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Review 2003 and Envisage 2004

Managing Director Daw Su Su Tin, whose office is opened at Sakura Tower, a high-rise office block at downtown Yangon, frankly expressed, "No need to compare us with Thai , which has been involved in tourism many years before we started. If compared to Myanmar, Cambodia is getting developed very fast, though they began to get involved in tourism two years ago. In Myanmar development had not reached that extent. Cambodia got new hotels and new airlines. So they could experience changes daily."

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Tourist Arrivals	
Yangon Entry Point	198435
Mandalay & Bagan Gateways	7175
Border Tourism	391405
Grand Total	597015
Ref: Myanmar Hotels and Tourism	

Total Visitor Arrivals to Cambodia from Jan - Dec was: 701,014	
Phnom Penh	269674
Siem Reap	186298
Land	226474
Boat	18568
Grand Total	701014
Ref: Ministry of Tourism (Cambodia)	

"I am to take part in the coming year's event as well"



Will you also be the official tour operator in the next year?

I am to take part in the coming year as well. I have leased the island where the festival will be held. Other tour companies have not been involved in tourism as long as we have. They don't have their own boats and own staff as well, and no need to place their staff continuously at the island. They are just observing to find out the opportunities.

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"We have to cope with it all the time ..., and we feel indifferent"



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Review 2003 and Envisage 2004

Zayar Ohn
Myint Zaw Aung

We could say the number of tourists who visited Myanmar is less than what it should be compared to available tourist sights in Myanmar. However, the state of Myanmar's tourism industry became more developed in 2003 than it was in 2002, according to the official data of the Myanmar Hotels and Tourism under the Ministry of Hotel & Tourism, and sources from privately owned tourism companies.

SARS and so on

"Although SARS cut down the number of incoming tourists, actually it happened in low season as SARS outbreak happened in late April," explained Daw Thit Thit Zin of Indochina Services. This tourism company with branch offices in Vietnam, Cambodia and Laos also have station offices in Myanmar at Yangon, Mandalay, Bagan, and Nyaung Shwe in Shan State.

U Thet Lwin Toe, Managing Director of Myanmar Voyages International Tourism Co Ltd, commented about the effect of SARS: "Last year SARS badly affected tourism. Should a thousand tourists have booked to visit Myanmar, just a hundred actually come to Myanmar. Tourists said that they would not pay to get infection, and cancelled their trips to Asia they had already planned. And they went to other destinations."

Sometimes westerners are found to be scared off very easily like Asians, said a Spanish-speaking tour guide. Spanish tourists did not dare to visit Asian countries, even after the region was announced free from SARS by WHO, the guide commented.

Over 100,000 more tourists came to Myanmar in 2003 than the number of those visited in 2002, although the country has to cope with SARS and economic sanctions of some Western countries.

Tourist Arrivals		
	2002	2003
Yangon Entry Point	212,468	198,435
Mandalay & Bagan Gateways	4,744	7,175
Border Tourism	270,278	391,405
Grand Total	487,490	597,015

Ref: Myanmar Hotels and Tourism

Leading hotels and motels had full occupancy during the peak season of 2003 as many tourists visited Myanmar. The fact was revealed by hoteliers and tourism companies.

If such disastrous events did not happen, Myanmar's tourism would develop much better. Due to outbreak of SARS and occurrence of Iraq War his hotel alone suffered 20% decrease of tourist arrival as told by the general manager of a hotel.

That is why we can imagine that number of tourists coming to Myanmar would be increased should such unfortunate events had not happened.

Highest number of tourists at border area

Tourists from Asia formed some 60% of tourists visited to Myanmar. Tourists from neighbouring Thailand had been ranked at the top of the Myanmar's tourist list, followed by China (Taiwan) and Japan. It was shown in the official statistical chart of Myanmar.

