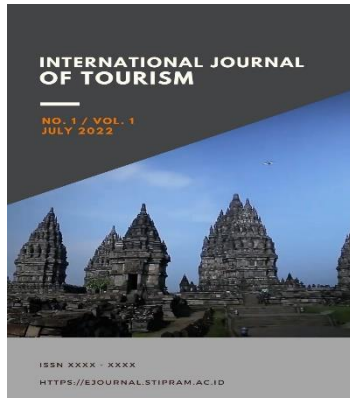


Tourism Development and Effects of Covid -19 on Tourism in Myanmar

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Article History

Received on 09 April 2023

Revised on 20 Mei 2023

Accepted on 01 July 2023

Abstract

Purpose: Although all tourism attractions would have a positive impact on the local population in Myanmar, COVID-19 has had a significant negative impact on the tourism industry globally, and Myanmar is no exception. All commercial flights to Myanmar have been suspended since April 2020, and domestic flights have also been suspended since early September. Due to the travel restrictions, this pattern abruptly stopped. Therefore, this study is to evaluate the economic, social and environmental impact of Tourism industry and to highlight the impact of COVID-19 on the Tourism industry in Myanmar.

Research methods: Primary data are collected from (100) stakeholders (tour operators, hoteliers, and other tourism providers) in the tourism industry in Yangon by using simple random sampling method through structured questionnaires. This study uses descriptive method to examine the collected data.

Results and discussions: The result indicates that tourism is one of the major sources of Myanmar's GDP. Since the combined profits from hotels, restaurants, and transportation businesses that are partially reliant on tourism are substantially greater, at 16% of GDP, this is anticipated to have a significant influence on the economy. It has also been pointed out that Myanmar's tourism industry is mostly dependent on international factors and foreign tourists. Since 2021, limitations have been loosened as Myanmar has been able to control the COVID-19 virus. The study's findings indicate that the COVID-19 outbreak has had a detrimental economic and social impact on Myanmar's tourism sector. Financial loss, a decline in customer demand on an international and national level, disruptions in the distribution system, and ruined connections with suppliers, customers, and employees are just a few examples of economic repercussions.

Conclusion: Among the business owners, the social impact included depression, annoyance, anxiety, and tension due to the current and potential future circumstances. Overall analyses suggest that building the capacity of stakeholders and encourage public-private partnership activities in order to develop and manage future tourism sector.

Keywords: *Economic Impact, Social Impact, Public-Private Partnership*

INTRODUCTION

Being a new and emerging tourist destination in South east Asia, Myanmar is recognized as the Golden Land. The country is abundant in cultures and natural attractions. Popular tourist attractions in Myanmar include Yangon, Mandalay, Bagan (greatest archaeological sites), including many famous places such as Inle Lake, Golden Rock Pagoda, Kengtung (Kyaing Tong), Hpa-An, Putao, Ngapali, and Ngwe Saung Beaches, Bago, Bhamo, Kalaw and Mrauk U. Besides, Myanmar has numerous pagodas, temples, landmarks, archaeological sites, biological and plant species, natural resources, together with the different religious traditions of ethnic groups. For this reason, Myanmar is the most glamorous and attractive destination, where visitors can uncover Myanmar as a beautiful place.

Tourism is considered as an important economic achievement for developed or emerging economies. Consequently, development of tourism is being prioritized (Bal, Akca & Bayraktar, 2016). The underlying forces in the development of tourism comprises the surge in household income, advanced transportation services, extended duration of paid vacations in developed countries, development in ICTs, new social organization caused by industrialization, change in family structure, daily stress caused by technologic life, and largely secured the world (Bal et al., 2016). The emerging economies have become apparent as important players that comprehend their economic potential (Rasool, Maqbool & Tarique, 2021). To encourage tourism development in Myanmar, the government extended the visa duration and eased restrictions on entry requirements in the early 2000s. Many tourists from all over the world were eager to visit and see the country when Myanmar opened itself. The total contribution of Travel and Tourism to GDP accounted for MMK 6,468.9bn (USD 4,918.2mn), 6.6% of GDP in 2017, and the forecast to rise by 5.4% in 2018, creating 570,000 jobs; 2.5% of total employment in 2017 (Aung, 2019).

Though, the global COVID-19 epidemic brought about a brutal blow to Myanmar's economy. Due to the pandemic, the GDP growth forecast for FY2019/20 of the country has been downward from 6.4 percent to just 0.5 percent. Therefore, Myanmar is required appropriate strategies and workable policies for the tourism GDP development and the local community also will have to endeavor to overcome and compete with other Asian countries. Thus, it is essential to pick up from the useful procedure and strategies of other developing and developed countries in the World.

As this analysis is aimed to explore the relation between the pandemic and its effect on the tourism sector, it provides tangible implications and recommendations to help policymakers to formulate an eco-friendly mechanism in the tourism sector. Also, this study will help professionals and researchers to understand and manage the tourism impacts of COVID-19. This study will support Myanmar's Tourism to become a more profitable for tourists/visitors and stakeholders by means of community-based tourism inspirations.

LITERATUR REVIEW

Impacts of Tourism Development

Tourism development can have substantial economics, environmental, and social and culture impacts in terms of creating both opportunities and challenges for destinations. The impacts of tourism development will be described as follows in the areas of economics, environment, and social and culture.

Economics Impacts: Tourism enhances job opportunities, ranging from low-wage entry-level to high-paying professional positions in management and technical fields. Consequently, it

can generate income and raise standards of living. In addition, tourism development can create investment, infrastructure development, and landscaping. Moreover, tourism encourages transportation development resulting in upgraded roads, airports, and public transportation. Furthermore, it can generate additional rounds of spending in the local market because tourists spend their money on accommodations, dining, and activities (Kreag, 2001).

