situation in Myanmar. This will lead to the second phrase of research which is to develop active network among the researchers and partners in related tourism business and government sectors of the country. This SWOT analysis and image position will gain their inputs and agreement before public presentations.

Research objectives of the study:

- To analyze tourism situation of Myanmar
- To propose tourism image positioning of Myanmar
- To create network of tourism researchers in Thailand and tourism business sectors and other stakeholders in Myanmar
- To serve information for tourism information bank of ASEAN

General Information of Myanmar

The following information about Myanmar was the succinct information received from the review of travel websites of Myanmar (see references) as a core.

Geography

Myanmar (or Burma) is located in south-east Asia. It is the largest Asian mainland country. With a land area of 678,576 square kilometers with its vaguely kite-shaped, it is twice the size of Viet Nam and about the size of the United Kingdom and France combined. South to north the length is approximately 1920 km and the width (east to west) is about 905 km. Lying between latitude 10 and 28 degrees north, and longitude 92 and 101 degrees east,

Myanmar is bounded by India and Bangladesh in the north-west, China in the north-east, and Lao People's Democratic Republic and Thailand in the south-east. To the south and south-west are the Andaman Sea and the Bay of Bengal. Set in a horse-shoe shaped ring of mountains, Myanmar can be divided into six distinct topographical regions: the northern mountain ranges, the Western Hills, the Shan Plateau in the east, the Tanintharyi (Tenasserim) coastal ranges in the south, the Central Dry Zone and the Ayeyarwady (Irrawaddy) delta. The country is mountainous and nearly 49% of this is totally forested. The highest point is Hkakabo Razi (5,967 metres) located in the extreme north on the Chinese border. The north reaches the Himalayan region. Myanmar's mountains pose great obstacles to commerce and transportation. Traversing the country from north to south is Myanmar's most important and well-known river, the Ayeyarwady. Over 2,000 kilometer long, this river finds its source in the Himalayas and runs through the Shan Plateau and the central region before emptying into the Andaman Sea. Ayeyarwady drains about three-fifths of the country's surface. The Ayeyarwaddy is the lifeblood of the country and barges and steamers carry passengers and cargo daily ply the country's most important transportation route. In the south, the river's vast delta with its rich, fertile soil is perfect for the cultivation of rice. The Salween basin lies to the east of the Ayeyarwady, draining the Shan Plateau region and emptying into the Gulf of Martaban

Regions facing the prevailing winds - particularly Arakan and Tenasserim, which are both backed by steep mountain ranges - receive some of the heaviest rainfall in the world. Sittwe (Akyab) in Arakan receives an average of 5,180 mm of rain a year, of which 4,980 mm falls during the 6 months of the Southwest monsoon. The mountain areas - particularly the Shan Plateau - are cool and comparatively dry. One traveller during the British colonial era described them as a 'tropical Scotland'.

In Myanmar's lowlands, the natural vegetation varies with precipitation. Where there is more than 80 inches (2,000 mm) of rainfall, evergreen tropical forests predominate (the delta areas support lush mangrove stands); regions with between 40 and 80 inches have plentiful hardwood monsoon forests (including teak); at less than 40 inches, the forests are gradually replaced by scrubland. In the highlands, forests of oak and pine are found above the frost line. The forests have also been destroyed by shifting cultivation and, increasingly, by logging. But Myanmar's forests still account for about 3/4 of the world's teak reserves. In the Dry Zone of central Myanmar, cacti and acacia trees are a common sight. Myanmar's flora has not been as thoroughly studied as other areas of Southeast Asia but is known for its diversity; there are thought to be over a thousand varieties of orchid. Animal life is abundant, with the rain forests supporting a variety of birds, mammals, and snakes of various kinds. The elephant and the tiger are also important though endangered species. There are also 52 varieties of poisonous snake. The deadliest snakes are Russel's viper and the Asiatic king cobra. The animal most Westerners associate with Myanmar is the Burmese cat. It is actually from Thailand and was the result of a lengthy period of experimental cross-breeding with Siamese cats.

There are seven administrative divisions (figure 1); Yangon, Pango, Mandalay, Magwe, Sagaing, Ayeyarwady and Tenasserim, and seven states; Arakan(Rakhine), Chin, Kachin, Karen, Kayah, Shan and Mon in Myanmar. The capital city and main port is Yangon. With a population of around four million, Yangon is the largest city in the country and houses ministries, directorates and head offices of government organizations. Myanmar's second largest city, Mandalay, is 620 kilometers north of the capital. Founded in 1857 by King Mindon, it is well-known as a centre for Buddhist learning and the fine arts.

Table 2: Myanmar's states and divisions

States and divisionsRivers

1 = Thaninthayi	A = Ayeyarwaddy
2 = Mon	C = Chindwin
3 = Yangon	M = Mekong
4 = Ayeyarwaddy	S = Sittoung
5 = Kayin	T = Thanlwin
6 = Bago	All rivers flow north to south
7 = Rakhine	
8 = Magwe	
9 = Mandalay	
10 = Kayah	
11 = Shan	
12 = Sagaing	
13 = Chin	
14 = Kachin	

(Source: Asterism Travel and Tours Co., Ltd.)

Climate

Myanmar has three seasons: the monsoon or rainy season, from June to October; a cool season from November to February; and a hot season from March to May. Myanmar's tropical climate is influenced greatly by the monsoons of southern Asia. Annual rainfall ranges from 200 inches (5,100 mm) along the coastal plains and mountains to 100 inches (2,500 mm) within the delta regions and 35 inches (900 mm) for the central basin around Mandalay. Nearly all of it comes during the monsoons. The mountain areas tend to be cooler, due to the elevation and are generally drier. In Rainy Season, rain can be torrential

but usually falls in short bursts during the afternoon. Although there is a slight drop in temperature, the rise in humidity makes for very uncomfortable conditions.

People and culture

Myanmar is one of the least densely populated countries in Asia, and the rugged, forested portion of its terrain is still only lightly settled. It is a land of villages, where fewer than one-fourth of the people live in urban areas. The annual rate of growth of the population is somewhat high by world standards but is about average for Southeast Asia. Myanmar is a nation of ethnic and cultural diversity. It has a total population of 48 million. Yangon has approximately between 4 to 5 million people and Mandalay (one of the main tourism city) is home to between 800,000 to 1 million.

Myanmar has 135 ethnic groups and more than 100 languages and dialects. The name Myanmar embraces all the ethnic groups. The Barmars (or Burmans) are the largest ethnic group, forming 69 per cent of the population. The other ethnic groups include the Shan (9 per cent), Karen (7 per cent), Rakhine (4 per cent), Chinese (3 per cent), Mon (2 per cent), and Indian (2 per cent). The remaining 4 per cent of the population are associated with the many other smaller ethnic groups such as Palaung, Padaung, Lisu, Wa, Danu, Lashi and Yaw. This diversity makes the country culturally very rich with many different languages, customs, traditions and dresses. But all these ethnic groups share a wide variety of social customs: the Longi (traditional dress for men and women), Thanaka (cosmetics), Lepet (pickled tea) and Ngapi (the fish paste).

The entire Ayeyarwady valley and the coastal strips hold three-fourths of the population. In the western hills of the Chindwin River are the various Chin tribes, and the upper Ayeyarwady valley and the northern hills are occupied by Kachin tribal groups. The Shan people occupy the Shan Plateau; the Wa and the Palaung are usually classified with the Shan. The Karen are found on the deltas, in the Pegu Mountains, and along the lower

Salween River. The Kayahs inhabit the southern edge of the Shan Plateau. A majority (89 per cent) of the population are Buddhists. The rest of the population are Christians (4 per cent), Muslims (4 per cent), Animists (1 per cent) and others (2 per cent). Buddhism has a great influence on the daily lives of the people. Maintaining close family ties and showing respect to elders are important traditions in the lives of the people. The official language is Myanmar. English is fairly understood in the big cities and tourist places.

Unlike most South East Asian countries, the food in Burma is a bit more limited, but it is none-the-less interesting. Due to the fact that there are large Indian and Chinese communities in Burma, most of the restaurants in the country actually specialize in food cooked in either of these two styles. Traditional Burman cuisine has made resurgence lately as the economy has improved. It consists primarily of rice, mild curry and soup. Myanmar currency is called Kyat. International credit cards and traveler checks are accepted only in large hotels.

History

Early and pre-independence Myanmar

Myanmar's history begins five thousand years ago when the Mon first arrived from Central Asia and settled on the estuaries of the Thanlwin (Salwin) and Sittaung (Sittang) rivers. But it was not until 1044 AD that Myanmar became a distinct political entity with the founding, by King Anawrahta, of the first Burmese empire at Bagan. He unified the country through his strong leadership and intellect. The kingdom survived until 1287, when it fell to the armies of Kublai Khan of the Mongols. For the next five centuries, Myanmar's history is characterised by much disunity. The kingdom disintegrated into small states with the Mon building a new state in Pegu (Bago), the Shan at Ava (Innwa) and the Burmans at Toungoo. However in 1754, Alaungpaua defeated the Shan and Mon kingdoms and founded the last Burmese dynasty, which was in power until the British came in the early nineteenth Century. From

1824 to 1886, three Anglo-Burmese Wars were fought. Myanmar ceded to the British and became a British colony on 1 January 1886. Incorporated into the British Indian Empire, Myanmar was administered as a province of India until 1937, when it became a separate colony. During the Second World War, Myanmar was occupied by the Japanese for nearly three years until the Allied Forces' reoccupation in 1945. In 1948, U Nu, the leader of the Burmese nationalist movement won Burma's long fight for independence from the United Kingdom. The sovereign Union of Burma was founded on January 4.