VISITORS BY NATIONALITIES			
No.	Country	2003	%
NORTH AMERICA			
1	Canada	2,519	1.22
2	America	13,256	6.45
LATIN AMERICA			
WEST EUROPE			
1	Austria	4,756	2.31
2	Bellgium	2,159	1.05
3	France	13,125	6.38
4	Germany	13,341	6.49
5	Italy	6,129	2.98
6	Switzerland	4,258	2.07
7	U.K	7,848	3.82
8	Spain	2,171	1.06
9	Others	4,374	2.13
EAST EUROPE			
1	Russia	551	0.27
2	Others	1,652	0.80
AFRICA			
MIDDLE EAST			
ASIA			
1	H.K	1,667	0.81
2	Japan	18,799	9.14
3	Malaysia	10,003	4.87
4	Singapore	10,373	5.05
5	Thailand	22,214	10.80
6	China	15,564	7.57
7	Taiwan	19,645	9.55
8	Korea	8,399	4.09
9	Bangladesh	1,999	0.97
10	India	6,291	3.06
11	Others	6,438	3.13
OCEANIA			
1	Australia	4,950	2.41
2	New Zealand	771	0.37
3	Others	21	0.01
TOTAL		205,610	100.00

Ref: Myanmar Hotels and Tourism

In 2003, over 100,000 more tourists visited through border checkpoints than the number of those visited in 2002, according to official data.

Yangon Entry Point (including tourist arrivals through border points to)		
Package	78,723	55,469
FIT	55,017	66,772
Business Travellers	37,084	44,151
Entry Visa	9,505	13,140
(Friends & Relatives)		
Others	32,139	18,903
Total	212,468	198,435

Ref: Myanmar Hotels and Tourism

The number of tourists who came through border checkpoints at Thai, ranked top among the tourists reached through Myanmar border. Increasing per capita income and growing interest in Myanmar led to the record number of Thai tourists visiting Myanmar in 2003.

"About half of our guests (tourists) came through the border. The number of such tourists increase yearly," said Daw Thit Thit Zin of Indochina Services. Germans form majority of tourists arranged by Indochina Tour, and more than half of them reached through the border as explained by Daw Thit Thit Zin. The fact revealed that not only people from neighbouring countries came through Myanmar border but also from other remote countries.

Those who visited Myanmar through border do not spend as much as that of tourists came by air according to tourism industry sources. Among those who come through Myanmar border, a considerable number of the visitors are for business purpose, as commented by a tourism company.

Pauk-phaws* and Samurais

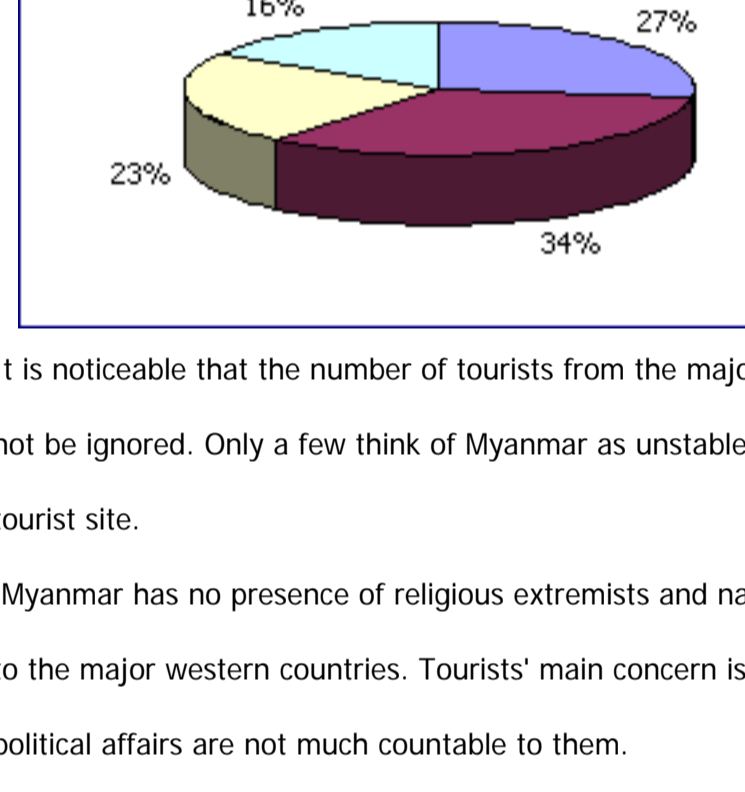
(*Pauk-phaw, literally meaning a person born at the same time. Chinese are commonly referred as Pauk-phaw in Myanmar, affectionately.)

Visitors from China, China (Taiwan) and Hong Kong formed almost a fifth of tourists visited Myanmar during 2003. That shows the interest of neighbouring pauk-phaws in Myanmar's economy and tourism.