Environmental Impacts: In the 21st century, the tourism sector found that it needed to prioritize the environment as a significant sector. Businesses and destinations emphasize sustainable tourism practices, including reducing waste, conserving water, and minimizing energy consumption in order to adopt eco-friendly dimensions. Therefore, the money earned from the tourists invest in the maintenance and management of national parks and protect areas in terms of aiding in the preservation of habitats and biodiversity (Kreag, 2001; Fletcher et al., 2018).

Social and Culture Impacts: Tourism contributes social and cultural impacts that can foster to develop both destinations and the travelers themselves. It also enriches the quality of life in a region in terms of introducing many attractions, recreational choices, products, and services. Additionally, it can provide local people with the chance to meet people who may have unique stories, experiences, or qualities, and to form friendships. In terms of enriching global knowledge and fresh perspectives, tourism development can empower locals and communities or society economically and culturally (Kreag, 2001). Regarding the impacts of tourism development, it has a range of positive and negative effects, however; many scholars proposed that the positive effects of tourism can address and mitigate its adverse consequences by implementing supportive policies from the government to gain sustainable tourism development. By employing the advancement of a more balanced and sustainable method of tourism development, tourism development can provide economic growth and environmental and social well-being (Baloch et al., 2023).

RESEARCH METHODS

Quantitative research approach was employed for this study. The secondary data were collected from the library, internal sources, published books and data from the Ministry of Hotel and Tourism, various issue of Central Statistical Year Books, Tourism Statistics and previous studies about tourism and other related sources. In this study, the targeted sample was (100) stakeholders in the tourism industry in Yangon, namely tour operators, hoteliers, and other tourism providers. Most statisticians agree that the minimum sample size to get any kind of meaningful result is 100 according to Bullen (2020). Bock (2020) also explained that studies should involve sample sizes of at least 100 as a rule of thumb. The sample-to-variable ratio suggests a minimum observation-to-variable ratio of 5:1, but ratios of 15:1 or 20:1 are preferred (Hair et al., 2018). The well-being questionnaires were distributed to chosen (100) respondents. The sample respondents were selected simple random sampling method. The (72) completed answers were returned so that respondent rate was 72% as considered to be highly successful. The survey was conducted by using five-point Likert scale questionnaire. Descriptive statistics were applied to examine the objectives of the study.

RESULT AND DISCUSSIONS

An Overview of Tourism Sector Development in Myanmar

The development of tourism in the country can improve the agriculture, fishing industry, manufacturing sector and other sectors such as construction and handicraft production. Myanmar's tourism industry is concerned with environmental protection; it can contribute to the restoration of biodiversity and more sustainable use of natural resources. The growth of tourism and the influx of tourists, including tourists within Myanmar, can have an economic impacts, environmental impacts, and social and cultural impacts on the country and its population (MCRB, 2015). Myanmar experienced a remarkable increase in tourist arrival and revenue, which contributed significantly to the country's economy and had various impacts on the environment, and society. This study presents that the tourism sector in Myanmar was undertaking significant development before the Covid-19 pandemic. In addition, it describes the tourism trends in Myanmar before, during, and after COVID-19 and foreign investment in hotels and commercial complexes in Myanmar.

(1) The Impacts of Tourism Development in Myanmar

- a. **Economic Impacts in Myanmar:** The economic benefits of tourism can result in direct tourist expenditure for goods and services in the destination. According to the statistics, the contribution of travel and tourism to the GDP of Myanmar was \$ 5.1 billion in 2019 (World Data Atlas, 2020). This primarily suggests that the economic activity generated by tourism services. But it also includes the businesses of the restaurant and leisure industries contributed by tourists. Additionally, it is estimated that every dollar spent on travel and tourism of Myanmar generates satisfying result for the country (WTTC, 2012).
- b. **Environmental Impacts in Myanmar:** The government's policies related to Myanmar tourism are aimed at promoting environmental and social protection (Ministry of Hotels and Tourism, 2020). The tourism sector can develop environmental protection mechanisms, and the sustainable management of tourism facilities such as hotels can enhance the benefits of tourism. But management requires careful planning and controlled development (Han, 2017). Revenue from park entrance fees collected from tourists and tour operators can be earmarked to the protection and management of environmentally sensitive areas.
- c. **Social and Culture Impacts in Myanmar:** In addition to the contact of Myanmar people to foreign media, the number of foreign tourists and investors increased, especially in the large cities. The growth of tourism and the flood of tourist into Myanmar can have a cultural impact on the country and its population. Due to the development of tourism, the demand for Myanmar traditional handicrafts such as wood carving and weaving handicraft arts and paintings, lacquer silverware can increase (MCRB, 2015b).

(2) Tourism Trends in Myanmar Before, During, and After COVID-19

Myanmar has a wealth of natural and cultural tourism assets, starting from Kachin's mountains to the pristine Myeik archipelago and it possesses 3S (Sun, Sea, Sand) which make destination managers to be more convenient when selling their tourism products in market (Myanmar Ministry of Hotels and Tourism, 2021). Given the variety of unique tourism experiences Myanmar, it has the potential to contribute significantly to employment creation and economic growth with the development of tourism. In Myanmar, tourism was a booming industry before COVID- 19 in terms of growing international arrivals. The industry created jobs over a million and Myanmar has a significant progress in the development of tourism infrastructure. However, the COVID-19 pandemic halted

international travel and had a devastating impact on tourism destinations, businesses, and communities with a drop of 79% in tourists arrival in the year of 2020 as a result of the pandemic (Myanmar Ministry of Hotels and Tourism, 2021). The following Figure (1) shows tourism trends in Myanmar between 2001 and 2021.

