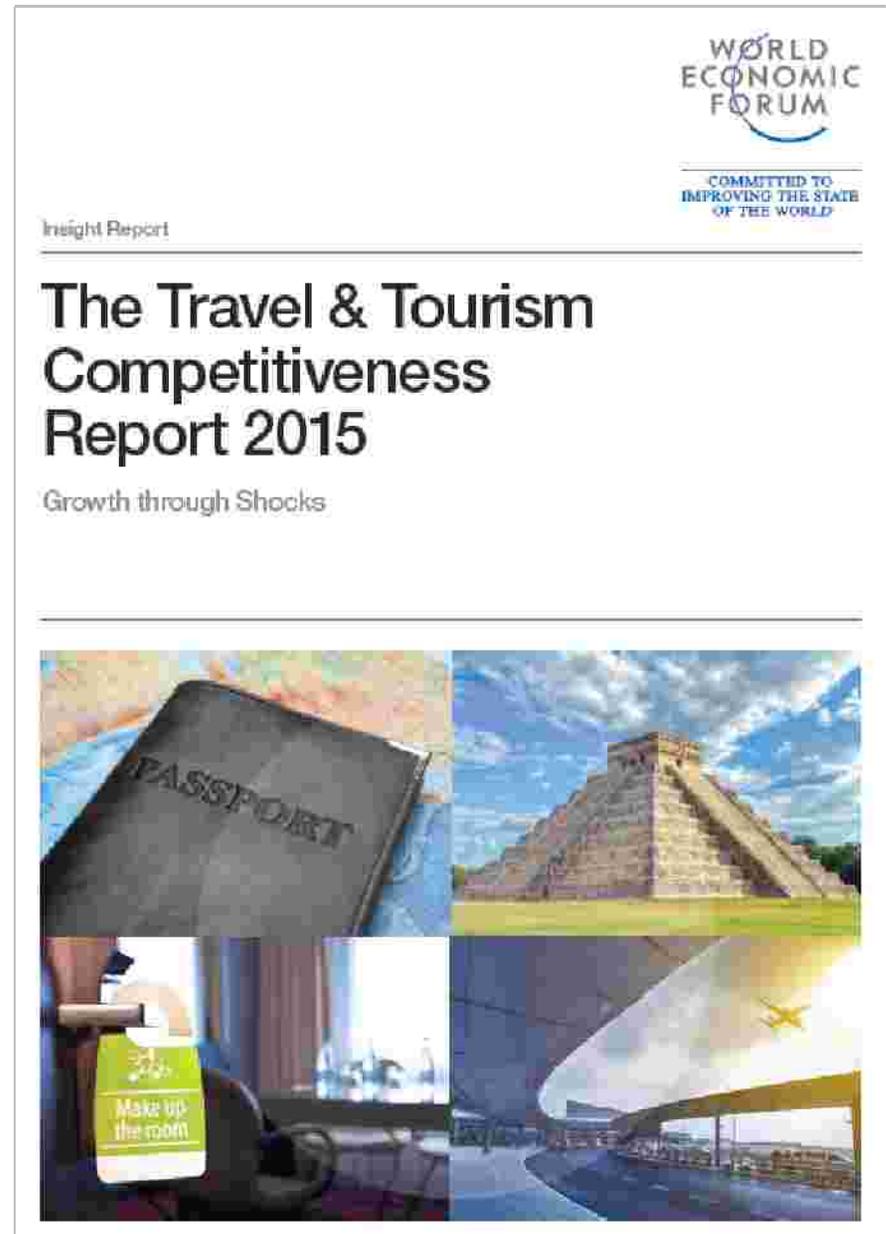


How does Myanmar's tourism sector compare internationally?

Uwe Sturmann
Senior Tourism Advisor, PEM Consult
German International Cooperation (GIZ)