Japanese WWII veterans, businessmen and young Japanese visited Myanmar in the last year. Therefore, the number of Japanese tourists stood third out of the tourists to Myanmar. However, most of the Japanese war veterans are in old age and their grandchildren have less interest in Myanmar. That is why the number of Japan tourists to Myanmar become smaller, as told by a Japanese-speaking tour guide from SM Tour Co.

A year ago, before the cancellation of ANA flights to Myanmar, only 20 passengers aboard on a single flight, she also said.

Some Western countries



It is noticeable that the number of tourists from the major western countries, which imposed sanctions on Myanmar, could not be ignored. Only a few think of Myanmar as unstable region and the majority of them think of the country as a safe tourist site.

Myanmar has no presence of religious extremists and national terrorists, like those in the countries which have easy access to the major western countries. Tourists' main concern is to visit wherever they want to go depending on their budgets, so political affairs are not much countable to them.

Economic sanctions affect some multi-national companies to some extent, though; it has few effects on free independent travellers.

Based on the Year 2003

(1) Most of the incoming tourists reached Myanmar via Bangkok. It would be better to have various points of entry rather than one or two location. At present number of tourists from Bangkok and the number of those from other regions are remarkably different.

STATEMENT SHOWING LOAD FACTOR OF AIRLINES FOR THE YEAR 2003					
Sr.	Route	No. of Flights	Seat Capacity	Occupied Seats	Percentage
1	BKK - RGN	1,334	258,370	120,678	46.71
2	CHIANGMAI - RGN	80	4,112	1,659	40.35
3	SINGAPORE - RGN	569	72,884	24,366	33.43
4	HONGKONG - RGN	6	906	389	42.94
5	KUALALUMPUR - RGN	246	36,145	9,700	26.84
6	KUMMING - RGN	102	13,056	6,494	49.74
7	DHAKA - RGN	193	19,406	2,301	11.86
8	CALCUTTA - RGN	106	15,264	3,161	20.71
9	TAIPEI - RGN	171	28,728	18,648	64.91
10	WIENNA - RGN	24	5,856	2,457	41.96
11	KUMMING - MDL	136	6,800	3,670	53.97
12	CHIANGMAI - MDL	52	2,392	1,353	56.56
13	BKK - MDL	58	6,844	1,372	20.05
14	BKK - NYU	24	1,200	257	22.41
15	SPECIAL FLIGHT	165	-	3,312	-
TOTAL		3,266	471,963	199,817	42.34

Ref: Myanmar Hotels and Tourism

The number of incoming tourists to Yangon is considerably more than the tourists whose destination is Mandalay and other regions. So we should try to establish tourists sites at various regions, like in other ASEAN countries, apart from Yangon.

HOTELS/MOTELS/GUEST HOUSES		
Sr.	Place	Numbers Rooms
1	Aungban	2 38
2	Bagan	81 1799
3	Bago	10 251
4	Bhamaw	2 82
5	Chaungtha	13 373
6	Dawei	2 54
7	Hpa-an	3 60
8	kalay	1 40
9	kalaw	18 297
10	Kawthaung	3 291
11	Kyaukse	8 181
12	Kyanlton	10 268
13	Kyaungpataung	1 14
14	Koongyangone	1 30
15	Lashio	5 160
16	Lokaw	1 24
17	Magwe	2 34
18	Mandalay	61 2420
19	Mawlamyine	6 114
20	Meiktila	5 98
21	Mogoke	1 11
22	Monywa	4 91
23	Mrauk-u	5 66
24	Muse	8 335
25	Myawaddy	1 40
26	Mitkyina	8 159
27	Ngapali	6 222
28	Ngwe Saung	17 640
29	Nyaung Shwe	36 724
30	Pakokku	1 6
31	Patheingyi	6 140
32	Pindaya	5 152
33	Pyaw	13 191
34	Pyin Oo Lwin	1 25
35	Pyin Oo Lwin	16 241
36	Sagaing	2 19
37	Shwe Nyaung	1 16
38	Sittwe	6 124
39	Tachileik	11 518
40	Taunggyi	12 395
41	Taungoo	8 110
42	Thazi	3 32
43	Thapaw	3 35
44	Yangon	154 6119
Total	563	17039

Ref: Myanmar Hotels and Tourism

(2) Myanmar should be a major player in regional tourism industry. However at present Myanmar can play just an insignificant role. The fact was remarked by an old-hand tour guide. "The tourists I've met already visited places like Angkor Wat from Cambodia or Borobudur from Indonesia before visiting to Bagan in Myanmar. Actually we are not having lesser number of tourist sites than those countries."

Daw Thit Thit Zin of Indochina Services made an interesting review: "Out of Vietnam, Cambodia, Laos and Myanmar, where we are running branch offices, Myanmar has a highest number of attractive tourist sights. Apart from commonly visited tourists spots, Myitkyina, Mount Victoria, Mindatt (in Chin State) etc. also are significant sights. You may enjoy new scenic views at border areas, as well." She could not sell tickets for a trip to Salon Festival due to limited time schedule. (Salons are a kind of sea gypsy, who lives in Myeik Archipelago, at southern Myanmar.)

(3) There are some language barriers for tourists visiting Myanmar. One Canadian business consultant who has stayed in many Asian countries, noted that he faced much more communication problems due to language barrier in Myanmar, than in most of the countries he had visited. When he asked a local people to know in which direction he got to go, there was no response because of language barrier. He might be going on the wrong route, at any time, he continued to say.

Some people said Myanmar people's English language skill level is not lower than that of other Asian countries. However Myanmar will be lagged behind if she ignores the active English language skill promotions in other countries in the region.

Those countries have economic and social relations with the Westerners.

(4) We can say Myanmar's transport facilities have been improved. Anyhow it still needs further improvements to reach the level of major countries in tourism industry in the region. A Spanish-speaking tour guide, trained in Spain, made this remark.

"Lek-khok-kon is a very nice place, really. We can reach there by a day-return trip from Yangon. We should provide better road and lodging facilities," one English people revealed his opinion, on the wide platform of the Shwedagon Pagoda.

(5) "Chartered flights are available all the time, but you can't materialize a hotel overnight. It takes years to build a quality hotel. It is really difficult to have a hotel room during peak season at Ngapali Beach and Inle Lake," commented Daw Su Su Tin of Exotissimo.

Around 1962 there are only six hotels in Yangon. Now we have a total of 154 hotels, motels and inns according to official statistics. Actually tour operators know if the number of hotels meet the market demand, and if they have the required standard.

Year 2004 in preview

Myanmar tourism has been developed over the past years. "Personally I believe both tourism and hotel industry will have further development. The fact is obvious if the present situation is compared to that of the last 10 or 20 years. If we can keep the pace of current development we will get much developed after a decade," General Manager U Win Myint of Panorama Hotel analyzed. The GM worked for a government department under the Ministry of Hotels & Tourism.

Managing Director Daw Su Su Tin, whose office is opened at Sakura Tower, a high-rise office block at downtown Yangon, frankly expressed, "No need to compare us with Thai, which has been involved in tourism many years before we started. If compared to Myanmar, Cambodia is getting developed very fast, though they began to get involved in tourism two years ago. In Myanmar development had not reached that extent. Cambodia got new hotels and new airlines. So they could experience changes daily."

Cambodia which survived internal conflicts, received 701,014 tourists in 2003. Among them 18,568 arrived by sea route. Myanmar received less volume of tourists than Cambodia's in terms of total number as well as number of tourists reached by sea route.

In Myanmar more tourists arrived in 2003 than in 2002. On the other hand Cambodia received less number of tourists in 2003 compared to the previous year.

During 2003 This top among the visiting tourists to Myanmar. They don't spend much, as remarked by tour companies. But in Cambodia, at the same period, the highest number of tourists in terms of citizens are Japanese, who are rich regionally as well as globally. Moreover much more Koreans visited Cambodia in 2003, compared to Koreans visited Myanmar.

Total visitor Arrivals to Cambodia from Jan-Dec 2003 was: 701,014			
-Air			
Phnom Penh:	269,674		
Siem Reap:	186,298		
-Land	226,474		
-Boat	18,568		

Ref:Ministry of Tourism (Cambodia)

Top 5 Main Market Arrivals from Jan-Dec 2003			
- Japan	88,401		
- USA	66,123		
- Korea	62,271		
- United Kingdom	50,266		
- France	45,396		

Ref:Ministry of Tourism (Cambodia)

Total Visitor Arrivals to Cambodia from Jan-Dec 2002-2003					
	2002	%Share	2003	%Share	%Change
Air					
Phnom Penh.	320,187	40.71%	269,674	38.47%	-15.78%
Siem Reap	202,791	25.78%	186,298	26.58%	-8.13%
Land & Boat	263,546	33.51%	245,042	34.96%	-7.02%
Total	786,546	100.00%	701,014	100.00%	-8.78%

Ref:Ministry of Tourism (Cambodia)

International Visitor Arrivals to Cambodia by Quarter 2002-2003			
Year	2002	2003	%Change
1 st Quarter	210,714	208,832	-0.89%
2 nd Quarter	164,636	103,116	-37.37%
3 rd Quarter	173,820	158,418	-8.86%
4 th Quarter	237,554	230,648	-2.83%
Total	786,546	701,014	-8.78%

Ref:Ministry of Tourism (Cambodia)

According to the tour guides Myanmar received Spanish visitors only in the rainy season, though Cambodia used to receive almost the same volume of tourists throughout a year.

Myanmar which has a wide variety of tourist sites including eco-tourism sites can reach the level of Cambodia in the near future, should she make appropriate restaging in time. However she still need much more time to be abreast with Thailand.

For this Year 2004 state of tourism in Myanmar will remain as usual, as envisaged by sources from Myanmar tourism industry.

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Trans: Lutha Kyaw



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"I am to take part in the coming year's event as well"

Zayar Ohn

Photo:Myint Zaw Aung

The Salon Festival was held in Thaninthayi Division on 14-17 February 2004 to promote Myanmar tourism. Follows excerpts from my interview with Dr Phon Win, Managing Director, Shambhala Tours, who organize the festival, at his office at Yangon.



Did you have all rights related to Salon (sea gypsies) Festival?

For the festival recently concluded, we had made more advice than others. Consequently we could provide all necessary information. Then all companies (who took part starting from the initial discussions) offered me to organize the festival and I accepted to do so. Anyhow I didn't have all the rights but I became the sole tour operator for this festival. Everybody can make sales, but others had to pay the sales proceeds to us. Actually the Ministry of Hotels & Tourism and the Coastal Region Command were the organizers.

How many visitors were there?

There were altogether 270 visitors, some of them came by their own arrangements and others came by ours.

We heard that tour companies from Thai could make more money than their local counterparts. Is it true?

Thai side is the most convenient access to the festival site. So it was profitable for Thai tour agents, but I think it gave us - Myanmar companies - a good experience, as we could held the festival at a remote locality. Previously only those foreign companies based at Phuket have access to that area.

Did you receive the expected number of visitors?

Before the opening of the festival we expected that just 50 to 150 tourists might come. Actually I myself could organize over 80 visitors.

How long it has been since beginning of Thai tour companies to send tourists to the place of Salon people?

It was in 1997. They monopolize to organize this tour programme. They drive others to accept the perception: nobody can bring tourists to this area.

Who got to pay more for a visit to the festival - those who bought from Thai tour companies or those from Myanmar companies?

Our price will be higher and we provide better service and facilities. Those who came via Phuket by small boats were entitled only to reach the island.

Do you have necessary infrastructure on the island?

It's not enough. We are to develop it. How can we start? We got to begin with adventure tourism. We are going to build bungalows in accordance with Myanmar culture. More over we need more boats and jetties. We need to do so many things.

Have you heard anything about the news saying that a boat capsized on the return trip from Salon Island?

I was asked about it. My response is: "All of us including visitors and my employees amounting to some 100. None of them know about it." I think that must be a wrong information. I am quite sure such incidence didn't happen in the area covering a 20-mile radius from the island.

Will the Salon Festival be held yearly?

Yes, yearly. Coming year it will take place on the Salon island.

How about their lives when the festival was not in session?

The difference is that senior officials visited here during the festival days and there will also be an entertainment programme. And Salons will gather at the festival site, but they will be spread out in small groups in their daily life. Anyhow we can manage to show them around in the area. Our Prime Minister asked us to arrange tour groups visiting around the area during the festival period as well as after the completion of the festival.

Do Salons like the presence of visitors?

Frankly speaking half of the populace like it and another half is in doubt. Men always have different opinions, isn't it?

Will you also be the official tour operator in the next year?

I am to take part in the coming year as well. I have leased the island where the festival will be held. Other tour companies have not been involved in tourism as long as we have. They don't have their own boats and own staff as well, and no need to place their staff continuously at the island. They are just observing to find out the opportunities.

Have Thais invested in those Salon islands?

Foreigners have put up proposals, but our government hasn't accepted involvement of foreigners yet. Myanmar national entrepreneurs will be given priority. Now there are three group of national entrepreneurs working there including us.

