



NTO's MEDIA BRIEFING

Tourism in Myanmar

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Myanmar Tourism Board

Thailand Travel Mart 2012
Bangkok, Thailand
7th June 2012



Overview

- Introduction
- Product Offerings/Selling points
- Positioning in Tourism
- Service Suppliers
- Tourism Promotion

TOURISM TIMELINE

- 1992: Government first promotes tourism
- Mid-1990s: First increase in tourism with more DMCs being established
- 2000-2004: steady increase in tourism despite calls for boycott
- 2005-6 season the best on record



TOURISM TIMELINE



- 2007: Saffron revolution
- 2008: Cyclone Nargis hits causing extensive damage
- 2009-2010: Tourism numbers slowly begin to increase
- 2011: International arrivals reach their highest level
- 2012: By-elections put Aung San Su Kyi into Parliament

RECENT TOURISM HISTORY



- 2011 saw a dramatic, unprecedented increase in tourism
- Highest tourist numbers ever- Almost double 2003 numbers
- The industry has reached 320 Million USD in revenue
- 66% of arrivals in 2011 were from Asia

RECENT TOURISM HISTORY

- Hotel development was stagnant
- 2012 forecasts show a further 30% predicted increase in arrivals
- Prices continue to climb, supply continues to grow at a much slower rate

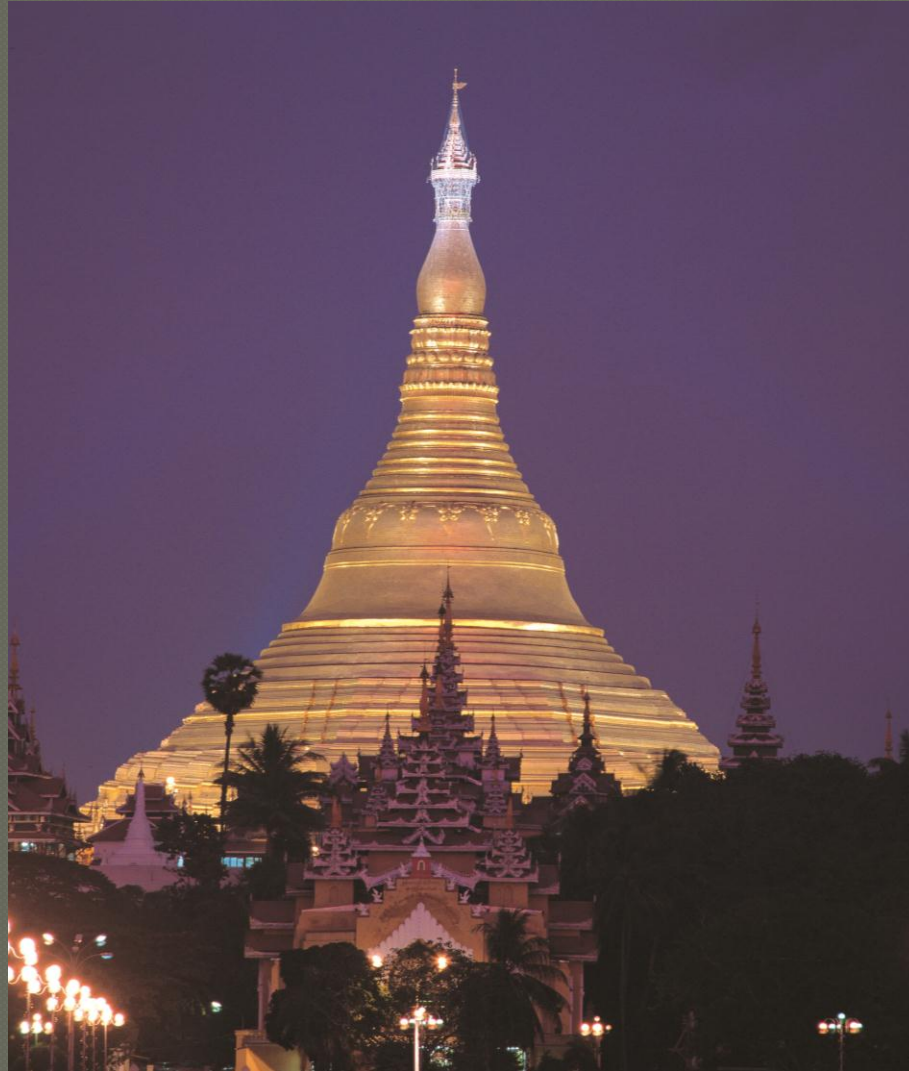
Tourists are coming,
perceptions have changed....
How can we seize this
opportunity?



