Sustainable Heritage Tourism Study

Hilary du Cros
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Executive Summary

Yangon has a hugely diverse array of cultural assets to draw on for tourism. This Tourism Master Plan should be considered a preliminary attempt at assessing the potential for tourism of ones not accessible to tourists and understanding how existing attractions can reach their full potential. No previous detailed analysis of tourism in Yangon has been carried out before and the city lacks a destination management plan for tourism, despite being Myanmar’s largest. The study for the report was conducted over only one month, by one consultant, Hilary du Cros, with the assistance of the Yangon Heritage Trust. It provides a guiding vision for the next five years and should be considered a document that can be used for further discussion on a way forward.

Highlights of tourism potential assessment of cultural assets

The majority of the pre-1950s architecture in and around the Yangon area is relatively untouched by redevelopment. The Downtown area offers an astounding range of structures that as yet have had little of their tourism potential realized either as attractions or (where appropriate) conversion to a tourism-related use. Potential primary attractions are the Secretariat zone (Secretariat, St Mary’s Cathedral, the Yangon Railway Station, and surrounding historic buildings), and the Waterfront (when part or all of the Trust’s vision is realized). When these become new icon attractions they should boost and broaden Yangon’s market appeal. They will also complement the existing pulling power of the Shwedagon Pagoda.

Yangon’s religious heritage is diverse. For the most part, this multi-religious city has developed a culture of tolerance that can be seen in its spatial arrangements and social practices. Both the tangible and intangible heritage associated with Yangon’s multiple religions are of interest to tourists. The city already attracts a dramatic number of religious tourists from neighbouring Thailand to its Pagodas and this market can be complement with better presentation of other religious places and practices.

Heritage and contemporary arts is also a strong asset set for Yangon. It contains examples of many different forms of cultural expression, such as, filmmaking, dance, drama, puppetry, painting, sculpture, umbrella making, timber boat building, and creative writing. Of particular interest, is the street culture, which is dynamic and full of the spontaneity and inventiveness missing from many other overly modernized Asian cities. For instance, in Downtown Yangon, which has the same population density of some parts of Macau, hawker calls are still to be heard, whereas in Macau, they are only evident in museum recordings.
Summary of tourism management issues

Strengths/Opportunities

- Diverse heritage/cultural asset set
- Key Buddhist and Christian religious places are already attracting tourism
- Shwedagon Pagoda is an icon attraction for Myanmar
- Handicrafts are not mass produced, demonstrate local influences (not generic national ones)
- A few local retail outlets feature good quality tourists handicrafts from social enterprises
- Very few franchises or international chain stores
- High local ownership of tour and hospitality enterprises
- Local people welcome tourists/safe environment/low crime rate
- Tourist numbers have steadily increased over the last five years
- Attracts tourists from many countries (particularly Downtown Yangon)
- Potential for film-related tourism, if international films could made on location here
- Opportunities for creating unique private and public museums
- Potential for greater community involvement in handicraft, music, theatre and dance development, marketing and distribution
- Cultural heritage tourism would provide for the much needed livelihood opportunities and would encourage development of much needed sanitation and education programs
- Potential for new exciting arts/cultural events to be developed
- Development of heritage hotels acting as a catalyst to improve the conservation and presentation of nearby heritage assets
- Potential greater awareness of heritage assets through new walking tours/suggested itineraries
- More attention to urban parks for tourism will also benefit local residents
- Pedestrianisation of specific areas on weekends will improve local and tourist street shopping experiences
- More tourism employment opportunities in Yangon may reverse brain drain of young people to overseas

Weaknesses/Threats

- Cultural heritage assets are not legally protected
Presentation and interpretation of cultural attractions are virtually non-existent or very old fashioned
Inadequate financial resources and technical capacity available in many sectors for management
Lack of communication between Cultural and Tourism Sectors
No guidelines, incentives or programs for engaging the private sector in the conservation and appropriate adaptive reuse
Tangible heritage assets are deteriorating from lack of regular maintenance, and/or inappropriate repairs and use to the point where parts of them are becoming unsafe for visitation
Archaeological sites are not adequately researched, conserved and presented in ways that demonstrate the complexity of past cultures to tourists
Air pollution, dangerous paving and congested streets in Downtown Yangon
Unsightly elements (e.g. electricity lines and modern street advertising signage) impact negatively on aesthetic values
Certain categories of locally produced intangible heritage, such as puppets, are struggling to service tourists because they are not well integrated into tour itineraries, unlike in Hanoi
Lack of awareness and support for artisans producing authentic handicrafts
Slow implementation of heritage reuse and revitalization projects
Lack of appropriate or unique cultural night time activities/events
Lack of unique cultural events or festivals, aside from Buddhist ones
Potential difficulties in getting key stakeholders to become interested in cultural tourism, work together on conserving heritage or creating new products
Threat to major heritage assets due to misuse and redevelopment
Interventions to the built fabric that are insensitive to the cultural value of the sites causing loss of authenticity (e.g. advertising signs)
Development of inappropriate infrastructure and land uses close to heritage attractions (e.g. care needs to be taken with the Railway Station site redevelopment so close to St Mary’s Cathedral and the Secretariat)
Failure to involve community stakeholders in the development of traditional cuisine and handicrafts and subsequent loss of skills and authenticity
Lack of business planning for social enterprises could affect the economic benefits to arts and handicrafts producers
Waterfront develops in an inappropriate direction or not at all
Traffic congestion and air pollution continue to become worse
Hanthawaddy International Airport project completion 2022. Yangon may become a domestic airport – however it may be able to fight off this threat if it develops into a very different city in the next five years!
Summary of tourism marketing issues

Strengths and opportunities

- Major gateway
- Shwedagon Pagoda is a primary attraction for Myanmar
- Still opening to tourism/considered a ‘novel’ destination by some markets
- There is still scope to position and project a more coherent image of Yangon
- Yangon/Myanmar can be bundled with other South East Asian/Indochinatype destinations for long haul tourists
- Curiosity about General Aung San and Daw Aung San Suu Kyi
- River day and dinner cruises are becoming more popular experience
- Colonial downtown area a good counterpoint to Buddhist heritage with St Mary’s Cathedral and other colonial/religious buildings
- Examples of types of urban heritage places and practices still evident that have disappeared from other large cities in Asia
- A few luxury and budget hotel offerings in heritage buildings
- Yangon has a growing number of small local restaurants/cafes that are tourist safe
- Most taxi fares/entry fees to attractions are still good value for the region
- Could attract more and longer staying long haul tourists to Yangon with more targeted destination marketing and a supply of new cultural tourism products
- New products could also potentially appeal to Asian regional tourists, Burmese Diaspora and regionally based expats
- Potential to offer innovative themed walking and street-based arts/heritage leisure experiences to tourists based on living culture and history that could be the envy of the region
- Youth of Yangon who love its arts and heritage could be a strong foundation for a sustainable cultural tourism industry by coming up with new and fun products for their visiting peers that do not cause negative impacts
- Possibility to leverage slow travel products, such as river cruises, to include more Yangon activities
- Possible new markets in the long term for product categories such as, art tourism, tea tourism, wedding tourism, photography tourism
- Themed products for Aung San (father and daughter), Rudyard Kipling, Tiger Balm discovery and any film or popular culture specifically associated with Yangon regionally and internationally
Weaknesses/Threats

- Buddhist heritage is the overwhelming image and primary attraction it may be hard to market others
- Informal destination image as a ‘gateway’ - not a place to stop and enjoy
- Lack of a destination marketing organization (DMO) that focuses just on Yangon to counteract above
- Lack of market research and statistics specifically for Yangon (hence the use of Shwedagon visitor information)
- Market share could erode as other destinations offer more novel experiences that are better value, easier to access and more closely matched to destination image
- Some risk that other Myanmar international airports could attract more visitors, especially those close to developing beach resorts
- Border restrictions have eased on Chinese package tours and budget tourism could dominate Myanmar
- No Aps or digital prompts e.g. Blue tooth/geofencing for heritage places for more tech-absorbed tourists and to assist DMO conduct research into tourist movements
- Value for money concerns by tourists
- Lack of mid-range/boutique accommodation options in heritage buildings could be deterring some markets from staying Downtown Yangon
- Walking experience of downtown hampered by air pollution, road and sidewalk/traffic congestion, lack of consistent food safety when stopping for refreshment
- Wasted waterfront: The Strand and the container port cut off access to waterfront and are unsightly/congested/noisy for tourists used to being able to access a waterfront as a major leisure experience (e.g. Clarke/Boat Quays, Singapore)
- Modern urban elements are visually intrusive (e.g. digital signboards and other street signage)
- Cultural offerings and nightlife considered dull by some markets used to better from the region
- Negative political associations still for the recent past for some markets
- Novelty could have already worn off with some regional markets (e.g. increase in negative comments on Internet)
- Very few appropriate or unique cultural night time activities/events that showcase local culture to promote as uniquely Yangon

Summary of five-year tourism forecast

From the available data it was possible to make some guessimates of tourist numbers for the next five years based on two possible rates of change. One rate of growth (15% year on year) relates to a slight increase, if the status quo is retained and all other external
factors remain good. The second growth rate of 30% represents a more rapid growth in tourist numbers, if measures for enhanced management and marketing of the city are implemented in a timely manner.

The study also offers some insights on potential community economic benefits and potential revenue leakage that may negatively affect those benefits. Again, some growth rates are presented based on information available in Yangon and the national year on year averages for tourist receipts. It is possible that with the status quo a modest growth rate in tourist receipts of 7% is possible, if external factors remain stable and 14%, if more active management of the destination is implemented.

*Potential tourism products*

Commodification for tourism does not necessarily mean the authenticity or intrinsic value of a cultural asset will be destroyed. It is the process by which cultural expressions and aspects of heritage become ‘cultural goods,’ because they have been transformed into commodities to be consumed easily by tourists. Most archaeological, engineering and intangible heritage assets, for instance, require some level of commodification (through site interpretation) to make their cultural values easily understandable to outsiders and provide a memorable tourist experience. A detailed section in the Appendix gives suggestions for appropriate tourism product development for the following:

- Tours/itineraries for revealing diverse religious heritage (example will be provided)
- Tours/itineraries incorporating other attractions around Yangon (and series of themes provided)
- Night tours (cycling and walking)
- Tours/itineraries incorporating Dhala attractions
- Itineraries/times for cycling
- Jump on/off bus
- Potential buildings for heritage hotels (list of hospitality needs for conversion)
- Potential buildings for museums (see below)
- Themed restaurant experiences (some tasteful suggestions)
- Repeatable cultural events for tourists (traditional and contemporary)
- Light and sound show (potential spaces/buildings – themes)
- Other: Initiatives to create new souvenirs, new cultural spaces/pedestrian areas, sculpture trails, wall mural painting and digital info sources
### Summary of strategies and actions (100 days, 2 years, 5 years)

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<th>Area</th>
<th>Strategy</th>
<th>Action</th>
<th>Responsible Authority</th>
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<tbody>
<tr>
<td><strong>Cultural assets</strong></td>
<td>Continue to highlight the importance / uniqueness of these assets (local, regional, national, international)</td>
<td>Create more tours/itineraries/events for revealing diverse religious other heritage assets; new museums and other cultural spaces</td>
<td>Trust/tourism sector/government/site managers</td>
</tr>
<tr>
<td></td>
<td>Highlight Secretariat and the Waterfront as potential icon tourist attractions</td>
<td>Continue to provide technical support/advocacy for sustainable development</td>
<td></td>
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<tr>
<td><strong>Tourism activity at destination</strong></td>
<td>Link the way the destination is positioned in the marketplace to cultural tourism and Yangon’s brand identity</td>
<td>Advocate for the designation of a responsive destination marketing organization</td>
<td>Trust, tourism sector and government</td>
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<td>Ongoing advocacy and research on cultural or heritage tourism activity for marketing and management purposes</td>
<td>Work with universities and other training institutions to conduct research. Provide advice on sensitive historical narratives</td>
<td>Trust</td>
</tr>
<tr>
<td></td>
<td>Improve awareness and access to handicrafts, performing and visual arts</td>
<td>Support and facilitate discussion on new museums and festivals; support arts/handicrafts not-for-profits and social enterprises</td>
<td>Trust/social enterprises/government</td>
</tr>
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<td><strong>Enhance sensitivity to socio-historical setting</strong></td>
<td>Create awareness of impact of changes in socio-cultural context on management of cultural and religious tourism Maintain awareness of building friendships or better relationships from constructive stakeholder discussion; facilitate more cultural exchange</td>
<td>Facilitate more multi-stakeholder discussions; show sensitivity to various cultural groups</td>
<td>All</td>
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<tr>
<td><strong>Improve conservation of cultural values and improve visitor experience (site specific projects)</strong></td>
<td>Facilitate dialogue between those responsible for heritage assets Advocated for the improvement of active management for tourism at heritage and religious attractions</td>
<td>Encourage Shwedagon Pagoda to implement a more active visitor management regime/lead by example/ run exchange programmes to build capacity Work with site managers of other religious places</td>
<td>Trust/religious site managers in Myanmar and Thailand</td>
</tr>
<tr>
<td><strong>Development of new tourism products</strong></td>
<td>Advocate for the enhancement of visitor experience at the site level Facilitate actions to spread the positive impacts of tourism</td>
<td>Promote selection of products provided in this report as a way to ensure better visitor experience Use and advocate principles for responsible and sustainable tourism</td>
<td>All</td>
</tr>
</tbody>
</table>
| **Stakeholder involvement** | Facilitate inclusive and transparent stakeholder involvement | Identifying all relevant stakeholders as early as possible in the process  
Inviting their participation throughout the process  
Dealing with dominant stakeholders with controlling interests in the asset  
Understanding and finding ways to accommodate their different involvement expectations and capabilities  
Noting any history of conflict or collaboration | All |
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<tbody>
<tr>
<td><strong>Providing a foundation</strong></td>
<td>Acting as a conduit for technical and coordination to ensure best practices in sustainable cultural tourism are adopted</td>
<td>Endorse relevant sets of principles and best practices</td>
<td>Trust</td>
</tr>
</tbody>
</table>

**Goals to achieve in next 100 days**
1. Feedback to Trust from government regarding priorities highlighted in Special Development Plan (including tourism management and marketing).
2. Trust to deciding what immediate priorities for implementation and seeking funds
3. Contact with stakeholders, potential partners and other contacts regarding feedback on Plan (keep the relationship going with the Shwedagon Pagoda Board of Trustees that this study has built up and make more contacts within the organisation)
4. Also contact sources named for more information (e.g. contact Lawrence Brahm, Red Capitalist Club, re ideas potential developers for saving and renovating Pegu Club and what stakeholders would support a maritime museum).
5. After consideration of the above and feedback on the Special Development Plan, priorities for implementation are amended and initial work begins.

*Goals to achieve in next 2 years*

6. Trust to seek involvement in any destination planning for Yangon, especially should MOHT seek to run a study for a plan based on actions coming out of the Union of Myanmar Tourism Master Plan (2013). The Trust should strongly advise that MOHT use that study as an opportunity to design a distinct destination marketing organization for Yangon to coordinate its image development with all sectors and plan for better tourism management and coordination to support that image.

7. Trust to provide support and advice to developer at the Secretariat and those for other hotel, food and beverage related projects in heritage buildings, as per recommendations and as required.

8. Two years should be long enough to make any necessary changes or improvements to the Trust’s tours and souvenirs, while adding new routes and possibly working with a tour operator towards establishing a regular volunteer tourism heritage conservation programme.

9. Encourage the Shwedagon Pagoda Board of Trustees to seek a partner temple in Thailand to run exchange programmes and assist staff in building visitor management capacity by undertaking language courses in order to provide on-site supervision/guidance to tourists

10. Provide advice and advocacy as required to fulfill the needs of product development requirements in Appendix 1. Although Yangon is still a working port, the idea of setting up a maritime museum should be heavily promoted so that oral history and
intangible heritage programmes can set up now to document ready for exhibition later (and in case the traditional shipyards start dying).

**Goals to achieve in the next 5 years**

Most of the implementation for actions will fall into this category, because much needs to happen outside the Trust’s control, before significant advances can be made.

11. The Secretariat could be completed or close to completion in 2020. The Trust should monitor the situation and add more tours of its own as the opening nears.

12. The Waterfront may have undergone some enhancement at the Trust’s urging. More pushing and coordinating will be needed to add appropriate cultural tourism and leisure experiences, as this occurs.

13. The Shwedagon zone should also have undergone some improvement for walking and cycling amenity over this period through the Trust’s advocacy and gentle persuasion. Further additions of a path of contemplation and conversion of the timber mansions may also have started to attract tourists to walk along the corridor, instead of always travelling by vehicle to the main Pagoda.