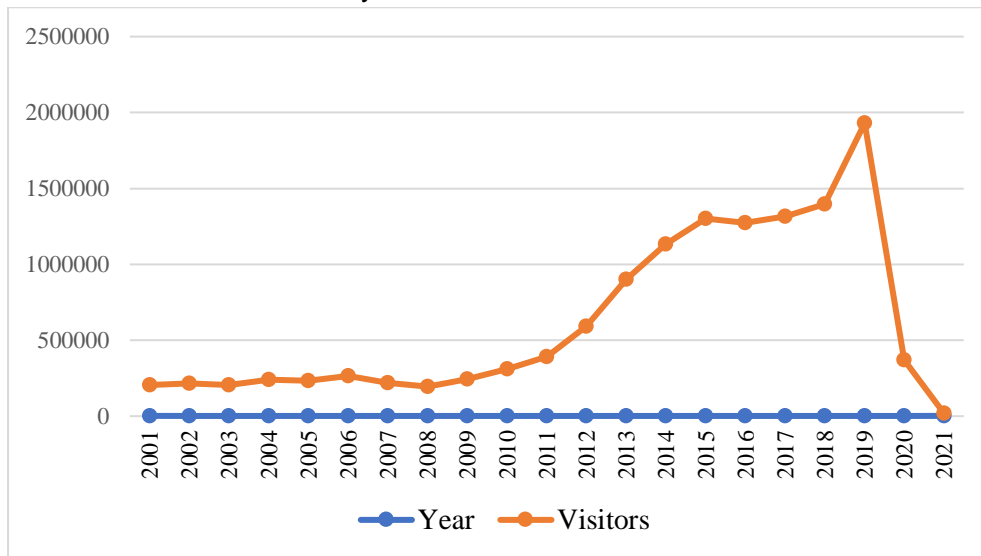


Figure (1) Tourism Trends in Myanmar

(3) Foreign Investment in Hotels and Commercial Complexes in Myanmar

Tourism-related FDI is also largely concentrated in developed countries. Myanmar attracted over US \$4,519.7169 millions of foreign investment in hotels and commercial complexes from thirteen countries: Singapore, Thailand, Vietnam, Japan, Hong Kong, Korea, Malaysia, United Kingdom, Luxembourg, Switzerland, China, France and Italy, according to the MOHT (2021). Among them, Singapore topped the line-up. Singapore is the top source of investment in hotels and commercial complexes; 35 Singapore-listed hotels put investment of \$2,829.0324 million in Myanmar, making up over 60% of the total investment during the period. Thailand stands as the second largest investor with an estimated capital of over \$ 480.964 million drawn from thirteen hotels. Japan and Hongkong are also Myanmar's foreign investors with their significant investment of \$394.385 million from six hotels and \$187.700 million from five hotels, respectively. Malaysia, The United Kingdom and France invested in Myanmar's hotel industry, with capital of \$23.136 million, \$14.500 million and \$2.3695 million. One hotel each from Korea (\$115.730 million), Luxembourg (\$ 6.730 million), Switzerland (\$1.970 million), China (\$20.000 million) and Italy (\$3.200) million, also invested in hotels and commercial complexes. According to Ministry of Hotels and Tourism, Singapore, Thailand and Vietnam are placed in the first three ranks among the 13 foreign countries investing in Myanmar's hotel industry (MOHT, 2022).

Covid-19 Outbreak in Myanmar

The first case of COVID-19 was detected in Myanmar in 2021. The news was released on 23 March, and as of July 13, there were 336 confirmed cases and six deaths nationwide (International Labor Organization-ILO, 2020). The government's measures to control the

spread of COVID-19 are an appropriate response. To prevent the spread of COVID-19, the government has imposed restrictions on international travel since February (ILO, 2020). Prohibitions of public events and festivals, various measures have been implemented, including extensive restrictions on businesses and workplaces by the government (Diao et al., 2020).

Due to the COVID-19 epidemic in Myanmar, exports have declined, and tourism and tourism industry weakened, reduced demand for services due to travel restrictions and precautionary behaviors has made tourism and travel difficult as the government laid down restrictions (Xinshen & Michael, 2020). An ILO survey found that 94% of Myanmar's hotel and restaurant businesses temporarily suspended operations due to COVID-19 epidemic (ILO, 2020). In addition, 39% were understaffed by reason of travel restrictions based on authorities' directives (United Nation, 2000).

The tourism industry, as in other countries, was badly hit by the Covid-19 pandemic. All international flights to Myanmar were suspended since April, and so were all domestic flights since early September. With an increase of 72% in tourist arrivals in the first quarter of 2020 compared to the same period the year before, tourism was on the rise before the pandemic. Tourism industry has come to an abrupt halt with the travel restrictions. According to World Bank (2020), foreign tourist arrivals have fallen by 40-50% by the end of FY 2019/2020. Domestic travel also declined at least 30% in March 2020 as compared to previous year. Consequently, tourism-related earnings from hotels, restaurants, rentals, overland transportation, and other services have decreased. As domestic travel is also difficult, hotels, restaurants, and tourism revenues from transport and other services were declining. The impact on the tourism sector disproportionately affects women, who represent 60 percent of employees working in food and lodging services (CARE, 2020).

In a recent survey of businesses, 87 percent of those in the tourism industry said that their operations were severely impacted (ITC, 2020). The economy may be significantly impacted by this. The combined income from hotels, restaurants, and transportation activities- which are partially supported by tourism-is much higher at 16 percent of GDP even though direct tourism income is only estimated at 2.7% of GDP (MoCOM, 2019). The government reduced 2020 tourism revenue by 50% (UN, 2020), but the actual number at the end of the fiscal year could be even worse. The sector's sharp contraction has affected both international and domestic markets, which are expected to recover more slowly than other subsectors of the economy even after restrictions are lifted. The tourism sector managed to create employment for 346,000 people in 2019. However, the Covid-19 epidemic greatly disturbed the jobs of workers in various sectors in Myanmar. According to the International Labor Organization, 6.9 million to 7.3 million jobs were affected in Myanmar by 2020. This includes reduced income, unreimbursed economic damages, and longer working hours. Because they lack social benefits or job security, unskilled and informal workers will suffer as a result (Myanmar Ministry of Hotels and Tourism, 2020). As a result of the Covid- 19 epidemic, not only the economic impact on Myanmar tourism, environmental impact and social and cultural impacts have come about (MCRB, 2015).

The Impact of COVID-19 on the Tourism Industry in Myanmar

a. Visitor Arrivals from ASEAN Countries

For Myanmar tourism, 2020 appeared to be a successful year as the number of visitors from ASEAN Countries surged; however, arrivals fell sharply due to COVID-19 and the international lockdown. Before pandemic, Myanmar stands with a stable growth in tourism sector. During the year 2020, there were 95,363 tourists from ASEAN countries. Looking at

the number of tourists arriving from ASEAN, tourists from Thailand and Vietnam are especially large in number, comprised 72% of the total visitors from ASEAN, equivalent to 68,756 visitors. After a significant hit by Covid, there was a negative impact on the travel and hotel sectors. The total number of visitor arrivals from ASEAN dropped sharply from 95365 in 2020 to only 3,294 in 2021; visitors to Myanmar were down 96.5% in 2021 compared to 2020. The coronavirus pandemic caused a 98% decline in ASEAN tourist arrivals from Thailand, Vietnam, Singapore and Cambodia respectively in 2021. Visitors from Lao accounted for a small share at 6 visitors, stood at -99% compared to 2020. As a matter of fact, movement restrictions due to Covid-19, while necessary in many cases, are proving costly for the economy.

b. Type of Visa in Myanmar

For the country’s tourism industry, type of visa (tourist, business and other) is considered as a tool to measure the situation of tourism industry. The COVID-19 pandemic significantly impacted tourism sector in Myanmar. The number of visitors with different type of visa such as for visit, business and others has seen a sharp decline, according to a recent survey of MOHT (2021). In 2020, visitors in Myanmar were 903,343; however, the number of visitors to Myanmar decreased to 130,947 in 2021. Visitors with the purpose of business (business visit visa holders) were down 83% in 2021 compared to 2020, equivalent to 12,533 visitors. Visitors who have other purpose of visit dropped sharply from 643,856 in 2020 to only 118,414 (decreased to 18%) in 2021. Tourist arrivals made up zero percent (0%) of the total number of arrivals in 2021, decreasing from 185,202 in 2020 to zero visitor in 2021. The following Figure (2) shows visitors with different type of visa such as for visit, business and others between 2020 and 2021.

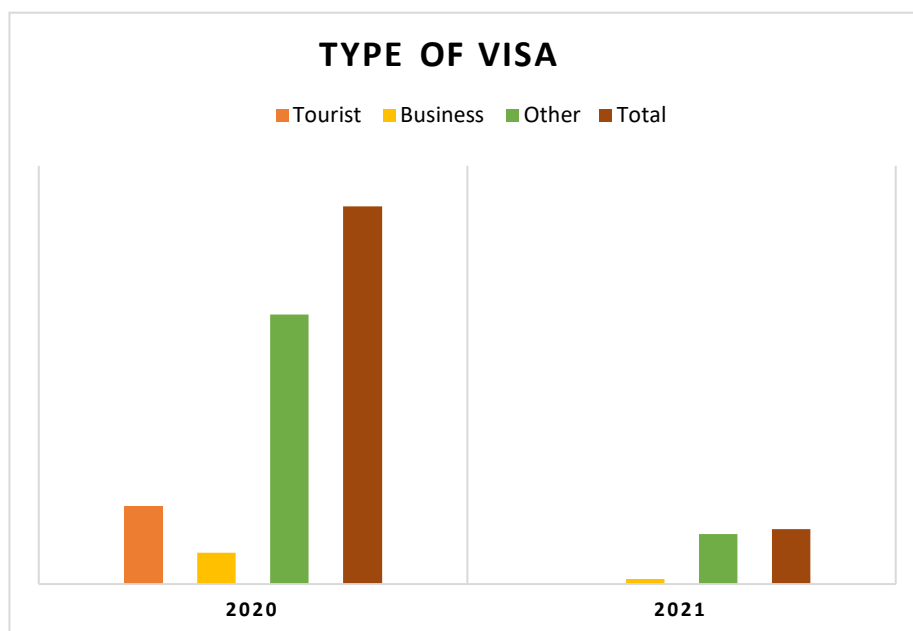


Figure (2) Type of Visa in Myanmar (2020-2021) (MOHT, 2021)

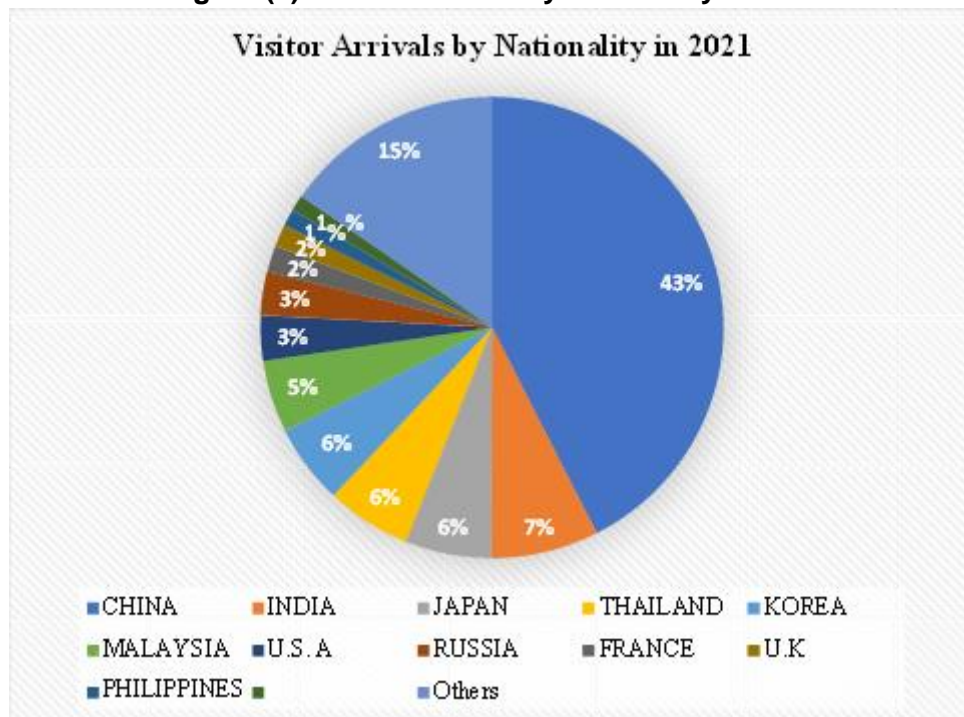
c. Visitor Arrival to Myanmar by Nationality

Myanmar received large number of international tourist arrivals since 2011, with the majority of international tourists coming from Asia. Most of the tourists coming to Myanmar are Asians as the government introduced new regulations to facilitate the entry of tourists to

Myanmar. The visitors especially from Middle East, South Korea, Hong Kong, Macau, and other Southeast Asian countries are granted visa exemption. Consequently, Myanmar expands its tourism market to Europe and America. Also, for those involved in the tourism sector Myanmar tries to develop and implement tourism promotion plans for international tourists from that country. However, travel and tourism were severely impacted by the coronavirus (COVID-19) pandemic. The number of visitors to Myanmar by nationality showed the sharpest drops when examining the percentage change in foreign visitor arrivals as a result of the health crisis.

According to MOHT (2021), the number of tourists who visited Myanmar were only 19,376 in 2021; decreasing from 371,901 in 2020 to 19,376 in 2021; stood at -95% compared to 2020 due to the virus, official figures showed (MOHT, 2021). In fact, tourists from China were 8,241; making up 43% of the total visitor arrival to Myanmar by nationality. China has become Myanmar's largest source of foreign tourists in 2021. India and Japan stands as the second and third largest source of foreign tourists; recorded 1,454 visitors (7% of total visitors) from India and 1,171 visitors (6% of total visitors) from Japan. Thailand (1,150 visitor arrivals), Korea (1,080 visitor arrivals), Malaysia (981 visitor arrivals), The United States (614 visitor arrivals) and Russia (594 visitor arrivals), also visited Myanmar in 2021; equivalent to 23% of total visitor arrivals. During the same period, the total number of travelers from France, the United Kingdom, Philippines and Singapore were 1,110; stood up 6% of total visitor arrival to Myanmar by nationality. Of the total visitors, 85% were from the countries/regions mentioned above and the remaining percentage (15%) was from other countries/regions. The following Figure (3) shows visitor arrivals by nationality in 2021.

Figure (3) Visitor Arrivals by Nationality in 2021



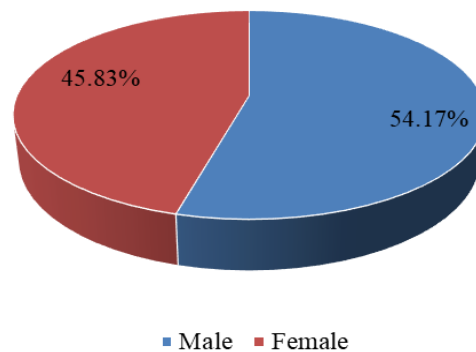
Source: MOHT (2021)

Results and Discussion Demographic Profile of Respondent

This research shows the gender of the respondents, out of (72) respondents, the majority of respondents, 54.17 % were male and 45.83% were female. As per the findings illustrated in the figures, the respondent's majority of involvement in hospitality sector were 34.72 %, followed by Education and Consulting (19.44%), Travel and Tour (19.44%), Tourism (12.5%), National Tourism Organizations (6.94%) and others (6.94%). Respondents are requested to indicate their job rank in the organization. The following figures indicated the findings. The position of the respondents was Top Level Managers (27.78%), Business Owner (1.39%), Middle-Level Manager (37.5%), Normal Employee (13.89%), and Low-Level Manager (19.44%). The majority of respondents are middle level manager working in related of tourism and hospitality sector.

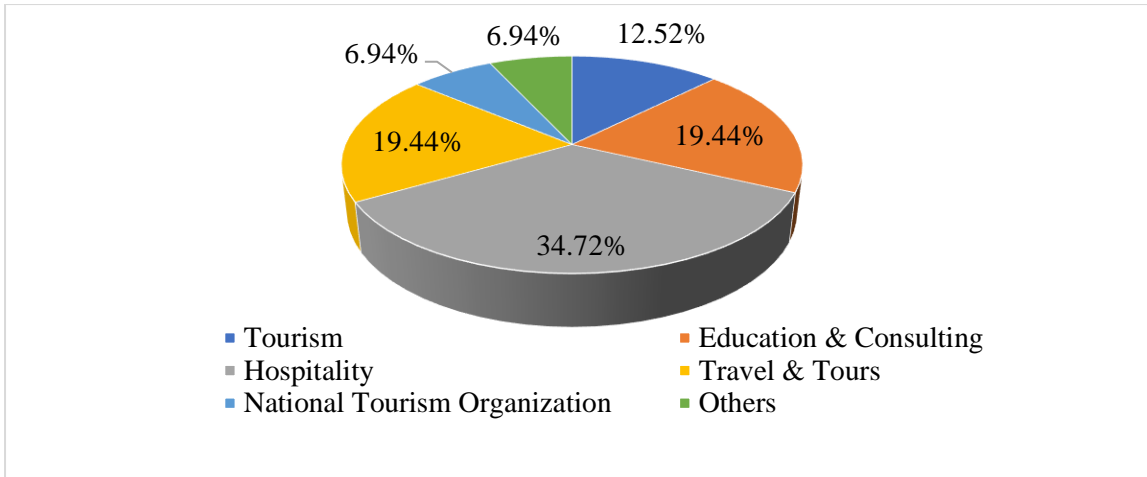
As per the findings illustrated in figures, the experience of employees was found 38.89% of respondents having 1 years to 3 years working experience, 36.11% of respondents having 4 years to 6 years working experience, 12.5% of respondents having 7 years to 9 years and 12.5% above 10 years working experience. From the findings, the number of employees in the organizations was less than 5 (2.78%), 5 to 25 (13.89%), 26 to 50 (45.83%), 51 to 75 (19.44%), 76 to 100 (9.72%), Over 101 (8.33%). The most of respondents are from organization with having between 26 to 50 employees.

Figure (4) Gender of Respondents



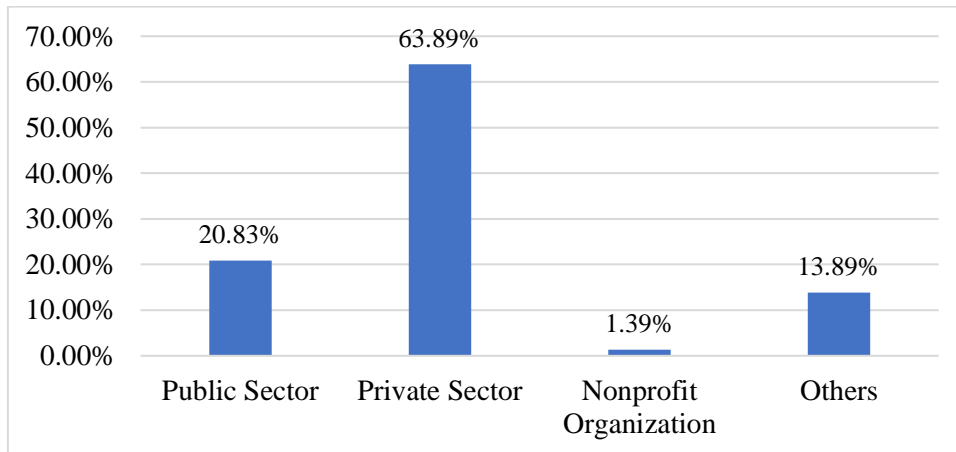
Source: Survey Data (2022)

Figure (5) Type of Business



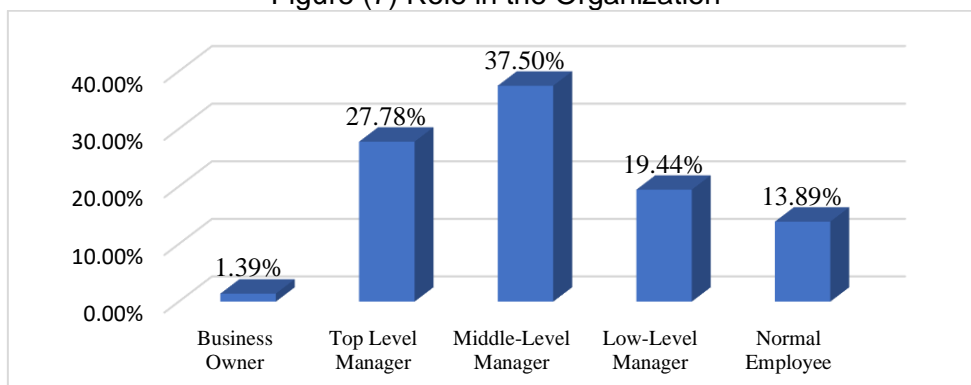
Source: Survey Data (2022)

Figure (6) Type of Organization



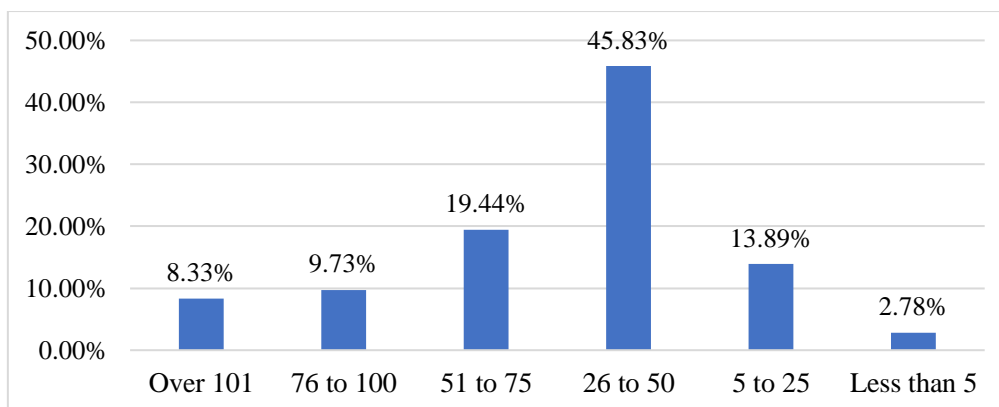
Source: Survey Data (2022)

Figure (7) Role in the Organization



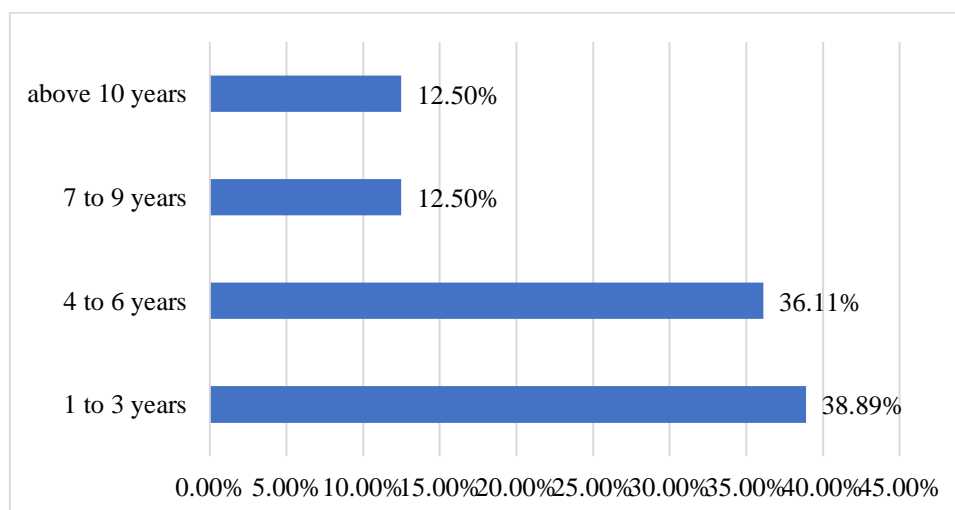
Source: Survey Data (2022)

Figure (8) The employee in the Organization



Source: Survey Data (2022)

Figure (9) Working Experience in Tourism Field



Source: Survey Data (2022)

Perception on Economics, Environmental, and Social-Cultural Impact of Tourism Industry
 Respondents were asked to state the extent to which they agreed or disagreed with the following statements about the economic, environmental and social-cultural impact of tourism industry. The findings were shown below in Tables.

Table (1) Economic Impact of Tourism Development

Particular	Mean	Std. Deviation
The resident's income increased due to the development of tourism.	3.8889	0.4909
Resident's Job opportunity is increased due to the development oftourism.	3.4444	0.6476
The local product has sales increment due to the development oftourism.	3.7361	0.6499

Prices of local housing and land are increased due to the tourism development.	3.6389	0.6348
Local products and transportation firms are increased due to the tourism development.	3.7361	0.605
Increase of job creation in the touristic area	3.4583	0.6907
Average Mean	3.6505	

Source: 2022 Survey Data

As respondents' perception related to economic impact of tourism development, the average mean scores achieved 3.6505 so that the stakeholder satisfied the economic benefit of tourism development. The result indicates that the highest mean score 3.89 is for the statement, "The resident's income increased due to the development of tourism." whereas the lowest mean score 3.44 is for the statement, "Resident's Job opportunity is increased due to the development of tourism."

When the tourist sector is developed, business was increased such as establishment of bed and breakfast, restaurants, the various production units, construction of roads and creation of various amenities which could affect the environmental distressed in the township. Because immigrants were increased so that their waste disposal become dumped. Trees are cut for the business booming then the area becomes deforestation. These all help in polluting of the environment unless the action is taken by the authorities to take remedial measures.

Table (2) Environmental Impact of Tourism Development

Particular	Mean	Std. Deviation
The resident receives knowledge to protect natural resources and environmental by tourism sectors.	4.0139	0.5171
Resident receives good practices on waste disposal through the tourism development.	3.7639	0.741
Road transportation is improved due to the development of tourism	3.6528	0.6747
Increase local production base on local resources due to the development of tourism.	3.6111	0.6179
Increase in the size of community construction area and the number of facilities	3.3889	0.6829
The community's natural environment is maintained cleaner	3.5556	0.6476
Average Mean	3.6644	

Source: 2022 Survey Data

The data was collected from the respondents through 6 specially structured questions. The views of the respondents on Environmental impact are collected. The result shows the mean and standard deviation of reciprocal agreement for environmental impact with respect to tourism development. The result indicates that the highest mean score 4.01 is for the statement, "The resident receives knowledge to protect natural resources and environmental by tourism sectors." whereas the lowest mean score 3.38 is for the statement, "Increase in the

size of community construction area and the number of facilities.” The average perception on distribution by stakeholders is 3.66. Therefore, it suggested that stakeholders are satisfied on the environmental impact of tourism development. The development of tourism facilities such as accommodation, water supplies, restaurants and recreation facilities can involve sand mining, beach and sand erosion, soil erosion and extensive paving. Beautiful natural landscapes or unique flora and fauna are the main drivers of tourism into an area. An ecosystem is a geographic area including all the living organisms (people, plants, animals, and microorganisms), their physical surroundings (such as soil, water, and air), and the natural cycles that sustain them. On the other hand, when the number of visitors is balanced with respect for the natural environment, tourism has great potential in supporting or even starting out new conservation projects that protect unique areas and benefit local residents.

Table (3) Social-Culture Impact of Tourism Development

Particular	Mean	Std. Deviation
Due to the development of tourism, young people would like to studymore on English, Computer and vocational training for tourism.	3.9028	0.5607
Due to the development of tourism, job opportunities are increased.	3.7639	0.6389
Community living standard is improved due to the development oftourism.	3.4861	0.6712
Indigenous cultural traditions and historical sites are preserved	3.5	0.7121
Intensive promotion and development of traditional cultural activities	3.6111	0.8317
Increased number and visibility of traditional culture and industries	3.5556	0.6026
Average Mean	3.6366	

Source: 2022 Survey Data

For the impact study, its effect on society both in social and cultural terms is considered as of greatest importance. In the tourist area, tourists arrived from different areas within the country, different cultures, communities and other countries of the world having different ways and methods of leading their lives left a certain impact in the area consciously or unconsciously. In this study, the social – culture impact of tourism development is analyzed through questions number 1 to 6.

Table (3) shows the mean and standard deviation of stakeholders’ agreement for social culture impact with respect to tourism development. The result indicates that the highest mean score, 3.90 is for the statement, “Due to the development of tourism, young people would like to study more on English, Computer and vocational training for tourism” whereas the lowest mean score, 3.48 is for the statement, “Community living standard is improved due to the development of tourism”. The average perception on social culture by stakeholder is 3.64. Therefore, it suggested that stakeholder is satisfied on social culture impact of tourism development.

Tourism may have different effects on the social and cultural aspects of life in a particular region, depending on the region's strengths. To boost huge tourism, money is invested in preserving the local heritage, improving infrastructure, and providing better local facilities, which in turn creates better education, better leisure facilities, organizing frequent social events and thus a better lifestyle for the local people. Due to the demand for better services, varied employment opportunities have been created.

Respondents’ Opinion on Economic Implications

Respondents were asked to state the extent to which they agreed or disagreed with the following statements about the economic implications on Myanmar's tourism industry. The findings were shown below in Table 4.

Table (4) Respondents' Opinion on Economic Implications

Statement	Mean	Std. Deviation
Tourism is a major contributor to Myanmar's GDP.	3.8194	0.6782
Myanmar tourism industry is dependent on international factors.	3.7083	0.7207
Most of the star hotels in Myanmar are dependent on inbound tourism.	3.2083	0.7494
The other sectors in Myanmar depend on the growth of the tourism sector in Myanmar.	3.2361	0.7218
Myanmar tourism industry highly relies on foreign tourists.	3.3333	0.7872

Source: 2022 Survey Data

Stakeholders agreed that tourism is a major contributor to Myanmar's GDP with mean score 3.82. In 2019, contribution of travel and tourism to GDP (% of GDP) for Myanmar was 6.7 %. Though Myanmar contribution of travel and tourism to GDP (% of GDP) fluctuated substantially in recent years, it tended to increase through 2000 - 2019 period ending at 6.7 % in 2019 according to the report of Ministry of Hotels and Tourism. Myanmar tourism industry is dependent on international factors with the perception mean score 3.7. The main reasons of the decline in tourist arrivals in Myanmar are also the low number of international carriers serving Myanmar compared to other regional destinations, the high cost of domestic air travel for foreigners because of discriminatory pricing (Sithu Aung Myint, 2018). Stakeholder gave the lowest mean score on "Most of the star hotels in Myanmar are dependent on inbound tourism". They agree that the other sectors in Myanmar depend on the growth of the tourism sector in Myanmar with moderate level 3.23 mean score. Stakeholders perceived that Myanmar tourism industry highly relies on foreign tourists.

RECOMMENDATIONS AND SUGGESTIONS

In the tourism industry, tourist arrivals were incredibly low and most of the bookings were cancelled, even travel agencies were found to be completely closed. Also, most small travel agencies are on the verge of permanent closure. Thus, all those involved in the tourism industry need to be able to manage Myanmar's tourism industry with great foresight and the government needs to provide revival programs for the survival of private sectors. As tourism becomes an integral part of economic, social and physical development, trust plays a key role in the decision-making process. In addition, in order to develop rural and village areas, the majority of medium-sized hoteliers need to promote, invest in tourism marketing in the Bagan region, as well as find some new tour site-products near to the Bagan region, such as Community Based Tourism (CBT) and Community Involvement Tourism (CIT).

According to research findings, the government should be developing response plans, preparations through evaluation and revision. Also, government and international actors should engage with the concerned government to advocate that humanitarian assistance and government resources go to meeting the basic needs of the most vulnerable members of society, including low-skilled informal workers, those in extreme poverty, and children working in the worst forms of child labor. As a suggestion for the tour guide segment, the Ministry of Hotels and Tourism (MoHT) should replace its current responsible tourism strategy with creative tourism, like Thailand. As a result, the region around Bagan will have a large number of new tourist attractions.

Regarding lacquerware, it is suggested that the government expand the current lacquer ware technical college to include a vocational training program. The government should establish a research center to study the domestic and international lacquer ware markets, as well as how to enhance the production process and the working environment at the company. Finally, associations, development organizations, or government institutions should conduct research on the current conventional methods to enhance the effectiveness and efficiency of on-the-job training, particularly for young people in the workforce. The government and development organizations should work together to enhance the institutions that support them, particularly business associations.

Administrative reform, in particular the coordination of the public and private sectors, is essential and requires assistance from the associations. The following suggestions are for both tourism businesses and tourism SMEs in Myanmar: opening new tourist destinations and promoting ecotourism, natural tourism, shopping tourism, and creative tourism; improving infrastructure, lowering taxes, improving service delivery and capacity building on staff, providing employment opportunities for skilled young people with capacity building, and promoting credit card use as well as product exports from tourism SMEs. The construction of new airports, hotel zones, and useful lacquer wear polytechnic institutions, as well as the support of loans and technical assistance for a few small businesses, are all being prioritized. Therefore, it is imperative that all tourism stakeholders have the foresight to plan how Myanmar's tourism industry can operate in the best possible way. Governments must help the private sector with survival, recovery and reboot packages.

CONCLUSION

Due to COVID-19, Visit Myanmar 2020 has been put off. Tourism is interconnected in all sectors such as the employment, hotel, restaurant, and transportation. Myanmar has now led to a shortfall in the economic chain because of the cancellation of all tourism activities. With the government prioritizing domestic travel over international travel, domestic tourism is expected to recover in at least a year or two, with South Asian countries expected to recover later. This study evaluated the impact of the tourism industry in Myanmar using tourism stakeholders' opinions. The result reveals, that it was agreed that tourism is a main source of Myanmar's GDP. It is also found that Myanmar's tourism industry is dependent on international factors and it highly relies on foreign tourists. The significance of this study is the findings of this research help the government to manage the dynamic behavior of the economic sector in the tourism industry.

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