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"We have to cope with it all the time ..., and we feel indifferent"

Zayar Ohn

To make a review on Myanmar's tourism I have met U Khin Maung Latt, Director General, Directorate of Hotels and Tourism, Ministry of Hotels and Tourism. Follows the excerpts from our interview, kindly granted by the DG although he's working to a tight schedule.

Did you receive the record number of tourists last year?

We could break the record in 2003 as we calculated the number of tourists visited through border checkpoints.

Which nationality belongs to the largest portion of tourists at border area?

Thais at the Thai border, but citizens of third party countries visited as well. Number of Chinese tourists is more than that of other tourists at the Chinese border area.

Could you say Myanmar received the lowest number of tourists among the ASEAN countries?

We couldn't be at the lowest in 2003. Previously we did not calculate the number of tourists reached through border, but calculate mainly on tourists arrived at Yangon. Laos used to calculate the number of tourists arrived through border area. In 2003 we calculated all in-coming tourists and we no longer be ranked at the lowest.

Is there any other country with the number of tourists received lower than that of Myanmar?

Probably Laos.

To what extent tourism could contribute towards the country's GDP?

Towards GDP our contribution is very small.

Is there any increase in number of tourism companies, in 2003?

An increase of just a small number of tourism companies, just two-digit figure. Even now we have a total of just over 500.

Did you have any complaints from tourism companies?

Not many. And they suggested to relax restriction on visa, and complained about inaccurate flight schedule and insufficient car transport facility.

Could you issue visa-on-arrival?

Not a genuine visa-on-arrival. Anyhow, we have arrangements to facilitate the issue of visa. One can email or fax its bio-data. Then we will try our best to issue visa. We will accept if that one is not in a blacklist here.

Do you have more application of that kind than those of normal application?

Some people don't know they can do like that. Those who know faxed to us saying that they live far from the location of embassy and asked to help them.

Is there any tourist arrived with an e-visa?

I couldn't tell.

Do we have enough hotels in Myanmar?

So far, we have enough. We have built targeting to accommodate some 500,000 visitors. Some of the tourists, who came through border checkpoints, are day return visitors. As we have enough hotels, those prospective hotel developers are observing the market. For instance, Traders Hotel is to build another at the adjacent land plot. However, they still have vacant rooms and they are not going to build new one, at present. When the occupancy rate becomes 80%, they will proceed to build.

Is there any chance to see new hotels in 2004?

Of course there is. When I visited Mandalay, I saw five new hotels under construction. They are high standard hotels as well.

Is it possible to complete in time, if you start to build hotels only when you receive many more tourists?

A big volume of visitors will not come together within one or two days' time. At any time, the tourist growth rate occurs on a regular basis. We can manage up to the growth rate of 50%, so we are not going to face any problem. Now we have just 40% occupancy rate, at the most.

Do you have any tourist sight that you haven't run yet, due to transport problem?

Every corner of Myanmar is nice to pay a visit, but difficult to reach there.

Can we say we have shortcomings in air transport?

When we could have realized the growth of tourists, the first thing we have to face is transport problem. Not just air transport, we may not have enough facility in road transport as well.

What is the difference between Myanmar and other ASEAN countries in promoting tourism?

Tourism in some ASEAN countries are much developed. They have overseas branch offices. It needs cash to promote tourism. For instance, Malaysian tourism regularly place TV commercials on CNN. It costs US\$ 20,000 per week, and we can't afford to spend that much.

If we can afford will they allow to place our adverts?

They will place ours if we pay. The media is not under any influence.

Is there any effect on tourism due to economic sanctions on Myanmar in 2003?

Economic sanctions did not start in 2003 in our tourism sector. Actually, it began to happen in 1996-Visit Myanmar Year. We have to cope with it all the time since then, and we feel indifferent to it. We are to develop tourism though we have such a tough time.

How do you make arrangements for international credit-card holders?

Private companies will find out their own solutions concerning this matter. The State will not intervene.

Tourists' average duration of stay in Myanmar is not short, isn't it?

On average, they stay seven and a half days. At Bagan they spend one or two days. Moreover, they stay as long as they enjoy at beaches.

Is there any influx of tourists at Indian border apart from Thai and Chinese borders?

At Indian border, there are trade activities mostly.

How many more tourists do you expect to receive in 2004?

Personally, I expect that the growth rate may be 10% to 15%, at least, should any other undesirable events do not happen.

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