Post-independence Myanmar

Post-independence Myanmar has been plagued by much instability. In March 1962, the "Burmese Way to Socialism" was introduced and widespread nationalisation of banks, schools, industries and hospitals took place. The Government established state economic enterprises and trading corporations that were monopolies headed mostly by military officers. Strict self-reliance and inward looking policies were also introduced. Under a 1974 constitution, the country became known as the Socialist Republic of the Union of Burma, with the Burma Socialist Programme Party as the only legal political party. Myanmar was run as a one-party socialist state until September 1988, when a military coup overthrew the administration and declared martial law. The State Law and Order Restoration Council (SLORC) was established and Burma was officially renamed Myanmar on 27 May 1990. SLORC is a 22-man military junta, with local governing bodies called State Law and Order Committees at the state, division, township, township sector and ward levels. Heading SLORC is General Than-Shwe, who serves as both the chairman of the Council and the Prime Minister. A number of reforms are currently underway in Myanmar, including ceasefire negotiations with many of the major insurgent groups and the drafting of a constitution that is to serve as a guideline for future multiparty elections. Now known as the State Peace and Development Council (or SPDC), the government has been subject to international outrage and has only recently made some attempts to appease the international community.

Economy

Myanmar relies to a large extent on agriculture. During British colonial time, Burma was the world's number one rice producer and exporter. It exported as much as 3.5 million tonnes a year. Whilst other countries turned to other industries, Burma continued producing just rice in significant quantities, and this dependence on the one product was to handicap the country in the post-war years. Rubber, jute, cotton and tea are grown for export while maize millet, beans, sugar cane and wheat are cultivated mainly for the domestic market. There are vast reserves of timber and minerals that are only being exploited partially. Despite Myanmar's rich endowment of natural resources, it is one of the poorest nations in the world. In 1987, Myanmar was accorded "Least Developed Country" status by the United Nations. Inefficiency and a lack of development led to Burma falling behind its neighbors. Large quantities of petrol and scarce consumer goods are smuggled in and sold illegally. Other notable illicit activities include the smuggling of gold and drugs. The "Burmese Way to Socialism" was finally discarded in 1988. SLORC's declaration to move away from central planning to a more "opendoor" policy based on the market-oriented system marked a major turning point in Myanmar's economic history. Some of the more significant measures taken to facilitate the new policy include the enactment of a liberal foreign investment law, the encouragement of the private sector and the implementation of a more favourable income tax regime. In this period, rice has been replaced by timber (teak) as the country's main export earner. The other main exports are gems. Smaller income comes from maize, rubber, cotton, jute, minerals and sea products. While there are obvious signs of economic recovery in Myanmar, the pace of development is somewhat slow when compared with the other transitional economies of Asia such as Viet Nam and the People's Republic of China.

However, in overall picture, it is a transitional economy moving from 26 years of centrally-planned socialist to market-oriented open economy. Private sector has been encouraged and developed in both domestic and external trade. Foreign investment is allowed in almost

all sectors of the economy with generous incentives for investors. Agriculture remains the main sector of the economy and private sector participation is strongly encouraged for rapid and sustainable development. In industry, small and medium enterprises are given priority in agro-based industries. As an emerging country rich in natural and human resources, Myanmar has enormous potentials for long term economic development.

Tourism in Myanmar

In the past, the number of tourists visiting the country is expected to increase to 500,000 by 1996, from just 8,000 in the early 1990s (Wheat, 1995) during the promotion of tourism in Myanmar. However, it was not quite successful. In 1993, the number of visitors to Myanmar was 61,000, of which 35 percent were tourists.

Tourist	21,399
Visitor arrivals	61,000
Composition	German (12%) French (11 %) Italian (10 %) British (9 %) American (9 %) Japanese (7%)

Source: Country reports, 1993

Prior to 1999, visitor arrivals included 60 % Tourists , 30 % Business Travelers and 10 % Visit Friends and Relatives. According to the statistics of 1999-2000, there were 23 % Foreign Independent Travelers, 36 % Package Tours, 18 % Business Travelers, 4 % Visit Friends and relatives and 19 % others.

Table 3: Tourist Arrival And Income(in Million)

<u>Year</u>	<u>Tourists</u>	<u>US(\$)</u>	<u>Baht</u>	<u>Yuan</u>
1996-97	358423	0.78	-- --	-- --
1997-98	302336	0.94	1.18	1.65
1998-99	277747	1.08	1.12	1.25
1999-2000	235550	1.59	0.82	1.43
2000-2001	135351	1.08	0.71	0.62

Source: Ministry of Hotel and Tourism (2002).

From the survey of ACD (2003), Myanmar has tourism strength categorized by market interests in culture, multi cities trip, cruise, eco and soft adventure, pilgrimage, and special event tourism.

In the past, the number of tourists visiting the country is expected to increase to 500,000 by 1996. However, it was not quite successful. In present, the number of international tourists has increased to 102,766 (MHT, 2005) which is positive potential for tourist of the country. Most tourists travelling in 2005 were male (63%) and age between 21-50 years (56%) (MHT, 2005).

Figures of tourist arrivals by nationality in 2005 (Jan. to May), the tourists from Asia accounted for 59,814, West Europe for 28,021, North America for 8,609, and Oceania for 3,220. These figures indicate that East Asia and Europe are the most potential markets for Myanmar tourism.

Table 4: Tourist Arrivals

Tourist Arrivals							
		2000 Jan- Dec	2001 Jan-Dec	2002 Jan-Dec	2003 Jan-Dec	2004 Jan-Dec	2005 Jan-May
1	Yangon Entry Point	206778	203200	212468	198435	236370	100846
2	Mandalay & Bagan Gateway	887	1662	4744	7175	5568	1920
3	Border Tourism	208679	270244	270278	391405	414972	186627
	Total	416344	475106	487490	597015	656910	289393

Source: Ministry of Hotel and Tourism (2005).

Table 5: Tourist Arrivals Through Border Points to Yangon

Yangon Entry Point							
		2000 Jan-Dec	2001 Jan-Dec	2002 Jan-Dec	2003 Jan-Dec	2004 Jan-Dec	2005 Jan-May
1	Package	77646	72503	78723	55469	48191	21015
2	FIT	46690	48740	55017	66772	109934	47422
3	Business Travellers	37032	36608	37084	44151	40521	15814
4	Entry Visa(Friends & Relatives)	8043	7756	9505	13140	16505	7842
5	Others	37367	37593	32139	18903	21219	8753
	Total	206778	203200	212468	198435	236370	100846

Source: Ministry of Hotel and Tourism (2005).

METHODOLOGY

This descriptive study focuses on exploring image positioning of Myanmar's tourism. Issues concerning image positioning in this study are: the overall situation analysis (SWOT), theme(s) of tourism that match the country's resources, and fifteen main attractions of the country.

Instrument

In the first phrase, the SWOT analysis of the country was explored by using secondary data as a core. This research also employed the content analysis of travel stories available to the public on the internet to gain initial image of the country. There are advantages of this method as its low cost, unobtrusiveness and as a consequence reduce bias (Dann, 1981; Mann & Stewart, 2000). It is possible to see online travelogues as a new unobtrusive data source because the writers of the travelogues have freely chosen what to write, what not to write, how to express themselves and how much to write (Yagi, 2001). This method allows the writers to discuss what they wanted to mentioned so it is possible that themes mentioned have some importance and personal significance. Tourism is one of the areas that has received considerable advantages from the internet, not commercially, but also as a tool for providing and gathering travel information (Williams, Bascombe, Brenner & Green, 1996) Therefore, this online travelogues are becoming very popular for presenting one's travel experience to a mass audience (Yagi, 2001).

Moreover, the travel agents in Thailand who operate tour to Myanmar were interview for cross checking with the secondary data. Based on the aims of the study, the questions used in the interview process consisting issues as follow:

- What would you say if you have to recommend people who would like to visit the country?
- What are SWOT about tourism in Myanmar from your opinion?
- What are the most prominent attractions in Myanmar that the visitors should not miss from your experiences?
- Other recommendations for the tourism development of the country.

In the second phrase, the SWOT analysis of the country, images and themes of tourism were explored by using focus group method. The researcher invited key informants from different related sectors to meet in Myanmar and ask them for agreement and inputs about SWOT, images, themes and main attractions in Myanmar. Also, field study was implemented to find comments from visitors who were visiting the country.

Data Collection

There were two phrases of data collections. In the first phrase secondary data collection and interview were implemented to initially analyze SWOT and image of tourism in Myanmar. The secondary data were searched from:

- 1) Websites: the 30 top websites of tourism in Myanmar were reviewed these websites were retrieved from the keyword “tourism Myanmar,” then the websites shown in order from the first to the thirtieth were chosen;
- 2) Articles, books, and magazines that written about tourism in Myanmar;
- 3) Travelogue which is a travel stories available to general public. Its advantages are low cost and unobtrusiveness and a consequent reduced bias (Dann, 1999; Mann & Stewart, 2000).

The travel agents chosen to interview about situation of tourism and image of Myanmar were from the list of Association of Thai Travel Agents (ATTA) of the year 2005. This was to crosscheck with the secondary data analysis. Those travel agents consider themselves as specialize for tourism in Myanmar. There were 4 travel agents involved in this interview process.

In the second phrase, the researcher contacted key professionals from different sectors of tourism such as government sector (Ministry of Tourism) and business or private sectors (restaurants, travel agents, NGO, hotels) to implement the focus group in Myanmar. There were a total of 25 key participants involved in the focus group. The discussion was:

- to gain their agreement and input about SWOT analysis from the first phrase of research;
- to discuss and finalize the image of tourism in Myanmar and also tourism themes that suite the country's resources; and
- to receive their input about the main 15 attractions that represent tourism in Myanmar

The focus group discussion period was four hours and successfully met the aims of the focus group meeting. In this phrase, the interview of the visitors on the field study was also implemented to crosscheck the overview data received. As the limitation of time, 10 visitors were chosen based on convenient sample.

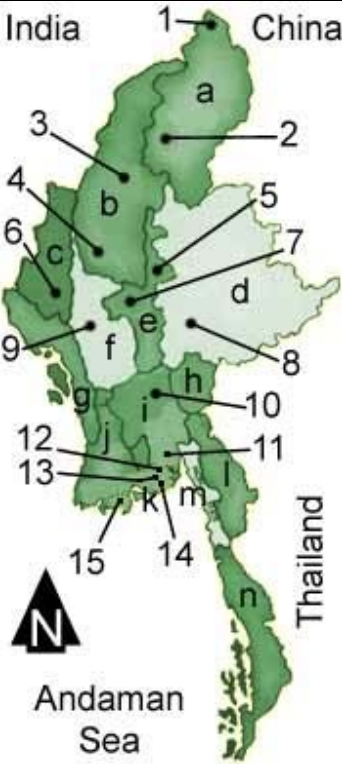
RESULTS OF THE STUDY

The results of the analysis are reported in sequence of SWOT analysis, Myanmar's images and themes of tourism, and fifteen attractions which represent the country.

SWOT analysis of Myanmar

The results of SWOT analysis of tourism situation in Myanmar derived from the first phrase and the second phrase of the study. The researcher reviewed secondary data and interviewed travel agents in Thailand then categorized the analysis into strengths, weaknesses, opportunities, and threats of tourism situation in Myanmar. In the second phrase, the agreement was made from the key informants before this final report (Table 6).

Table 6: SWOT ANALYSIS OF TOURISM IN MYANMAR

Strengths	
Attractions	
Myanmar is blessed with natural scenic beauty	
Myanmar contains more than 2000 kms coastline with beautiful beaches.	
 <p>India China</p> <p>1 2 3 4 5 6 7 8 9 10 11 12 13 14 15</p> <p>a b c d e f g h i j k l m n</p> <p>Thailand</p> <p>Andaman Sea</p>	<p>There are 40 National parks, wildlife sanctuary and protected area under the Forestry Ministry. Fifteen national parks have been registered as ecotourism sites.</p> <ol style="list-style-type: none"> 1. Khakaborazi national park 2. Indawgyi lake wildlife sanctuary 3. Chatthin wildlife sanctuary 4. Alaungdaw Kathapa national park 5. Maymyo botanical garden 6. Nat Ma Taung (Mt Victoria) national park 7. Popa mountain park 8. Inle lake wetland sanctuary 9. Shweseettaw wildlife sanctuary 10. Sein Ye forest camp 11. Moneyingyi wetland wildlife sanctuary 12. Myaing Hay Wun elephant camp 13. Hlawaga park 14. Yangon zoological garden 15. Meinmahla Kyun (island) wildlife sanctuary <p>(http://www.asterism.info/parks/index.html)</p>
Myanmar has biggest tiger reserve in the world which has around 100 tigers. The area covers 8,000 square miles on the northwest of the country.	

Myanmar is one of the largest country in South East Asia with ethnically diverse , Myanmar is a nation of many races. There are more than 180 national groups.
Myanmar's unique and long historical and cultural heritage dates back over 5,000 years.
The National Tourism Organization has submitted national heritage sites to ASEAN which for example are Bagan and Mragkoo.
Myanmar is an enchanting country with a rich history in arts and crafts . Mandalay represents the largest repository of Myanmar arts and crafts.
Myanmar has well known Mother-Of-pearl Mosaic Painting.
Myanmar is a land of unsurpassed beauty with the Buddhist religion being the focal point of countless Pagoda's and Buddha images. Buddhism has a great influence on the daily lives of the people. Maintaining close family ties and showing respect to elders are important traditions in the lives of the people.
Mount. Victoria has diving site which is the standard international diving sites and beautiful islands surrounded.
Myanmar is popularly known as The Land of Festivals because of the countless religious and cultural festivals that take place all year round. Therefore, Myanmar can be visited year round. JANUARY On January 4 th , Independence Day of the Union of Myanmar is celebrated across the country. On January 14 th , Naga New Year Festival is celebrated. On January 10 th , Kachin Manaw Festival is celebrated. FEBRUARY Traditionally, this is the month of the Harvest Festival when people rejoice in the feast of Htamane. This is opportunity to sample a delicious Myanmar delicacy consisting of glutinour rice freckle with coconut, sesame seeds, peanuts, ginger, and oil, which is

specially prepared for the feast.

On February 7 is the Shan State Day and on February 20 is the Chin State Day.

The anniversary of the Union Day falls on February 12. Representatives and cultural troupes of the seven States and seven Divisions of the Union of Myanmar dressed in colourful, traditional costumes gather at venues across the country.

MARCH

March is the most colourful month of the year as Pagoda Festivals are in full swing. The Shwedagon Pagoda Festival is held on the day of the full moon of Tabaung and is one of the month's biggest events. The Arm Force Day is also on March 27.

On March 19 is Mon State Day.

APRIL

Thingyan or the Water Festival is held throughout the country for three days in the month of April. It simultaneously marks the end of the old year and beginning of the new. It is one of the most important festivals.

MAY The Kason Festival of watering the Sacred Banyan Tree symbolises the prophesy that the Buddha will become Buddha, the birth, enlightenment and death of Buddha. It is an important Buddhist holiday and many processions are held at temple grounds throughout the country.

JUNE AND JULY

The onset of monsoon season makes June and July relatively quiet months in Myanmar. There are, however, various smaller Buddhist festivals to be enjoyed.

AUGUST

In this month the Taungpyone Nat or Spirit Festival is held. This is actually a pagoda Festival but known more as Nat Festival. However, the pagoda festival is depend on the lunar calendar.

SEPTEMBER

The famous Phaung-Daw-Oo Pagoda Festival is held at Inle Lake once a year. The procession of the Inle leg-rowers in full pageantry and ceremonial splendour is a sight not to be missed by anyone visiting Myanmar. Sometime this festival is in October depending on Lunar calendar.

OCTOBER & NOVEMBER

The celebration will be a gloriously festive occasion. The Thadingyut or Light Festival, which ends the Buddhist Lent, is also one of the most prominent festivals of the year. Another celebration of light is the Tazaungdine festival held in November. Pagodas, houses, buildings, parks, and monuments are all illuminated and there are various kinds of activities for everyone to enjoy. The other important festival outside Yangon is the exotic Elephant Dance held in Kyaukse, a small town not far from Mandalay.

There is also the Hot Air Balloon Festival on full moon day of November at Taunggyi.

DECEMBER

In this month, there is Karen's New Year and Ralchine State Day on Dec. 15th.

Information/ Promotion

There are **websites** informing Myanmar's general information and Myanmar's tourism information.

There were **cooperated promotions** among ASEAN countries; for example:

-Establish the Asian Pavilion to promote regional tourism in major trade shows such as

Expo 2005 in Osaka and in Qatar during the Asian Games.

-Promote intra-regional tourism in Asia.

-Develop E-Tourism

There were **joint marketing campaigns** to promote thematic packages which will combine the tourism strengths of each destination into a group to attract specific target segments.

1. Bilateral Cooperation – Joint marketing between two Asian countries e.g. Thailand-Myanmar (Two Countries, One Destination)
2. Multilateral Cooperation
 - Greater Mekong Subregion (GMS) including Cambodia, Laos, Myanmar, Thailand, Vietnam and the southern Chinese province of Yunnan – culture, nature, ecotourism and leisure.
 - Bangladesh, India, Myanmar, Sri Lanka and Thailand Economic Cooperation (BIMST-EC) – Buddhist circuit.
 - Mekong-Ganga Cooperation including India, Myanmar, Cambodia, Vietnam and Thailand – Buddhist circuit.
 - Thailand, Myanmar and India – soft adventure, auto adventure, and Buddhist circuit.
 - Thailand, Myanmar, India, Nepal and Bhutan – Pilgrimage Tourism

Activities
<p>Meditation – Myanmar is the living Buddhism. The people not only go to the pagoda to pray but also do meditation. The country has meditation centers and learning about Buddhist philosophy at the Buddhist University such as “International Theravada University.” There are many meditation centers and the instructors teach in English. Some centers also work corporately with India.</p>
<p>Golf- The best time for golf tours are from October to May. Yangon and central Myanmar (Mandalay and Bagan) for all year round.</p>
<p>Adventure tours- especially in the area of Andaman Sea and Himalayas Mountain. Elephant camps are also offered in the country.</p>
<p>One unique activity that tourist can engage is to see the Ayeyarwady dolphin in the Ayeyarwady river (North of Mandalay). Here, dolphin help the fishermen catch fish.</p>
<p>Myanmar offers variety of sport activities for tourism such as ski in the North, diving, bird watching, water rafting.</p>
<p>Shopping- especially handicrafts, gems and clothes.</p>
Accessibility
<p>The capital Yangon has direct air links with Bangkok, Chiang Mai, Singapore, Hong Kong, New Delhi, Kuala Lumpur, Korea, and Kuming. There are flights to Mandalay from Chiang Mai and Bangkok of Thailand.</p> <p>Overland border crossing with China</p> <ul style="list-style-type: none"> • Muse in northern Shan state with Ruili in Yunan province of southern China. (Prior permission is required)

Overland border crossings with Thailand

- Tachileik in eastern Shan state with Mae Sai in Chiang Rai province of northern Thailand

(For the time being, it is temporarily closed for international visitors.)

- Myawaddy in Kayin state with Mae Sot in Tak province of Thailand
- Kaw Thauung in the southern tip of Thaninthayi division with Rannong of southern Thailand

(For the time being, it is temporarily closed for international visitors.)

Overland crossings with Laos, India and Bangladesh are currently only for the local people.

Climate

Myanmar has pleasant climate and **long tourist seasons**.

May to September can be called “**value season**” instead of low season because tourists do not have to pay expensive cost if visiting during this time.

People/ Ways of life

Agricultural ways of people's life in Myanmar. This is one of the charm for tourism.

People in Myanmar have been described as **hospitable**.

Myanmar's **food** is “Mohinga” or rice noodle with fish paste.

Many people in Myanmar can speak or at least **understand simple English**. English is frequently used in dealings with foreign investors.

The **costume** is also considered as strength because people in Myanmar still wear traditional dress in their daily life called “longi”

Sea Gypsies are locals of Myanmar whose life is related to the sea. They live around the Myeik Archipelago.

Support policy
Myanmar has masterplan for tourism which emphasizes promotion based on natural resources, avoidance of the negative effects of tourism, and diversification of tourism activities.
Myanmar has tourism law of 1993 which defines the functions and duties of the Ministry of Hotels and Tourism (MHT) and its Directorate. There is the Tourism Development Management Committee (TDMC) that responsible for policy formulation, planning, marketing, facilitation and regulation of the private sector.
Visit Myanmar Year 1996 The Visit Myanmar Year (VMY) 1996 campaign was launched at the first meeting of the Tourist Industry Development Management Committee in May 1994. The main objective is to promote Myanmar as an unusual and original tourist destination and to attract many more visitors.
Myanmar also have tourism safety unit. It is one of the safest places but wait for visitors to prove when they arrive. There is no racial or religious discrimination.
Four main regions have been declared as tourist centres , namely, Yangon, Bagan, Mandalay and Taunggyi. There are the specific areas within the regions that the government has singled out as suitable to become priority areas for development. Yangon : Yangon, Htaukkyant, Bago, Tanyin (Syriam/Kyauktan), Twantay Bagan : Nayung 00 and Pagan, Kyaukpadaung, Popa, Meikitla, Thazi Mandalay : Mandalay, Sagaing, Amarapura, In-wa, Mingun, Pyin Oo Lwin, Monywa Taunggyi : Taunggyi, Nyaung Shwe, Inle Lake, Kalaw, Pindaya

Myanmar's tourism is growing because the policy of opening the country to the outside world.
Infrastructure/ Facilities
The development of the country's infrastructure has begun. Existing roads are being upgraded and new ones constructed. But the most visible sign of development is the increase in hotel upgrading and construction.
Weaknesses
Negative country's image
In some parts, there is the travel safety warning that there is the constraints imposed on local travel and the dangers of criticizing the regime.
The infighting between the ethnic groups in some parts of the country.
Quality of Labour
The country's workforce lack expertise and exposure to a competitive market environment. Initiative and motivation are largely absent. A lack of technical know-how tends to cause delays, especially in construction projects. There is a need for more training in English and other languages for workers in the Tourism industry. However, there are steps underway to improve the situation especially the ACCSTP project which is the ASEAN project on upgrading the human resources' skills.
On the other hand, the country has manpower to support tourism industry in some sector for example there are 6,000 people who have got guide license but only 300-400 are working because of the limitation of available work and tourists.
There is an absence of sufficiently qualified hotel, catering and tourism personnel. Most of the staff in the industry lack experience and training has been limited. However, it is expected that this situation will improve. For example, Myanmar has 2 training centres now that are recognized by the Ministry. The annual workplan of the ministry support the integration of networking such as Initiative of ASEAN Integration (IAI). Union of Myanmar

Travel Association (UMTA) and Yagon University also offers training courses for tourism.
Quality of product
Currently produced by cottage industries, souvenirs and handicrafts are of inferior quality and lack variety.
Insufficient Infrastructure
Limited infrastructure includes: lack of modern vehicles, roads and railways, unreliable power supply, slow and costly installation of telecommunication facilities.
For the moment Myanmar is the place unlike most other tourist destinations. Travel is sometime unpredictable because the essential infrastructures such as efficient good management, transport, communication and hotels are still far from near complete.
The local transportation is quite still high cost.
<p>The country's lack of infrastructure is a serious constraint on the tourism sector. The last 30 years of isolation have deprived Myanmar of modern transport and communication facilities.</p> <ul style="list-style-type: none"> - need to improve domestic air travel. - Lack of airport facilities. Mingaladon Airport at Yangon is the gateway to Myanmar but still falls short of international standards. - Suitable public transport is unavailable. - Telecommunication facilities are limited. - Current power supply is insufficient to meet the growing demand.
Myanmar has not received any aid from organization to improve infrastructure so the government have to work hard of the country's transportation improvement.
Hotel shortage still exist in some tourists areas in Myanmar such as Inlay and Bagan.
Unpredictable weather
Myanmar is a difficult country to sum up in terms of <u>weather</u> since it has a varied terrain with tropical beaches, lowland plateaus and the shoulders of the Himalayas. However, it is considered as a 12 year destination.

Other limitations
It is a cash society. The credit card settlements are limited in Myanmar. USD cash is the preferred mode of payment. Some hotels do accept VISA and MASTER cards which will be charged in Singapore dollars plus an additional credit card usage surcharge may apply. This is because of the US sanction.
Lack capital to undertake the necessary programs to develop tourism.
Travellers to Myanmar can visit only officially designated tourist areas. Permission is needed for treks to remote parts of the country. The process of permission takes about seven days.
Opportunities
Government Support
Myanmar conducted the 'Visit Myanmar Year 1996' to promote Myanmar as a tourist destination.
National Coalition Government of the Union of Burma : After winning the elections in 1990, the military rulers stopped the democratic parties from taking over the government. The MPs, with support from the Democratic Alliance of Burma, the National Democratic Front, and others, formed the National Coalition Government of the Union of Burma (NCGUB). The NCGUB has led the call for a tripartite dialogue between the ethnic nationalities, the NLD, and the military to resolve national problems. If there is peace in the country, it is the opportunity for tourism to be promoted.
The "Burmese Way to Socialism" was finally discarded in 1988. SLORC's declaration to move away from central planning to a more "opendoor". As part of the Government's commitment to move away from a centrally planned, to an open-door, market-oriented economy, a Myanmar Tourism Law was enacted in June 1990. The promulgation of this law marked a turning point in Myanmar's tourism industry. It put an end to the State's monopoly on tourism and opened the industry to private investors, both local and

foreign. In October 1993, a new Hotel and Tourism Law was proclaimed with the following objectives:

- (1) To ensure a systematic development of the hotel and tourism industry;
- (2) To enable tourist access to Myanmar's cultural heritage and natural scenic beauty;
- (3) To prevent destruction and damage of Myanmar's cultural heritage and natural scenic beauty;
- (4) To contribute to international friendship and understanding through the hotel and tourism industry;
- (5) To develop technical knowledge relating to the hotel and tourism industry and to create more employment opportunities;
- (6) To provide security and satisfaction for tourists.

Myanmar's foreign investment law was enacted in 1988, the same year that the country abolished its isolation policy. The law benefits to the investor, namely:

- 100 per cent foreign ownership is permitted: For joint ventures, Myanmar stipulates at least 35 per cent foreign equity, Viet Nam 30 per cent, and Mongolia 20 per cent. In addition, Myanmar requires a minimum investment of US\$ 100,000;
- Profits can be repatriated;
- There is a guarantee against nationalisation and expropriation;
- Incentives in the form of tax relief, tax holidays and customs exemptions: Myanmar offers tax holidays of three years, 50 per cent tax relief on profits from exports, and exemption from customs duties.

Myanmar's top investors are Singapore and Thailand and the main target for foreign investment has been the hotel sector. The group of Asian businessmen has invested in Myanmar Airways International.

<p>In April 1994, a Tourism Industry Development Management Committee (TDMC) was established to address issues affecting development. Comprising 26 high ranking personnel, the committee aims to develop international tourism in order to increase foreign exchange earnings and raise awareness of the country. The TDMC has 12 subcommittees headed by Ministers and Deputy Ministers of tourism-related ministries, and each is responsible for the implementation of specific development plans.</p>
<p>International/ NGO Support</p>
<p>The seminar on investment and economic cooperation in the tourism sector of developing Asian countries of the ESCAP region held in Tokyo 1991 recommended that ESCAP undertake studies to promote tourism investment in the areas.</p> <p>The third Ministerial Conference on Subregional Economic Cooperation in Indochina held in Hanoi in 1994 identified the potential of tourism development in the Indochina subregion</p>
<p>International organizations can also play an important role in providing advisors to assist in establishing training schools and in tourism promotion and marketing abroad (for example, to help Myanmar dispel misperceptions).</p>
<p>Promote investment in the country</p>
<p>Due to the strong interest shown by Singaporean investors in Myanmar's tourism industry, the Singapore-Myanmar International Leisure Enterprise (SMILE) was set up by a group of Singaporean companies to act as a coordinating body. SMILE is currently working on a number of proposals including one on ground handling services and another on a limousine service, in addition to a number of hotel projects.</p>

<p>There are potential and priority areas for foreign participation.</p> <p>As a transitional economy with much tourism potential, Myanmar needs the valuable contribution of foreign investment. The benefits derived are measured not only in terms of the amount of foreign capital brought in, but also includes the long-term transfer of technology and the encouragement of entrepreneurship. There are several areas in which foreign participation can contribute to the development of the economy, and specifically to the tourism sector such as hotel development, infrastructure development, tour operations, souvenir industry, and preservation and restoration of monuments.</p>
More flexible regulation
<p>In Myanmar, visitor visas have been extended to 28 days and package tour groups can now obtain visas on arrival. Tourists are allowed to enter through several checkpoints along the Thai borders.</p>
Threat
Socio-economic stability
<p>Uncertainties about socio-economic stability and a lack of definite signs of reform deter some foreign investors.</p> <p>Travelers are often very susceptible to concerns over social unrest and risks to personal safety. Due to these concerns, Myanmar will need to overcome such apprehensions through a far-reaching and aggressive promotion campaign in all its potential tourist markets.</p>
<p>The economic malaise of the past three decades has fuelled an extensive black market in the country.</p>

Negative images that are exaggerated or presented in their own point of view by international media such as the issues of human rights and travel advisory.
Tourism Boycott
In 1995 Daw Aung San Suu Kyi, speaking in the context of the junta's promotion of 1996 as 'Visit Myanmar Year', argued that it was too soon for visitors to come "pouring in" to Myanmar.
<p>Many NGOs urge the international community to boycott the country. They argue that revenue from tourism supports the Government financially, and holidaying in the country could be interpreted as approval of the military regime. Furthermore, forced labor was used to build some of the tourist infrastructure and tourists are kept away from large parts of the country, where repression of minorities is occurring.</p> <p>However, many comments argue that it is increasingly possible to use privately-owned lodging and transport facilities, benefiting the local people. Likewise, economic development could lead to a democratization of the country.</p>

RESULT OF IMAGES AND TOURISM THEMES

The prominent images and themes of the country were received from the review of secondary data and then were approved by the key informants from the focus group meeting in the second phase of the research. The results were as follow:

Prominent images (coded from tourism websites, travelogue, and interview)

- Myanmar has bags of potential but is haunted by the political situation. Many, although not all, democracy activists have implored tourists to keep away.

- Myanmar's most famous asset is the remarkable 42 square kilometers of ruins at Bagan.
- Myanmar The largest of the GMS countries, Myanmar with its great history and myriad sites of interest, has the potential for strong tourism development.
- Myanmar is probably the last undiscovered country in Southeast Asia. With a population of around 48 million people and a land-size bigger than France, and a great deal of cultural diversity, it is still very underdeveloped and there is quite a lot of poverty in the country.
- The development of tourism in Burma is directly linked to well documented mass human rights abuses. There are approximately eight million men, women and children as young as eight years old in forced labour each year in Burma. The United Nations International Labour Organisation (ILO) reports that "the military...treat the civilian population as an unlimited pool of forced labourers and servants at their disposal. The practice of forced labour is to encourage private investment in infrastructure development, public sector works and tourism projects.
- Aung San Suu Kyi speaking in January 1999 said: "Guide book writers should listen to their consciences and be honest about their motivations. Profit is clearly their agenda. It's not good enough to suggest that by visiting Burma tourists will understand more. If tourists really wanted to find out what's happening in Burma – it's better if they stay at home and read some of the many human rights reports there are."
- Myanmar is the name which has long been used by its people to describe their homeland which the British called Burma. It is also known as the Golden Land not only for its golden pagodas but for its rich land and the wealth of its agriculture and precious minerals. Geographically, Myanmar is

the largest country in South-East Asian Peninsular sharing borders with Bangladesh, India, China, Laos and Thailand.

- Yangon is the only place that can be considered international. Hotels are of a high standard with good service levels but everything starts to disintegrate very quickly further out. Most of the country is sleepy and agricultural with simple cottage industries; this lifestyle is reflected in the hotels. Banking is a major problem and credit cards are also almost totally impractical outside the capital.
- Much of this country is shut off to foreigners and is lawless. There are rebel insurgencies, vast poppy fields and a huge smuggling network that the government would rather tourists did not stumble upon.

Themes presented (coded from tourism websites, travelogue, and interview)

Myanmar is a vacation destination probably different to any other vacation - holiday destination on this planet. A Myanmar Burma vacation, holiday, is mainly focused on cultural themes like temples, pagodas, monasteries and so on. Slowly Myanmar Burma is emerging also as a vacation - holiday destination for beach vacation, adventure vacation and exploration vacation.

“The last undiscovered country in Southeast Asia.”

“The land of villages, where fewer than one-fourth of the people live in urban areas.”

“ Those who decide to visit will witness one of the last exotic outposts of a rapidly changing world.”

“The inconveniences and the subsequent low volume of tourist arrival make the country one of the most wanted destinations for ones who want to see the really traditional Asia.”

“In this age of mass tourism with loss of local cultures in many a thousand locations worldwide (Asia especially), Myanmar people still maintain some of their traditional cultures.”

“The British colonial era described the mountain areas of Myanmar as ‘tropical Scotland’ as there are variety of flora and fauna according to regional rainfall patterns”.

“Myanmar is also known as the ‘Golden land’ not only for its pagodas but for its rich land and the wealth of its rich land and the wealth of its agriculture and precious minerals.”

“Myanmar hospitality is legendary.”

“It is one of the very few ‘virgin’ places on this planet, above and under the ocean surface.”

“Myanmar presents a dilemma. On the one hand, it has a timeless beauty -- it feels like something out of a dream. It's one of the last remaining places where you can catch a glimpse of Old Asia -- of men and women in traditional *longyis* walking beside golden pagodas and dilapidated colonial buildings as horse carts and vintage taxis ply the streets. On the other hand, the group of generals who rule the country have combined some of the worst aspects of Old Asia with some of the less admirable aspects of their more modernized neighbors. Their contradictory impulses -- to keep the country closed and tightly under

control while desperately attempting to lure foreign investors and travelers -- make for a very unsettling place.”

“There are not too many countries in the world that hold the allure of Burma (Myanmar). Through years of isolation, it has managed to retain its cultural traditions and preserved its historical heritage. A visit to Burma is in many ways a journey back in time, a journey back to an Asia of old.”

Table 7: Topics presented from the review of websites

URL	Topics presented
http://www.burma.azuretravel.com/Myanmar.htm (3-7 days tour)	History Cultural diversity Natural beauty (park, lake) Richest archaeological sites in South-east Asia. Arts
Worldsurface.com	Geography People History Ecology Human rights Health and travel information Travelogue

http://www.voicesforburma.org/VisitBurma/	<p>Issues of human rights</p> <p>Travel advice</p> <p>Tourism situation</p>
http://www.asiahotels.com/hl/Myanmar.asp	<p>Accommodation</p> <p>Attractions/ Main cities</p> <p>Travelogue</p> <p>Weather</p>
http://www.asiatravel.com/	<p>Nationalities of Myanmar</p> <p>Historical and cultural heritage</p> <p>Arts and crafts</p> <p>Scenic beauty</p> <p>Special events</p>
http://www.iexplore.com/ (9 days tour – cultural exploration, 2,999)	<p>Cultural exploration</p> <p>Unsurpassed beauty</p> <p>Buddhist religion</p> <p>Lifestyle</p>
http://www.thavibu.com/	<p>Arts</p> <p>Paintings</p>
http://www.trekthailand.net/myanmar/index.html http://www.asterism.info/tours/index.html (4-9 days tour)	<p>General information</p> <p>Adventure</p> <p>Ecotour</p> <p>Cultural tour</p> <p>National parks</p>
** http://www.traveltomyanmar.com/ (2-15 days tour)	<p>Arts and crafts</p> <p>Culture and tradition</p>

		<ul style="list-style-type: none"> Nature Eco-tourism Attractions Less-known places Festival Travel advice
http://asiatours.net/burma/info/countryinfo.html (1-14 days tour)		<ul style="list-style-type: none"> General information History Weather Travel guide Tours
http://www.lonelyplanet.com/worldguide/destinations/asia/myanmar/		<ul style="list-style-type: none"> Cultural beauty Natural beauty People Situation Travel advice
http://www.allmyanmar.com		<ul style="list-style-type: none"> Attractions Adventure travel People life Music Natural beauty Religion
http://www.Burma\MyanmarTour.htm (18 days tour)	Cultural	<ul style="list-style-type: none"> Cultural tour (Golden Myanmar) Activities

http://www.tomyanmar.com/myanmar.php (3 days tour)	General information Popular destinations (Yangon, Bagan, Mandalay, Inle Lake, others)
http://www.myanmars.net/	General information Main destinations (Yangon, Bagan, Mandalay, Inle Lake) Arts Business Culture History Language
http://travel.yahoo.com	Top cities in Myanmar (Yangon , Bagan , Thandwe , Mandalay , Taunggyi , Meiktila)
http://www.geckosadventures.com/sth_east_asia/ (12-15 days)	General information Attractions Highlights (Inle lake, Bago) Travel advice
http://www.asiatour.com/myanmar/e-01land/em-lan10.htm	General information Travel information The cities: Yangon, Bago, Bagan, Mandalay, Taunggyi, Keng Tung

http://www.taharn.net/y/burma.html	Information about country of Myanmar especially history, politics, and general information
http://myanmartravelinformation.com/	General information Travel agents Travel information/ suggestions Attractions: Yangon, Mandalay, Bagan, Inle, Kyaikhtiyo, Mrauk U, others Arts and culture History Food Money People Music Throne Tourism news
http://news.bbc.co.uk/1/hi/world/asia-pacific/3761022.stm	Articles about Myanmar such as “Dilemma of dealing with Burma”

From the initial research of the interview of thai travel agents and secondary data analysis based on the content analysis, Myanmar's images can be summarized as following:

- *Images from quotations:* The frequently stated images about tourism in Myanmar could be categorized into five clear images. Myanmar is seen as: Old Asia, Land of Pagoda and Temples, Friendly People, filled with Buddhist Atmosphere, and beautiful natural resources. The examples of the

quotations that reflect both positive and negative sides of image are such as:

"Myanmar is probably the last undiscovered country in Southeast Asia. With a population of around 48 million peoples and a land-size bigger than France, and a great deal of cultural diversity, it is still very underdeveloped and there is quite a lot of poverty in the country."

"There are not too many countries in the world that hold the allure of Burma (Myanmar). Through years of isolation, it has managed to retain its cultural traditions and preserved its historical heritage. A visit to Burma is in many ways a journey back in time, a journey back to an Asia of old."

- *Images from the pictures:* the 30 top websites of tourism in Myanmar were reviewed these websites were retrieved from the keyword "tourism Myanmar." The pictures appeared on the first page of these websites were categorized into three clear images which are: Historic Construction, Natural Beauty, and People's ways of life.
- *Images from the review focused on attractions and package tours:* The mostly stated four main attractions which are the official attractions are: Yangon, Bagan, Mandalay, and Taunggyi. Some specific destinations often mentioned are: Shwedagon Pagoda , Chaukhtatkyi Pagoda, Kyaikhtiyo Pagoda (Golden Rock), Inle Lake, Marauku, Beaches (Mawlamyaing, Sethse Beach, Nga Pali Beach, Chaung Tha Beach, Ngwe Saung Beach)

The results of images and themes after the focus group meeting of key informants

After the discussion in the focus group meeting from the key informants, there were several inputs. Eight positioning images were received from the brainstorming process of the focus group. Those images were:

- Unique culture (which represents culture, costume, music, language, literature)
- Fascinating Myanmar (which represents scenery, culture, life style, flora and fauna)
- Enchanting Myanmar (diverse culture)
- Spectrum of scene and sound (motto)
- Myanmar the golden land (Shwe = gold and this image could represent not just gold pagoda but imply to golden heart of people)
- Culturally Golden Myanmar
- Surprise Myanmar
- Friendly Myanmar (culture and ways of life)

Finally, the key informants voted for the image of **“Culturally Golden Myanmar”**. The reason is that tourism of Myanmar is cultural oriented. One of the key informants stated that “people here are considered as friendly people because the influence of Buddhism. Everyday in people’s daily life, they go to the shrine room,” and also “most of Myanmar’s attractions are based on culture.” Therefore, Myanmar should stress the tourism image on “culture” as the first priority. When asking the focus group what Myanmar should be specialized for in ASEAN tourism, the meeting group voted for Culture Tourism and Meditation Tourism.

Themes presented

The researcher proposed three tourism themes to the focus group meeting resulted from the research in the first phase. The themes were historical tourism, Cultural Tourism and Nature-based Tourism. The key informants prioritized the themes into Cultural Tourism, Nature-based Tourism and Historical Tourism. Also, they added the potential themes that are: Ecotourism, Ethnic tourism, Adventure tourism, and Marine tourism.

Fifteen attractions

The focus group meeting were asked to input fifteen main attractions which represent tourism in the country and to be published in ASEAN Tourism Book. From the process of brainstorming, the result of fifteen attractions is:

1. Bagan



2. Mandaley



3. Inle + Pindaya (Combined)



4. Yangon



5. Mrauk-U



6. Bago



7. Sagaing



8. Kyaikhti Yo (Golden Rock)



9. Mingun + Myeik Archipelago



10. Putao



11. Pyinoolwin



12. Ngapali beach



13. Myeik



14. Natma Taung (Mt. Victoria)



15. Kyaing Tong



CONCLUSION AND DISCUSSION

It is confirmed from the research results that Myanmar has attractive unspoiled scenic areas, nature reserves and forests, wealth of historical, archaeological and religious sites, and rich cultural heritage. Therefore the themes of tourism in the country should emphasize on cultural tourism, historical tourism and nature-based tourism. While there are many misperceptions concerning Myanmar that need to be addressed as shown in the SWOT analysis, it is important that a realistic picture is portrayed especially when promoting tourism of the country.

Myanmar's potential to develop as a unique and exotic tourist destination has not gone unrecognized especially from ones who have been in the country. Tourism has been singled out as being of the highest potential for rapid growth. Since Myanmar opened its doors in 1988, effort has been made to make the country a more attractive destination. As an indication of the Government's growing interest and its commitment to developing the tourist sector, a Ministry of Hotels and Tourism (MHT) was created in September 1992. The development of tourism had previously been the responsibility of the Ministry of Planning, Finance and Trade, and when this ministry was split, the Ministry of Trade. The MHT claims to be one of the most active ministries in Myanmar and have important role in tourism development of the country. It is proved from the process of the focus group meeting that the government sector sees tourism as important element of the country presently.

Many countries, however, have adopted a different approach. The opportunity for Myanmar is that the neighbouring ASEAN countries have adopted a "constructive engagement" approach to help Myanmar. Thus, it is of no surprise that the South-East Asian countries are the main source of foreign investment in Myanmar. However, long-term growth in Myanmar will require far-reaching policy reforms to attract loans and aid from international organizations, as well as investments from the developed

countries. However, government has developed some infrastructures to serve tourism in the country within their limited budget.

As for the result, the image that should represent tourism of the country that was voted from the focus group and interview is “Culturally Golden Myanmar”. This should be supported by the process of promotion within and outside the country. Also cultural tourism is the first theme of tourism that should be prioritized when promoting tourism in Myanmar.

This study is also one of the implementations that endeavor to build ASEAN tourism network. As the results and the research process especially the focus group meeting in Myanmar, this networking is considered successful. The continuation of the network is possible as everyone share the same goal that is to develop tourism in ASEAN sustainably and promote tourism of ASEAN internationally.

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APPENDIX I



Dear Distinguished Participant

I would like to express my thank to you for your kind cooperation and willingness to join the focus group meeting on this 27 December 2006 at Dusit Inya Hotel. According to my initial contact, this meeting will be about tourism in Myanmar which will ask for your comment and find agreement in the content of SWOT analysis, themes and images positioning, and attractions in Myanmar. The key participants will be from both government and business sectors as one of the objectives of the project is to build up network among involved stakeholders.

However, the time of the meeting is a limit; therefore I would like to ask for your kind help to read and fill out the following questionnaire before the meeting and further discussion will be upon the comments you have made when we meet. Please kindly bring the filled questionnaire with you on the day of the meeting. I have also attached the sequence of our meeting below for your information.

I am very much appreciated your participation in this meeting and looking forward to meeting you in Myanmar soon.

Best Regards,

Dr. Pimrawee Rocharungsat

**FOCUS GROUP MEETING
ASEAN IMAGE POSITIONING PROJECT
(THE CASE STUDY OF MYANMAR)
SUPPORTED BY THAI RESEARCH FOUNDATION
27 DECEMBER 2006**

9 a.m. – 1.30 p.m.

- 1) Registration of the participants**
- 2) Introduction of the project and introducing the team**
- 3) SWOT analysis presentation and discussion**
- 4) Presentation about the images/ themes**
- 5) Asking the key informants to discuss and comments about images and themes of tourism in Myanmar**
- 6) *Lunch Break***
- 7) Additional brainstorming about the main and possible attractions of the country**
- 8) Conclusion/ Agreement of SWOT, Images and Themes**
- 9) Presenting the souvenir by Dr. Terdchai (Head of the project from TRF)**
- 10) Photo taking of the group – End of the meeting**



Questionnaire: Tourism Image Positioning of The Union of Myanmar

**Please provide your comments on this initial SWOT analysis of
tourism in Myanmar**

<u>Strengths</u>	Agree	Disagree	<u>Reason</u>
Myanmar is blessed with natural scenic beauty			
There are several national parks, wetlands, botanical gardens, and wildlife sanctuaries in Myanmar Myanmar contains more than 2000 km coastline with <u>beautiful beaches</u> .			
Myanmar is one of the largest country in South East Asia with ethnically diverse , It is a nation of many races			
Myanmar has unique and long historical and cultural heritage dates back over 5,000 years			
Myanmar is an enchanting country with a rich history in arts and crafts . Mandalay represents the largest repository of Myanmar arts and crafts.			
Myanmar has well known Mother-Of-pearl Mosaic Painting .			
Myanmar is a land of unsurpassed beauty with the Buddhist religion being the focal point of countless Pagoda's and Buddha images. Buddhism has a great influence on the daily lives of the people. Maintaining close family ties and showing respect to elders are important traditions in the lives of the people.			
Myanmar is popularly known as The Land of Festivals because of festivals that take place all year round . JANUARY On January 4th, Independence Day of the Union of Myanmar is celebrated across the country. The Myanmar Traditional Equestrian Festival or Myin-Khin-Thabin is a national festival which is held annually in Yangon. FEBRUARY Traditionally, this is the month of the Harvest Festival when people rejoice in the feast of Htamane. This is opportunity to sample a delicious Myanmar delicacy consisting of glutinous rice freckle with coconut, sesame			

<p>seeds, peanuts, ginger, and oil, which is specially prepared for the feast.</p> <p>The anniversary of the Union Day falls on February 12. Representatives and cultural troupes of the seven States and seven Divisions of the Union of Myanmar dressed in colorful, traditional costumes gather at venues across the country.</p> <p>MARCH March is the most colorful month of the year as Pagoda Festivals are in full swing. The Shwedagon Pagoda Festival is held on the day of the full moon of Tabaung and is one of the month's biggest events.</p> <p>APRIL Thingyan or the Water Festival is held throughout the country for three days in the month of April. It simultaneously marks the end of the old year and beginning of the new.</p> <p>MAY The Kason Festival of watering the Sacred Banyan Tree symbolizes the birth, enlightenment and death of Buddha. It is an important Buddhist holiday and many processions are held at temple grounds throughout the country.</p> <p>JUNE AND JULY The onset of monsoon season makes June and July relatively quiet months in Myanmar. There are, however, various smaller Buddhist festivals to be enjoyed.</p> <p>AUGUST Taungpyone Nat or Spirit Festival is a popular five day festival held in Taungpyone near Mandalay. According to tradition, Nats are spirits that must be appeased or they will wreak havoc in people's lives. The two Nat Brothers honoured during Taungpyone Nat belong to the 37 well-known Myanmar Nats.</p> <p>SEPTEMBER The famous Phaung-Daw-Oo Pagoda Festival is held at Inle Lake once a year. The procession of the Inle leg-rowers in full pageantry and ceremonial splendour is a sight not to be missed by anyone visiting Myanmar.</p> <p>OCTOBER & NOVEMBER The celebration will be a gloriously festive occasion. The Thadingyut or Light Festival, which ends the Buddhist I Lent, is also one of the most prominent festivals of the year. Another celebration of light is the Tazaungdine festival held in November. Pagodas, houses, buildings, parks, and monuments are all illuminated and there are various kinds of activities for everyone to enjoy. The other</p>			
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<p>important festival outside Yangon is the exotic Elephant Dance held in Kyaukse, a small town not far from Mandalay.</p> <p>DECEMBER The traditional Boat Regatta Festival is held at Kandawgyi Lake to remind the younger generations of the glory, sovereignty, patriotism and national spirit of Myanmar</p>			
There are several websites informing Myanmar's general information and Myanmar's tourism information.			
<p>There were cooperated promotions among ASEAN countries; for example:</p> <ul style="list-style-type: none"> -Establish the Asian Pavilion to promote regional tourism in major trade shows such as Expo 2005 in Osaka and in Qatar during the Asian Games. -Promote intra-regional tourism in Asia. -Develop E-Tourism 			
<p>There were joint marketing campaigns to promote thematic packages which will combine the tourism strengths of each destination into a group to attract specific target segments.</p> <ul style="list-style-type: none"> - Bilateral Cooperation – Joint marketing between two Asian countries e.g. Thailand-Myanmar (Two Countries, One Destination) - Multilateral Cooperation - Greater Mekong Subregion (GMS) including Cambodia, Laos, Myanmar, Thailand, Vietnam and the southern Chinese province of Yunnan – culture, nature, ecotourism and leisure. - Bangladesh, India, Myanmar, Sri Lanka and Thailand Economic Cooperation (BIMST-EC) – Buddhist circuit. - Mekong-Ganga Cooperation including India, Myanmar, Cambodia, Vietnam and Thailand – Buddhist circuit. - Thailand, Myanmar and India – soft adventure, auto adventure, and Buddhist circuit. -Thailand, Myanmar, India, Nepal and Bhutan – Pilgrimage Tourism 			
Golf- The best time for golf tours are from October to May. Yangon and central Myanmar (Mandalay and Bagan) for all year round.			

Adventure tours - especially in the area of Andaman Sea and Himalayas Mountain.			
Shopping -especially handicrafts and gems			
<p>Accessibility- The capital Yangon has direct air links with Bangkok, Chiang Mai, Singapore, Hong Kong, New Delhi, Kuala Lumpur, Japan, Korea, Pakistan, Indonesia, Brunei, Bhutan and Kuming. There are flights to Mandalay from Chiang Mai and Bangkok of Thailand.</p> <p>Overland border crossing with China</p> <ul style="list-style-type: none"> • Muse in northern Shan state with Ruili in Yunan province of southern China. <p>Overland border crossings with Thailand</p> <ul style="list-style-type: none"> • Tachileik in eastern Shan state with Mae Sai in Chiang Rai province of northern Thailand • Myawaddy in Kayin state with Mae Sot in Tak province of Thailand • Kaw Thauung in the southern tip of Thaninthayi division with Rannong of southern Thailand <p>Overland crossings with Laos, India and Bangladesh are currently only for the local people.</p>			
Myanmar has pleasant climate and long tourist seasons .			
Agricultural ways of people's life in Myanmar. This is one of the charm for tourism.			
People in Myanmar have been described as hospitable .			
Many people in Myanmar can speak or at least understand simple English . English is frequently used in dealings with foreign investors.			
Sea Gypsies are locals of Myanmar whose life is related to the sea.			
Myanmar has masterplan for tourism which emphasizes promotion based on natural resources, avoidance of the negative effects of tourism, and diversification of tourism activities.			
Myanmar has tourism law of 1993 which defines the functions and duties of the Ministry of Hotels and Tourism (MHT) and its Directorate. The organization responsible for policy formulation, planning, marketing, facilitation and regulation of the private sector.			
<p>Visit Myanmar Year 1996</p> <p>The Visit Myanmar Year (VMY) 1996 campaign was launched at the first meeting of the Tourist Industry Development Management Committee in May 1994. The main objective is to promote Myanmar as an unusual and original tourist destination and to attract many more visitors.</p>			

<p>Four main regions have been declared as tourist centres, namely, Yangon, Bagan, Mandalay and Taunggyi. There are the specific areas within the regions that the government has singled out as suitable to become priority areas for development.</p> <p>Yangon : Yangon, Htaukkyant, Bago, Tanyin (Syriam/Kyauktan), Twantay</p> <p>Pagan : Nayung 00 and Pagan, Kyaukpadaung, Popa, Meiktila, Thazi</p> <p>Mandalay : Mandalay, Saggaing, Amarapura, In-wa, Mingun, Pyin 00, Monywa</p> <p>Taunggyi : Taunggyi, Nyaung Shwe, Inle Lake, Kalaw, Pindaya</p>			
<p>The development of the country's infrastructure has begun. Existing roads are being upgraded and constructed. But the most visible sign of development is the increase in hotel upgrading and construction.</p>			

Weaknesses	Agree	Disagree	Reason
There is the issue of human rights in relation to tourism.			
According to the United Nations Development Programme's Human Development Report, Myanmar has low level of human development.			
World Bank classified Myanmar as low income country.			
Myanmar's population suffers from generally poor health conditions. These health problems have been aggravated by a shortage of trained medical personnel.			
There is the travel safety warning that there is the constraints imposed on local travel and criticizing the regime.			
Terrorists attack by insurgents have been reported in some parts of Myanmar.			
The infighting between the various ethnic groups.			
The country's workforce lack expertise and exposure to a competitive market environment. There is a need for more training in English and other languages for workers in the Tourism industry.			
Local operators lack the necessary experience and expertise in organizing interesting tour packages, and in overseas promotion and contacts.			

There is an absence of sufficiently qualified hotel, catering and tourism personnel. However, it is expected that this situation will improve. For example, in November 1994, there was an opening of the Myanmar Computer Centre (MCC) Hospitality Professional Career Training Programme. This programme, which is conducted by the MCC in cooperation with the Ministry of Hotels and Tourism and the Baiyoke Hotel Group.			
Cuently produced by cottage industries, souvenirs and handicrafts are of inferior quality and lack variety.			
Limited infrastructure includes: lack of modem vehicles, roads and railways, unreliable power supply, slow and costly installation of telecommunication facilities.			
<p>The country's lack of infrastructure is a serious constraint on the tourism sector. The last 30 years of isolation have deprived Myanmar of modern transport and communication facilities.</p> <ul style="list-style-type: none"> - Need to improve domestic air travel. - Lack of airport facilities. - Suitable public transport is unavailable. - Telecommunication facilities are limited. - Current power supply is insufficient to meet the growing demand. - Lack of international class accommodation 			
Hotel shortage still exist in tourists areas in Myanmar.			
Myanmar is a difficult country to sum up in terms of <u>weather</u> since it has a varied terrain with tropical beaches, lowland plateaus and the shoulders of the Himalayas. Monsoons sweep up the coast from May to October so a generally better time to visit is during the dry season from November to April.			
It is a cash society. The credit card settlements are limited in Myanmar. USD cash is the preferred mode of payment. Some hotels do accept VISA and MASTER cards which will be charged in Singapore dollars plus an additional credit card usage surcharge may apply.			
Lack capital to undertake the necessary programs to develop tourism.			
Travelers to Myanmar can visit only officially designated tourist areas. Permission is needed for treks to remote parts of the country.			

Opportunities	Agree	Disagree	Reason
Myanmar conducted the 'Visit Myanmar Year 1996' to promote tourism in the country. This means government has supported tourism as one of the income to the country.			
National Coalition Government of the Union of Burma : After winning the elections in 1990, the military rulers stopped the democratic parties from taking over the government. The MPs, with support from the Democratic Alliance of Burma, the National Democratic Front, and others, formed the National Coalition Government of the Union of Burma (NCGUB). The NCGUB has led the call for a tripartite dialogue between the ethnic nationalities, the NLD, and the military to resolve national problems. If there is peace in the country, it is the opportunity for tourism to be promoted.			
<p>The "Burmese Way to Socialism" was finally discarded in 1988. SLORC's declaration to move away from central planning to a more "opendoor". As part of the Government's commitment to move away from a centrally planned, to an open-door, market-oriented economy, a Myanmar Tourism Law was enacted in June 1990. The promulgation of this law marked a turning point in Myanmar's tourism industry. It put an end to the State's monopoly on tourism and opened the industry to private investors, both local and foreign.</p> <p>In October 1993, a new Hotel and Tourism Law was proclaimed with the following objectives:</p> <ul style="list-style-type: none"> (1) To ensure a systematic development of the hotel and tourism industry; (2) To enable tourist access to Myanmar's cultural heritage and natural scenic beauty; (3) To prevent destruction and damage of Myanmar's cultural heritage and natural scenic beauty; (4) To contribute to international friendship and understanding through the hotel and tourism industry; (5) To develop technical knowledge relating to the hotel and tourism industry and to create more employment opportunities; (6) To provide security and satisfaction for tourists. 			
<p>Myanmar's foreign investment law was enacted in 1988, the same year that the country abolished its isolation policy. The law benefits to the investor, namely:</p> <ul style="list-style-type: none"> - 100 per cent foreign ownership is permitted: For joint ventures, Myanmar stipulates at least 35 per cent foreign equity, Viet Nam 30 per cent, and Mongolia 20 per cent. In addition, Myanmar requires a minimum investment of US\$ 100,000; - Profits can be repatriated; - There is a guarantee against nationalization and expropriation; - Incentives in tax relief, tax holidays and customs exemptions: Myanmar offers tax holidays of three years, 			

<p>50 per cent tax relief on profits from exports, and exemption from customs duties.</p> <p>Myanmar's top investors are Singapore and Thailand and the main target for foreign investment has been the hotel sector. The group of Asian businessmen has invested in Myanmar Airways International.</p>			
<p>In April 1994, a Tourism Industry Development Management Committee (TillMC) was established to address issues affecting development. Comprising 26 high ranking personnel, the committee aims to develop international tourism in order to increase foreign exchange earnings and raise awareness of the country. The TillMC has 12 subcommittees headed by Ministers and Deputy Ministers of tourism-related ministries, and each is responsible for the implementation of specific development plans.</p>			
<p>The Delhi Declaration on Strengthening Regional economic Cooperation in Asia and the Pacific towards the twenty-first century called on the secretariate to increase its support to the least developed and developing countries in their economic and social development</p>			
<p>The seminar on investment and economic cooperation in the tourism sector of developing Asian countries of the ESCAP region held in Tokyo 1991 recommended that ESCAP undertake studies to promote tourism investment in the areas.</p> <p>The third Ministerial Conference on Subregional Economic Cooperation in Indochina held in Hanoi in 1994 identified the potential of tourism development in the Indochina subregion</p>			
<p>International organizations can also play an important role in providing advisors to assist in establishing training schools and in tourism promotion and marketing abroad (for example, to help Myanmar dispel misperceptions).</p>			
<p>There are forms of international and NGO support such as the group called "Voices for Burma" who seeks to promote the welfare and human rights of all ethnic groups in Burma. (http://www.voicesforburma.org/)</p>			
<p>Due to the strong interest shown by Singaporean investors in Myanmar's tourism industry, the Singapore-Myanmar International Leisure Enterprise (SMILE) was set up by a group of Singaporean companies to act as a coordinating body. SMILE is currently working on a number of proposals including one on ground handling services and another on a limousine service, in addition to a number of hotel projects.</p>			
<p>There are potential and priority areas for foreign participation.</p> <p>There are several areas in which foreign participation can contribute to the development of the economy, and</p>			

specifically to the tourism sector such as hotel development, infrastructure development, tour operations, souvenir industry, and preservation and restoration of monuments.			
In Myanmar, visitor visas have been extended to 28 days and package tour groups can now obtain visas on arrival. Tourists are allowed to enter through several checkpoints along the Chinese and Thai borders.			

Threats	Agree	Disagree	Reason
Uncertainties about socio-economic stability Travelers are often very susceptible to concerns over social unrest and risks to personal safety. Due to these concerns, Myanmar will need to overcome such apprehensions through a far-reaching and aggressive promotion campaign in all its potential tourist markets.			
In practice, foreign investors face much red tape. Policies have changed but not attitudes.			
The economic malaise of the past three decades has fuelled an extensive black market in the country.			
Tourism Boycott: In 1995 Daw Aung San Suu Kyi, speaking in the context of the junta's promotion of 1996 as 'Visit Myanmar Year', argued that it was too soon for visitors to come "pouring in" to Myanmar.			
Many NGOs urge the international community to boycott the country. They argue that revenue from tourism (for example, the mandatory purchase of Foreign Exchange Certificates worth US\$ 200) supports the Government financially, and holidaying in the country could be interpreted as approval of the military regime. Furthermore, forced labor was used to build some of the tourist infrastructure and tourists are kept away from large parts of the country, where repression of minorities is occurring. However, many comments argue that it is increasingly possible to use privately-owned lodging and transport facilities, benefiting the local people. Likewise, economic development could lead to a democratization of the country.			

The followings are examples of images about tourism in Myanmar (taken from travelogue and websites)

Myanmar's most famous asset is the remarkable 42 square kilometers of ruins at Bagan.

*Pagoda and temples are more or less a synonym of Myanmar, “**The Golden Land**” or “**The Land of Pagodas**”.*

Myanmar The largest of the GMS countries, Myanmar with its great history and myriad sites of interest, has the potential for strong tourism development.

Myanmar is probably the last undiscovered country in Southeast Asia.

Myanmar hospitality is legendary

Myanmar has bags of potential but is haunted by the political situation. Many, although not all, democracy activists have implored tourists to keep away.

Please write the most prominent main tourism images in Myanmar from your opinion

1).....

2).....

3).....

Myanmar is suitable for these following tourism themes (please put the number in order of importance)

.....Cultural tourism

.....Historical tourism

.....Adventurous tourism

.....Eco-tourism

.....Natural based tourism

.....Agro-tourism

.....(others, please specify).....

If tourists visit Myanmar, they should not miss visiting these places

- 1).....in
- 2).....in
- 3).....in
- 4).....in
- 5).....in
- 6).....in
- 7).....in
- 8).....in
- 9)..... in
- 10).....in

The unseen attractions in Myanmar that could be developed are:

- 1).....in
 - 2).....in
 - 3).....in
 - 4).....in
 - 5).....in
 - 6).....in
 - 7).....in
 - 8).....in
 - 9).....in
 - 10).....in
-

Additional comments:

I am willing to provide this information to the researcher and willing for it to be presented to the public

(Signature)

APPENDIX II

Pictures of the focus group meeting in Myanmar: 27 December 2006







APPENDIX III

Registration form of the participants

REGISTRATION FORM

FOCUS GROUP MEETING
 ASEAN IMAGE POSITIONING PROJECT
 (THE CASE STUDY OF MYANMAR)
 SUPPORTED BY THAI RESEARCH FOUNDATION
 27 DECEMBER 2006

	NAME	SURNAME	POSITION	ADDRESS/TEL./EMAIL
1	YE MYINT		Deputy General Manager	Myanmar Hotels & Tourism Services Ph 871927
2	Daw Khin Than Win		Asst. General Manager	Myanmar Hotels and Tourism Services Ph: 378376 mth.mht@mptmail.net.mm
3	U Kyaw Soe		Manager	Myanmar Hotels and Tourism Services Ph. 662652 info.mth@mptmail.net.mm

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101 6	Daw Suu Thandee Htwe		Manager	NO. 126 Shwazet, Road Baba Township.
7	Thandee Chaitaung			
110 8	HLA AYE		M.D SHAN YOMA TOURS	124/126, 5 th ST 295510 email. shanyoma@mptmail.net.mm
111 9	Hpone Thant		Secretary Union of Myanmar Travel Association	69/ Shweqovdine Rd Room 609 (5) Baba Twp. Yangon umta@mptmail.net.mm 55-9672-3

	NAME	SURNAME	POSITION	ADDRESS/TEL./EMAIL
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11	U PHYO WAH YAR ZAR		MANAGING DIRECTOR AHN YAR TATAR & T	225, SATYEE PIN, ROAD, THUVUNNA PH: 573400
12	Sau Wla Chit		General Manager SST, Tourism	NW. S. 6. NW of Inyang San Stadium mtr T/S. YCN SST Email: nct-m
13	U Myint Aung သုတေသန		Admin Manager	Myanmar Polestar Travel & Tour #0501, Sakura Tower, 339 Bogyoke Aungmye Road. post-mt@myanmar.com.mm
14	Yim Maenly		A-205	P.O. Box 24222 Traders Hotel, Yagan yimmoe.nyo@shangri-la.com
15	U Tin Htun Aung		Managing Director	THINGAZAR TRAVELS & TOURS thingazar@mpmail.net.mm Tel: +951-543977 Fax/Tel: +951-556665

28. Ma Zin Nyein.

Summit Parkers Hotel.

(141)

	NAME	SURNAME	POSITION	ADDRESS/TEL/EMAIL
16	Thun Thun Soe	leave in the the afternoon		1, Thunthar Road, Sandaung IS, Yangon. thunthunsoe@gmail.com.
17	Sai Khon Saing.			"
18	NAT Ruo mya			Rm (103) Bld. C Nandaun St. Doha Qip.
19	Sa Lwin			Heritage.
20	KHAW-QUIN			MK GEMS Centre 16 Park Road.

21 FRANK

Mavis Restaurant & Bar.

(139)

22 Nyo Hlaing Win

Mavis Restaurant & Bar.

(138)

23 Aye Myin Chan

Manager

la Sane Beauty Spa

(137)

24 KHINE WAT THU

PR MANAGER

MYANMAR MARKETING COMMITTEE
TOURISM PROMOTION BOARD

(136)

(144)

APPENDIX IV

Signed Letter of Agreement



LETTER OF AGREEMENT

The researcher has conducted the research in the topic of **Myanmar Tourism Image Positioning** in Myanmar on 27 December 2006 at Dusit Inya Hotel. This was the process of focus group meeting. The key participants were from both government and business sectors. This is to encourage networking among involved stakeholders. The topics of the meeting were about tourism in Myanmar which asked the comment and find agreement among key participants in the content of SWOT analysis, themes and images positioning, and attractions in Myanmar.

The meeting has successfully finalized with an agreement on SWOT of tourism in Myanmar, clear themes and images of tourism in Myanmar, and recommended and possible tourist attractions in Myanmar. There were totally key participants involved in the meeting and all have agreed on the topic discussed and willing to have the information be presented to the international public. Therefore all participants have signed to confirm the agreement of the content being discussed here in this letter and show their consent to express the results of the meeting to the public.

1. Htay Aung Director General (Ministry of Hotels & Tourism)
2. Chairman CHAIRMAN ()
3. Union of Myanmar Travel Association UNION OF MYANMAR TRAVEL ASSOCIATION ()
4. Myint DGM Myanmar Hotels & Tourism (Ministry of Hotels & Tourism)
5. Secy Secy: Union of Myanmar Travel Association ()
6. Admin Manager Admin Manager / Myanmar Polestar Travels & Tours ()
7. Sa Shad Toua Myanmar ()
8. Khin Jhan Win Myanmar Hotels and Tourism Services ()
9. HE ME KHAYIN Myanmar Travels & Tours ()
10. YE JHAN Dusit Inya Lake Resort ()
11. ()