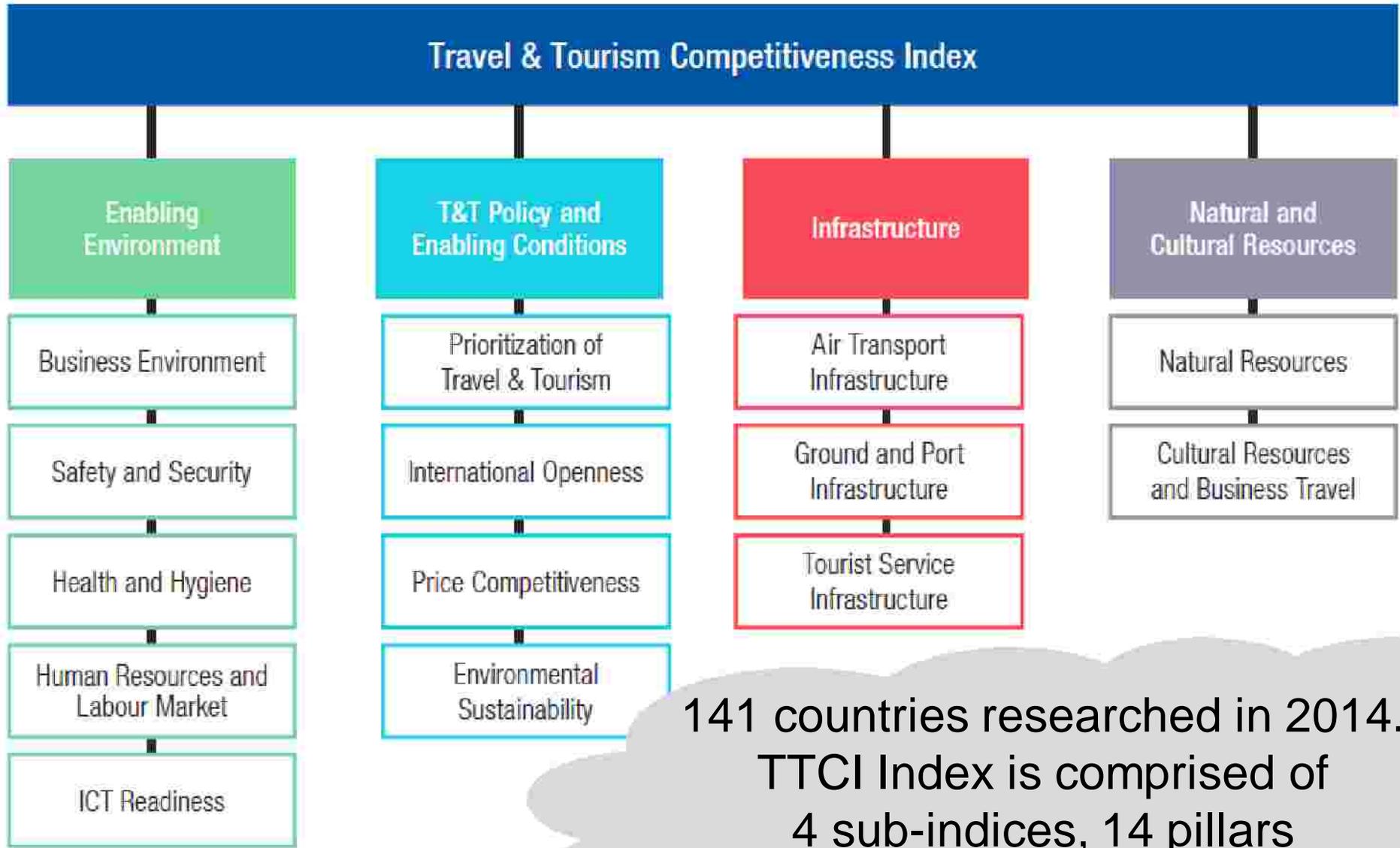
Competitiveness

The ability to capture markets

Tourism Competitiveness

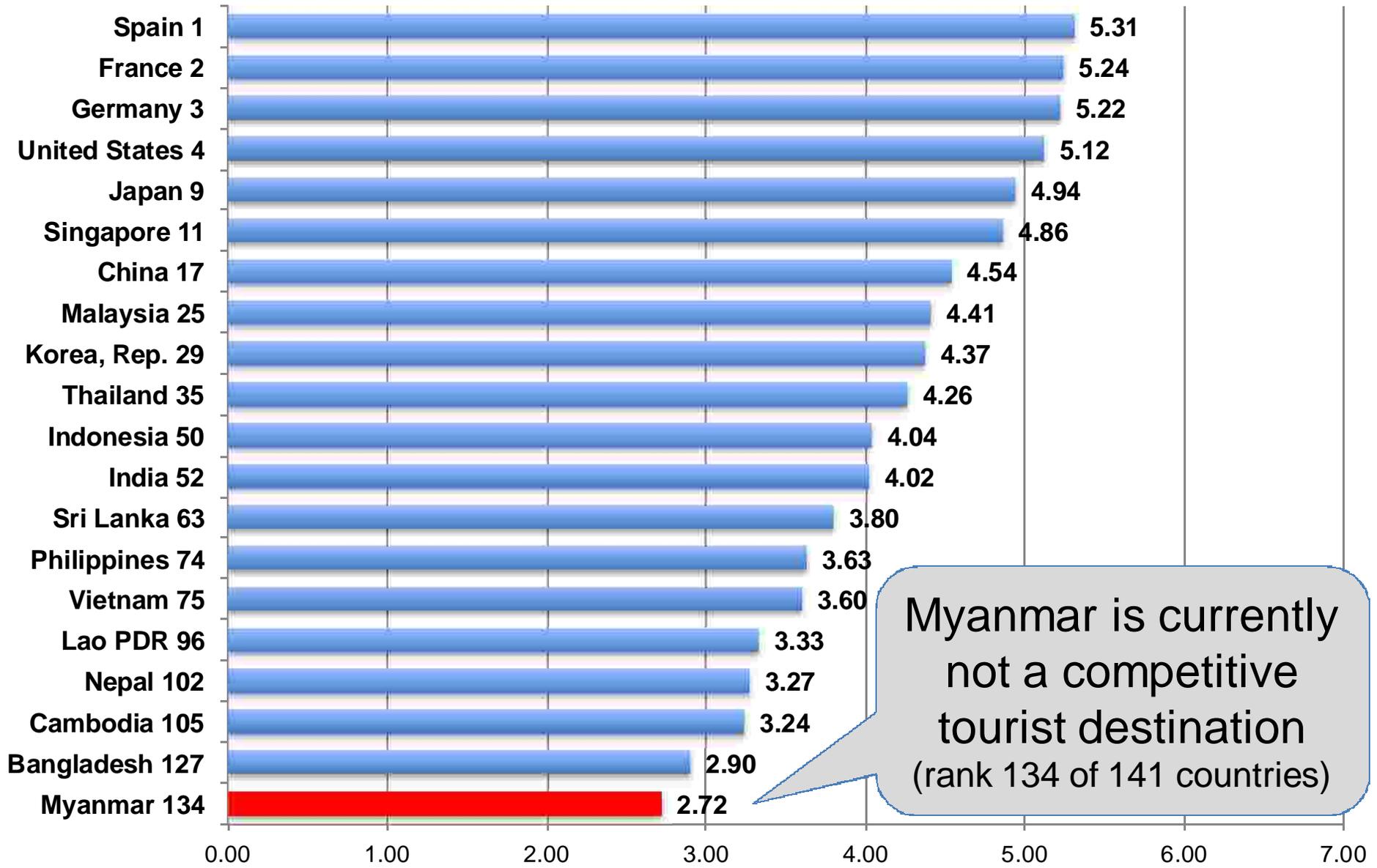
- § The ability of tourist destinations to attract domestic and international visitors in comparison to other destinations (local, national or international).
- § It includes factors and policies that enable the sustainable development of the tourism sector.
- § Tourism competitiveness depends on the seamless interaction of all tourism stakeholders to provide the best visitor experience.

WEF Travel & Tourism Competitiveness Index 2015

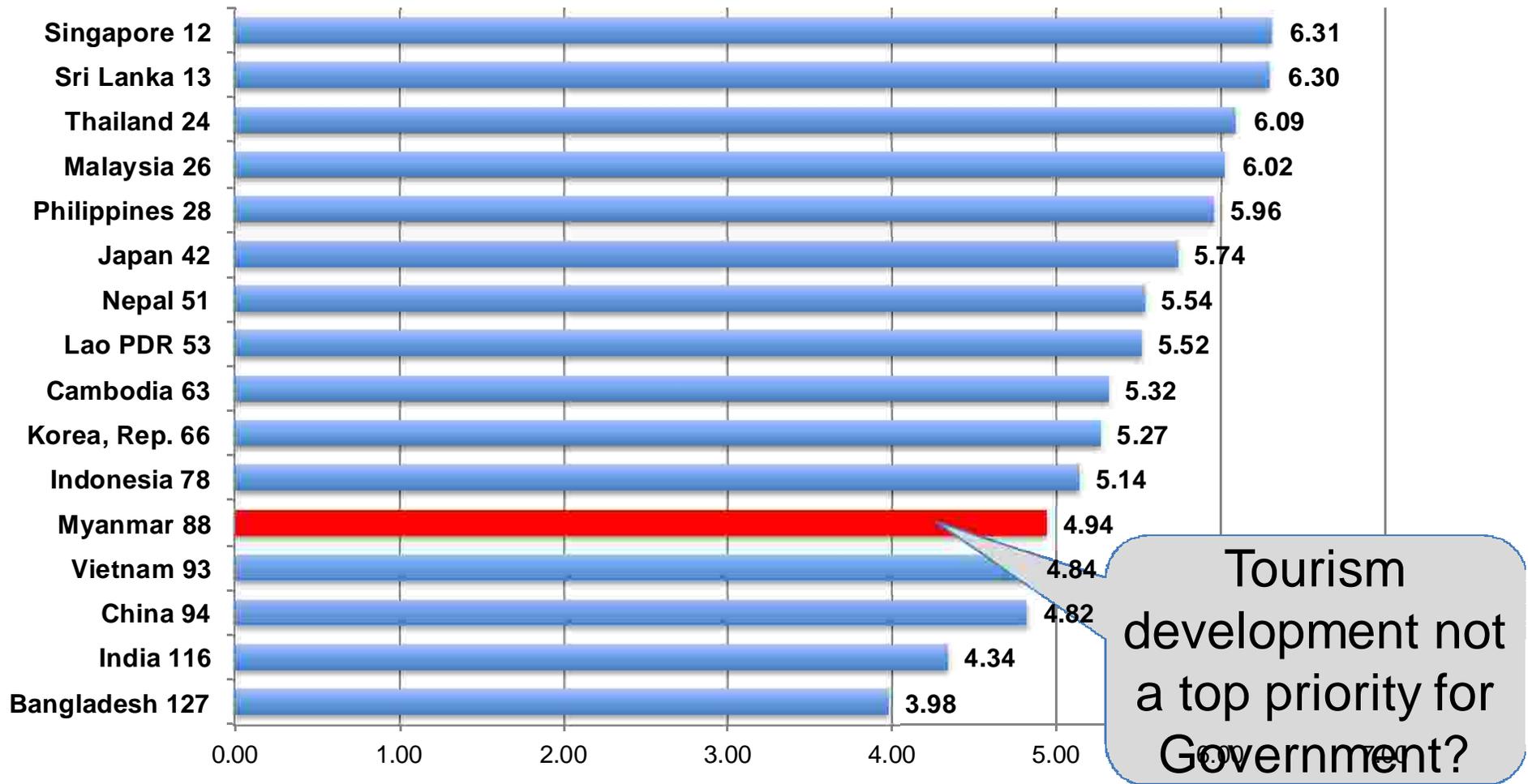


141 countries researched in 2014.
TTCI Index is comprised of
4 sub-indices, 14 pillars
and 93 indicators

Overall Travel & Tourism Competitiveness Ranking



Government Prioritization of the Travel & Tourism Industry

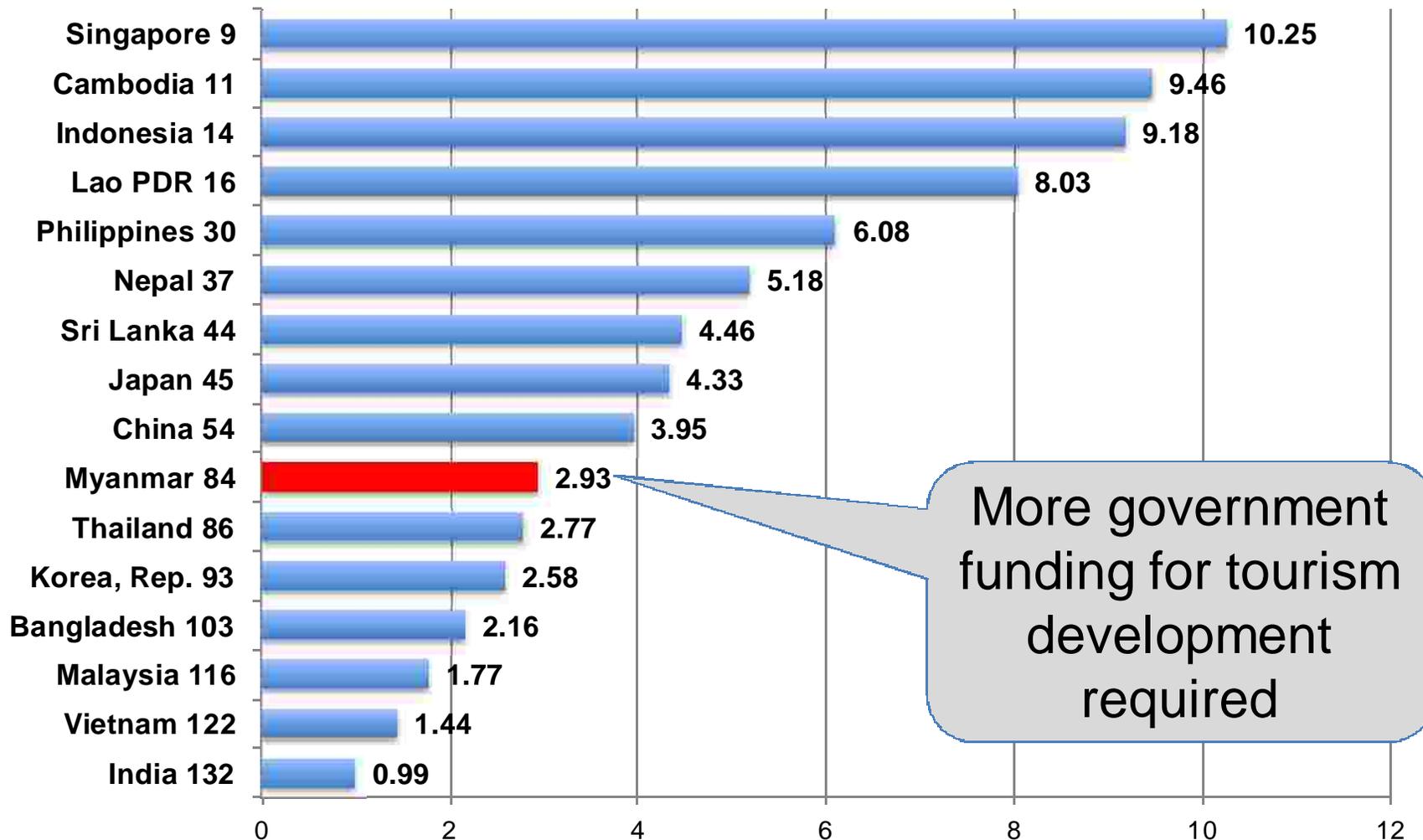


“How high of a priority is the development of the travel & tourism (T&T) industry for the government of your country?”

(1 = not a priority at all, 7 = a top priority) | 2013-2014 weighted average.

Source: World Economic Forum, Executive Opinion Survey

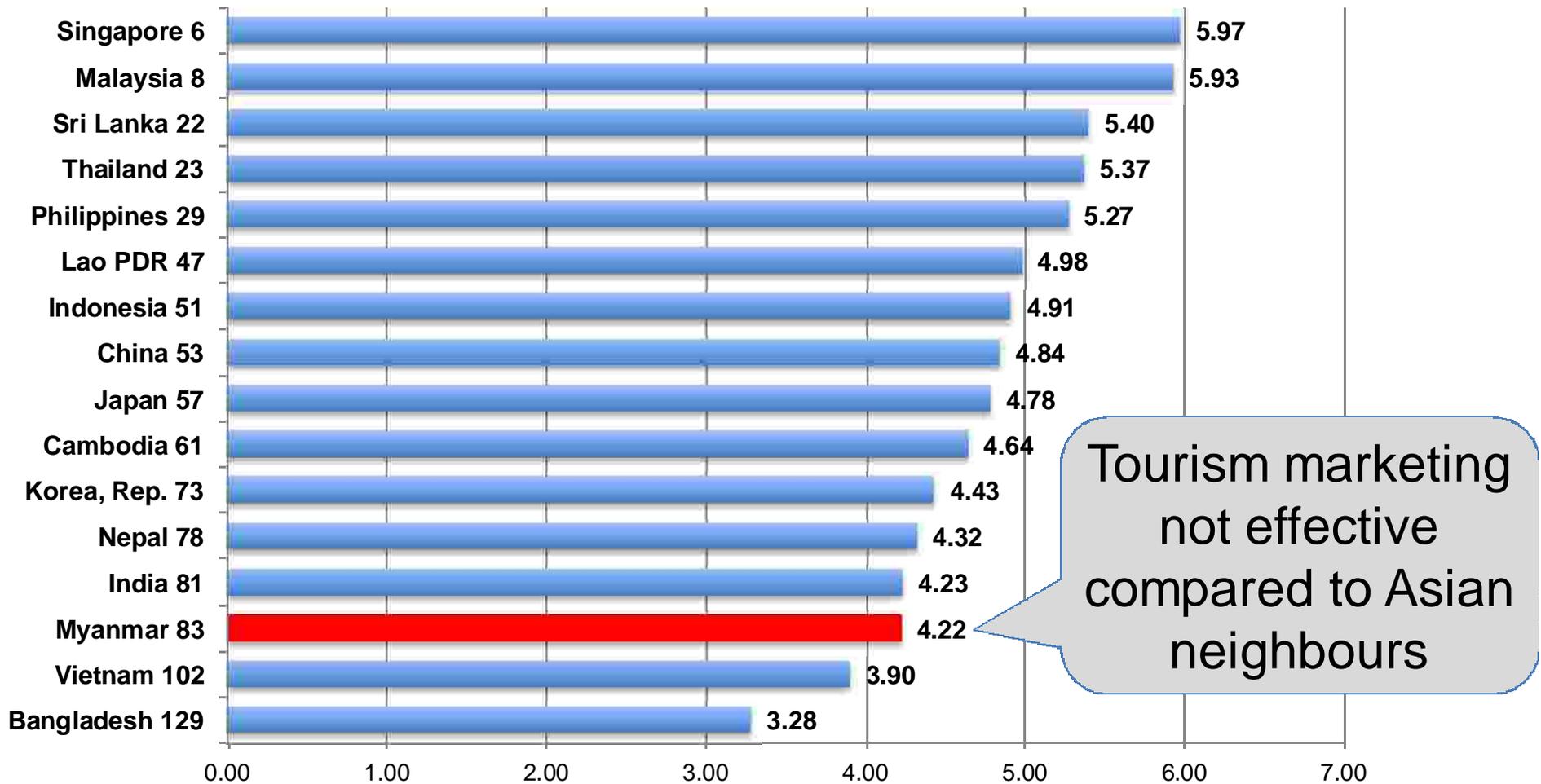
T&T Government Expenditure (Percentage of total Government Budget)



More government funding for tourism development required

T&T government expenditure as a percentage of total government budget | 2013 or recent. This indicator includes expenditures (transfers or subsidies) made by government agencies to provide T&T services such as cultural (e.g. art museums), recreational (e.g. national parks), clearance (e.g. immigration/customs) and so on to visitors. Source: World Travel & Tourism Council 2014

Effectiveness of Marketing and Branding to attract Tourists

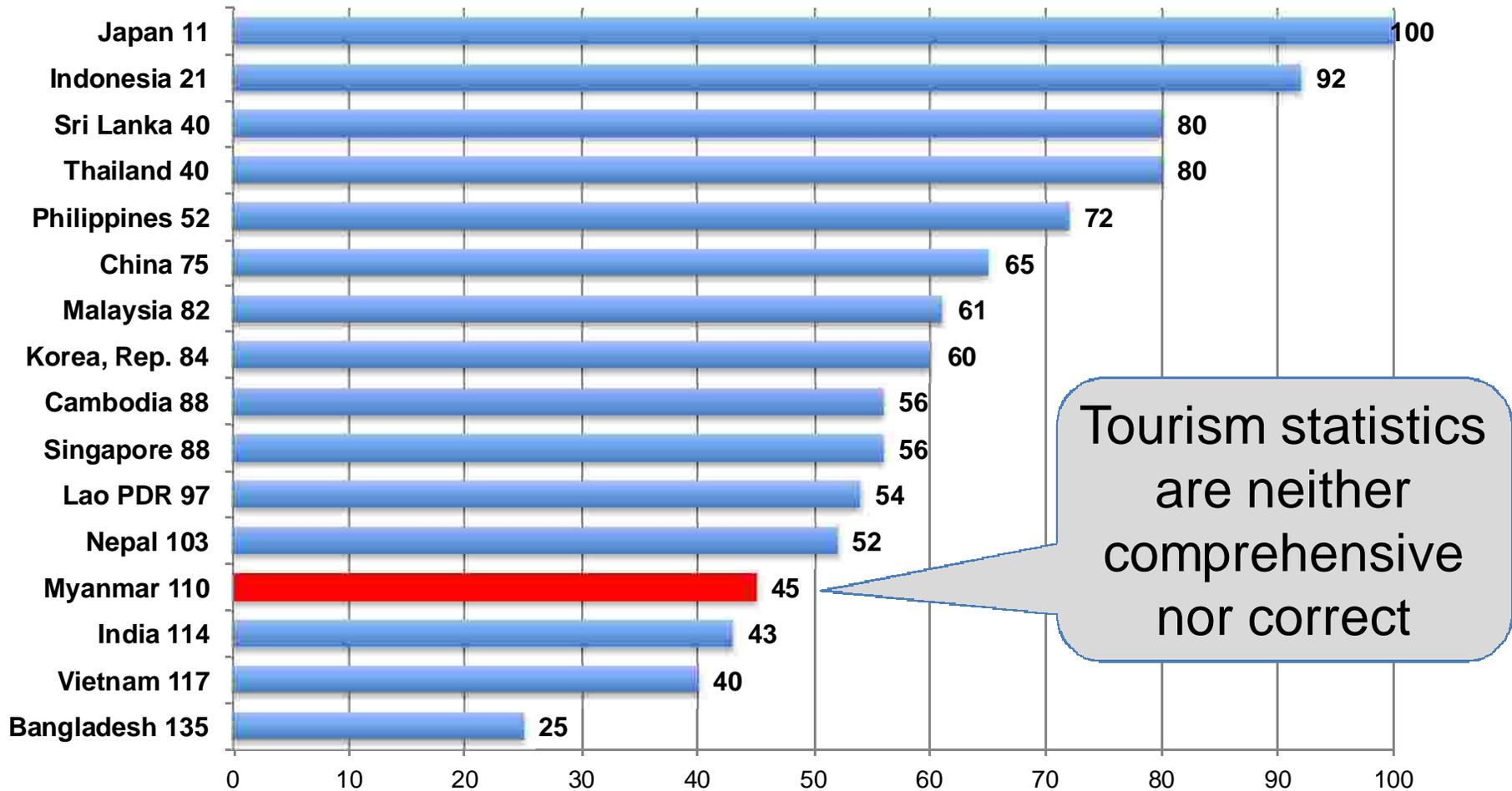


“How effective is your country’s marketing and branding campaigns at attracting tourists?”

(1 = not effective at all, 7 = extremely effective) | 2013–2014 weighted average.

Source: World Economic Forum, Executive Opinion Survey

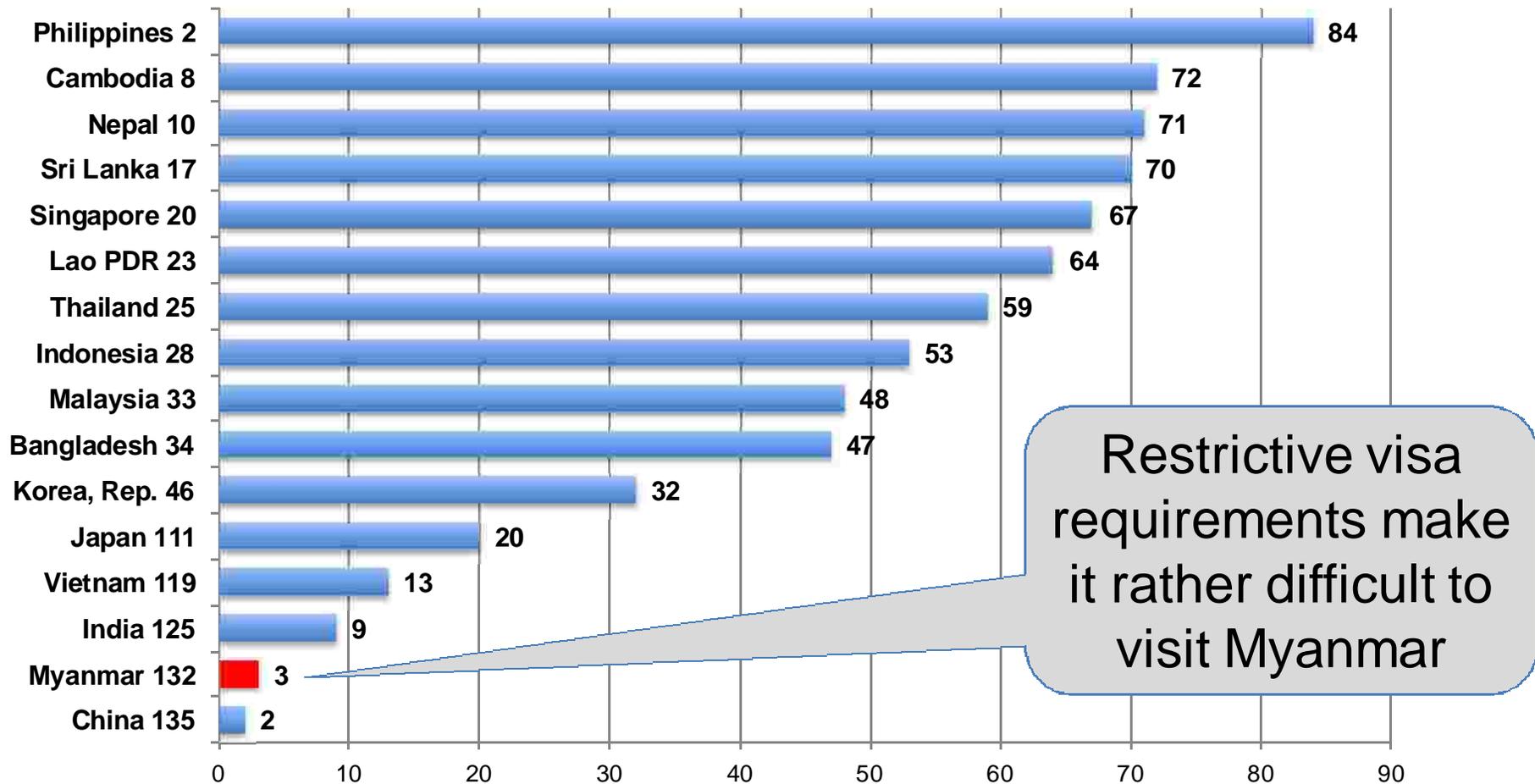
Comprehensiveness of Annual Travel & Tourism Data



Number of data available (0 = no data, 120 = all selected indicators are available) | 2010–2014

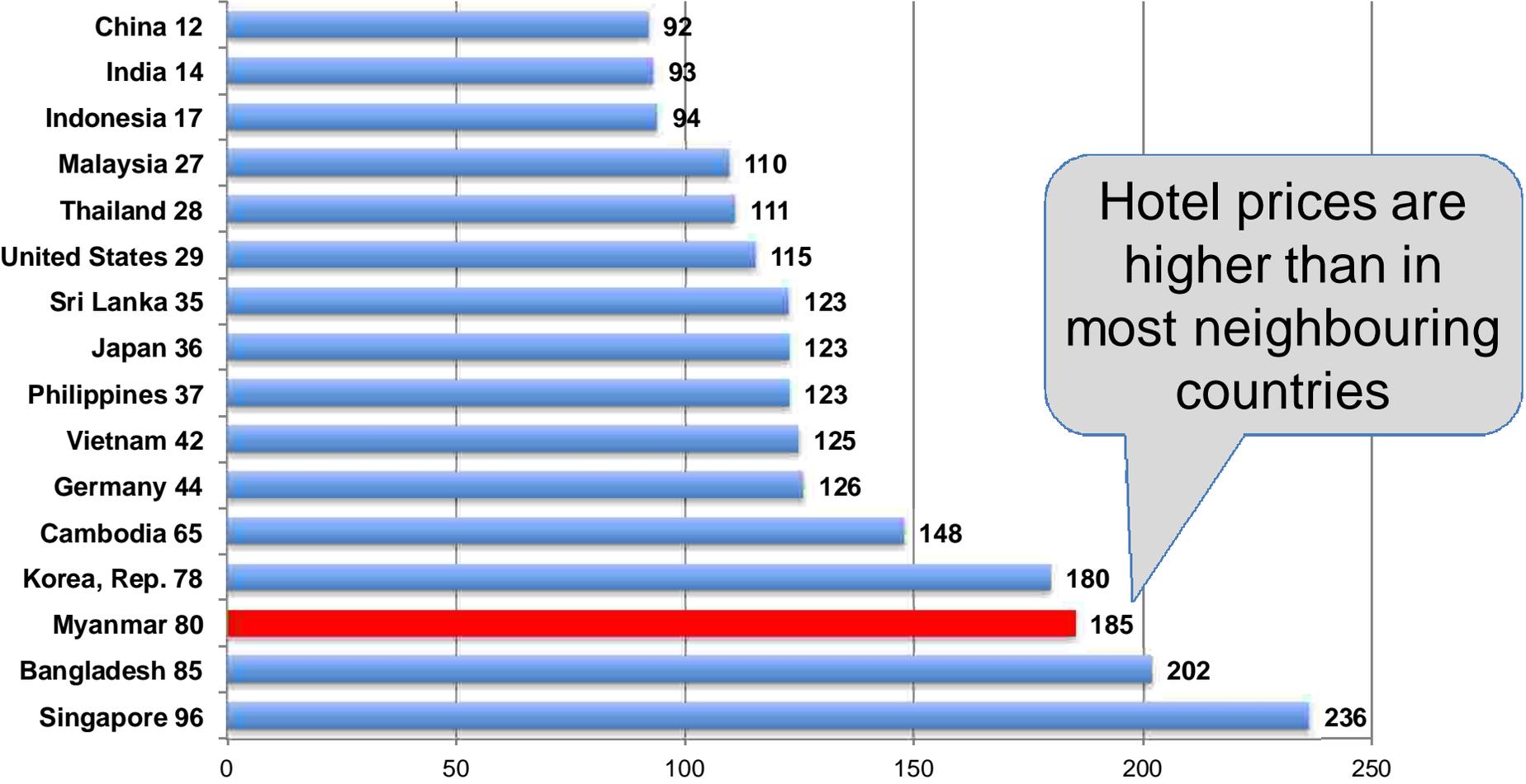
This indicator shows how many of the yearly data provided by national administrations on 30 different concepts from the UNWTO Compendium of Tourism Statistics are available. Source: World Tourism Organization (UNWTO)

Visa Requirements for Foreign Tourists



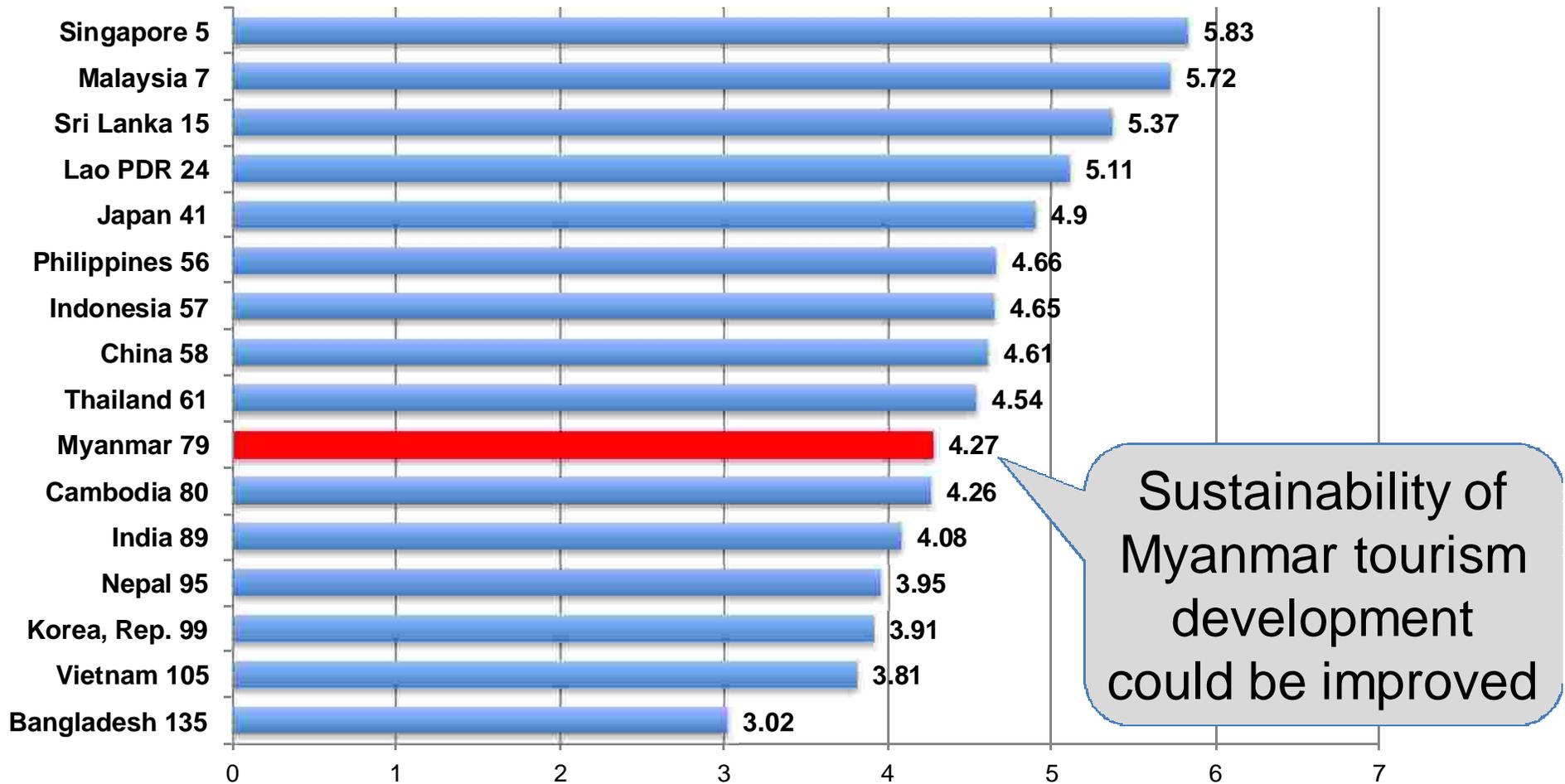
Visa requirements for entry in the destination country for a tourism visit of a limited duration for visitors from worldwide source markets (100 = no visa required for visitors from all source markets, 0 = traditional visa required for visitors from every source market) | 2014. This indicator measures to what extent a destination country is facilitating inbound tourism through its visa policy, distinguishing whether the country can be visited without a visa, a visa can be obtained on arrival or an electronic visa is available.

Average Hotel Prices (USD) of First-class Accommodation



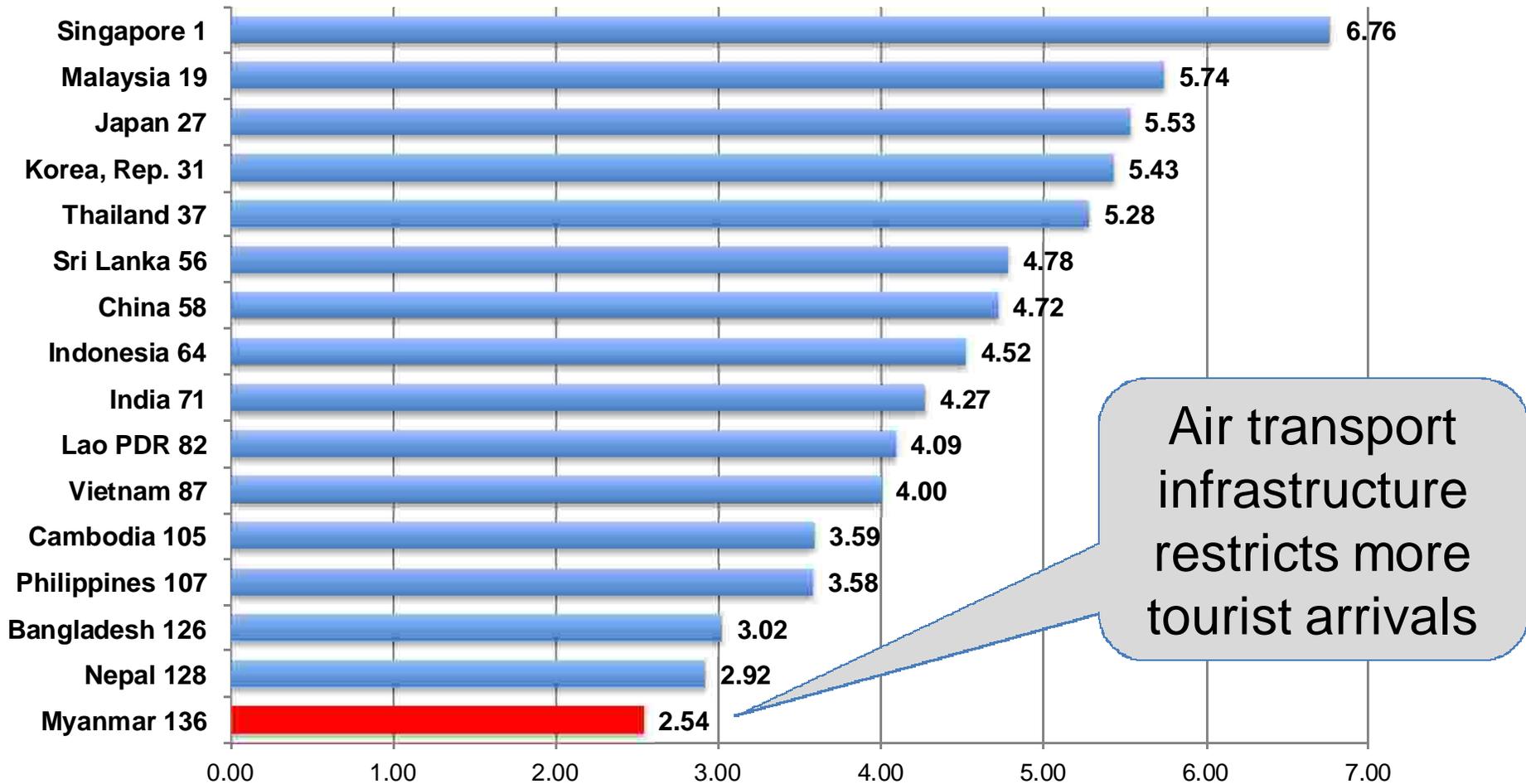
Average room rates calculated for first-class branded hotels for calendar year (USD) | 2013–2014. This index measures the average price, in US dollars, of first-class hotel accommodation in each country. The index is calculated by using the average room rate achieved by first-class hotels in each country.

Sustainability of Travel & Tourism Industry Development



“How effective is your government’s efforts to ensure that the Travel & Tourism sector is being developed in a sustainable way?” (1 = very ineffective, development of the sector does not take into account issues related to environmental protection and sustainable development; 7 = very effective, issues related to environmental protection and sustainable development are at the core of the government’s strategy) | 2013-2014 weighted average. Source: World Economic Forum, Executive Opinion Survey

Quality of the Air Transport Infrastructure

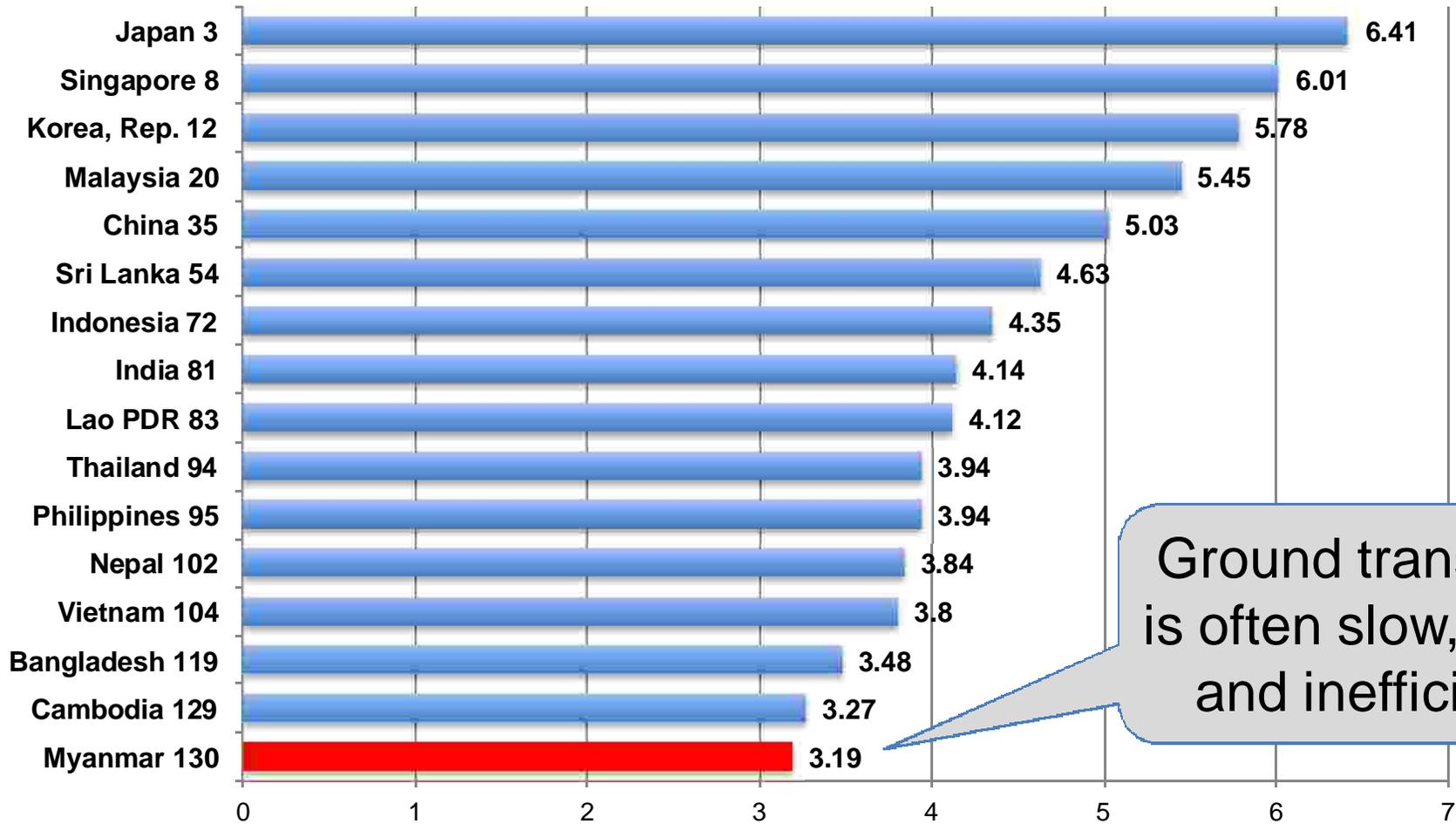


“How would you assess the quality of air transport infrastructure in your country?”

(1 = extremely underdeveloped, among the worst in the world; 7 = extensive and efficient, among the best in the world) | 2013-2014 weighted average.

Source: World Economic Forum, Executive Opinion Survey

Quality of the Ground Transport Network



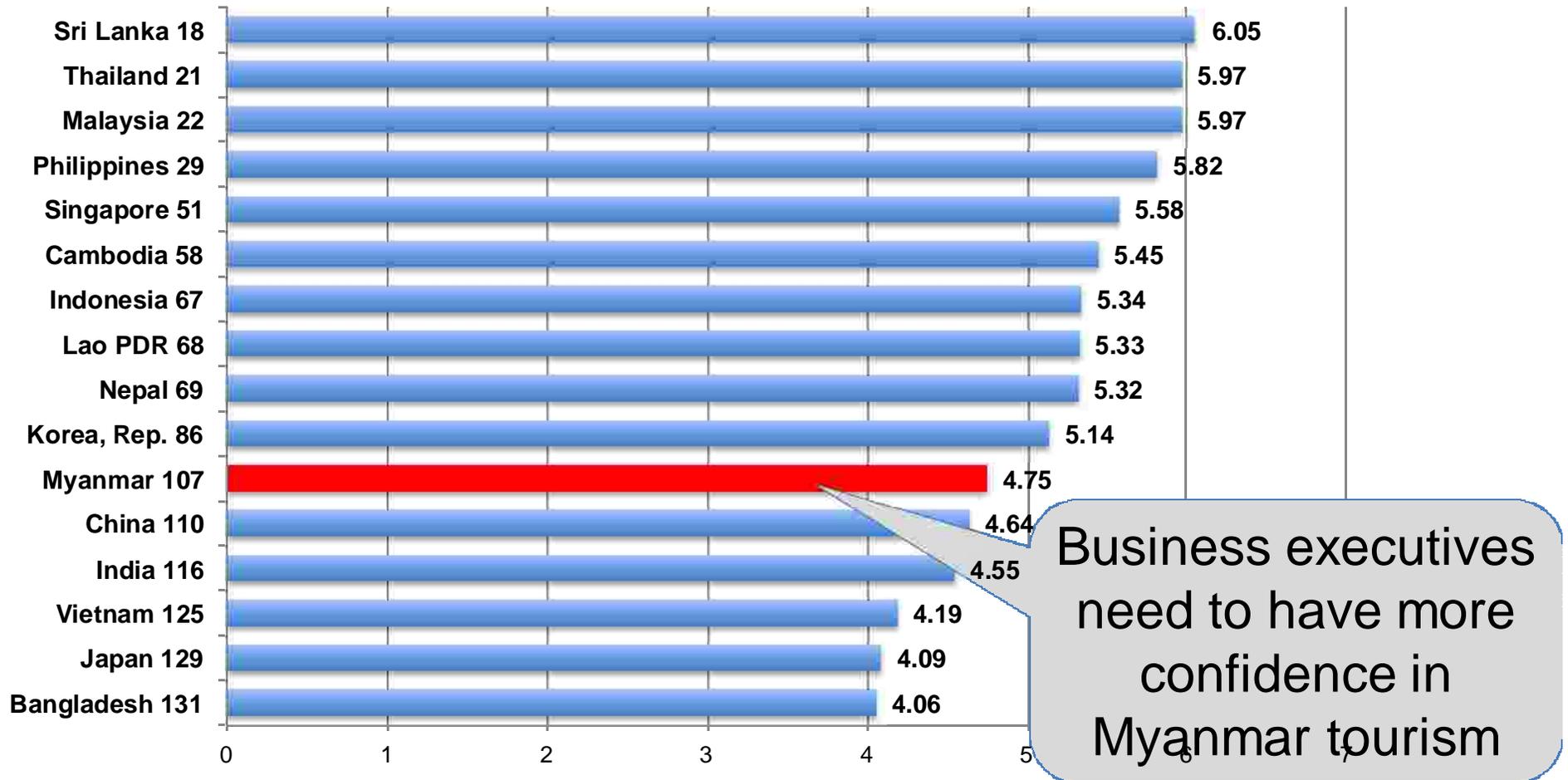
Ground transport is often slow, risky and inefficient

“In your country, to what extent does your national ground transport network (e.g. buses, trains, trucks, taxis, etc.) offer efficient transportation?”

(1 = not at all, 7 = to a great extent) | 2013–2014 weighted average

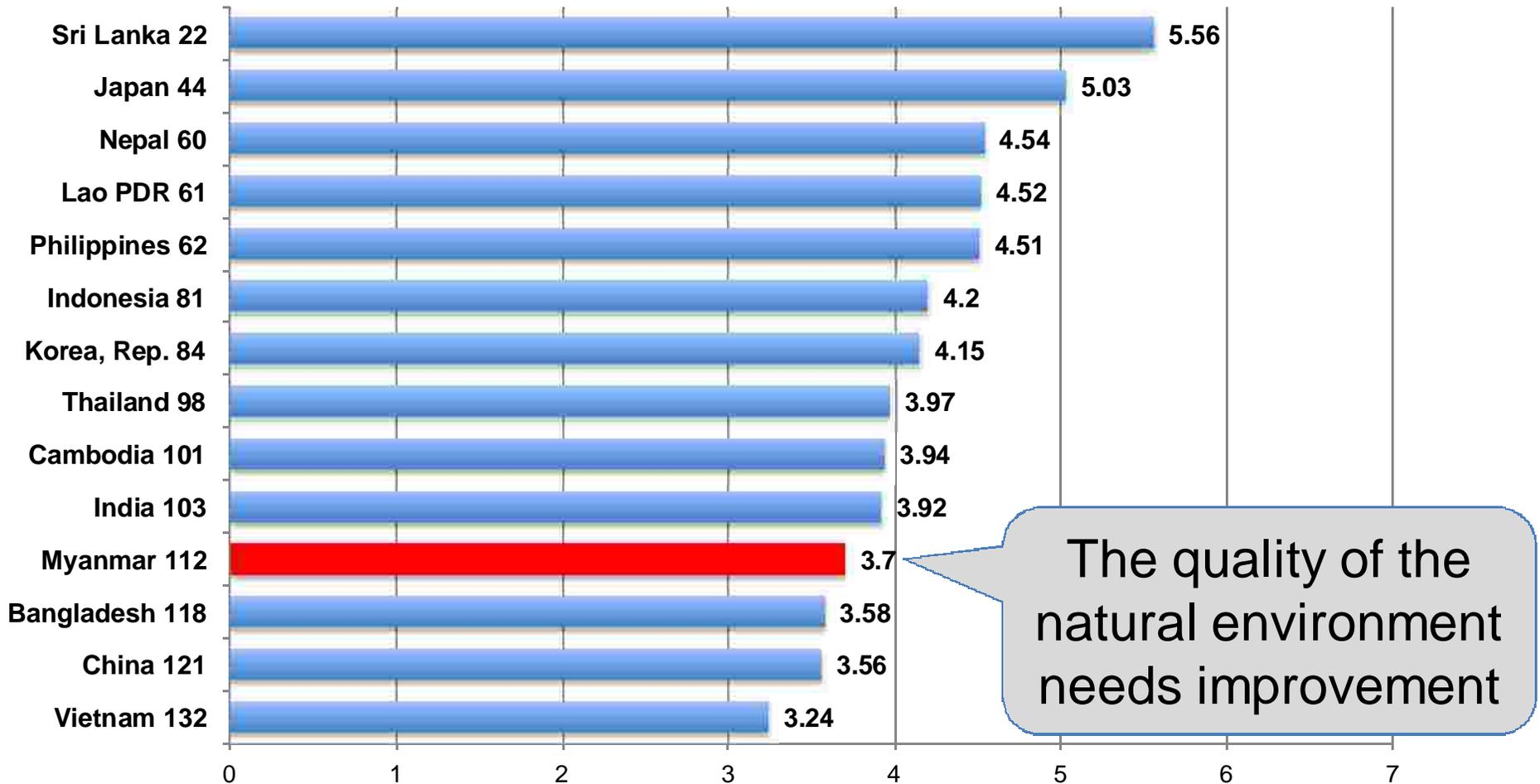
Source: World Economic Forum, Executive Opinion Survey

Extension of Business Trips recommended?



“When senior executives visit your country for the first time for business purposes, how likely are you to recommend extending their trip for leisure purposes?” (1 = very unlikely, 7 = very likely) | 2013–2014 weighted average. Source: World Economic Forum, Executive Opinion Survey

Quality of the Natural Environment

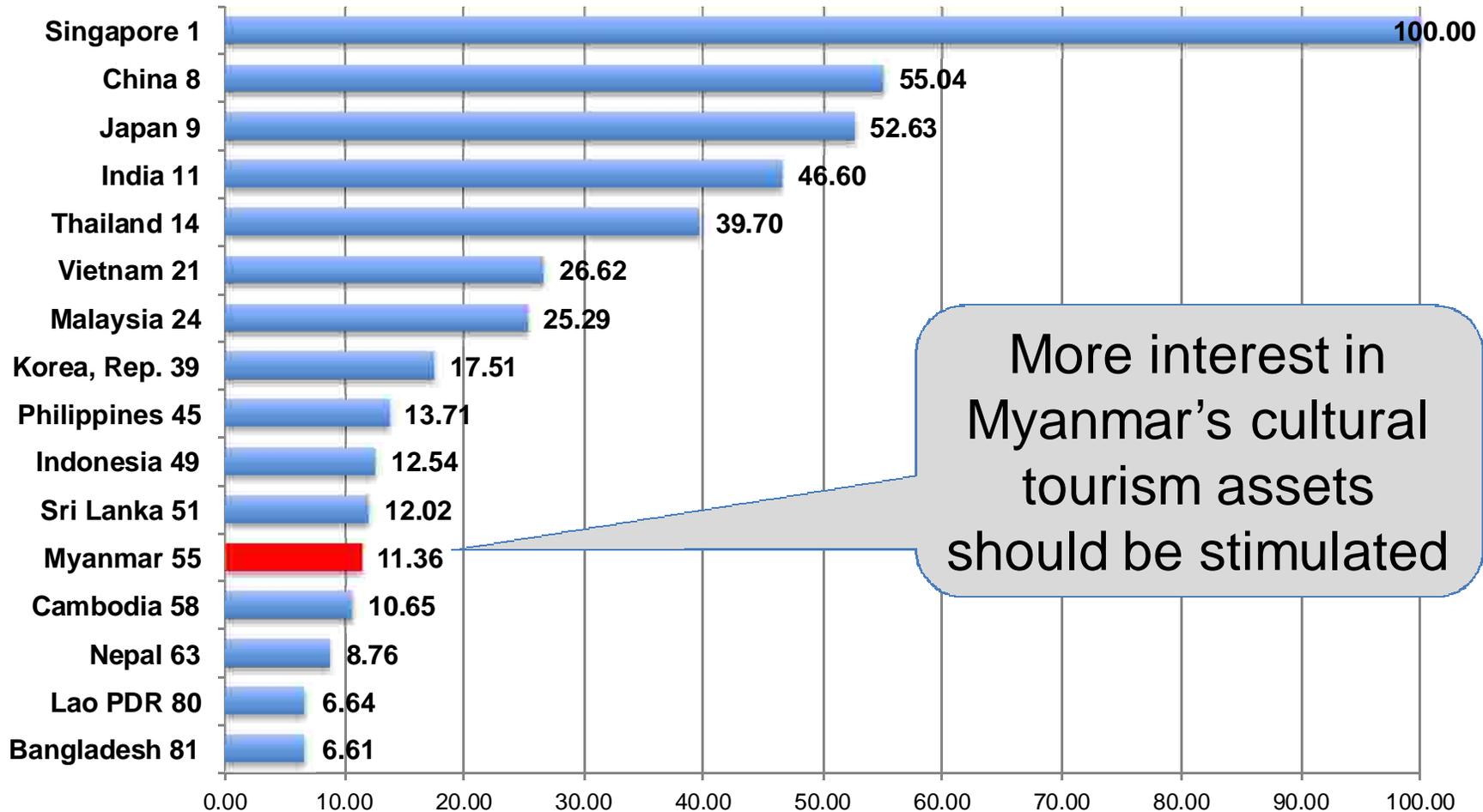


“How would you assess the quality of the natural environment in your country?”

(1 = extremely poor; 7 = among the world’s most pristine) | 2013–2014 weighted average.

Source: World Economic Forum, Executive Opinion Survey

Cultural and Entertainment Tourism Digital Demand



More interest in Myanmar's cultural tourism assets should be stimulated

Number of online searches index (0–100 best) | 2014

This indicator measures the total online search volume related to the following cultural brandtags: Historical Sites, Local People, Local Traditions, Museums, Performing Arts, UNESCO, City Tourism, Religious Tourism, Local Gastronomy, Entertainment Parks, Leisure Activities, Nightlife and Special Events. Source: Bloom Consulting based on Country Brand Ranking, Tourism Edition.

No time for complacency.

Myanmar's tourism sector needs to become more competitive and sustainable to create incomes and jobs.

Questions or comments?



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