PRODUCT OFFERINGS

- ◉ Key destinations
- ◉ Cultural interests
- ◉ Festivals & Events
- ◉ Niche Tour options

KEY DESTINATIONS - YANGON

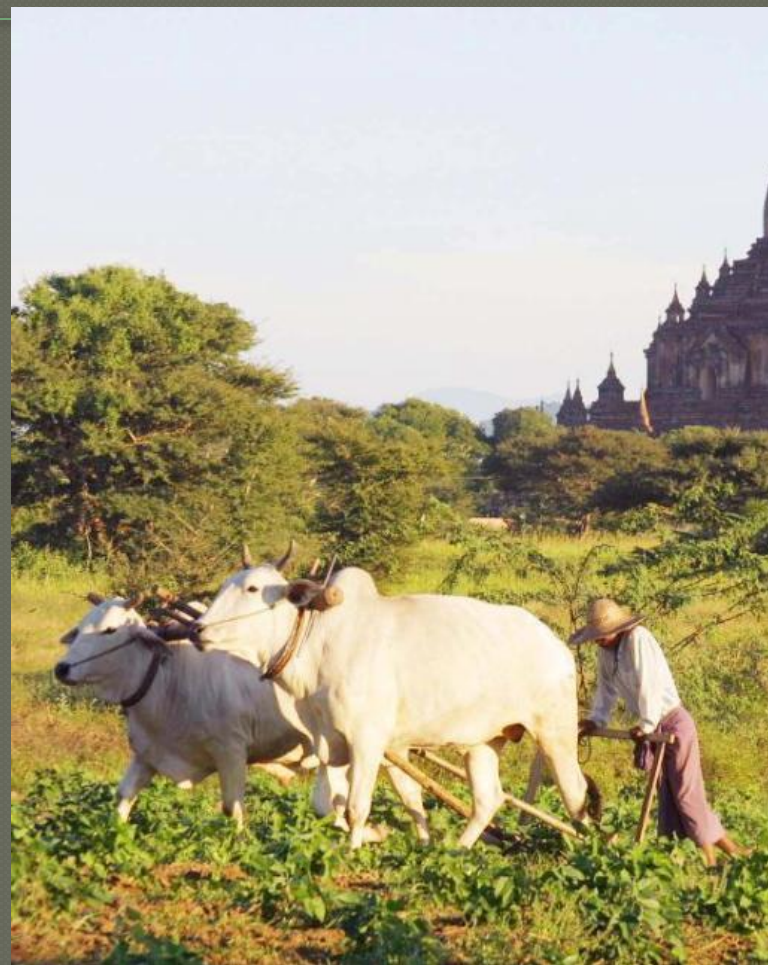






KEY DESTINATIONS - BAGAN







KEY DESTINATIONS - MANDALAY







KEY DESTINATIONS – INLE LAKE









THEMES/NICHE PRODUCTS

- CULINARY & CULTURE
- SPIRITUAL
- ARCHITECTURE
- LUXURY
- SOFT ADVENTURE
- FAMILY



POSITIONING IN TOURISM

- ◉ Arrival statistics
- ◉ Analysis & Predictions

ARRIVAL STATISTICS

	2003	2004	2005	2006	2007	2008	2009	2010	2011
Yangon Entry Point	198435	236370	227300	257594	242535	187766	234417	297246	364743
Mandalay & Bagan Gateways	7175	5568	4918	5920	5541	5553	8861	13442	20912
Naypyitaw Gateway									5521
Border Tourism	391405	414972	427988	366547	468358	537911	519269	480817	425193
Total	597015	656910	660206	630061	716434	731230	762547	791505	816369