14. Provide advice and advocacy as required to fulfill the needs of product development requirements in Appendix 1.
1. Introduction

The Master Plan sets out a vision for sustainable cultural tourism development and includes strategic programs, priority projects, and activities in an implementation framework for a short-term (100 days, 2016-2018), medium-term (2016–2020) action plan. The Master Plan seeks to maximize the contribution of tourism to local employment and income generation and ensure equitable distribution of its social and economic benefits. This plan was prepared at the request of the Yangon Heritage Trust (hereafter known as “the Trust”).

Preparation of the Master Plan was undertaken between February and March 2016, with technical assistance from within the Trust and a grant from the British Embassy in Yangon. Development of the Master Plan involved a situational analysis of Yangon’s management and marketing for tourism, stakeholder consultations, and a review of internationally accepted good practice for sustainable cultural tourism planning and development in regard to Yangon. Fieldwork included observational studies by the consultant of Yangon’s heritage assets and existing cultural tourism products.

Consultations with more than 20 representatives of government agencies, industry associations, religious organizations, individual enterprises, civil society, and community leaders shaped the Master Plan. Similarly, the Master Plan incorporates the views of more than 50 international visitors sourced from TripAdvisor and the Trust’s own surveys. Other tourism consultants in Yangon, already working on hospitality and tourism projects for the public and private sector, also provided valuable insights.

1.1 The Master Plan

The Master Plan begins with an overview of Myanmar’s tourism system including an analysis of national tourism development, tourism activity and assets, institutional and regulatory issues, investment environment, infrastructure, and human resources. Based on the situational analysis, forecasts are given for international visitor arrivals, length of stay and tourism receipts. A Tourism Vision, that complements the Trust’s Vision for Yangon, follows with a set of guiding principles for tourism in Yangon.

Related tourism goals and milestones needed to achieve the vision and objectives of the Master Plan are presented in Section 5. Section 6 describes key strategies and actions for an implementation framework with a short-term action plan with milestones and
activities (for 100, 2 years and 5 years), including the roles and responsibilities of various public and private stakeholders. The more detailed more examples of possible tourism products for the Trust or other organizations to develop are in Appendix 1.

1.2 Objectives

The objectives designated by the Trust for the Master Plan are:

1. Investigate hotel bed capacity, pricing and types of accommodation available
2. Investigate the market potential and management issues for the most visited sites (and any others that should be visited)
3. Analyse who is visiting/nature of demand (cultural distance, market share, seasonality issues)/key and potential source markets and comment on trends
4. Look at how long tourists spend in Yangon and why
5. Identify heritage assets (tangible and intangible) that could have market appeal to tourists with suitable presentation and management
6. Comment on how much income could be generated for residents and city authorities by more integrated planning of heritage assets for tourism (different projections related to both modest and more rapid rates of tourism growth for Yangon)
7. Identify issues for suitable presentation and management for tourism of heritage assets from (6)
8. Identify ways to ensure that tourism does not adversely impact the livability of Yangon for local residents.

1.3 Rationale shaping study methodology

Unlike many purely tourism-driven master plans, this document includes a high integration of information and analysis concerned with the sustainable management of cultural and heritage assets, community development goals and the Vision for the Trust as a guiding principle. Hence, it offers a holistic approach to achieving sustainable cultural tourism in Yangon.

The methodology itself is based on what the consultant has used and written about before in terms situation analysis and assessment of tourism potential. The following concepts are of use in understanding the rationale and approach taken: broad definition of cultural
tourism; cultural and heritage assets; triple bottom-line sustainability; cultural commodification and what is meant by optimizing benefits and minimizing impacts. Also, where available, examples of best practices in tourism management from within the region are featured in this report, where cultural distance is less of an issue.

1.3.1 What is cultural tourism?

The challenge is how to define cultural tourism in a manner that captures the essence of the experience, can be used by destination management organizations as a marketing tool, can be used to identify potential products, and most importantly, also can be used to identify and proscribe management actions that reflect the legitimate needs of all stakeholders. This Master Plan adopts a more marketing oriented approach by defining cultural tourism as a product class that is defined by four interrelated factors.

Cultural tourism is defined as:

A form of tourism that relies on a destination's cultural heritage assets and transforms them into products that can be consumed by tourists.

(McKercher and du Cros 2005: 211-212)

This definition recognizes that cultural tourism is a term involves four elements:

- Tourism
- Use of cultural/heritage assets
- Consumption of experiences and products
- The tourist

1.3.2 What could be considered cultural assets?
Cultural assets are everything from historic buildings to works of artistic expression that reflect different aspects of a culture. Sometimes, they are attractive to tourists or are used by a destination to attract tourists. The word “asset” has been chosen to group these diverse forms of cultural expression to indicate that they are of intrinsic or special value foremost to people who produced them and consider the building blocks comprise their cultural capital. The assets’ extrinsic or use value to those outside the community (such as the tourist industry) may not always be the same as their intrinsic value, because of commercial, political or other considerations.

Even so, until there is a better collective noun for all the cultural items, activities and so on that could be potentially developed for tourism, the term “assets” is useful. This is because it gives an idea to all stakeholders of what resources are meant and fits well with the idea of them being first and foremost the cultural capital of a community.

1.3.3 Triple Bottom Line Sustainability

The term triple bottom-line sustainability was introduced initially in a commercial context to argue that enterprises needed to integrate economic, social and environmental objectives into their core business strategy. The need for such a change grew out of the broader recognition for businesses to function in a more corporately social responsibility manner (Elkington 2004). In essence, it was designed to reflect a holistic management philosophy (Stoddard, Pollard and Evans 2012). Such a management approach provides many benefits for the tourism sector, including the ability to tap into previously unrecognized markets, enhance connection with stakeholders and minimize adverse social and environmental impacts (Dwyer and Edwards 2013). Integrating management concerns into marketing ones (and visa versa) provides a basis for a closer relationship between tourism and cultural heritage management sectors.

Underlying issues as a result of this arrangement are centred on the sustainable use of cultural tourism products, while monitoring triple bottom line sustainability requires an application of diverse indicators (see du Cros and McKercher 2014). The tension between the needs of tourism commodification (that is, how a heritage asset is actualized/presented for tourists) and the needs of communities/heritage managers continues and requires special attention in tourism development planning. Most conflicts arise because of poor attempts at planning products so that their commodification leads to negative impacts on the asset and its other users. The parallel (not integrated) development of tourism and cultural heritage management at a place lies at the heart of this issue.
1.3.4 Cultural commodification

There is a fine line between presenting cultural tourism products in a manner that facilitates easy consumption and over-commodification that results in the trivialization of local culture, alienation of host communities and loss of any sense of authenticity. The successful provision of cultural experiences must involve an element of standardization, modification and commodification to ensure consistent quality and to cater for tourists who may know little about the culture of the place being visited. But, over commodification can result in the delivery of tacky or mundane products resulting in embarrassed or bored visitors (Ashley, et al 2005).

1.3.5 What is really meant by optimizing benefits and minimizing impacts?

Cultural tourism is indeed a dual-edged sword. Adverse impacts are reflection of the loss of control over the cultural asset. Key use decisions have either not been made, have been made but not communicated well, have been ignored by stakeholders with differing agenda, or poor decisions have been made. Often the cause can be traced to a belief that asset managers have little or no control over either the volume or type of tourist who visits.

Yet, in reality, visitation does not occur spontaneously. Instead, it is induced in response to a number of stimuli communicated to the tourist formally and informally by markers about the type of product/experience to be consumed (through marketing, tour guides and other information gatekeepers). The failure to set management objectives, develop tourism products to reflect those goals, and position the product in the marketplace to send a desired message about the type of experience to be had to a desired audience, creates a vacuum where tourists or the travel trade can shape experiences to suit their own needs (du Cros and McKercher 2014).

The key question is: how do you control the genie of tourism once it has been released? The answer lies at a community level in the development of a holistic master planning approach such as this one that defines what type of tourism sector is desired (markets, proponents and infrastructure), how many tourists are wanted and what benefits the community wants to gain from tourism. In Yangon, there is an urgent need for all management stakeholders to develop measures in cooperation with communities that attract realistic visitor numbers designed to protect their cultures and ways of life. Another challenge for the Trust is to ensure that policymakers and site managers develop cultural tourism activities that do not negatively influence the daily lives of the inhabitants.
Given the diversity of cultures likely to be involved in cultural tourism development in Yangon, it is important that planning and development mechanisms respect these differences and in fact celebrate them. It should be remembered that community-based development processes are not for the impatient. They take time, patience as well as understanding and commitment from the local community and other stakeholders in order to achieve sustainable development objectives.

1.4 Limitations of this Master Plan

The key limitations of this Master Plan are mainly those related to the limited resources available. Unlike most Master Plans or destination management plans for tourist destinations the size of Yangon, it is not the result of months of work by a multi-disciplinary team with a large amount of institutional support and the resources to conduct primary research (where data is missing) and comprehensive consultation with large numbers of stakeholders. It was carried out over one month by one tourism consultant.

Even so, the Trust has done its best to assist the consultant by providing the services of their resident tourism expert as a local tourism counterpart, guides to act as research assistants to collect primary data and the space and facilities to conduct the study. Because, there has been no previous study of its kind for Yangon, this report should be considered a useful preliminary step to enhanced marketing and management for cultural tourism, despite its limitations.
2. Management Situation Analysis

2.1 Wider context

This section reviews the broader issues that must be considered from both a tourism and cultural heritage management perspective, and includes an assessment of cultural/heritage assets with tourism potential and key issues associated with potential development. The tourism potential assessment provides a brief evaluation of the destination mix of assets in Yangon. Finally, the strengths, weaknesses, opportunities, threats (SWOT) analysis featured at the end of this section gives a clear summary of where the destination sits in terms of key issues for its management.

Tourism and cultural tourism, in particular, are both linked closely to the broader social and political context in which they operate. If conditions are not favorable for cultural tourism development, regardless of how appealing the project may seem, its chances of success will be limited. No matter how good an idea is, if legislation prohibits certain types of development, it will not proceed. Likewise, if market conditions are not favorable or if the proposed product is incompatible with either the image of the destination or other products at the destination, then its chances of success are limited. Initially a broader or destination-wide assessment must be undertaken (du Cros and McKercher 2014).

Table 1 identifies the many factors that must be considered. They are grouped under three broad areas: the political or legislative context; cultural or heritage assets, and; tourism activity within the destination. Factors that are relevant to both cultural heritage management and tourism stakeholders are identified, as well as a wide range of sector specific concerns.

Finally, cultural tourism is best understood as representing a product class of experiences and activities that embodies a destination’s cultural heritage assets. A product class is defined as a group of products that share some common characteristic or characteristics that distinguish them from other product classes.

The building blocks of a community’s cultural/heritage assets and the need to convert them into tourism products represent the key features that differentiate cultural from other tourism products classes, for these features raise unique managerial and product development considerations. Separate product categories can be identified within each product class. A product category is a group of
related products that are distinguished from other products in the same class by one or more significant features. Within each category, smaller sub-units can be found.
Table 2.1  
Cultural tourism - looking at the broader context

<table>
<thead>
<tr>
<th>Theme</th>
<th>Common Considerations</th>
<th>CHM Considerations</th>
<th>Tourism Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legislative / Political Context</td>
<td>Existing legislative / policy framework</td>
<td>Codes of ethics and conservation principles</td>
<td>Political importance of tourism</td>
</tr>
<tr>
<td></td>
<td>Existence of conservation legislation</td>
<td>In-house heritage agency or departmental policies</td>
<td>Support for tourism in the community</td>
</tr>
<tr>
<td></td>
<td>Zoning / use by-laws</td>
<td>Heritage agreements with stakeholders</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Development controls / guidelines</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cultural / Heritage Assets</td>
<td>Quantum of cultural / heritage assets</td>
<td>Robusticity - ability to withstand visitation pressures</td>
<td>Critical mass of assets</td>
</tr>
<tr>
<td></td>
<td>Spatial distribution of assets</td>
<td>Resources available to manage the above</td>
<td>Ability to bundle awareness of cultural or heritage assets</td>
</tr>
<tr>
<td></td>
<td>Importance / uniqueness of these assets (local, regional, national, international)</td>
<td>Need to restrict access to certain assets for conservation or stakeholder related reasons</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Icon assets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourism Activity at the Destination</td>
<td>How the destination is positioned in the marketplace (and importance of cultural tourism in that positioning)</td>
<td>How the management policy or regime associated with conservation of the asset integrates tourism needs along with those of other users?</td>
<td>Amount of tourism activity</td>
</tr>
<tr>
<td></td>
<td>Amount of other cultural or heritage tourism activity</td>
<td>Is overall visitation increasing and, if so, what planning and management is required?</td>
<td>Level of infrastructure, superstructure</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Sources of tourists</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Tourist profile (length of stay, trip purpose, first or repeat visitor, demographic profile, etc)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Psychographic profile</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Prices</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Synergies (bundling, nodes, etc) Revenue leakage</td>
</tr>
</tbody>
</table>
2.1.1 Legislative/Political Context

A chronological perspective will be used to discuss the legislative and political context in Myanmar and Yangon in relation to tourism development.

History of Tourism Development

Historically, when Myanmar was known as Rangoon, the country benefitted from the same kind of modern tourism evident elsewhere in Southeast Asia – steamer cruises for tour groups and visits by individual adventurers in the late nineteenth century kicked off by Thomas Cook (Thomas Cook Tours still provide tours to the country – Thomas Cook 2016). After independence, this pattern changed little other than arrival by new forms of transport with drops in interest due to wars in the region. From the 1960s, the government began to dominate the sector. All foreign tour companies were forced to work with a local partner agency. There was no clear directive about the policy and the situation remained a bit opaque. This lack of transparency and lack of strong tourist demand deterred foreign investment in tourism infrastructure for many years.

Yangon was the centre of modern tourism development for Myanmar. In fact, the former department story building near Sule Pagoda housed the Tourism Burma office in the 1970s and later in 1992 the Ministry of Hotels and Tourism set up there, when a more open tourism system was established. The latter moved offices to Nay Pyi Taw at the end of 2005 (AMA 2015).

Myanmar’s tourism sector has barely developed compared with others in region over the last 50 years, first as a result of restrictive visas and limited destination/transport options, and later as a consequence of a tourism boycott called for by opposition groups inside the country and in exile, prompted partly by the military government’s declaration that 1996 should be Visit Myanmar Year.

In 2011, after over 50 years of military rule, the government of Republic of the Union of Myanmar initiated political, social and economic reforms. Daw Aung San Suu Kyi’s party the National League for Democracy (NLD) released a statement that the tourism boycott should be lifted and it would “welcome visitors who are keen to promote the welfare of the common people and the conservation of the environment and to acquire an insight into the cultural, political and social life of the country while enjoying a happy and fulfilling holiday in Burma.” Accordingly, Myanmar rejoined the UN World Tourism Organization (WTO) in June 2012, which promised to support Myanmar in taking full advantage of its tourist potential. In 2013, the government announced a much
longer list of permitted areas for tourists to visit without, and in some cases with, prior permission (MOHT 2013 and SWIA 2014). In order to implement change, the government established some new authorities including: the Myanmar Marketing Committee, Myanmar Hotel Association, and the Union of Myanmar Travel Association (Henderson 2015).

So 2012 was indeed the turning point for improved international relations. As a consequence, tourist markets that had avoided Myanmar, because of its poor human rights record, started to return (see Table 1 below). As a result of these changes, the country has seen an unprecedented growth in international tourist arrivals. Visitor numbers surpassed the 1 million mark in 2012 and shot past 3 million visitors in 2015, and may reach the forecast of 7 million by 2020 (MOHT 2013; 2015). The increase in tourist demand has meant that changes were needed to support it in the legislative context.

Table 2.2
International Arrivals into Myanmar by Entry Point, 2008–2012

<table>
<thead>
<tr>
<th>Gateway</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yangon</td>
<td>187,766</td>
<td>234,417</td>
<td>297,246</td>
<td>364,743</td>
<td>559,610</td>
</tr>
<tr>
<td>Mandalay</td>
<td>5,553</td>
<td>8,861</td>
<td>13,442</td>
<td>20,912</td>
<td>32,521</td>
</tr>
<tr>
<td>Nay Pyi Taw</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>5,521</td>
<td>1,250</td>
</tr>
<tr>
<td>Land Borders</td>
<td>537,911</td>
<td>519,269</td>
<td>480,817</td>
<td>425,193</td>
<td>465,614</td>
</tr>
<tr>
<td>Total</td>
<td>731,230</td>
<td>762,547</td>
<td>791,505</td>
<td>816,369</td>
<td>1,058,995</td>
</tr>
</tbody>
</table>

CAGR = compound annual growth rate. Source: Ministry of Hotels and Tourism 2012/MOHT Masterplan 2013

As a result of agreeing to host the Southeast Asia Games 2013 and the ASEAN Summit 2014, even more demand was created for hotels (MBN 2012). In a bid to fulfill the hotel demand, the Myanmar Ministry of Hotels and Tourism started to plan some new hotel zones in areas between Myanmar's Yangon International Airport and the proposed Hanthawaddy International Airport (MBN 2013).

Initially in 2012, the government proposed one more new hotel zone in Yangon, undertaking a feasibility study of a 200-acre (81-hectare) land plot in suburban area of Dagon Myothit (East) to cope with growing prospective visitors this year (MBN 2013).
Types of hotels in Myanmar can vary. Some are funded by direct foreign investment, others are joint-ventures with domestic companies, some are government-owned buildings leased to private entrepreneurs, while yet others are privately owned by locals. There are 31 hotels operated by foreign owners in Yangon, Mandalay, Bagan, Kawthoung, Techilek and Myeik.

Local tycoons have invested over US$667 million into the tourism sector, and foreign companies have invested $2 billion by the end of 2014, according to the Directorate of Investment and Companies Administration (MBN 2014). Hence, the temptation is there to abide by the demands of short-term interests.

Recognizing the country’s unique situation in February 2012, a responsible tourism week was held in Naypyitaw involving 22 government ministries as well as private sector organisations and experts. Following extensive consultation, supported by Hanns Seidel Foundation (HSF), a Responsible Tourism Policy was published in September 2012 (MOHT 2012).

This initiative was followed in June 2013 by the government unveiling the Tourism Master Plan (2013-2020)(MOHT 2013a). It was completed with Asia Development Bank technical assistance and financial support from Norway, to promote economic growth while attempting to safeguard Myanmar culture and the environment. Six ‘strategic programmes’ were proposed: strengthening the institutional environment; building human resource capacity and promoting service quality; strengthening safeguards and procedures for destination planning and management; developing quality products and services; improving connectivity and tourism-related infrastructure; and building the Tourism Myanmar image, position and brand.

Overall, a total of 38 projects were envisaged. It is expected that this would be possible to implement within the timescale of 2013 to 2020. At the time, it was expected to cost US$ 486.6 million (MOHT 2013a). One of the most recent actions to be taken up by a development partner is the creation of a Human Resource Development Strategy and Action Plan by Luxembourg Development as a Development Cooperation Project (Paul Rogers pers. comm.).

In May 2013, a policy on Community Involvement in Tourism was launched Hanns Seidel Foundation, Myanmar (MOHT 2013b; Hanns Seidel Foundation 2013). SWIA observed in their 2014 report that the tourism sector could be considered to have more widely consulted on, adopted and published government policies relating to responsible business and sustainability than any other economic sector in Myanmar (SWIA 2014). The challenge now is to implement them in full.
2.1.2 Cultural/Heritage Assets

The current context for heritage and tourism management in Yangon regarding the critical mass of heritage assets and the ability to bundle or present them as new tourism products provides some good and bad news for cultural tourism proponents. First of all, it should be remembered that market appeal generally does not match heritage significance. However, the good news is that with the highest number of colonial-era buildings in Southeast Asia, burgeoning arts scene, lively street culture and its diverse mix of historic and religious architecture, Yangon should logically be of high interest for both arts/heritage management and tourism sectors. The bad news is that it currently lacks a framework to build on this advantage in regard to actualizing its market appeal to allow tourists a deep and enjoyable tourism experience. Consequently, tourists rarely return to see more of its attractions and the city struggles to retain visitors for more than two nights, as will be seen.

Also, there are no short cuts to address the problem, such as a quick World Heritage inscription to pull in tourists and make them stay. The nomination preparation process is expensive and takes a concerted effort from and new ways of working for all stakeholders over a long period (du Cros and McKercher 2014). Accordingly, whether or not Yangon becomes World Heritage inscribed is irrelevant for the heritage management sector, even if it is a prime candidate to be listed as a UNESCO World Heritage national project officer in Myanmar, DawOohnmarMyo, recently suggested (Aye 2015). That is because there is not a suitable planning and management framework in place yet for the nomination to be accepted for evaluation. Such a framework would have to fulfill the current World Heritage Convention Operational Guidelines for submitting nominations (WHC 2016), as well as the new infrastructure and modernization requirements of the community that lives within Yangon. Such a balance can be difficult for an ambitious city to maintain.

2.1.3 Tourism Activity at the Destination

This section will outline available information about tourism activity in order to be used as a foundation for this section and the marketing situation analysis later in the report. It will assist in understanding how Yangon’s current position in the marketplace and how well the current management regime integrates tourism with other uses for heritage assets. It will discuss how tourism activity is increasing and in what ways, as a basis for understanding what additional planning and management policies and actions are required for sustainable cultural tourism.
The key aspects that will be commented on are: the amount of tourism activity; level of infrastructure and superstructure to support it; tourist profile (with trip length, purpose, first or repeat visitor, demographic profile as far as this recorded); psychographic profile; prices, synergies (bundling, nodes, etc); distance decay and market access issues.

*Amount of tourism activity*

Each year, Yangon’s overall share of visitor arrivals has been decreasing as the new visa approval system makes the border crossing a more efficient option for neighbouring countries, particularly China and Thailand (see Table 2.3). However, care should be taken in interpreting these statistics, because it shows all the international arrivals: genuine tourists are not clearly divided from parallel traders.
Table 2.3
International Arrivals into Myanmar by Entry Point, 2011-2015

<table>
<thead>
<tr>
<th>Gateway</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yangon</td>
<td>364,743</td>
<td>559,610</td>
<td>817,699</td>
<td>1,022,081</td>
<td>1,180,682</td>
</tr>
<tr>
<td>Mandalay</td>
<td>20,912</td>
<td>32,521</td>
<td>69,596</td>
<td>90,011</td>
<td>107,066</td>
</tr>
<tr>
<td>Mawlamyine/Myeik</td>
<td>-</td>
<td>-</td>
<td>1,024</td>
<td>271</td>
<td>-</td>
</tr>
<tr>
<td>Nay Pyi Taw</td>
<td>5,521</td>
<td>1,250</td>
<td>11,842</td>
<td>19,261</td>
<td>13,835</td>
</tr>
<tr>
<td>Land Borders</td>
<td>425,193</td>
<td>465,614</td>
<td>1,144,146</td>
<td>1,949,788</td>
<td>3,379,437</td>
</tr>
<tr>
<td>Total</td>
<td>816,369</td>
<td>1,058,995</td>
<td>2,044,307</td>
<td>3,081,412</td>
<td>4,681,020</td>
</tr>
</tbody>
</table>

Source: Ministry of Hotels and Tourism 2011-2015

MOHT also provides tourist categories by entry point however even here there are some inconsistencies. Table 2.4 shows the figures for tourist categories for the Yangon entry point by which it is assumed the airport is meant, however on a closer examination figures from the border entry points are included too (presumably statistics collected at all land borders for where tourists are planning to stay in Myanmar). It would appear that in 2015, 463,198 arrivals had designated Yangon as their main port of call.

Table 2.4
Tourist arrivals by category
Consequently, airport arrivals and border arrivals must be lumped together for the Overall Tourist Arrivals statistics for Yangon or there are 463,198 arrivals coming by ocean line or train from the border to the city. There are no figures for train arrivals (presumably included in land arrivals). Business travelers account for only 173,004 in 2015 and ocean liner figures are a fairly low (26,776). Finally, it is also possible that the 463,198 arrivals for Yangon could include Myanmar nationals returning from overseas work or leisure trips. It would certainly help with forecasting studies, if the government statisticians defined these categories more clearly, acknowledging who are and are not really tourists.

Given the confusion evident in the above, a data source was sought to triangulate the arrivals data with that for the package tourists and FIT (defined by the government as Foreign Independent Traveler not Free Independent Traveler, as is more standard). This triangulation yielded some useful information about leisure tourism and overnight stays in Yangon.

The data source chosen to assist with this triangulation was the visitor figures over five years collected by the Shwedagon Pagoda (see Photo), which is icon attraction for Yangon. The rationale for using the Shewdagon statistics is based on interviewee’s comments and even some from Trip Advisor, such as, “If you are in Yangon, you’re going to see it” (February 24 Review of Shwedagon Pagoda). The Pagoda has been reviewed over 6,000 times and the next most popular attraction, St Mary’s Cathedral, only has around 660 reviews at the time of writing.
Figure 2.1

Triangulation of Yangon arrivals, combined FIT/Package tourists totals and Shwedagon Visitor Totals
An approximate estimate of how many tourists are staying overnight for sightseeing in Yangon, also can be gleaned from the visitor numbers for Shwedagon Pagoda, which is the city’s icon attraction, when compared to Yangon FIT/Package tourist totals (see Figure 2.1). Also, it should be noted that there are more Foreign/Free Independent Travelers (FIT) visiting Yangon, than tourists on a tour package (see Table 2.4). However, if total number of leisure tourists to Yangon of 517,588 (taking the Shwedagon as more complete), then this is a 11% share of the total arrivals for Myanmar from all entry points and has a 44% share of the arrivals quoted for Yangon that are not purely airport arrivals (See Figure 1 and MOHT 2016 statistics).

Another big factor in understanding the tourism context of Yangon is seasonality. More will be said about this in the section on physical setting, however, suffice to say the high season is the dry season between the months of November and March with October and April considered the shoulder season (despite the Thingyan Water Festival in the latter). Costs for flights and accommodation are higher and most of the tourism packages are sold during this period. Hotel occupation rates are higher though this is not the main reason for the rise in price for accommodation as hotel development is keeping pace with demand.

Source markets

In 2012, key source markets included Thailand and the People’s Republic of China, accounting for 16% and 12%, respectively, of the 593,381 arrivals by air. Japan (8%), the United States (6.3%), and the Republic of South Korea (6%) round out the top five generating markets arriving by air, and France, Malaysia, Singapore, the United Kingdom, and Germany each account for about 4%–5%. Overall, visitors from Asia comprise 64.1% of all arrivals by air, followed by Western Europe (21.9%), North America (7.4%), and Oceania (3.4%). Of the 465,614 visitors entering Myanmar on a border pass through land gateways in 2012, most were citizens of Thailand who stayed less than one day. MOHT estimates that the overall average length of stay in 2012 was 7 days (MOHT 2013).

In 2015, 1,301,563 arrivals were made by air to Myanmar, which is an increase of over 45% over the last five years. For comparison with the above, see the origins of arrivals given for 2015 nationwide for arrivals by air (see Table 5 below). It should be remembered that according to government statistics around 89% of air arrivals still go through Yangon (though this number is slowly decreasing as more new international airports become operational). Thailand, China, Japan, the Republic of South Korea and the United States are all down by one percent from the 2012 figures. They are still the top five generating markets arriving by air, and France, Malaysia, Singapore, the United Kingdom, and Germany each account for between 2%–3.6% each. Overall, visitors from Asia comprise 72.1% last year were up markedly from the 2012 figure of 64.1% of all arrivals by air. This was followed by Western Europe with 16.8% (down from 21.9%), North America and Oceania (both down one percent). Visitors from other parts of the world have increased a few
percent. Meanwhile, border entry had increased dramatically (it is unlikely that the majority of these arrivals are headed for Yangon), also the overall average length has changed from 7 days in 2012 to 9 days in 2015 (MOHT 2013).

In addition to visitor totals, the Shwedagon Trust also provided information on visitor origins for 2015, which is helpful for understanding which source markets prefer FIT and which are the key markets for Yangon (see Table 2.6 below).
<table>
<thead>
<tr>
<th>No.</th>
<th>Country</th>
<th>2015</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ASIA</td>
<td>938487</td>
<td>72.10</td>
</tr>
<tr>
<td>2</td>
<td>THAILAND</td>
<td>204539</td>
<td>15.71</td>
</tr>
<tr>
<td>3</td>
<td>CHINA</td>
<td>147977</td>
<td>11.37</td>
</tr>
<tr>
<td>4</td>
<td>JAPAN</td>
<td>90312</td>
<td>6.94</td>
</tr>
<tr>
<td>5</td>
<td>KOREA</td>
<td>63715</td>
<td>4.90</td>
</tr>
<tr>
<td>6</td>
<td>SINGAPORE</td>
<td>45125</td>
<td>3.47</td>
</tr>
<tr>
<td>7</td>
<td>MALAYSIA</td>
<td>40852</td>
<td>3.14</td>
</tr>
<tr>
<td>8</td>
<td>TAIWAN</td>
<td>31735</td>
<td>2.44</td>
</tr>
<tr>
<td>9</td>
<td>INDIA</td>
<td>34628</td>
<td>2.66</td>
</tr>
<tr>
<td>10</td>
<td>HONGKONG</td>
<td>4237</td>
<td>0.33</td>
</tr>
<tr>
<td>11</td>
<td>BANGLADESH</td>
<td>2913</td>
<td>0.22</td>
</tr>
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<td></td>
<td>OTHERS</td>
<td>272454</td>
<td>20.93</td>
</tr>
<tr>
<td>1</td>
<td>WEST EUROPE</td>
<td>209300</td>
<td>16.08</td>
</tr>
<tr>
<td>2</td>
<td>FRANCE</td>
<td>47435</td>
<td>3.64</td>
</tr>
<tr>
<td>3</td>
<td>U.K</td>
<td>45120</td>
<td>3.47</td>
</tr>
<tr>
<td>4</td>
<td>GERMANY</td>
<td>35727</td>
<td>2.74</td>
</tr>
<tr>
<td>5</td>
<td>ITALY</td>
<td>14841</td>
<td>1.14</td>
</tr>
<tr>
<td>6</td>
<td>SWITZERLAND</td>
<td>12293</td>
<td>0.94</td>
</tr>
<tr>
<td>7</td>
<td>SPAIN</td>
<td>9158</td>
<td>0.70</td>
</tr>
<tr>
<td>8</td>
<td>BELGIUM</td>
<td>6666</td>
<td>0.51</td>
</tr>
<tr>
<td>9</td>
<td>AUSTRIA</td>
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<td>10</td>
<td>OTHERS</td>
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</tr>
<tr>
<td>1</td>
<td>NORTH AMERICA</td>
<td>83866</td>
<td>6.44</td>
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<td>2</td>
<td>AMERICA</td>
<td>69815</td>
<td>5.36</td>
</tr>
<tr>
<td>3</td>
<td>CANADA</td>
<td>14051</td>
<td>1.08</td>
</tr>
<tr>
<td>1</td>
<td>OCEANIA</td>
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<td>2.73</td>
</tr>
<tr>
<td>2</td>
<td>AUSTRALIA</td>
<td>30820</td>
<td>2.37</td>
</tr>
<tr>
<td>3</td>
<td>NEWZEALAND</td>
<td>4547</td>
<td>0.34</td>
</tr>
<tr>
<td>4</td>
<td>OTHERS</td>
<td>499</td>
<td>0.02</td>
</tr>
<tr>
<td>1</td>
<td>EAST EUROPE</td>
<td>15433</td>
<td>1.19</td>
</tr>
<tr>
<td>2</td>
<td>RUSSIA</td>
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<td>0.32</td>
</tr>
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<td>3</td>
<td>OTHERS</td>
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<td>1</td>
<td>OTHER AMERICAS</td>
<td>9575</td>
<td>0.74</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>5527</td>
<td>0.43</td>
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Table 2.5
Arrivals by air to Myanmar by country of origin
(Source Ministry of Hotels and Tourism)
Table 2.6
2015 Visitor figures by country of origin from Shwedagon Pagoda
<table>
<thead>
<tr>
<th>No.</th>
<th>January</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Most</td>
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</tr>
<tr>
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<td>2</td>
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<td>China</td>
<td>5187</td>
<td>Kuwait</td>
</tr>
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<td>Japan</td>
<td>4388</td>
<td>Jordan</td>
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<tr>
<td>5</td>
<td>USA</td>
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<td></td>
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<td>13014</td>
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<td>4</td>
<td>Germany</td>
<td>4258</td>
<td>Finland</td>
</tr>
<tr>
<td>5</td>
<td>China</td>
<td>3831</td>
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<td>4</td>
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<tr>
<td>5</td>
<td>China</td>
<td>3623</td>
<td>Brazil</td>
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<table>
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<td>Thailand</td>
<td>7458</td>
<td>Brunei</td>
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<td>2</td>
<td>Korea</td>
<td>2610</td>
<td>Nether-lands</td>
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<td>China</td>
<td>2571</td>
<td>Iran</td>
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<td>4</td>
<td>Japan</td>
<td>1709</td>
<td>Poland</td>
</tr>
<tr>
<td>5</td>
<td>France</td>
<td>1104</td>
<td>Sri Lanka</td>
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<table>
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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Most</td>
<td>Least</td>
<td></td>
</tr>
<tr>
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<td>Thailand</td>
<td>7477</td>
<td>Belgium</td>
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<tr>
<td>2</td>
<td>China</td>
<td>2968</td>
<td>Nether-lands</td>
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<tr>
<td>3</td>
<td>USA</td>
<td>2485</td>
<td>Brazil</td>
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<td>4</td>
<td>Japan</td>
<td>1751</td>
<td>Sri Lanka</td>
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<tr>
<td>5</td>
<td>Korea</td>
<td>1623</td>
<td>Norway</td>
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</table>

<table>
<thead>
<tr>
<th>No.</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The Shwedagon Pagoda figures for 2015 (January to December) for most and least common countries of origin provide more depth than the yearly MOHT tourist Package and FIT numbers (see Table 2.6). It is possible to pick up some trends in relation to which markets are affected by seasonality and distance decay and which markets are not, by looking at the figures for this icon attraction. Thais are the only group, which are coming all year round (not just over the high season). This result fits with what interviewees in the guide, food and beverage sector relayed in interviews.

However, there are a few surprises when looking at distance decay (short haul over long haul markets) for Table 2.6. Distance decay is an effect that occurs when the interaction between two points declines as the distance between them increases. If the point of origin for a tourist is a neighbouring country, it will be more attractive for them to visit (price, psychological and cultural distance-wise) than if their point of origin was further away. There is decay in rates of travel activity to and from a destination from neighbouring countries to long distance points of origin (several flights away or more and therefore evoking lower rate of activity with the destination). In the case of Yangon, distance decay occurs after border crossings and declines markedly after 2-3 hours flying (see Figure 2.1 and Table 2.6).

Much of this is connected with limited direct access for long-haul flights. Longest flight to Yangon originates in Doha, Qatar. Hence, most long-haul tourists transit in a neighbouring or regional destination before arriving in Myanmar increasing the overall ease and cost of their trip.

However, it is unexpected to see Myanmar’s neighbour Laos appear a couple of times in the least number of visitors. It is also strange to see Sri Lanka there given it is also a Buddhist country. The latter may be because of lack of direct flights and a different style of Buddhism being popular, however, it is difficult to explain the lack of Laos to the Pagoda and Yangon. Perhaps, these are two markets that should be further encouraged.

It is not unexpected to see high numbers of Americans, British, French and Germans to the Pagoda. These are also nationalities that have a particular interest in Yangon’s cultural heritage and are most likely to stay more than one to see the Pagoda and a number of other attractions after their long trip.

MOHT 2015 statistics for arrivals by gender nationwide give the ratio of males to females as 62% to 38%. As this probably includes border crossings (any other things), it is not surprising that the figures are skewed towards males. This is because many of these arrivals could be returnees or parallel traders or even business people using a tourist visa.
for quicker access. Anecdotal evidence from Singapore indicates that it is not uncommon for business people working in Yangon to have a second residence (e.g. serviced apartment) from which they commute back and forth to their homes in neighbouring countries. Countries, such as Greece, which attract more genuine leisure and cultural tourists, tend to have the gender balance skewed the other way.

However, the statistics for arrivals by age seem to fit the situation in Yangon more appropriately. There seems to be an unusually high percentage (35%) of arrivals nationwide, which are over 51 years of age. It is unlikely that many of these are business tourists from the region, who tend to young or middle-aged. It is more likely that these numbers are enhanced by long and short-haul FITs to travelling to the country for either cultural or religious tourism. The consultant has observed that most FITs in Downtown Yangon would fit within this category, especially those who visit the Trust’s exhibition and use its tours.

Tourist profiles

Information available on tourist profiles for Yangon is limited. As has been seen, it is limited to basic categories of Foreign/Free Independent Traveler and Package Tourist. In the following section, an attempt will be made to broaden this perspective using available data from MOHT, reports, interviews, observations and limited data collective by the consultant during the time allocated for the study. More methods of data collection need to be established preferably through a destination marketing authority tasked with promoting Yangon and conducted regular tourist marketing studies.

Currently, opportunities are being missed to collect information at the airport and the MOHT branch near MahaBandoola Gardens. The latter does provide limited assistance to FITs (within the range of its language skills), however, it is not set up to document the number of visitor inquiries or anything else. It is one of the problems for Yangon that is it is difficult for independent travelers to get clear advice when in Yangon, without engaging a guide. This might affect the decision to stay longer for some tourists with some flexibility in their travel itineraries. Most tourists with English speaking skills have to resort to TripAdvisor and/or guidebook, such as, Lonely Planet. However, an analysis of TripAdvisor is useful for seeing who, what and where many of these FITs are going and what they enjoy, beyond the icon attraction of Shwedagon Pagoda. As to how long the majority of this website’s users are staying in Yangon, it is not easy to gauge. Guesstimates have been given of one or two days on the way into Myanmar and one or days on the way out, if they return Yangon not Mandalay to fly or sail out.

Finally, surveys of tourists taking the Trust’s own guided heritage walking tours and visitor book comments has yielded some information about which FIT source markets are visiting Downtown Yangon (see Table 2.7). It seems surprising that such large of these tourists would be long-haul travelers (83%), of which half came from either the United States or the UK. Also, note the percentage of visitors travelling solo (11.4%). It should be remembered that for every tourist that writes a comment, there are likely to be 100
who visited the exhibition and did not for some reason and the Trust’s walking tours do not always end back at the Trust. Consequently, it is possible that the Trust received around 15,000 visitors over this period.

Table 2.7
Visitors to YHT who left a comment in the Visitors Book (February 2015 to 2016)

<table>
<thead>
<tr>
<th>Country</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>38</td>
</tr>
<tr>
<td>UK</td>
<td>30</td>
</tr>
<tr>
<td>Australia</td>
<td>17</td>
</tr>
<tr>
<td>France</td>
<td>8</td>
</tr>
<tr>
<td>Japan</td>
<td>7</td>
</tr>
<tr>
<td>Singapore</td>
<td>7</td>
</tr>
<tr>
<td>Germany</td>
<td>6</td>
</tr>
<tr>
<td>Canada</td>
<td>4</td>
</tr>
<tr>
<td>Malaysia</td>
<td>3</td>
</tr>
<tr>
<td>Vietnam</td>
<td>2</td>
</tr>
<tr>
<td>New Zealand</td>
<td>2</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>2</td>
</tr>
<tr>
<td>The Netherlands</td>
<td>2</td>
</tr>
<tr>
<td>Sweden</td>
<td>2</td>
</tr>
<tr>
<td>Republic of Ireland</td>
<td>2</td>
</tr>
<tr>
<td>Finland, Brazil, Denmark, India, Nepal, Belgium, Portugal, Spain, Poland, Slovenia, Italy, Egypt, Istanbul, South Africa, Republic of South Korea, People’s Republic of China</td>
<td>1 each (17)</td>
</tr>
<tr>
<td>Total</td>
<td>149</td>
</tr>
</tbody>
</table>

A brief survey of tourists taking the Trust’s tours over February and March revealed that most were from the UK (30%) and United States (40%). Sketchy as these statistics are for both these research exercises are, they indicate a reverse ratio of the source markets evident for the whole country. Currently, Thailand and China are the biggest source markets for Myanmar (see Table 2.5), but only one Chinese tourist and no Thais (the two biggest source markets for Myanmar) recorded their visit to the Trust.

Interviewees from the Myanmar Tourism Federation and the Myanmar Tourist Guides Association Tour Guides provided verbal information for the study on package tourists and those FITs who took custom packages and private tours with a guide. They confirmed that the majority of FITs were older long haul tourists traveling as couples, small groups or solo.

Meanwhile, package tourists to Yangon could be either long haul or short haul tourists. With regard to tourists that stay overnight, the Tourism Federation thought that would be at least 15% less than the total arrival statistics, perhaps around 440,000 tourists.
visited over the high season this year. This total was actually lower than that provided by Shwedagon for annual total of visitors of 517,488 for the first time in years (See Figure 2.1).

**Psychographic profile of tourists to Yangon**

The cultural tourism market consists of five segments based on the role that culture plays as a trip motivator and the depth of experience. These segments are shown in Figure 2.2. This framework was developed by the Consultant and a colleague (for latest edition see du Cros and McKercher 2014) and has been verified by a number of other studies. It has now been adopted widely by governmental and quasi-governmental agencies (Beesley 2005; ETC 2005; AL 2010; Failte Ireland (2012); Latvia 2006; VB 2010; Williams 2010; CTC 2013; CBI 2014; COE nd).

**Figure 2.2**

*A cultural tourist typology (based on du Cros and McKercher 2014)*

The horizontal axis reflects the centrality of a cultural tourism in the overall trip decision-making process. It recognizes the role of culture can vary in importance from being the main or only reason to visit to playing no role at all in the decision-making process, even though the tourist may still participate in some cultural tourism activities. The vertical axis represents depth of experience. This axis recognizes that not all tourists want or can have a deep experience. Instead, there are a range of experiences that can exist. The five types of cultural tourist that emerge from the matrix are the:

- **purposeful cultural tourist** – cultural tourism is the primary motive for visiting a destination and the individual has a deep cultural experience
• sightseeing cultural tourist – cultural tourism is a primary or major reason for visiting a destination but the experience is more shallow
• serendipitous cultural tourist – a tourist who does not travel for cultural tourism reasons but who, after participating, ends up having a deep cultural tourism experience
• casual cultural tourist – cultural tourism is a weak motive for visiting a destination and the resultant experience is shallow
• incidental cultural tourist – who does not travel for cultural tourism reasons but who nonetheless participates in some activities and has a shallow experience.

From the following, it is likely that the majority of cultural tourists to be found in Yangon are sightseeing and serendipitous cultural tourists. Because many long-haul tourists are coming to Myanmar or Asia for the first time, it is likely that because Yangon’s street culture is so dynamic and unavoidable they are forced to think more deeply about how it contrasts with their own. The opportunity for this mindfulness is not so common in more developed destinations, such as Singapore and Hong Kong. The cultural tourists that the Trust is more likely to attract for the exhibition and tours probably comes from both the sightseeing and purposeful categories.

Myanmar Tourist Guides Association provided some useful information on the psychographic profile of tourists to Yangon, which together with tourist spending patterns (see below) presents an interesting picture. Tourists who employ private guides are usually comfortably well off or high income long-haul tourists expecting a mixture of leisure and learning experiences. They are not keen to rise early in the morning for a dawn viewing of Shwedagon, for instance, or spend too much time in the heat without resorting to cold water and/or a spell in the air-conditioned hired car with the guide. The activity of the package tourists is largely controlled by the itinerary they purchase with the tour agency and the guide’s advice. Hence, many of the FITs to be seen at Yangon’s most popular attractions on their own are young and those who use guides are older/retired.

The Thai’s usually buy package or customized pilgrimage tours (a fact borne out by Thai tourism colleagues). Meanwhile, the Chinese will travel in either a tour group or as a FIT depending on what their home visa conditions allow. Experience from Hong Kong and Macau suggests this market segment prefers to travel as FITs, where possible, and are quite diligent in creating their own itinerary, which allows more discretion for free time to shop or relax (e.g. go to a spa) as required.

Other interviewees have made useful observations about the Asian regional market in regard to how much strangeness and familiarity they are seeking. For instance, some groups of young ethnically Chinese tourists from Hong Kong and Singapore are excited to see the differences in the culture and physical environment from their own cities (e.g. street typists, public buses with conductors touting and the variety of street food available). Meanwhile, other groups from these destinations are uneasy or uncomfortable with the differences they perceive (e.g. wary of being bitten by dogs and or catching bird flu from pigeons).
Most tourists interviewees have observed behave respectfully in religious places, however, a small number (perhaps with an illegal foreign guide) or travelling solo has been known to cause social impacts. Most of the worst trouble recently has been in Bagan. However, some problems have arisen also at pagodas in Yangon because of communication breakdowns as caretakers have little in the way of multilingual skills and signage is poor.

**Prices and tourist receipts**

The statistics given by MOHT for the last five years provide some insights on tourist spend. First of all, it is related to both how long tourists spend in Myanmar, which has been on average between 7 and 9 days. Some tourists stay longer and some shorter depending on the package they have purchased and whether the visit is part of a longer trip. Budgeting is practiced by most tourists, so spontaneous buys that are over that daily budget is not that common. Even so, such purchases are possible, especially for jewelry or artworks, if the desire for these items overcomes budgetary concerns. Some tourists also include contingency money in their budget to stay longer and travel to additional attractions, in case they really like the destination.

**Table 2.8**

*Tourist Expenditure in USD (millions)*

<table>
<thead>
<tr>
<th>Year</th>
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<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
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</thead>
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<tr>
<td>Tourist Expenditure</td>
<td>319 M</td>
<td>534 M</td>
<td>926 M</td>
<td>1789 M</td>
<td>2122 M</td>
</tr>
<tr>
<td>Average Expenditure per person per day</td>
<td>120</td>
<td>135</td>
<td>145</td>
<td>170</td>
<td>171</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>8</td>
<td>7</td>
<td>7</td>
<td>9</td>
<td>9</td>
</tr>
</tbody>
</table>

Source Ministry of Hotels and Tourism 2016

An analysis was carried out of data collected for prices and tourist spend using information from interviews, TripAdvisor and the consultant’s own observations. It indicates that the major cost for tourists is currently accommodation; because of the way licensed hotels set their rates in Myanmar\(^1\). The next biggest expense is donations and religious souvenirs for religious tourists from region. Other Asian tourists spend most on

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\(^1\) Off the record, interviewees noted that government licensed hotels tend to collude on price, while unlicensed hotels are still reasonably priced for the guest experience offered.
souvenirs, jewelry, jade (especially Chinese), sandalwood carvings (Indian) and lacquer-ware according to the Myanmar Tourist Guides Association. Interviews with souvenir sellers confirmed this pattern and that long-haul tourists are more likely to buy artworks for pleasure, as well as jewelry and jade. Asian tourists do not yet trust the Yangon artists’ brand enough for investment or buying for pleasure.

The cost of private guides and guided tours seems on par with the region. However, like most destinations, private guides booked through hotels or tour agencies pass on the booking fee to tourists in the overall cost of the tour. Guides that approach FITs at the Ferry Terminal and the Trishaw Drivers in Dala are not licensed and therefore cost much less. The Trust’s tour was sometimes commented upon in TripAdvisor as expensive in comparison to other private tours for the length of time involved. However, other tours are not a source of income for heritage conservation, so this point needs to be made more clearly to tourists.

Meals were sometimes mentioned as unexpectedly expensive for the destination. Many tourists do not trust the local restaurants and street food, so pay more for International cuisine, well presented local cuisine or cuisine from their home country. French, Italian, Korean, Thai, and Chinese restaurants seem to be the most popular. The Guide Association noted the South Korean tourists would only eat at Korean restaurants.

The next highest item for tourist expenditure in Yangon was entrance fees to attractions for FITs (these fees are included in package and private tours, so not commented upon as often by tourists who purchase these products). Shwedagon has the highest entrance fee at 8000 KYT. An additional fee is charged to mind shoes, but not compulsory. Tourists who rent clothing to fit in with the temple etiquette of covering bare skin are charged a deposit of 5,000 KYT. Both the guides and TripAdvisor observed that some tourists complained about the entrance fee and additional charges for several pagodas, especially Shwedagon. Again, more discussion of how the money was spent would allay concerns, because tourists are usually quite positive about money going to a good cause.

Given the lack of concrete data, the following is based on observation during the work, interview responses and from travelling and conducting research in the region for the last 18 years:

- Most Western tourists and those from beyond neighbouring countries will not spend long in Yangon, because they have come a long way and want to see the rest of the country/are on a package that does not offer that option.
- Domestic tourists and those from neighbouring countries will stay two days maximum on arriving in Yangon and visit many of the Buddhist sites. They do not spend much overall (except sometimes on jade and jewelry), but give generous donations to these sites to earn merit.
- Breakfast is included in hotel tariff for most tourists – so it is just lunch, dinner, snacks, drinks, that tourists have to cover from their daily budget.
- Taxi fares can be short and long-distance (and require negotiation). All FIT markets use taxis equal amount, unless they have a driver, because public transport to difficult or unfamiliar to use.
- International cruise tourists will spend less, if housed on the boat.
- Guides will influence food and shopping location choices.
- There is often an early end to the day as little to do at night after 9pm when most restaurants close (though some night markets open a little later).

Overall, the older long-haul FIT tourists travelling without children (particularly those from Western Europe and the United States) are more likely to spend the most money on comfortable accommodation, souvenirs, jewelry, jade, artworks, private guides, attraction entrance fees for Yangon. The longer they stay the more they spend. Hence, the estimates for the average spend (which is probably skewed by the large numbers of short stay Thai and Chinese tourists visiting Yangon for its Buddhist heritage attractions) is close to the national estimate (171 USD per day) at between 100-200 USD for Yangon.

Meanwhile, the estimated spend for these wealthier long haul FIT tourists could be anywhere between 200 USD to 1,000 USD, depending on where they stay and what they buy. It is likely that the breakdown for Yangon’s leisure tourists is that 10% are budget (100 USD or less), 80% are midrange (100-200 USD) and only 10% are high-end (200-1,000 USD) spenders. The good news for Downtown Yangon is that the most expensive accommodation in the city is in it or nearby (the Governor’s Residence, The Strand Hotel, The Chatrium, The Shangrila and The Park Royal) drawing the high-end spenders to its shops and restaurants. More five star properties and better restaurants will be available soon, so maybe more tourists from this segment will stay longer before going to Mandalay. Also, most of the better souvenir and jewelry shops and art galleries are based in or near this area.

Revenue leakage

Revenue leakage is the net profit made from an enterprise operating in one country that leaves the country by being sent to its main operation in its home country (though its hard to tell where most international corporations hide their profits these days). The hotel sector is often the highest source revenue leakage. Currently, revenue leakage from the hotel sector in Yangon does not seem to be very high as most hotels are government owned, government leased to private entrepreneur (usually a local hotelier) or joint venture, joint venture or owned by private Myanmar companies and residents. This situation could change dramatically over the next five years as more foreign investment is poured into the hotel sector, even if most of these projects are joint ventures. Currently, 324 hotels offering 15,424 are fully operated by international companies as against franchised out to local hoteliers. Investment in the hotel sector has boomed in the last few years (Myanmar Business Network 2014; MOHT 2016). However, there are also rumours, but no real concrete information, regarding numerous unlicensed hotels and guesthouses. These local enterprises have sprung up out of a mixture of economic opportunism and the difficulty/expenses associated with the current licensing system. This instance, combined with various that of Airbnb properties offering their hospitality
on the Internet, means that Yangon’s hospitality sector also has a stake in the grey economy. While it may keep tourist dollars in Yangon, standards and safety are difficult to guarantee for tourists.

Another key area of revenue leakage is by international or foreign-based tour companies that do not outsource tours to local operators. Again, the current situation seems very leakage adverse. There are very few joint ventures (39 out of a total of 1,946) and only one completely foreign tour company operating in Myanmar (and probably also in Yangon) (MOHT 2016). When local operators are used there still may be a discrepancy between what the tourist is charged initially and what is paid to the local operator. The current legislative and regulatory framework does try to make this gap as small as possible, however, it is a difficult area to police. While the UMTA did not mention a problem, the Myanmar Tourist Guide Association representatives interviewed have observed unlicensed foreign Chinese guides (presumably working for foreign based tour companies) in Yangon.

**Synergies (bundling, nodes, and so on)**

One of the most common forms of bundling tourist experiences and one that reduces stress from constant decision-making are package tours and customized itineraries. There are no longer any direct flights to Myanmar for the long-haul market (e.g. from Western Europe by Dutch airline KLM). These tourists currently fly into Myanmar from another airport in the region, which has an impact on the perception on Myanmar’s affordability and accessibility. A typical tour with Myanmar as the highlight might comprise source country-Bangkok/Singapore-Yangon-Bangkok/Singapore-source country (e.g. 10 days or more, if 7-8 days are spent in the country). Alternatively, tourists may be in packages that allow them to fly into Yangon and out of Mandalay if they do not have time to return to Yangon.

Yangon is a gateway also for a large number of products at the regional as well as national level, for instance:

1. Tour of Indochine (including ex-French and British colonies in SE Asia) by air
2. Tour of Myanmar plus one or two other countries by air
3. Tour of Myanmar plus any number of countries by ocean cruiser
4. Tour of key Buddhist countries in SE Asia (including Myanmar)
5. Tour of the region, where the package includes chartered not scheduled flights

Within the country itself, a number of types of packages are available for instance:

1. Tour of Myanmar entering/exiting Yangon by air.
2. River cruise of the Irrawaddy River Delta (doesn’t involve Yangon, however, tourists may have to fly there before Mandalay, if they cannot fly into/out of Mandalay directly for some reason)
3. Bus tours of any number of destinations operating to and from Yangon
4. Bus tours crossing the border that include a visit to Yangon
FITs can copy or develop their own itinerary. They often book all their travel and accommodation online themselves, as many younger and regional tourists are doing (du Cros 2014). FITs can also purchase a day package for Yangon with driver and car or just the guide for any number of possible itineraries.

Meanwhile, nodes and hubs and gateways can play a role in the development of a travel itinerary, whether for or by tourists. The key nodes outside Myanmar for travel to Yangon are evident by the scheduled flights recorded by MOHT statistics and in local English newspapers and magazines in Yangon (probably to help tourists alter their plans, if required). Common airport transfer nodes for long and short haul travel is shown in Table 2.9 below:

Table 2.9  
Nodes and hubs for air transport to Yangon

<table>
<thead>
<tr>
<th>Source</th>
<th>Transfer node</th>
<th>Myanmar node</th>
</tr>
</thead>
<tbody>
<tr>
<td>Western Europe/North America/Australia/New Zealand/Middle East/South America/Africa</td>
<td>Bangkok, Singapore, Kuala Lumpur, Seoul, Hong Kong, Doha</td>
<td>Yangon, Mandalay, and some to Nay Pyi Taw,</td>
</tr>
<tr>
<td>Thailand, Singapore, Malaysia, South Korea, Hong Kong, Japan, Vietnam, India, China</td>
<td>Bangkok, Chand Mai, Gaya, Singapore, Kuala Lumpur, Seoul, Hong Kong, Tokyo, Hanoi, Don Mueang, Ho Chi Minh City, Delhi, Mumbai, Kolkata, Kunming, Taipei,</td>
<td>Yangon and some to Mandalay</td>
</tr>
</tbody>
</table>

Infrastrucure and superstructure

Tourism infrastructure (e.g. airports, hotels, related retail and hospitality services) and general superstructure (e.g. roads, bridges, hospitals, and so on) are on a sharply upward swing with increasing foreign investment in Myanmar from its wealthier Asian neighbours. Singapore has been particularly active investing in hotel development (MOHT 2016), while Korea, China and Japan have been targeting general superstructure such as proposed bridges near Yangon (MMT 2015).

According to the available statistics for Yangon, the number of hotels has increased from between 287 and 324 over the last year. Consequently, room numbers have risen from 13,146 to 15,424. Again, these are official estimates for licensed hotels and the total capacity for Yangon may be higher than this, if all properties are taken into account. Accordingly, most long-haul tourists fly from these destinations to Yangon and some that stay there will be able to compare the experience with hotels in Yangon.
However, most of this increase in hotel capacity is directed at the regional Thai and Chinese market for leisure travel and Japan, Korea and China in relation to business travel (see MOHT 2016). There has been growth in new properties of between 3 and 5 stars on the Myanmar rating system. This is where most foreign investment funds from neighbouring countries are going, especially between the edge of Yangon’s Downtown area and further north, where a hotel zone is developing.

Conversion of heritage properties into 3-5 star hotel properties is proceeding a lot more slowly, because most owners or developers are local and incentives are not in place to the same extent from the government. One example of a 5 star property still undergoing conversion after a number of years is the former Burma Railways Company building being developed. At the time of writing, it was uncertain when it would be open to guests, possibly 2017.

More positive note is provided by the Secretariat conversion project where a sympathetic local developer has been allowed to lease the property from the government.

Meanwhile, SWIA observed in their 2014 report that across Myanmar “the unprecedented increase of the number of tourists is accelerating damage to cultural/natural heritage sites without any proper measures being taken (SWIA 2014: 4). Of greatest concern to Yangon, is the lack of cumulative management of environmental impacts and lack of impact assessment prior to approval of infrastructure and superstructure development. Land speculation in relation to the tourism sector is of particular concern, especially in relation to hotel zones (formal or informal).

Superstructure projects that could have an impact on heritage and tourism management comprise the proposed new airport at Hathawaddy, various bridges across the Yangon River and rail and rail expansion projects. While some of the transport projects could ease congestion and make access to Yangon’s Downtown easier, others may mean that tourists could end up staying further away or skip Yangon altogether (as in the case of the Hathwaddy International Airport). As many of these projects are beyond the five-year vision for this report, it is difficult to comment. The first bridge to Dala Township and the planned redevelopment of the Yangon Railway Station area hold the greatest concern for impacts on the amenity and aesthetics of Yangon for tourism, if not planned appropriately.

The relocation of the existing container terminal and the associated portside facilities to another part of the river, is a superstructure project that would provide a positive impact on tourist amenity and aesthetics of Yangon. Currently, the waterside area is mostly blocked from view and waterside leisure activities are largely impossible. This area provides a huge opportunity to improve Yangon’s destination image and give tourists more reason to stay in the city. It would also provide a badly need focus for dockside facilities for day, dinner and heritage themed cruises, which are currently scattered around the city. Needless to say, the Trust’s vision of what this place could become with the relocation of the port and terminal facilities is a vast improvement on the current situation.
2.2 Setting

South East Asia is emerging as a generator of and destination for tourists, challenging China, India and more traditionally dominant destinations of Europe and North America. There is much happening in the region that is reshaping the demand and supply of products for tourism. Economic advances and political changes along with the development of a middle class with disposable income for travel have brought Myanmar to the fore. It was readmitted to into the international community after decades of isolation and curiosity about the destination rose consequently within the region and outside.

2.2.1 Intact or fragmented

While Myanmar promotes itself in 2016 as an open and liberalizing economy, there is still a degree of centralization of government control akin to that in Laos. However, unlike Laos, Myanmar is still subject to economic sanctions from the United States, which may not be lifted for another year due to the political situation in both countries (US – it is the election year) and Myanmar (military action in Shan State, indicative of civil unrest). Myanmar still has some no-go or restricted access zones for the latter reason. That said, Myanmar is still perceived by tourists and other visitors as an intact nation within which it is relatively safe to travel and where the tourism and hospitality industry functions in a recognizable way.

Myanmar is also benefitting from membership to ASEAN. It joined in 1997, along with Laos and Vietnam. ASEAN stuck with the nation through its darker political years in the hope of offering ‘constructive engagement’. As has already been stated, the nation’s policy development on tourism and hospitality has included documents from ASEAN to assist in integrating its approach to that of its neighbours’ (Henderson 2015). It is receiving advice and assistance from the International Monetary Fund, Asian Development Bank and international aid agencies, which alongside the waiving of almost 60% of the country’s foreign debt, may help cultivate political and economic security.

However, more needs to be done at the local level to build the capacity and produce frameworks to manage change appropriately. So far, this has not been easy in Myanmar as the years of “economic mismanagement led to a weak private sector and under-developed financial sector, misallocation of public resources with relatively small public spending on basic public services” (Henderson 2015: 383).

2.2.2 Contested or not
The military dictatorship in Myanmar has shaped the socio-historical setting for tourism in Yangon. What this means in practice is that changes were made over its rule that the industry still has to live with today. For instance, Rangoon was renamed Yangon (still with no attempt to brand it is an attractive destination to visit in itself). Many external bodies still use the old appellation of “Rangoon” and long-haul tourists (particularly older ones) cannot easily recognise “Yangon”, but can make quick associations for “Rangoon”.

In regard to the government’s jettison of “Burma” in preference for “Myanmar” Henderson (2015:383) has observed, “the tourism industry outside of Asia seems to prefer Burma (and Rangoon sic), perhaps perceiving it as more easily recognized and to have connotations of a nostalgic colonial heritage which has commercial value.”

Asian regional tourism sector has made calls about rebranding Myanmar as “New Myanmar” in the follow up to the 2015 election (Henderson 2015). As yet, nothing concrete has emerged in relation destination branding one way or the other, which suggests it is a post-colonial nation with a contested past that has affected its destination branding and likely visitor experience (see Hall and Tucker 2004). The implications for this contestation are that associations and expectations of tourists to Yangon are going to differ markedly depending on whether they are old or young, or believe the regional or the international marketing.

Another issue for Yangon is how much it wants to engage in dark tourism tours for the Taukkyan War Cemetery managed by the Commonwealth War Graves Commission or historical tours that include extensive discussion of the history of the former Law Courts (on Pansodan Road) or War Office buildings (on Shwedagon Pagoda Road). While Japanese markets would be interested in tour products associated with colonial heritage, they would avoid a tour of the cemetery. It is unclear how much would they want to engage in tours that “mention the war” and its impact on the Yangon Downtown area and its people. While it is not a big issue, some care may be required designing new walking tours and shape certain ones for specific markets - not take a one-size-fits-all approach.

### 2.2.3 Cultural distance

The notion of cultural distance has appeared regularly in the literature in regard to Western-centric studies of tourist-host relations, but rarely has the alternative been considered, probably under the erroneous assumption that it would not be a major factor. Some studies show that differences can be expected between groups even within the same region, such as Asia. Reflection about the nature of cultural distance between Hong Kong, other Asian countries and China has also occurred frequently and on many levels. For instance, a recent study found that outbound Asian independent youth tourists could be considered consumers of deep, as well as shallow, cultural experiences of local culture for Hong Kong (du Cros and Liu 2012). There is also potential for this group to be open to slow travel options in a less expensive destination, such as Myanmar.
2.3 Nature of cultural/heritage assets

This section will outline the key features of Yangon’s cultural/heritage assets and their potential as a base for new tourism products. It will focus on the tangible and intangible heritage of Yangon, for example: heritage places, heritage and contemporary arts, festivals, and street culture. This focus will also discuss their market appeal in terms of:

1. Uniqueness
2. Ability to provide a good tourist experience
3. “Product” potential and ability to actualize that potential without losing authenticity
4. Spatial relationship with other assets for bundling into trails, itineraries or events
5. Place on the attractions’ hierarchy

Accordingly, there will be a concise discussion of management issues, particularly those relating to one or more of the following depending on the type of heritage asset:

1. Ownership structure (private, public, community)
2. Purpose (private sector vs. public sector)
3. Presence / absence of a formal management structure and business plan
4. How tangible works with associated intangible heritage and visa versa

Finally, there will be some consideration of:
1. Key stakeholders’ interest in being involved in tourism, particularly with regard to allowing access for visitation or special cultural knowledge (to enhance visitor experience)
2. Number of similar / competing places/items and their level of development
3. Its place on the attractions hierarchy and ability to shift places

The audit process is a four-step process (see Figure 2.3) to facilitate the identification of key issues and the selection of possible management directions that will form the basis of the development of subsequent management plans. This issue is the focus of the next part of the book but is worth mentioning here.

*Figure 2.3*
Sequential tourism potential assessment tool

<table>
<thead>
<tr>
<th>Cultural values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical values</td>
</tr>
<tr>
<td>Tourism values</td>
</tr>
<tr>
<td>Experiential values</td>
</tr>
</tbody>
</table>
The Market Appeal/Robusticity Matrix (du Cros 2001) as shown in Figure 2.4 is a proven assessment tool that can be applied in a proactive manner to assess potential and identify management options prior to tourismification or, reactively, to evaluate existing tourism products to identify issues that need resolution. It is predicated on the integration of different elements that constitute its two axes. The Robusticity Axis focuses on issues relating to cultural and physical values, while the Market Appeal Axis reflects product and experiential values (see also du Cros and McKercher 2014).

Figure 2.4
Market Appeal - Robusticity Matrix of tourism potential

<table>
<thead>
<tr>
<th></th>
<th>D1</th>
<th>C1</th>
<th>A1</th>
</tr>
</thead>
<tbody>
<tr>
<td>D2</td>
<td></td>
<td>C2</td>
<td>A2</td>
</tr>
<tr>
<td>D3</td>
<td>B2</td>
<td></td>
<td>B1</td>
</tr>
<tr>
<td>LOW</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HIGH</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Robusticity

The two values sets that constitute the robusticity dimension determine whether the asset is culturally significant and whether it can cope with the pressures brought by increased visitors. The cultural values element, for example, assesses its social, historic, scientific or educational significance, and further seeks to determine if it is a rare or common example of the type of asset under consideration. Importantly, as well, issues relating to social impacts and the desires of stakeholders have to be considered.

The physical values element focuses primarily on issues relating to the state of repair, fragility of the asset and the existence of formal plans of management or legislative controls designed to conserve its unique values. This evaluation will answer pragmatic
questions about the ability of the site to cope with tourists and whether its fabric can be modified without compromising its cultural values.

**Market appeal**
The market appeal dimensions focus on whether the asset has the necessary attributes to function as a product. The product values element considers the asset and its surrounding area. On-site considerations relate to existing awareness levels, whether the place offers enough activities to justify the journey time and whether it can be positioned uniquely in the marketplace either as a product or for specific market segments. Finally, issues relating to amenity provision and the broader context of the destination must also be considered. Off-site considerations relate to the appeal of the surrounding area and whether it is conducive to tourism. Experiential values focus exclusively on the ability of the asset to provide a high quality experience for visitors. It examines how well it is presented currently and how it could be presented in the future. Importantly, the goal is to determine if the tourists can engage with the place.

The matrix is qualitative in nature, even though it was envisioned initially as a quantitative tool. Attempts have been made to apply it in a quantifiable manner (Li and Lo 2004; Stamenkovic and Jaksic 2013) with mixed results, primarily because it was difficult to develop absolute weighting measures for context specific issues that may have different impacts. For example, the issue of stakeholder willingness to enter tourism may be a paramount concern in some assets but irrelevant in others. Likewise, amenities may be critical in remote assets but not particularly relevant in cultural items located in well-established tourism nodes.

Overall, the application of the audit tools identifies five main options, if tourism value is low or there is some fatal flaw (e.g. no access possible).

1. deciding not to identify tourism as an objective as the asset has insufficient market appeal
2. selecting another asset for tourism use that is less costly to conserve or commodify
3. continuing the development process with the original asset with a higher priority on conservation measures to better manage its cultural values in face of projected visitation
4. continuing the development process with the original asset with a higher priority on commodification and tourism product design needs to boost or enhance market appeal
5. continuing the development process with the original asset with equal emphasis on conservation measures and commodification/product design needs.
2.3.1 Tangible heritage

The diverse tangible heritage asset set for Yangon comprises:

- Colonial buildings
- Religious heritage places (all faiths)
- Dynamic streetscapes/vernacular buildings/markets
- Transport and engineering heritage
- Historic gardens and parks (zoo, lakes and MahaBandoola Gardens)
- War cemeteries
- Archaeological sites (from prehistory onwards)

Many books are currently available for at least brief descriptions of the key aspects of this mix. As far as tourism potential, some preliminary assessment is provide below in Table 2.10. More detailed work should be done using the system described above before the final decision is made for any individual raw asset which has never been part of tourism is actualized as a tourism attraction.

Table 2.10
Tangible Heritage Assets

<table>
<thead>
<tr>
<th>Type</th>
<th>Location/Name</th>
<th>Tourism Values</th>
<th>Cultural Values</th>
<th>Responsible Body/Owner</th>
<th>Tourism Potential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colonial buildings</td>
<td>Pansodan Road</td>
<td>High</td>
<td>High</td>
<td>Various</td>
<td>High (some access issues)</td>
</tr>
<tr>
<td></td>
<td>Waterfront</td>
<td>High - Medium</td>
<td>High</td>
<td>Various</td>
<td>High (some access issues)</td>
</tr>
<tr>
<td>Secretariat</td>
<td>N/A (conversion not completed)</td>
<td>High</td>
<td>Developer/YCDC</td>
<td>High</td>
<td></td>
</tr>
<tr>
<td>Around MahaBandoola Gardens</td>
<td>High-Medium</td>
<td>High</td>
<td>Various</td>
<td>High-medium (some access issues)</td>
<td></td>
</tr>
<tr>
<td>Isolated locations in conservation zone</td>
<td>High-Medium</td>
<td>High</td>
<td>Various</td>
<td>High-medium (some access issues)</td>
<td></td>
</tr>
<tr>
<td>Embassy/former military zone</td>
<td>High-Medium</td>
<td>High</td>
<td>Various</td>
<td>Medium (most are embassies or in need of urgent care)</td>
<td></td>
</tr>
<tr>
<td>Near Inle Lake</td>
<td>High-Medium</td>
<td>High-medium</td>
<td>University of Yangon/US</td>
<td>Low (tourism not</td>
<td></td>
</tr>
<tr>
<td><strong>Buddhist religious places</strong></td>
<td>Shwedagon Pagoda and Surrounds</td>
<td>High</td>
<td>High</td>
<td>Shwedagon Pagoda Board of Trustees</td>
<td>High</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>--------------------------------</td>
<td>------</td>
<td>------</td>
<td>------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>Sule Pagoda</td>
<td>High</td>
<td>High</td>
<td>Sule Pagoda Trust</td>
<td>High</td>
<td></td>
</tr>
<tr>
<td>Botatung Pagoda</td>
<td>High</td>
<td>High</td>
<td>Botatung Pagoda Trust</td>
<td>Medium-High (some access issues)</td>
<td></td>
</tr>
<tr>
<td>Pagodas outside conservation zone</td>
<td>High</td>
<td>High</td>
<td>Various</td>
<td>Medium to High (ones above usually visited first)</td>
<td></td>
</tr>
<tr>
<td>Monasteries north of Inya Lake</td>
<td>High - Medium</td>
<td>High</td>
<td>Various</td>
<td>Medium (Thais key market)</td>
<td></td>
</tr>
<tr>
<td>Monasteries at Dala</td>
<td>High - Medium</td>
<td>High</td>
<td>Various</td>
<td>Medium (access by ferry and road)</td>
<td></td>
</tr>
<tr>
<td><strong>Christian Religious Places</strong></td>
<td>Holy Trinity and St Marys Cathedrals</td>
<td>High</td>
<td>High</td>
<td>Various</td>
<td>High</td>
</tr>
<tr>
<td>Armenian Church</td>
<td>High</td>
<td>High</td>
<td>Armenian community</td>
<td>High</td>
<td></td>
</tr>
<tr>
<td>St Johns Catholic Church</td>
<td>N/A</td>
<td>High/one of the older churches</td>
<td>Yangon Catholic Community</td>
<td>Unsure/No access</td>
<td></td>
</tr>
<tr>
<td>Other churches in or near conservation zone</td>
<td>Medium to low</td>
<td>High</td>
<td>Various</td>
<td>Medium (varies depending on how open they are to having tourism)</td>
<td></td>
</tr>
<tr>
<td><strong>Hindu Religious Places</strong></td>
<td>Indian Quarter/also 44th Street and a few isolated places</td>
<td>High to medium</td>
<td>High</td>
<td>All Myanmar Hindu Central Council?</td>
<td>High-Medium (some access issues)</td>
</tr>
<tr>
<td><strong>Chinese Religious Places</strong></td>
<td>Temples/Chinatown</td>
<td>High</td>
<td>High</td>
<td>Various temple committees</td>
<td>High</td>
</tr>
<tr>
<td>Category</td>
<td>Description</td>
<td>Maintenance</td>
<td>Access/Low</td>
<td>Owner/High</td>
<td>Condition/Medium</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>-------------</td>
<td>------------</td>
<td>------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Clan Halls/Chinatown</td>
<td>Medium (some clans using halls less)</td>
<td>Various clans</td>
<td>Medium (access issues/some in bad condition)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Muslim Religious Places</strong></td>
<td>Mosques/Shwebontha Area/38th Street and other locations</td>
<td>Medium</td>
<td>High</td>
<td>Various Muslim associations</td>
<td>Low-Medium (not sure how much tourists are welcomed)</td>
</tr>
<tr>
<td><strong>Musmeah Yeshua Synagogue</strong></td>
<td>28th Street</td>
<td>High</td>
<td>High</td>
<td>Synagogue Committee?</td>
<td>High</td>
</tr>
<tr>
<td><strong>Jain Temple</strong></td>
<td>?Shwebontha Street</td>
<td>Medium</td>
<td>High</td>
<td>Jain Temple Committee</td>
<td>Unsure/Not open</td>
</tr>
<tr>
<td><strong>Streetscapes/Vernacular Buildings</strong></td>
<td>Shwebontha Street (lower block)/Bogalary Zay Street/44th street (lower block)/Parts of 18-20th 37th Streets 40th Street</td>
<td>High</td>
<td>High</td>
<td>YCDC/Various</td>
<td>High</td>
</tr>
<tr>
<td><strong>Chinatown Buildings Facing the Strand</strong></td>
<td>Medium</td>
<td>High</td>
<td>YCDC/Various</td>
<td>Medium (poor condition)</td>
<td></td>
</tr>
<tr>
<td><strong>Most streetscapes that are still largely pre-1950s and/or have original residents</strong></td>
<td>Medium</td>
<td>High</td>
<td>YCDC/Various</td>
<td>Medium-High</td>
<td></td>
</tr>
<tr>
<td><strong>Remaining Burmese/Chinese Mansions</strong></td>
<td>Mostly outside Conservation Zone/includes House of Aung San Suu Kyi</td>
<td>High</td>
<td>High</td>
<td>Various private owners</td>
<td>High (some have already been converted to restaurants or hotels)</td>
</tr>
<tr>
<td><strong>Markets</strong></td>
<td>Thieves Market/other markets in conservation zone</td>
<td>High-Low</td>
<td>High - Medium</td>
<td>YCDC</td>
<td>High-Low (depending on amount of cultural distance)</td>
</tr>
<tr>
<td><strong>Transport and engineering heritage</strong></td>
<td>Yangon Railway Station</td>
<td>High</td>
<td>High</td>
<td>YCDC</td>
<td>High</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>------------------------</td>
<td>------</td>
<td>------</td>
<td>------</td>
<td>------</td>
</tr>
<tr>
<td><strong>Circle train</strong></td>
<td>High</td>
<td>High</td>
<td>YCDC</td>
<td>Medium (depending on market)</td>
<td></td>
</tr>
<tr>
<td><strong>Sewage Pumping Station</strong></td>
<td>Medium to High</td>
<td>High</td>
<td>Water Department/ YCDC</td>
<td>Medium (needs a lot to actualize full potential)</td>
<td></td>
</tr>
<tr>
<td><strong>Printing Presses</strong></td>
<td>Medium</td>
<td>High</td>
<td>Government Printers</td>
<td>Medium (stakeholder issues)</td>
<td></td>
</tr>
<tr>
<td><strong>River ferry terminal and ferries</strong></td>
<td>Medium to High</td>
<td>High</td>
<td>Ferry operator</td>
<td>Medium-High</td>
<td></td>
</tr>
<tr>
<td><strong>Historic gardens and parks</strong></td>
<td>Zoological Gardens</td>
<td>Medium to High</td>
<td>High</td>
<td>YCDC</td>
<td>Medium (some markets not interested)</td>
</tr>
<tr>
<td><strong>Lakes</strong></td>
<td>High</td>
<td>High</td>
<td>Various</td>
<td>High</td>
<td></td>
</tr>
<tr>
<td><strong>MahaBandoola Gardens</strong></td>
<td>High</td>
<td>High</td>
<td>YCDC</td>
<td>High (more Interpretation Needed)</td>
<td></td>
</tr>
<tr>
<td><strong>War cemeteries</strong></td>
<td>Taukkyan (Allied) Cemetery/ Cemetery Closer to Downtown</td>
<td>Medium</td>
<td>High</td>
<td>Common-Wealth War Graves Commission</td>
<td>Medium (dark or war tourists mainly)</td>
</tr>
<tr>
<td><strong>Archaeological sites</strong></td>
<td>Potential site of the ancient village connected with Shwedagon’s earliest history</td>
<td>?</td>
<td>?</td>
<td>?</td>
<td>Just flagging Because it could be a hidden gem</td>
</tr>
</tbody>
</table>
2.3.2 Intangible cultural heritage

The intangible cultural heritage site for Yangon comprises:

- Annual festivals
- Puppets
- Traditional dancing/drama/music
- Literature (city’s associations with famous writers)
- Handicrafts
- Cuisine
- Cosmetics (particularly thanaka) and medical knowledge (origin of Tiger Balm)
- Social practices

Unlike the tangible heritage of Yangon, very little information is available to researchers in English on this asset set. A summary of what the consultant has been able to discover is provided below on the key categories of festivals, traditional arts and handicrafts in relation to their potential for tourism.

Buddhist fairs/pagoda festivals

Staggered at different times through the year with late February/March being for Yangon, religious activities at all the pagodas, religious arts and crafts markets and a few cultural performances e.g. puppets.

Key tourist attraction is the Shwedagon Pagoda Festival that is promoted outside Yangon. The event takes place in Yangon during Tabaung or March month every year. One of the highlights of this event is the candle-lit pagoda during the night, with crowds from neighboring countries come to celebrate with the residents.

Thingyan Myanmar New Year Water Festival April

It is a Buddhist festival celebrated over a period of four to five days, culminating in the New Year. Water-throwing or dousing one another with water from various vessels (including some that are specially designed in Myanmar) is the distinguishing feature of this festival and may be done on the first four days of the festival. However, in most parts of the country, it does not begin in earnest until the second day. Thingyan is comparable to other new year festivities in Theravada Buddhist areas of Southeast Asia such as Songkran in Laos, and Thailand, the Cambodian New Year, the Sinhalese New Year and Puthandu in Tamil Nadu, Bohag-Bihu in Assam.

During the Water Festival, the Myanmar government relaxes the restrictions on gatherings. In Yangon, the government permits crowds to gather on the Kadawgyi Pet and Kabaraye Roads. Temporary water-spraying stations, known as pandals are set up, and double as dance floors. Eminent families and successful businesses sponsor many of these pavilions.
This is a key tourist attraction for those tourists who enjoy water throwing and/or have never attended the event elsewhere.

*Thadingyut Festival (Full Moon Day) late October*

The key aspects of this festival is that it:

- Marks the end of Buddhist lent
- Festival of 9,000 lights at Shwedagon Pagoda
- YayKyaw Festival at Shwe Phone Pwint Pagoda, Bogyoke Road, 49th and 47th Streets have handing lights
- Chinatown lanterns and firecrackers, wax burning especially near 20th Street
- Hlaing Township has its main street transformed into a street market, tattooists and performances by magicians.

The Light Festival is the key attraction, although the other activities would have potential.

*Tazaungdaing Festival (Festival of Lights/Hot Air Balloons) November*

Likewise, the main aspects of this festival are:

- Mathodthingan: robe weaving competition between Myanmar’s top ten weavers at Shwedagon Pagoda
- Kahtain: robe offering to monks
- Hot air balloon festival: balloons lit with candles (fire risk?) similar to Northern Thailand. Prize money for balloon that flies the highest.
- Satuditha feasts: open banquets and alms giving
- KyimanoPwel: Young men playing minor tricks on people at the height of the full moon.

The Balloon Festival is already recognized as the key attraction for tourists out of the above. Tourists are best to view the balloons ascending from the special viewing platform (Lonsdale 2015). Not sure if pre-booking required but possibly should be. Could possibly add to the experience by having the option of a visit to a fire master/balloon maker’s workshop in Yangon prior to the event.

*Yangon does Christmas*

It should be remembered that Yangon has a strong Christian community hence some activity at Christmas (the winter feast) should be expected to celebrate the birth of Christ. Local celebrations include a carol service at the Evangelical Baptist Church and a Christmas live show in KandawGyi Lake Nature Park with local celebrities and fireworks.
Tourists who find themselves in the region might get a buzz out of some of the events with a Myanmar take on Christmas. Possibly, at the top end would be Christmas dinner at the Governor’s Residence for 50 USD per person or The Strand for 65 USD. The Savoy Hotel has traditional Christmas dances and other live entertainment for 65 USD.

**Peace Festival 2013**

This looks like it was a one time only event, although it has potential for community development and tourism if held more regularly.

**Myanmar Traditional Arts and Handicrafts**

Currently, there are four main artisanal centres for Myanmar: Yangon, Bagan, Inle Lake and Mandalay. These centres have good transport links for distribution of their goods. However, there are excellent goods available where supply lines are not as reliable. Many have limited access to tourist markets. Within Yangon, there are only a few places where a diverse selection of art and handicrafts are sold as souvenirs, which include goods from all over the country. Currently, there is evidence of: value chain leakage due to guide commissions (sometimes up to 35%); inequity in some workshops where women are paid less than men and little in the way of access to start-up or investment capital (Paul Penfolds pers. comm.). Interviewees did observe that there is increasing numbers of artisans dropping out of production to work in more lucrative positions in tourism industry. Also, fewer young people are keen to learn traditional arts and handicrafts production as against contemporary arts or other pursuits. On a positive note, there is still evidence of unique craftsmanship not practiced elsewhere in Asia and a few of souvenir sellers in Yangon are starting to practice Fair Trade in sourcing the souvenirs that they sell.

History of arts and handicrafts development in the colonial period and later is difficult to ascertain from limited amount of information available in English. Hence, a discussion with Moe Moe(cultural expert at the Trust) and a perusal of the article by Browne Roberts in the 2015 reprint of Wright (et al 1910) were used to gain a few insights. Most of the traditional handicrafts have survived the last hundred years reasonably well and some are disappearing as you read. However, may be already reviving in another form (e.g. recent paper cutting exhibition with some traditional elements by local Yangon artist HtweAungLwin at Lokanat Gallery). Some should not be revived, for instance, ivory carving. Other arts and handicrafts that use parts of endangered animals and plants also should not be revived.

Meanwhile, Myanmar’s pre-colonial trade with China involved exchanges in kind, such as its gemstones for Chinese silk and tea (Tea and Silk trade route from Yunnan see du Cros2007), hence some industries have always had competitors. Also, such industries that were struggling back in 1910 against imports such as silk with a local reduction in silkworm farming (Robert Browne; Wright in Wright et al 1910). However, local silk and cotton production, has long since given way to imports. However, weaving of the imported thread into traditional Myanmar items is still common.
Buddhism is an underlying framework behind the construction of Myanmar’s national identity and has had an immense influence on the rationale for production and local consumption patterns over the years (MyoOo 2016). Monasteries and Buddhist trust committees have a lot of power in relation to where and what is sold. Not sure how much power they exert over copyright of images/items produced outside the country.

Production and sale of many handicrafts was linked to large Buddhist fairs and festivals that sweep the country each year taking advantage of the dry season. Yangon has one in late February. April water festival also requires that production of special tools for splashing water and often home-made hair washes and shampoos for purification rites.

Huge problem with stealing copyright and patents. A Japanese company once put a patent on thanaka during worst of military upheavals and Myanmar’s cosmetic industry proponents will need to undo some of this. Chinese have started copying water-splashing tools in plastic to sell their own tourists near the border (Moe Moe Lwin pers. comm.).

Yangon is also a hub for the sale of all kinds of arts and crafts. For instance, the most common kinds of items available as souvenirs are: Buddhist images (although over near Shwedagon there may be some workshops still producing their own); wood carving; gilded and glass mosaics; silverwork; jewelry; lacquer ware and iron and brass work.

There is also some rare and interesting intangible heritage associated with boat building – several Yangon shipyards still producing traditional wooden boats and locally designed river cruises with colonial style interiors.

Umbrella making is still to be found in Yangon with a whole street of workshops in Western Yangon. This is also a popular kind of souvenir even though prices vary enormously.

In the past, there was much more traditional painting, embroidery, locally produced silk (already struggling in 1910 against imports and competitors), cotton (same)

Minor industries are still evident providing gold leaf, musical instruments (drums, harps, pipes, clarinets, cymbals, gongs) and more recently rattan weaving/work (see contemporary company furniture products being produced in Yangon).

More recently, card-making and other more recent craft initiatives set up in Yangon by not-for-profits over the last 20 years. For instance, YMCA, Helping Hands (street kids) and PannNannEin Foundation have been very active in this area.

There is potential for new products (handicrafts, furniture, décor, cosmetics etc.) that involve some contemporary design/marketing element, as long as this is not too bold. Subtle is better. There is also some potential to develop studio tours with some guide interpretation, similar to what is offered for by Artisans d’Angkor.
<table>
<thead>
<tr>
<th>Name/type</th>
<th>District</th>
<th>Tourism Values</th>
<th>Cultural Values</th>
<th>Responsible Body/Owner</th>
<th>Tourism Potential</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Annual Festivals</strong></td>
<td>Buddhist festivals</td>
<td>High</td>
<td>High</td>
<td>Various</td>
<td>High</td>
</tr>
<tr>
<td></td>
<td>Thingyan Myanmar New Year Water Festival April</td>
<td>High – Medium</td>
<td>High</td>
<td>Various</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td>Thadingyut Festival (Full Moon Day) late October</td>
<td>High – Medium</td>
<td>High</td>
<td>Various</td>
<td>High</td>
</tr>
<tr>
<td></td>
<td>Tazaungdaing Festival (Festival of Lights/Hot Air Balloons) November</td>
<td>High</td>
<td>High</td>
<td>Various</td>
<td>High</td>
</tr>
<tr>
<td></td>
<td>Yangon Christmas</td>
<td>Medium - Low</td>
<td>High</td>
<td>Various</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td>Peace Festival 2013</td>
<td>N/A</td>
<td>Medium</td>
<td>Various</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td>Home-made hair washes and shampoos for purification rites during Thingyan</td>
<td>N/A</td>
<td>Medium</td>
<td>Host community</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td>Thanaka</td>
<td>High</td>
<td>High</td>
<td>Various</td>
<td>High</td>
</tr>
<tr>
<td></td>
<td>Buddhist images</td>
<td>High</td>
<td>High</td>
<td>Various</td>
<td>High</td>
</tr>
<tr>
<td></td>
<td>Wood carving; gilded and glass mosaics; silverwork; jewelry; lacquer ware</td>
<td>High</td>
<td>High</td>
<td>Various</td>
<td>High</td>
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<td></td>
</tr>
<tr>
<td>and iron and brass work</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Boat building</td>
<td>N/A</td>
<td>High</td>
<td>Various/Yangon</td>
<td>High</td>
<td></td>
</tr>
<tr>
<td>Umbrella-making</td>
<td>High-Medium</td>
<td>High</td>
<td>Various – some in Yangon</td>
<td>High-Medium</td>
<td></td>
</tr>
<tr>
<td>Gold leaf application</td>
<td>N/A</td>
<td>High</td>
<td>Various</td>
<td>High</td>
<td></td>
</tr>
<tr>
<td>Musical instruments</td>
<td>High</td>
<td>High</td>
<td>Various</td>
<td>High</td>
<td></td>
</tr>
<tr>
<td>(drums, harps, pipes,</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>clarinets, cymbols,</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>gongs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Weaving</td>
<td>High</td>
<td>High</td>
<td>Various</td>
<td>High</td>
<td></td>
</tr>
<tr>
<td>Bamboo items</td>
<td>High</td>
<td>High</td>
<td>Various</td>
<td>High</td>
<td></td>
</tr>
<tr>
<td>Fusion of traditional</td>
<td>varies</td>
<td>High</td>
<td>Various/Yangon Artists and</td>
<td>High</td>
<td></td>
</tr>
<tr>
<td>and new styles</td>
<td></td>
<td></td>
<td>designers</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2.3.3 Cultural spaces and events

Museums
Yangon has very few museums per head of population, much less than most large cities in Asia. Without going into statistics, it is noticeable that it has only one sizeable public museum, the National Museum. It covers a very broad remit: prehistory through to the twentieth century with the emphasis on Myanmar as a whole. It also displays some archaeological remains (mostly from outside Yangon). Hopefully, the new government will put some thought into how Myanmar’s past is being preserved in its public cultural institutions and give the museum the resources and freedom to create a new vision for itself. Suggestions are given in Appendix 1 for upgrades for the General Aung San Museum and for the creation of new public or private museums to help present Yangon’s varied history and culture more comprehensively.

Consequently, the best contemporary art in is private galleries, mostly in and around Downtown Yangon. As these are not constrained by government policy, the offerings can be divided into ‘tourist art’ and ‘art’, according to MyaMya, manager at the River Gallery. The former can be copies of the latter, if it has been found that its topic or style is popular with tourists. This avid counterfeiting is not limited to painting. Some sculptures have also been copies. One interview with a souvenir shop at the Strand Hotel bemoaned the fact that artisans engaged by shops at the BogokeAung San Markets had copied his particular design for a small sitting statue and there was nothing he could do about it. Copyright protection is still unheard of in Yangon.
Repeatable cultural festivals

The two main ones are the International Heritage Film Festival and the Annual Photography Festival have been held in Yangon with growing success. The Heritage Film festival would no doubt receive an even greater boost, if one of the historic theatre buildings could be restored and used as its base.

2.3.4 Random cultural activities that could be less random

Silent film showings with live Myanmar traditional orchestra/musicians

This event was held as part of the recent 3rd International Heritage Film Festival where The Adventures of Prince Achmed (1926) was featured under the supervision of famous local filmmaker U KyiSoe Tun. Although, such an activity need not involve such high level people as at the film festival, there is definitely potential to hold it regularly during the tourist season at a downtown venue or even out in Mahabandoola Park at night (with mosquito prevention).

The Sydney and Melbourne Royal Botanic Gardens have been running showings of contemporary films and performances of Shakespeare for years.

Teen entertainment

Yangon students used to organize a contemporary music event known as “Tea Party” on Sundays weekly at Bogyoke Market to showcase local music talent in the late 1990s. Could also bundle this experience with a visit to “The Bridge” informal skate park at Hledan Junction for teenagers/family tourists (Ko Bo San in Khaing 2015; Downing 2015). If the Tea Party event or similar could be held weekly at a key tourist space for young Asian tourists to showcase local hiphop/contemporary music talent, it could have some interest for tourist families with teens. It may be possible to combine this event with workshops or visits to The Bridge skatepark.

Live Street Cooking Demonstrations

This event was advertised a while ago in one of the magazines as “Live Street Cooking Demonstrations By Jambalaya at TIN TINBogalay Street this month”. It sounded intriguing. Possibly, there is a chance it may be repeated and the information made available to tourists. If not, this is the kind of activity that may play well with the Asian regional market, if held Downtown in a pedestrianized space as part of a food festival.

Oil Painting/Paper cutting/Drawing workshops

Lokanat Galleries has requested local artists to include demonstrations as part of their exhibitions there. However, this needs better promotion, so that tourists get to hear about it too. The consultant interviewed local artist, HtweAungLwin, who was keen to do
more, “Yes, I’m really interested to organize paid workshop for tourists and local people at my home studio or might hold it at some gallery during tour season.”

There is an organization in Yangon that calls itself the Burmese Drawing Club that holds occasional events to outsiders at Pansodan Scene Art Gallery. It is possible that the same people may be able to hold similar specially for tourists.

*Street magicians and fortunetellers*

There is some indication that street performers, such as magicians, and fortune-tellers can be found in association with the major festivals. There are tarot readers evident at the Lake. Perhaps, such street activities could be a more regular feature somewhere for tourists.

*Theatre on the train (and other places for student flashmobs)*

On March 22 2015, surprised commuters lent their ears, and eyes, to an unlooked-for display of theatrical fireworks on the normally staid Yangon circle line, when the Shakespeare School brought their whimsical production “Stories on the Circle Train” to its carriages. Impromptu performances such as these are sometimes called ‘flashmobs’ where students or young people who know each other suddenly start singing, dancing or acting in public. It is another kind of street performance that enhances the cultural experience of a city for tourists.

*Yoga and/or Tai Chi in the Park*

Some classes are already at Mahabandoola Garden, but more regularly offered and promoted activities that would welcome tourists (see HKTB examples).

*2.3.5 Cultural theme parks*

The only one in Yangon is the National Races Village on the northeast edge of the city. The consultant visited the park with two local residents who are part of the Mon ethnic group. No one knew exactly what to expect. One comment was “there’s not much to do but walk around a bit”. Not many of the buildings representing different groups from around Myanmar were being actively presented. Perhaps, it was better that way. Anyway, it had the air of being on the way to becoming another local park with a few odd buildings, rather than the exercise in social unity promotion. In other words, it was very much a tertiary or local attraction. Frankly, tourists find current street culture in and around Downtown Yangon is far more interesting and authentic.
Table 2.12
Cultural spaces/activities/events

<table>
<thead>
<tr>
<th>Name/type</th>
<th>Name/Location</th>
<th>Tourism Values</th>
<th>Cultural Values</th>
<th>Responsible Body/Owner</th>
<th>Tourism Potential</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Museums</strong></td>
<td>National Museum</td>
<td>Medium</td>
<td>Medium - High</td>
<td>Ministry of Culture</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td>General Aung San Museum</td>
<td>Low</td>
<td>Medium</td>
<td>Ministry of Culture</td>
<td>Low</td>
</tr>
<tr>
<td></td>
<td>Other museums</td>
<td>Low</td>
<td>Medium</td>
<td>Various</td>
<td>Low</td>
</tr>
<tr>
<td><strong>Art galleries</strong></td>
<td>Private galleries with ‘art’</td>
<td>Medium – High</td>
<td>High</td>
<td>Various</td>
<td>High</td>
</tr>
<tr>
<td></td>
<td>Private galleries with ‘tourist art’</td>
<td>Medium</td>
<td>Low</td>
<td>Various</td>
<td>Medium – Low</td>
</tr>
<tr>
<td><strong>Festivals</strong></td>
<td>International Heritage Film Festival</td>
<td>Medium – High</td>
<td>High</td>
<td>Festival Committee</td>
<td>Medium – High</td>
</tr>
<tr>
<td></td>
<td>International Photography Festival</td>
<td>Medium</td>
<td>Medium – High</td>
<td>Festival Committee /Alliance Francais</td>
<td>Medium</td>
</tr>
<tr>
<td><strong>Random events that could be less random</strong></td>
<td>Silent film showings with live Myanmar traditional orchestra/musicians</td>
<td>N/A</td>
<td>High</td>
<td>Festival Committee</td>
<td>High</td>
</tr>
<tr>
<td></td>
<td>Teen entertainment</td>
<td>N/A</td>
<td>Low</td>
<td>Various/ YCDC (public Space)</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td>Live Street Cooking demonstrations</td>
<td>N/A</td>
<td>Medium</td>
<td>Individual Chefs/YCDC (public Space)</td>
<td>Medium – High</td>
</tr>
<tr>
<td></td>
<td>Oil Painting/Paper cutting/Drawing workshops</td>
<td>Medium</td>
<td>Medium</td>
<td>Gallery owners/ artists</td>
<td>Medium – High</td>
</tr>
<tr>
<td></td>
<td>Street magicians and fortunetellers</td>
<td>Medium</td>
<td>Medium</td>
<td>Performers/YCDC (public Space)</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td>Theatre on the train (and other places for student flashmobs)</td>
<td>N/A</td>
<td>Medium</td>
<td>Youth groups/ Schools/ artists</td>
<td>Medium – High</td>
</tr>
<tr>
<td></td>
<td>Yoga and/or Tai Chi in the Park</td>
<td>N/A</td>
<td>Medium</td>
<td>Class leaders/YCDC (public</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>


### 2.4 Stakeholders

A brief summary of a methodology for dealing with key stakeholder issues is provided below in Table 2.4.1. Only a brief analysis of this complex area was possible during the study. Section 6 outlines which key stakeholders are important for addressing the implementation of the Master Plan’s strategies and actions.

<table>
<thead>
<tr>
<th>Theme</th>
<th>Common Considerations</th>
<th>CM/CHM Considerations</th>
<th>Tourism Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stakeholder</td>
<td>Identifying all relevant stakeholders as early as possible in the process</td>
<td>Listening to stakeholders’ concerns and incorporating feedback into day to day management once the asset has been fully developed as an attraction</td>
<td>Listening to stakeholders’ concerns and incorporating feedback into product development, marketing and business strategies</td>
</tr>
<tr>
<td></td>
<td>Inviting their participation throughout the process</td>
<td>Understanding the perspective and agenda of the tourism sector and associated stakeholders</td>
<td>Understanding the perspective and agenda of the CHM and conservation sector and associated stakeholders</td>
</tr>
<tr>
<td></td>
<td>Being aware that there are dominant stakeholders with controlling interests in the asset</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Understanding their different involvement expectations and capabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Noting any history of conflict or collaboration</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Types of stakeholders | | Educational institutions, arts, conservation and heritage NGOs, government agencies, museums, indigenous groups / ethnic minorities, religious groups, others | Local, national, state government tourism organizations, tour operators, local guides, |
| Key stakeholder issues | Power and power relationships between stakeholders | Controlling stakeholders and owners need to feel comfortable with and | Controlling stakeholders and owners support visitation and |

Table 2.4.1
Stakeholders
2.5 People, skills and financial resources

There is no doubt that human and financial resources are important areas for improvement for Myanmar and Yangon. Already, some measures have been implemented from the 2013 National Master Plan towards capacity building in the tourism and hospitality sector. For instance, one of the key outcomes was the development of a draft Human Resources Development Strategy and Action Plan now being reviewed by the government and key stakeholders (Paul Penfolds and Paul Rogers Lux Dev pers. comm.). The key recommendations of direct relevance to this study are:

1. Skill gaps
2. Possible strategies to reverse the brain drain
3. Staff turnover reduction
4. Development of fair gender recruitment and capacity building practices
5. The impact of online training
6. Development of language skills/more multilingual personnel
7. More attention to building a ‘service culture’

YHT’s own capacity to conduct further research on tourism is aided by the high language skills of the guides it employs and growing linkages with the tourism and hospitality industry as a result of this study. As ever, the problem with everything is funding and financial resources. It is hoped that the momentum built up by the national Master Plan will bring positive impacts to destinations, such as Yangon, in regard to funding for more capacity building and research. Until now, there has been little integrated study of the area of capacity building, which is having a huge impact on maintaining and enhancing Myanmar’s marketing position.
2.6 Yangon Destination Management SWOT

Table 2.12
SWOT Analysis (tourism destination management)

<table>
<thead>
<tr>
<th>Strengths</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Diverse heritage/cultural asset set, including unique examples of tangible</td>
<td></td>
</tr>
<tr>
<td>and intangible heritage</td>
<td></td>
</tr>
<tr>
<td>Key historic buildings reasonably well documented</td>
<td></td>
</tr>
<tr>
<td>Walking tour culture already established to experience urban heritage</td>
<td></td>
</tr>
<tr>
<td>Key Buddhist and Christian religious places are already attracting</td>
<td></td>
</tr>
<tr>
<td>tourism</td>
<td></td>
</tr>
<tr>
<td>Shwedagon Pagoda is an icon attraction for Myanmar</td>
<td></td>
</tr>
<tr>
<td>Handicrafts are not mass produced, demonstrate local influences (not</td>
<td></td>
</tr>
<tr>
<td>generic national ones)</td>
<td></td>
</tr>
<tr>
<td>A few local retail outlets feature good quality tourists handicrafts</td>
<td></td>
</tr>
<tr>
<td>from social enterprises</td>
<td></td>
</tr>
<tr>
<td>Very few franchises or international chain stores</td>
<td></td>
</tr>
<tr>
<td>High local ownership of tour and hospitality enterprises</td>
<td></td>
</tr>
<tr>
<td>Local people welcome tourists/safe environment/low crime rate</td>
<td></td>
</tr>
<tr>
<td>Tourist numbers have steadily increased over the last five years</td>
<td></td>
</tr>
<tr>
<td>Attracts tourists from many countries (particularly Downtown Yangon)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Weaknesses</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultural heritage assets are not legally protected and managed actively</td>
<td></td>
</tr>
<tr>
<td>for their short and long term survival</td>
<td></td>
</tr>
<tr>
<td>Presentation and interpretation of religious and heritage attractions</td>
<td></td>
</tr>
<tr>
<td>are virtually non-existent or very old fashioned</td>
<td></td>
</tr>
<tr>
<td>Inadequate financial resources and technical capacity available in the</td>
<td></td>
</tr>
<tr>
<td>public sector for conservation, presentation and management of heritage</td>
<td></td>
</tr>
<tr>
<td>assets</td>
<td></td>
</tr>
<tr>
<td>Lack of coordination and adequate dialogue between Cultural and Tourism</td>
<td></td>
</tr>
<tr>
<td>Sectors</td>
<td></td>
</tr>
<tr>
<td>The cultural heritage places are in the ownership of multiple agencies,</td>
<td></td>
</tr>
<tr>
<td>which makes it even more difficult for their protection and conservat</td>
<td></td>
</tr>
<tr>
<td>ion</td>
<td></td>
</tr>
<tr>
<td>No guidelines, incentives or programs for engaging the private sector</td>
<td></td>
</tr>
<tr>
<td>in the conservation and appropriate adaptive reuse of protected and</td>
<td></td>
</tr>
<tr>
<td>unprotected monuments, sites and other heritage assets</td>
<td></td>
</tr>
<tr>
<td>There is no monitoring system that would ensure that conservation and</td>
<td></td>
</tr>
<tr>
<td>revitalisation are undertaken to internationally acceptable standards</td>
<td></td>
</tr>
<tr>
<td>Tangible heritage assets are deteriorating from lack of regular</td>
<td></td>
</tr>
<tr>
<td>maintenance, and/or inappropriate repairs and use to the point where</td>
<td></td>
</tr>
<tr>
<td>parts of them are becoming unsafe for visitation</td>
<td></td>
</tr>
<tr>
<td>Archaeological sites are not adequately researched, conserved and</td>
<td></td>
</tr>
<tr>
<td>presented in ways that demonstrate the complexity of past cultures</td>
<td></td>
</tr>
<tr>
<td>to tourists</td>
<td></td>
</tr>
<tr>
<td>Air pollution, dangerous paving and congested streets in Downtown Yangon</td>
<td></td>
</tr>
<tr>
<td>Unsightly elements (e.g. electricity lines and modern street advertising</td>
<td></td>
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<tr>
<td>signage) impact negatively on aesthetic values</td>
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<tr>
<td>Certain categories of locally produced intangible heritage, such as</td>
<td></td>
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<tr>
<td>puppets, are struggling to service tourists as not well integrated into</td>
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<tr>
<td>tour itineraries, unlike in Hanoi</td>
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<tr>
<td>Lack of awareness and support for artisans producing authentic handicrafts</td>
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<tr>
<td>Lack of promotion by tourist information office of small local creative</td>
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<tr>
<td>businesses to tourists</td>
<td></td>
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<tr>
<td>Slow implementation of heritage reuse and revitalization projects</td>
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<tr>
<td>which have been funded</td>
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<tr>
<td>Lack of information about when and how to visit attractions/low capacity</td>
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<tr>
<td>of tourist information centre in diverse tourist markets beyond Asian</td>
<td></td>
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<tr>
<td>Buddhists</td>
<td></td>
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<tr>
<td>Lack of appropriate or unique cultural night time activities/events</td>
<td></td>
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<tr>
<td>Lack of unique cultural events or festivals, aside from Buddhist ones</td>
<td></td>
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</tbody>
</table>
### Opportunities

- Introduction of modern presentation and interpretation techniques and the concept of “active learning” in museums and at heritage sites to enrich the visitor experience.
- Potential for film-related tourism, if international films could be made on location here.
- Opportunities for creating unique private and public museums.
- Potential for greater community involvement in handicraft, music, theatre and dance development, marketing and distribution.
- Cultural heritage tourism would provide for the much needed livelihood opportunities and would encourage development of much needed sanitation and education programs.
- Potential for new exciting arts/cultural events to be developed.
- Development of heritage hotels acting as a catalyst to improve the conservation and presentation of nearby heritage assets.
- Potential greater awareness of heritage assets through new walking tours/suggested itineraries.
- More attention to urban parks for tourism will also benefit local residents.
- Pedestrianisation of specific areas in weekends will improve local and tourist street shopping experiences.
- More tourism opportunities in Yangon may reverse brain drain of young people to overseas.

### Threats

- Potential difficulties in getting key stakeholders to become interested in cultural tourism, work together on conserving heritage or creating new products.
- Threat to major heritage assets due to misuse and redevelopment.
- Interventions to the built fabric that are insensitive to the cultural value of the sites causing loss of authenticity (e.g. advertising signs).
- Development of inappropriate infrastructure and land uses close to heritage attractions (e.g. care needs to be taken with the Railway Station site redevelopment so close to St Mary’s Cathedral and the Secretariat).
- Failure to involve community stakeholders in the development of traditional cuisine and handicrafts and subsequent loss of skills and authenticity.
- Lack of business planning for social enterprises could affect the economic benefits to arts and handicrafts producers.
- Waterfront develops in an inappropriate direction or not at all.
- Traffic congestion and air pollution continue to become worse.
- Hanthawaddy International Airport project completion 2022. Yangon may become a domestic airport – however it may be able to fight off this threat if it develops into a very different city in the next five years!
3. Marketing Situation Analysis

3.1 Forecasts

It should be remembered that according to government statistics around 89% of air arrivals still go through Yangon (though this number is slowly decreasing as more new international airports become operational). Given the growth evident in the statistics available for 2010 to 2015, there is no doubt that Yangon’s leisure/cultural tourism market share will continue to grow. It is possible to forecast modest cumulative growth each year from 2016 to 2020 of between 68,487 to 72,293 leisure and sightseeing tourists, who stay one night or more in Yangon. This conservative estimate was arrived at using Shwedagon Pagoda and MOHT package tour/FIT figures from Table 3.1 below.

Table 3.1
Year on year increases over last five years

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Shwedagon</td>
<td>50,327</td>
<td>121,229</td>
<td>67,397</td>
<td>87,039</td>
<td>16,442</td>
</tr>
<tr>
<td>Pack/FIT</td>
<td>41,392</td>
<td>188,867</td>
<td>78,945</td>
<td>75,247</td>
<td>-22,986</td>
</tr>
</tbody>
</table>

This estimate is also based on the assumption that air arrivals will continue an upward rise of 15%, as they showed for 2015 (Myanmar Travel Federation 2016). This may seem conservative, given the number of airlines and flights to and from Yangon, but there have been rumours from interviewees that more direct flights to Mandalay and NPD could stop Yangon’s share rising too dramatically. It is hard to say how and if length of stay will continue over the next five years. At a guess, it will probably hold steady at 9 days for Myanmar and 1-2 days for Yangon, unless marketing and management for latter can improve.

Needless to say, major improvements in destination marketing and management for the city would certainly improve the attraction and retention rate for tourists and likely increase year over year growth rate markedly, even double it. It could also see more repeat visitors than is currently the place, where there are indications that the re-visit rate, even from regional tourists, is quite low.

This forecast is also based on the status quo for Yangon’s physical, political and industrial context. It cannot allow for the negative impact of any dramatic changes in overall arrivals to Yangon from major external agencies such as: natural disasters, industrial action in the aviation industry or any factor that could disrupt tourism over the high season.
Again, without more data it is difficult to give a solid forecast but based on project growth rates of 15% (status quo) and 30% (after destination marketing and management improvement), the attractive guesstimates can be made (see Table 3.2).

**Table 3.2**

*Rough forecasts for two possible rates of increase in tourist receipts over the next five years*

<table>
<thead>
<tr>
<th>Destination</th>
<th>Current Spend 2015 (USD Millions)</th>
<th>2020 (after projected 7% growth)</th>
<th>2020 (after projected 14% growth)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Myanmar</td>
<td>2122 M</td>
<td>2783 M</td>
<td>4,085 M</td>
</tr>
<tr>
<td>Yangon</td>
<td>233 M</td>
<td>306 M</td>
<td>449/898 M*</td>
</tr>
</tbody>
</table>

*Market share of 11% (current) and 22% (double growth, if improvements occur in Yangon’s marketing and management), respectively

Table 3.2 above provides rough estimates of tourist spend based on incremental yearly growth witnessed in overall tourism revenue quoted by MOHT (2016) and potential doubling of growth should current marketing and management of both destinations start to have an impact on tourist spend. These figures could be subject to change if more accurate data is available and/or external factors noted before come into play or there is significant revenue leakage. Revenue leakage is the net profit made from an enterprise operating in one country that leaves the country by being sent to its main operation in its home country (though its hard to tell where most international corporations hide their profits these days).

### 3.2 Products offered/not offered/not appropriate

#### 3.2.1 Products offered

Current heritage tourism products include: YHT tours, other walking tours, themed day tours, themed package tours (Pegu’s WWII tours, religious heritage tours). Cultural products comprise: Museums, souvenirs, craft items with named producers (from NGO charities), annual film and photography festivals, art gallery exhibitions and workshops, cooking workshops (Monsoon restaurant), National Races theme park, small puppet show, cultural show at the Kan DawGyi Lake royal barge restaurant, any other cultural shows.

#### 3.2.2. Products not offered

The heritage tourism products not offered include: sound and light shows, Downtown hop on/off buses, themed cycling tours, themed river cruises with a stop off at Dala,
anything to do with themes such as: maritime history and trade, diverse religious heritage, famous people, literary, medical or WWII heritage specifically for Yangon.

In terms of cultural products, the following are not offered: arts and crafts street markets (night or day), Food festivals, art festivals (other than film and photography), art studio visits/events, handicraft workshops and more interactivity at National Races Theme Park, cultural shows with well interpreted segments from famous plays.

3.2.3 inappropriate products

Cultural shows that trivialize the local culture for tourists’ entertainment, day tours with poor supervision to religious places, tours of redlight/bar districts, tacky souvenirs of religious places, and cycling tours in the worst heat of the day.

3.3 Competing tourism products

Current destination image of Yangon very weak, even the consultant has to keep saying either Myanmar or Rangoon to get people to picture it who live outside the country, particularly UK and the United States. It should have a strong enough destination brand that people will know it immediately, without mentioning the other names. This weakness leaves it vulnerable when in competition with other destinations, especially LuangPrabang and Vientiane in Laos nearby.

3.4 Complementarity of Yangon products with others in region

Yangon’s destination product complements some existing British post-colonial products in Singapore, Georgetown and Hong Kong. It can also work with other cities that promote there living culture as important, such as Macau. It could learn a lot from the way heritage trails, suggested itineraries and digital offerings are designed for tourists and structure them in a similar way for ease of use, while not repeating any mistakes.

3.5 Markets to target/not to target

3.5.1 Markets to target

Ministry figures show total arrivals of around 15% and 11% for Thailand and China, respectively. For this market, Yangon probably needs to improve opportunities for good food (if proved safe, affordable and well presented), shopping (maybe to invest in contemporary art as well as jewelry, as Yangon artists become better known in the region) and photography (especially for the wedding market) to lure them away from the Buddhist attractions into the Downtown area with its spectacular Colonial era buildings, which more has been done to present and interpret them. The strongest market for
Downtown Yangon appears to be long-haul, well educated middle-aged to elderly travelers from Europe, UK, Japan, South Korea, Australasia and USA. It is also possible that the area would also appeal to a number of regional tourists with this profile, especially regionally-based expatriates. Discussions with various interviewees, indicates that this could be quite a strong market for Yangon in terms of visiting with friends and relatives (e.g. expats bringing visiting parents to Yangon as a treat).

3.5.2 Markets to avoid

Backpackers are inevitable as one of the major trails for backpackers has run through South East Asia for nearly 30 years now. The backpacker market has been proved to contain a variety of attitudes to host societies. At one end of the spectrum are those with few scruples about exploiting local hospitality to save money to those who offer their services for free as volunteer tourists. In between, are a plethora of attitudes as each is shaped by their travel experience (Valentin 2009). Lonely Planet Guide stresses the principal of spreading money around and has a long section on the state of Myanmar’s community development and how tourists’ are expected to contribute to it (Lonely Planet Myanmar 2014). Suffice to say, there is a sub-section of backpackers who do not contribute much to local economies and leave social impacts from the hedonistic behaviour (but not all backpackers). This is one market not to encourage.

Next on the list would be Chinese budget bus tours from across the border. These tourists are intent on the same goals as the un-mindful backpackers, which is to have as much fun as possible for the least amount of money at the expense of the host community. Hopefully, this market will stay close to the border, where various suitable entertainments await them.

3.6 Competitors to compete against/avoid

3.6.1 Compete against

From the consultant’s experience: Georgetown in Malaysia, Vientiane in Laos, Columbo/Kandy in Sri Lanka and some Indian cities would be closest competitors, based on current products offered by Yangon. More research would be required to ascertain how accurate this impression is and how to deal with the competition. Again, the lack of an active destination marketing organization to act as its champion, leaves Yangon vulnerable in such an active marketplace.

3.6.2 Avoid competing against

Yangon should not compete against neighbouring cities, such as Bangkok, Chang Mai or Singapore, as these places offer more developed tourism and hospitality products. Even so, it provides a good contrast on arrival from Singapore for tourists. The latter has lost a
lot of its spontaneity in its street culture, after years of overly tight urban planning regulation.

### 3.7 Marketing SWOT

**Table 3.3**

**SWOT Analysis (marketing)**

<table>
<thead>
<tr>
<th>Strengths</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Major gateway (though Mandalay and border entries also important)</td>
</tr>
<tr>
<td>- Shwedagon Pagoda is a primary attraction for Myanmar</td>
</tr>
<tr>
<td>- Still opening to tourism and considered a ‘novel’ destination</td>
</tr>
<tr>
<td>- Yangon/Myanmar can be bundled with other South East Asian/Indochine destinations for long haul tourists</td>
</tr>
<tr>
<td>- Curiosity about the two Aung Sän</td>
</tr>
<tr>
<td>- River day and dinner cruises are becoming more popular experience</td>
</tr>
<tr>
<td>- Colonial downtown area a good counterpoint to Buddhist heritage with St Mary’s Cathedral and other colonial/religious buildings</td>
</tr>
<tr>
<td>- Examples of types of urban heritage places and practices still evident that have disappeared from other large cities in Asia</td>
</tr>
<tr>
<td>- A few luxury and budget hotel offerings in heritage buildings</td>
</tr>
<tr>
<td>- Yangon has a growing number of small local restaurants/cafes that are tourist safe</td>
</tr>
<tr>
<td>- Most taxi fares/entry fees to attractions are still good value for the region</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Buddhist heritage is the overwhelming image and primary attraction – currently hard to market other religious and secular ones</td>
</tr>
<tr>
<td>- Informal destination image as a ‘gateway’ – not a place to stop and enjoy</td>
</tr>
<tr>
<td>- Lack of a destination marketing organization (DMO) that focuses just on Yangon to counteract above</td>
</tr>
<tr>
<td>- Lack of market research and statistics specifically for Yangon (hence the use of Shwedagon visitor information)</td>
</tr>
<tr>
<td>- No ApS or digital prompts e.g. Blue tooth/geofencing for heritage places for more tech-absorbed tourists and to assist DMO conduct research into tourist movements</td>
</tr>
<tr>
<td>- Value for money concerns by tourists who have visited evident in some TripAdvisor reviews in regard to flights/accommodation in comparison with other destinations at a similar stage of development (not such a weakness as it discourages some of the more disreputable backpackers)</td>
</tr>
<tr>
<td>- Lack of concrete information on tourist receipts for Yangon. No information on how Yangon contributes to Myanmar’s tourism satellite accounts either</td>
</tr>
<tr>
<td>- No mid-range/boutique accommodation options in heritage buildings</td>
</tr>
<tr>
<td>- Walking experience of downtown hampered by air pollution, road and sidewalk/traffic congestion, lack of consistent food safety when stopping for refreshment</td>
</tr>
<tr>
<td>- Tourism products themed specifically to Yangon political, literary and social history are not yet available (will also need access to the Secretariat and other significant buildings for this to work)</td>
</tr>
<tr>
<td>- Wasted waterfront: The Strand and the container port cut off access to waterfront and are unsightly/congested/noisy for tourists used to being able to accessa waterfront as a major leisure experience (e.g. Clarke/Boat Quays, Singapore)</td>
</tr>
</tbody>
</table>
- Modern urban elements are visually intrusive (digital signboards and other street signage, high-rise and hotel development and a few badly designed/sited fast food outlets (e.g. KFC))
- Cultural offerings and nightlife considered dull by some markets used to better from the region
- Negative political associations still for the recent past for some markets
- