



# Tourism Market Research Findings Report 2025



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# Content

- Executive Summary
- Research Objectives
- Scope of Research
- Training Schedule
- Trainers' Profile
- Inbound Tourism Research Report
- Outbound Tourism Research Report
- Hotel Research Report
- Hospitality Training Research Report
- Bago Research Report

# Executive Summary

This study was conducted to identify knowledge gaps by analyzing Myanmar's outbound tourism trends. Data was gathered through qualitative interviews and a B2B survey of senior industry stakeholders. Findings reveal sustained leisure demand and a strong corporate travel segment. However, growth is hampered by significant challenges, including complex visa procedures for key destinations, limited direct flights, economic volatility, and a critical shortage of skilled human resources for tourism industry. In future, Travelling service provider via OTA is fast and mobile friendly. It will be more convenient.

Based on the analysis and findings, the following strategic recommendations are proposed to strengthen Myanmar's outbound tourism sector beyond 2025:

The Ministry of Hotels and Tourism (MOHT) should enhance industry capabilities by implementing specialized tour operator management courses. Furthermore, MOHT, in collaboration with the Myanmar Tourism Federation (MTF), can organize familiarization trips to key destinations to improve market knowledge.

To address operational barriers, we recommend engaging with central and private banks to facilitate foreign currency payments for travel expenses and partnering with foreign embassies to streamline visa procedures. Finally, a concerted effort is needed to implement the Tourism Development Master Plan through collaboration between the government, airlines, and industry stakeholders.

# Objectives of Research

- Provide a foundation for evidence-based skill development and policy support in Myanmar's tourism sector.
- Establish key account data for inbound/outbound tour operations, accommodation, and training institutions.
- Identify capacity gaps and growth opportunities across core tourism subsectors.
- Develop a readiness and capacity assessment model for tourism services in Bago.
- Build a sector-specific database to support MTF's HRD programs and strengthen data-driven training and coaching initiatives.

# Training Schedule

Task	Date	Sept 25		Oct 25			
		W3	W4	W1	W2	W3	W4
1 Research Design	21 Sept 25						
2 Research Tools	21 Sept 25						
3 Data Collection & Interview	22 Sep- 3 Oct 2025						
Secondary Data Collection							
<b>Primary Data Collection</b>							
Key Informant Interviews (KIIs)							
B2B Quick Survey							
4 Data Entry for Interview data/ outputs- database	23 Sep- 3 Oct 2025						
5 Review collected Data (Coaching)	4 Oct 25						
6 Plan for Analysis Reporting (Coaching)	5 Oct 25						
7 Data Processing and reporting	6 to 10 Oct 25						
8 Review the processing data (Coaching)	11 October 25						
9 Analysis & Report Drafting, Presentation PPT	12- 17 October 25						
10 Review the Draft Report (Coaching)	18 October 25						
11 Finalize the Draft Report	18 to 23 October 25						
12 Final Draft Report (Presentation format)	24 October 25						
Closing Event _ Report Presentation	25 October 25						

# Trainers' Profile



Dr. Thuta Aung



U Phyo Kyaw Thu



Daw Kyi Kyi Aye

# Team Members for Inbound Tourism Market



- U Aung Phyo



- Daw Hanni Soe



- Daw May Thet Lwin



- U Than Win Kyaw



- Daw Hnin Witt Yee



- Daw Tin Kyi Min

# Research for Inbound Tourism Market

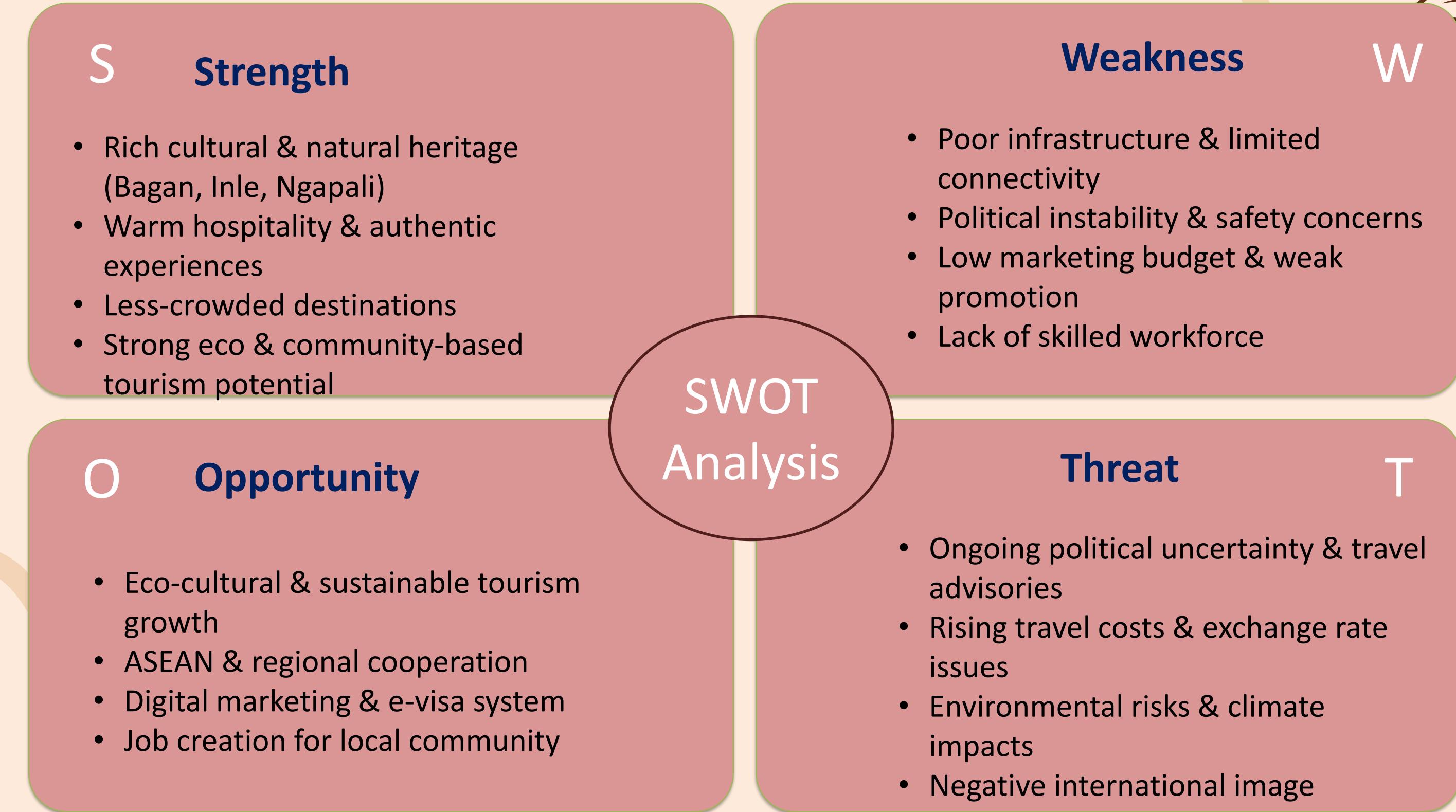
## International Visitor Arrivals to Myanmar by Entry Point (2019 to 2025 as of August)

Entry Point	2019	2020	2021	2022	2023	2024	2025 up to Aug
International Airports	1,782,353	330,373	18,558	90,859	276,887	280,039	206,324
Cruise (By Sea)		1,113	818	1,166	688	716	269
Land Borders (Visa)		40,425	-	-	11,327	1087	627
Land Borders (EP,BP, TBP)	2,433,767	531,442	111,571	141,462	995,289	781,239	446,732
Total	4,364,101	903,343	130,947	233,487	1,284,731	1,063,072	653,952
Changes	(+) 23%	(-) 79%	(-) 86%	(+) 78%	(+) 450%	(-)17%	

## International Visitor Arrivals by Region

Region	2019	2020	2021	2022	2023	2024
<b>Asia</b>						
<b>  Asia</b>	4,032,862	809,735	127,481	219,431	257,117	246,847
<b>Europe</b>						
<b>  Europe</b>	202,665	63,034	2121	7,256	15,848	18,033
<b>America</b>						
<b>  America</b>	88,044	20,486	759	3,802	10,764	11,393
<b>Africa</b>						
<b>  Africa</b>	4,490	1,384	192	509	1,149	1,502
<b>Middle East</b>						
<b>  Middle East</b>	6,006	1,890	152	1,184	949	1,002
<b>Oceania</b>						
<b>  Oceania</b>	30,034	6,814	242	1,305	3,075	3,056
<b>Total</b>						
<b>  Total</b>	<b>4,364,101</b>	<b>903,343</b>	<b>130,947</b>	<b>233,487</b>	288,902	281,833

# Research for Inbound Tourism Market



# Findings and recommendations

The findings indicate that the destination is currently facing challenges such as high hotel and airfare costs, heavy taxation on tourism services, slow and unclear permit procedures, and ongoing safety and security concerns, which together reduce tourist confidence and competitiveness

It is recommended to encourage more competitive pricing through incentives for hotels and airlines, review and reduce tourism-related tax burdens, streamline and simplify the permit process, and strengthen safety communication and coordination. In addition, increasing international promotion and digital marketing is essential to enhance destination visibility and attract more visitors.

# Team Members for Outbound Tourism Market



- Dr. Thet Lwin Toh



- Daw Hnin Lae Lae Paing



- Daw Thazin Aung



- U Naing Htoo Aung



- Daw K Zar Lin

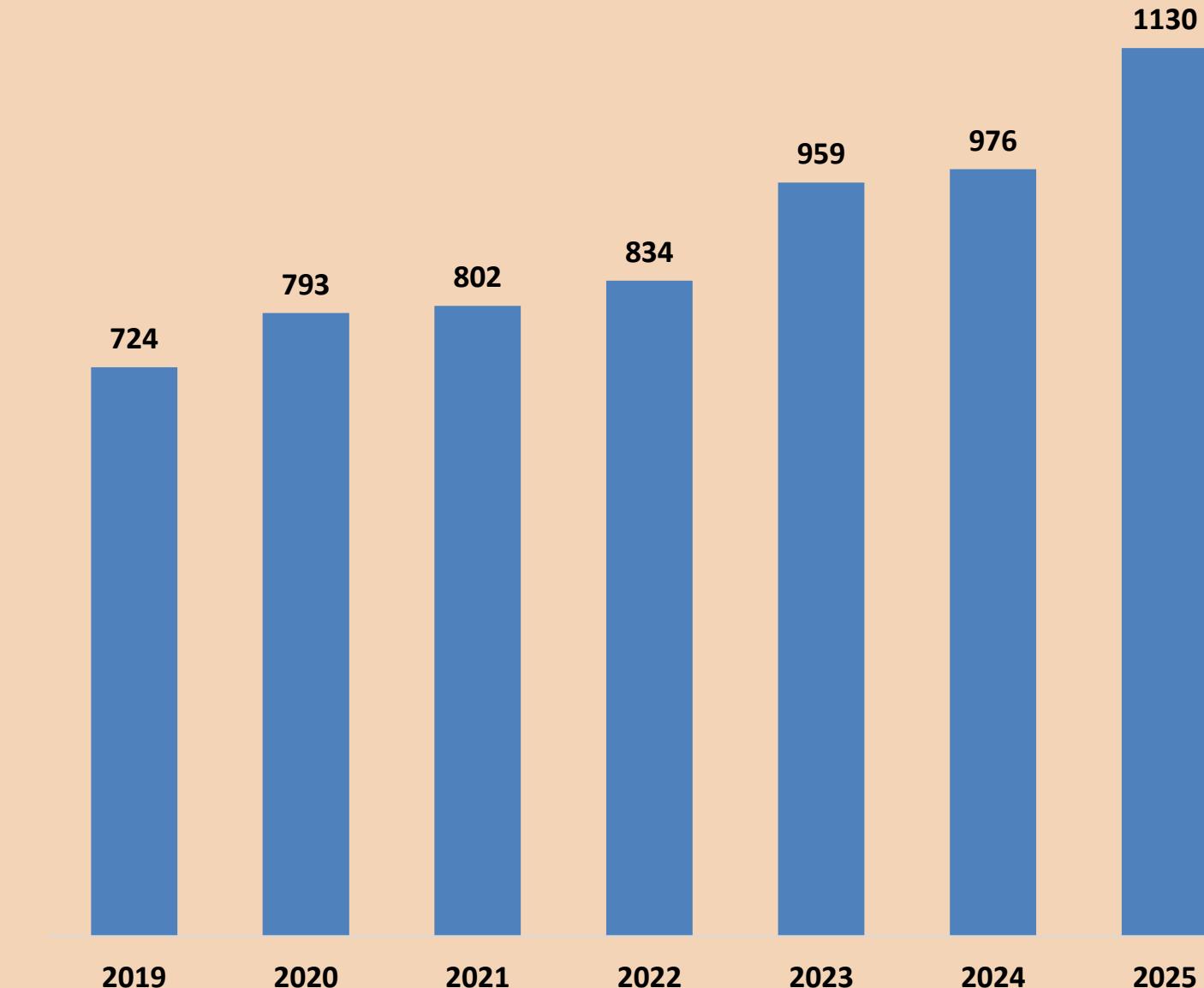


- Daw Eaint Kyar Phyu

# Outbound Tourism Statistics

စဉ်	Passport အမျိုးအစား/ အလုပ်အကိုင်	လအလိုက်တွက်ခွာမှု												ပေါင်း	
		အမှု	အနှစ်	ပို့	ပို့	ပို့	ပို့	ပို့	ပို့	ပို့	ပို့	ပို့	ပို့		
၁	သံမန် (Diplomatic)	၆	၁၀၃	၁၂၅	၁၀၈	၁၂၀	၁၁၇	၁၄၀	၁၄၅						၄၅၀
၂	အထူးနိုင်ကူးလက်မှတ် (Official)	၄၅၈	၇၀၇	၅၃၈	၃၂၆	၅၀၅	၅၇၄	၇၃၈	၉၀၀						၂၁၀၆
၃	သင်္ကာသာ (CDC)	၄၁၆၀	၄၂၂၆	၅၅၄၃	၄၃၁၁	၄၈၈၅	၄၇၆၀	၄၇၄၉	၄၇၄၄						၂၇၃၀၀
၄	စီးပွားရေးလုပ်ငန်း (UBP/B)	၄၄၀	၄၇၉	၄၄၇	၄၃၃	၄၂၀	၄၂၄	၄၄၂	၄၄၂						၂၀၁၃
၅	ရွှေပြောင်းအလုပ်သမား (UBP/CI)	၀	၀	၀	၀	၀	၀	၀	၀						၀
၆	မိန္ဒီ (UBP/D)	၆၀	၆၉၉	၆၇၇	၆၀၁	၆၇၄	၆၆၆	၆၇၃	၆၇၄						၂၄၃၆
၇	ပညာသင် (UBP/E)	၅၀၇	၂၄၅	၁၄၁၆	၂၂၆၄	၂၇၄	၂၇၄	၂၇၄	၂၇၄						၂၂၀၀
၈	အလုပ်အကိုင် (UBP/J)	၁၂၂၄	၁၁၂၆	၁၂၁၀	၁၀၇၉	၁၁၀၀	၁၂၀၀	၁၂၇၂	၁၂၇၂						၄၂၀၉
၉	ဘာသာရေး (UBP/R)	၅၁	၆၈	၇၀	၅၉	၇၃	၁၀၂	၅၈	၅၈						၂၆၅
၁၀	အလည်အပတ် (UBP/SV)	၄၂၀၂	၄၂၀၂	၄၂၀၂	၄၂၀၂	၄၂၀၂	၄၂၀၂	၄၂၀၂	၄၂၀၂						၂၀၁၀၈
စုစုပေါင်း		၆၁၇၆	၅၀၃၉၃	၆၆၀၂၀	၇၃၆၇၉	၅၇၇၃၉	၅၃၃၃၉	၅၃၃၄၉	၅၃၃၄၉	၀	၀	၀	၀	၀	၂၈၀၇၉

Licensed Outbound Tour companies



# Findings and recommendations to Develop Myanmar's Outbound Tourism Sector

## Findings

This study was conducted to identify knowledge gaps by analyzing Myanmar's outbound tourism trends. Data was gathered through quantitative and qualitative interviews by B2B survey of senior industry stakeholders. Findings reveal sustained leisure demand and a strong corporate travel segment. However, growth is hampered by significant challenges, including complex visa procedures for key destinations, limited direct flights, economic volatility, and a critical shortage of skilled human resources for tourism industry. In future, travelling service provider via OTA is fast and mobile friendly. Here are the more detailed for findings.

1. Market Overview & Key Driver
2. Evolving Destination Preferences & Traveler Motivations
3. Critical Shift in Consumer Behavior
4. Primary Barriers to Growth
5. Underdeveloped Financial Infrastructure

**Conclusion:** The Myanmar outbound market is poised for growth, driven by digital-savvy consumers and demand for regional travel. Overcoming infrastructural and financial barriers through public-private collaboration is essential to capitalize on this emerging potential.

# findings and recommendations to Develop Myanmar's Outbound Tourism Sector

## Recommendations

Based on the analysis and findings, the following strategic recommendations are proposed to strengthen Myanmar's outbound tourism sector beyond 2025:

1. Product Development & Market Innovation
2. Industry Capacity Building & Collaboration
3. Policy Advocacy & Travel Facilitation
4. Long-Term Strategic Positioning
5. Strategic Recommendations for 2026. To unlock growth, a coordinated effort is required before 2026, focusing on: Infrastructure & Policy: Expand air connectivity and simplify visa procedures through government-led agreements.
6. Financial Reform: Stabilize currency exchange and enable easier access to foreign currency for travel expenses through Central Bank and private bank initiatives.
7. Digital Transformation: Encourage policies that promote digital innovation, helping businesses meet the demand for mobile-friendly booking and payment platforms.

# Team Members for Hotel Research Report



Daw Kay Thi Naing



Daw May Myat  
Noe



U Aye Min Oo



Daw Chaw Su  
Thin



Daw Nan Inzali



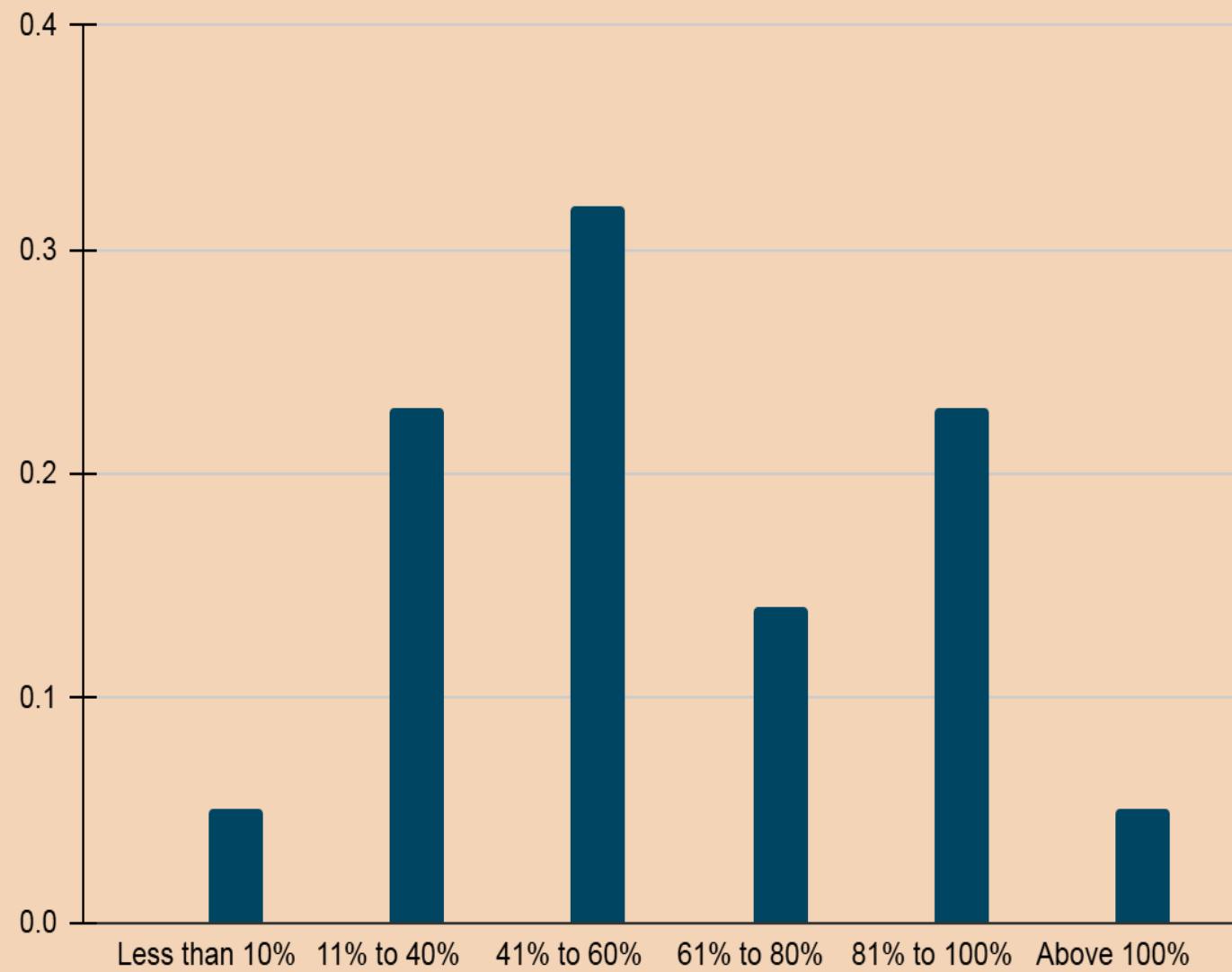
Daw Than Than  
Win



U Ponnya Min  
Lwin

# Qualitative and Quantitative Data Collecting

Average Occupancy By Annum



Interviewing to get Qualitative Data

# Findings and recommendations

1. Unstable for high value market
2. Service and Experience are below international standard
3. Lack of Digital marketing
4. Challenge of Luxury raw material supplies/ Secondary raw
5. Skillful labor shortage

1. Promote Local Market, Week-end short stay, ( Mid luxury)
2. Flexibility in travel restriction and visa facilitation especially e-visa.
3. Boost up air lines capacity
4. Special events/ National Level events and facilities lead by Goverment officials
5. Use Social Media
6. Reduce cost and support local agriculture
7. Provide loyalty-based staff retention programs

# Teams for Hospitality Training Research



Daw Hnin Lei Lei Paing



Daw Soe Soe Moe



Dr. Khin Theingi Hla Maung



U Thaik Tun Aung



Daw Phyu Phyu Tin



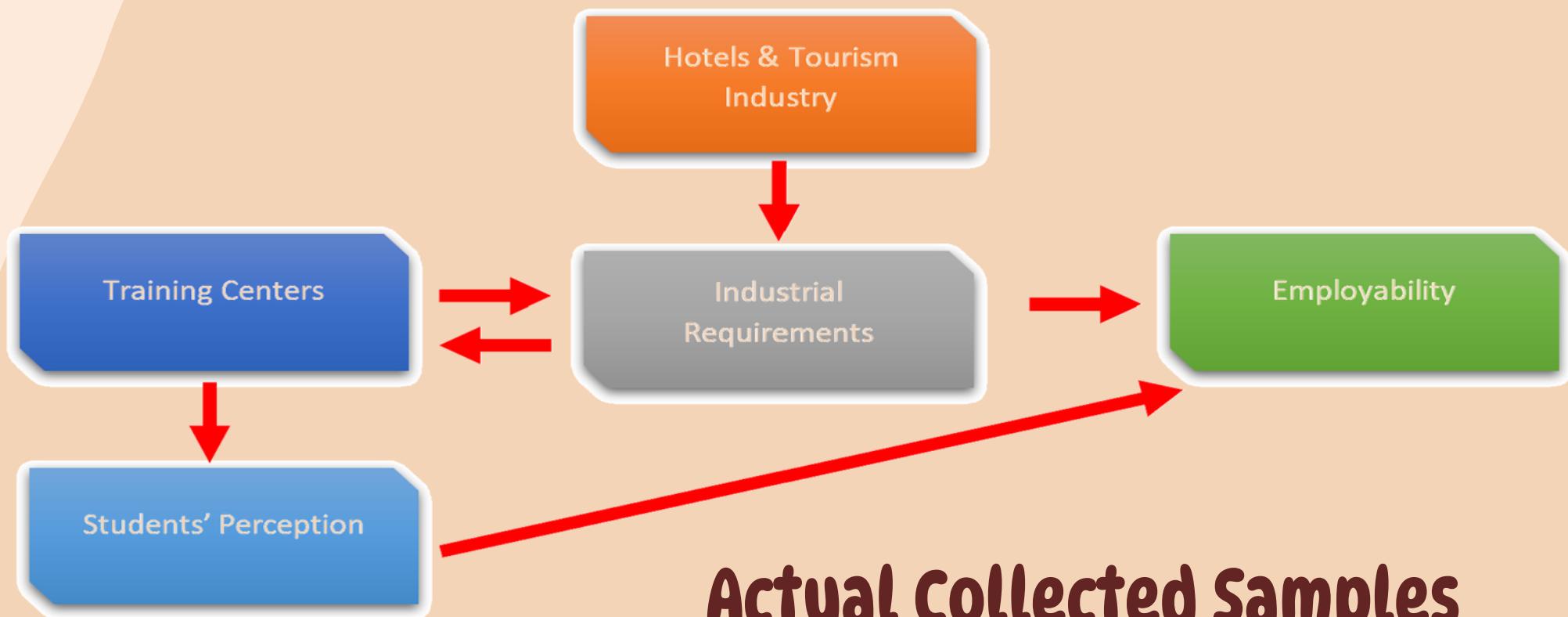
Daw Nay Yi Aung



Dr. Ohmar Ohn

# Hospitality Training Research Report

## Conceptual Framework



## Actual Collected Samples

Sr.	Survey Type	Qty
1	Students	33
2	Training Centers (KII)	7
3	Employers (KII)	6

# Findings and recommendations

## Student Perspectives

- Founded that it easy to get jobs post-training and also indicates general satisfaction with job placements

## Training Centers 'Input

- Arranging internships and facing with 4 acknowledging challenges
- Facilitate full-time jobs placements post-internships

## Employers Feedback

- Offer internship placements
- Accept internships and also offer full time positions

Recommended as,

- Standardized curricula
- Strengthen WIL mechanisms
- Employer Engagement
- Career counseling and placement cells
- Soft skills Development

Suggested as,

- Introduce short-term vocational courses on traditional handicrafts, packaging, and marketing.
- Collaborate with domestic tour operators and retail platforms to promote student-made products.
- Link cultural preservation with income generation through local entrepreneurship.
- Government and Private Sectors should collaborate more in education to facilitate students from government schools to get more practical and internships

# Bago Research Report



Field trip to Bago

# Qualitative and Quantitative Data

## Visitors Arrivals in Bago Cities

Visitors	2021	2022	2023	2024	2025 Aug
Domestic	78315	370369	414925	440171	351005
International	5972	8441	10052	6900	3093
Total	84287	378810	424977	447071	354098
Income(MMK million)	944.66	3871.91	4600.21	5413.14	4963.99

## Readiness Framework

Sr. No.	Dimension	Focus Area	Example Indicators
1	Infrastructure	Roads, Utilities, Signage	Accessibility, Cleanliness
2	Service	Hospitality Quality	Training, Customer Care
3	Community	Local participation	Awareness, products
4	Institutional	Coordination, Licensing	Support Mechanisms
5	Market	Promotion, Tour Linkages	Visitor Flow

# Findings and recommendations

- The key gaps and priority areas for improvement.
- Recommendations for training, infrastructure, and policy support.
- Action plan for capacity development and promotion strategies for the Bago City.
- Training and Capacity Development
- Infrastructure and Facilities
- Policy and Government Support

**Foundation and Coaching For Tourism Market**  
**Research Candidate List**

No.	Name	Association
1	U Aung Phyo	MOHT
2	Daw Thazin Aung	
3	Daw Hanni Soe	
4	Daw Than Than Win	
5	U Than Win Kyaw	MTF
6	Dr.Thet Lwin Toh	
7	U Pon Nya Min Lwin	
8	Daw May Thet Lwin	
9	U Naing Htoo Aung	MHA
10	Daw Hnin Witt Yee	
11	Daw Eaint Kyar Phyu	
12	U Aye Min Oo	
13	Daw Khaine Yin Mon Thant	UMTA
14	Daw Tin Kyi Min	
15	Daw K Zar Lin	
16	Daw Phyu Phyu Tin	
17	Dr. Khin Theingi Hla Maung	MTM
18	U Thaik Tun Aung	
19	Daw Nay Yi Aung	
20	Daw Soe Soe Moe	
21	Dr. Ohn Mar Ohn	MTHRDA
22	Daw Hinn Lae Lae Paing @ Yuki	
23	Daw Kay Thi Naing	
24	Daw Chaw Su Thin	
25	Daw Nan Inzale	Aye Thar Yar Golf Resort (Aye Thar Yar)
26	Daw May Myat Noe	U Zarni Tin Myint MTF
<b>Total</b>		<b>26 pax</b>