VISITORS BY NATIONALITY

(REGIONAL)

No.	Nationality	2008	2009	2010 up to September	2011	%
	ASIA	12005	161133	148810	259692	66.39
1.	CHINA	1105	36341	32912	62018	15.85
2.	THAILAND	3129	43254	39178	61696	15.77
3.	MALAYSIA	1131	9668	11128	23287	5.95
4.	KOREA	69	12508	13214	22524	5.76
5.	JAPAN	661	13809	11995	21321	5.45
6.	TAIWAN	872	12276	10845	15542	3.97
7.	SINGAPORE	3129	10712	8345	15391	3.93
8.	INDIA	818	8609	7507	12318	3.15
9.	HONGKONG	1208	2747	2180	3820	0.98
10.	BANGLADESH	524	1212	1072	1988	0.51
11.	OTHERS		9997	10434	19787	5.06

VISITORS BY NATIONALITY (EUROPE & UK)

No.	Nationality	2008	2009	2010 up to September	2011	%
	WEST EUROPE	4577	48527	37982	80895	20.68
1.	FRANCE	883	10458	8608	19414	4.96
2.	GERMANY	1212	9608	6451	14006	3.58
3.	UK	495	6171	5023	11056	2.83
4.	ITALY	619	5975	4886	9710	2.48
5.	SPAIN	232	4481	3889	6659	1.70
6.	SWITZERLAND	332	3229	2342	5545	1.42
7.	BELGIUM	157	1848	1280	3376	0.86
8.	AUSTRIA	155	1447	1077	1964	0.50
9.	OTHERS	492	5310	4426	9165	2.34

VISITORS BY NATIONALITY

(OTHERS)

No.	Nationality	2008	2009	2010 up to September	2011	%
	NORTH AMERICA	1733	17440	13231	25365	6.48
1.	AMERICA	1455	15053	11568	21680	5.54
2.	CANADA	278	2387	1663	3685	0.94
	OCEANIA	956	8005	5682	11622	2.97
1.	AUSTRALIA	862	7163	4963	10415	2.66
2.	NEWZEALAND	94	830	713	1188	0.30
3.	OTHERS		12	6	19	0.01
	EAST EUROPE	434	4623	3507	7622	1.95
1.	RUSSIA	206	2070	1616	3496	0.89
2.	OTHERS	228	2553	1891	4126	1.05
	MIDDLE EAST	97	1564	1574	2607	0.67
	OTHER	119	1222	1100	2380	0.61
	AFRICA	64	764	615	993	0.25
	TOTAL	19985	243278	212501	391176	100.00

TOURISM INCOME

Year	2006	2007	2008	2009	2010	2011
	(US\$)	(US\$)	(US\$)	(US\$)	(US\$)	(US\$)
Total Earnings	164M	182M	165M	196M	254M	319M
Average Expenditure Per Person Per Day	94	98	95	95	102	120
Average Length of Stay	7.0	7.5	9.0	8.5	8.0	8.0

2012: ARRIVALS JAN - APRIL

MONTH	2011 TOTAL ARRIVALS	2012 TOTAL ARRIVALS	DIFFERENCE
JAN	35,965	48,243	+ 34 %
FEB	35,529	50,243	+41%
MARCH	35,301	46,394	+31 %
APRIL	22,115	31,050	+40%
TOTAL	128,910	175,930	+ 36%

ANALYSIS

- Year on year increase in arrivals of 15% in 2010-11 season despite a serious economic crisis in the west
- Already seeing 30-40% increase for 2012
- Average Daily spending up 18%
- Majority of tourists are from China and Southeast Asia
- 90% increase in arrivals from China in 2011
- 95% of visitors are 21 years and older- not the young backpacker crowd

SERVICE SUPPLIERS

- ◉ Licensed Tour Companies
- ◉ Licensed Transport
- ◉ Licensed Guides
- ◉ Hotels & FDI Hotels
- ◉ International flights

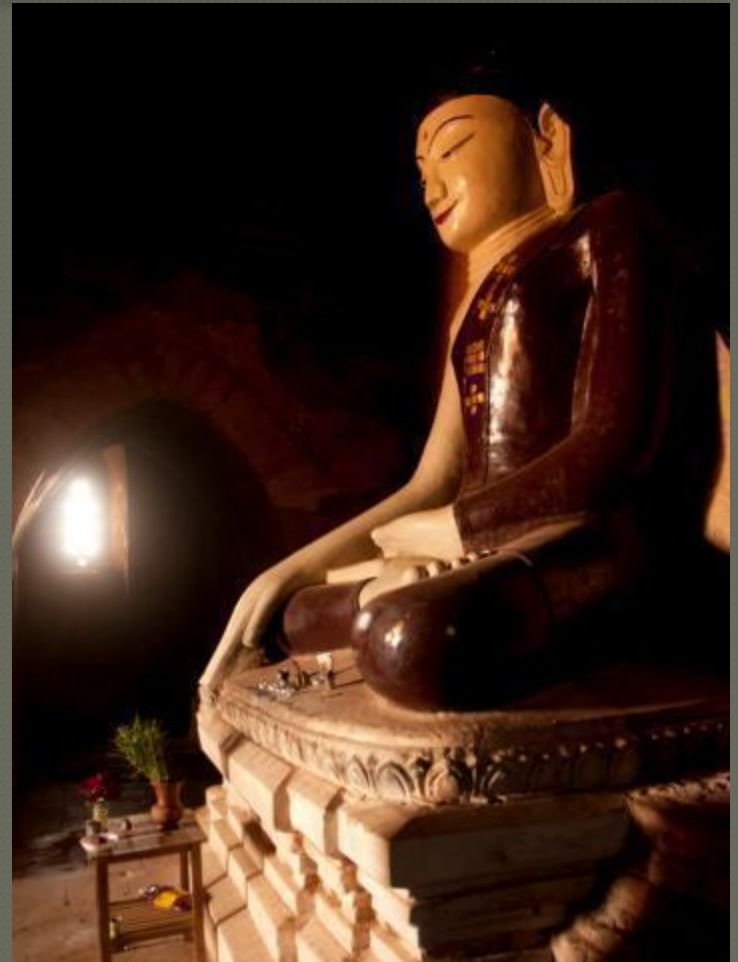
LICENSED TOUR COMPANIES

FOREIGN COMPANIES: 1

JOINT VENTURES: 15

LOCAL COMPANIES: 743

TOTAL: 759



LICENSED TRANSPORTATION



COACH (26-50 seater): 63

MINI BUS (13-25 seater): 27

HI ACE/TOWNACE (5-12): 13

SALOON/VAN (4 seater): 19

MOTORBOAT: 12

BOAT: 17

YACHT: 26

HOT AIR BALLOON: 1

TOTAL: 178

LICENSED TOUR GUIDES

ENGLISH: 1931

JAPANESE: 343

FRENCH: 231

GERMAN: 219

CHINESE: 125

THAI: 106

SPANISH: 106

RUSSIAN: 35

ITALIAN: 43

KOREAN: 21

TOTAL: 3160



LICENSED HOTELS, MOTELS & GUESTHOUSES



LESS THAN 30 ROOMS

439 Properties

7161 Total rooms

BETWEEN 30-50 ROOMS

159 Properties

6754 Total Rooms

BETWEEN 51-100 ROOMS

84 Properties

8573 Total rooms

ABOVE 100 ROOMS

9 Properties

996 Total Rooms

TOTALS: 691 Properties

23,454 Rooms

FOREIGN INVESTMENT IN HOTELS

PROJECTS	ROOMS	INVESTMENT USD (in Millions)	REMARKS
31	5145	855,919	Completed
5	1415	288,500	Under Construction
TOTAL	6560	1,144,419	

FOREIGN INVESTMENT IN HOTELS

COUNTRY	NUMBER OF PROPERTIES	INVESTMENT USD (in Millions)
SINGAPORE	12	597,756
THAILAND	11	263,250
JAPAN	6	183,013
HONG KONG	4	77,000
MALAYSIA	2	20,000
BRITISH	1	3,400
TOTALS	36	1,144,419

FOREIGN INVESTMENT HOTELS (UNDER CONSTRUCTION)

Hotel Name/Country	Rooms	INVESTMENT IN MILLIONS
Rose Garden/Hong Kong	315	42
Shangri La/Singapore	700 + Commercial	100
Traders Square/Singapore	Commercial	128
*St Luke's/Thailand	30 Bungalows	3.5
Pearl Laguna/Thailand	100	15
Centre Point Towers/Thailand	270	
TOTALS	1415	288.5

INTERNATIONAL FLIGHTS

Sr No	From	No. of Flight	Seat Capacity	Occupied Seat			Occupancy %
				Foreigner	Myanmar	Total	
1	Bangkok-Yangon	219	444093	173485	106913	280398	63.14
2	Singapore-Yangon	1227	181314	36700	98866	135566	74.77
3	Kuala Lumpur-Yangon	776	119982	24209	45152	69361	57.81
4	Kunming-Yangon	590	51886	19426	6764	26190	50.48
5	Taipei-Yangon	154	24332	14963	4367	19330	79.44
6	Guang Zhou-Yangon	105	12600	4783	2863	7646	60.68
7	Calcutta-Yangon	52	7488	1265	3126	4391	58.64
8	Gaya-Yangon	57	8558	387	5438	5825	68.06
9	Nanning-Yangon	14	630	253	25	278	44.13
10	Hanoi-Yangon	178	15837	7519	1184	8703	54.95
11	Hochimin-Yangon	20	3000	1244	221	1465	48.83
12	Chiang Mai-Yangon	103	8667	3116	2188	5304	61.20
13	Kunming-Mandalay	479	23950	13352	2318	15670	65.43
	TOTAL	5974	902337	300702	279425	580127	64.29

TOURISM PROMOTION

- ◉ 2011- Activities in Country
- ◉ 2011- Promotion overseas
- ◉ 2011- Recent Developments
- ◉ 2012- Future Plans

2011: ACTIVITIES IN COUNTRY

- ESTABLISHED: Myanmar Tourism Board
- UPGRADED: Infrastructure of tourist facilities
- ENHANCED: Tourism personnel through workshops and training
- HOSTED: Symposium on Travel Leaders' Sustainable Tourism Development
- LAUNCHED: PATA Myanmar Chapter in Nov 2011
- APPLIED: for e-visa entrance system

2011: ACTIVITIES OVERSEAS

- ASEAN TOURISM FORUM (PHNOM PENH) 2011
- WORLD TRAVEL MART (LONDON)
- INTERNATIONAL TOURISM BORSE (BERLIN)
- INTERNATIONAL TOURISM BORSE ASIA (SINGAPORE)
- INTERNATIONAL TRAVEL EXPO (HO CHI MINH)
- MEKONG TOURISM FORUM (PAKSE, LAOS)
- ASIA WORKSHOP 2011 (SWITZERLAND)

RECENT DEVELOPMENTS

- Resuming of authorized money changers and possible return to the international banking
- Yangon-Mandalay Expressway
- Old car buy back program = newer vehicles arriving
- Improvements in telecom for travelers (20 USD sim cards)
- Introduction of E-Visa
- More international airlines flying into Myanmar

FUTURE PLANS

- **DEVELOP:** Hotel Zones in main tourist destinations
- **INCREASE:** Awareness of Myanmar as a year-round destination
- **ENHANCE:** Cooperation within regional organizations
- **ENCOURAGE:** Development of national and international investment in the industry
- **CREATE:** Awareness of best practices in line with the development of tourism

FUTURE PLANS

- RESPONSIBLE : to manage growth in responsible way
- CONSERVATION :of identity and culture
- PROTECTION :of Environment DEVELOPMENT: of local community
- TRAINNING :Professional training of a skilled workforce
- TOURISM PLANNING :short term, long term strategic plan for the future



Thank You
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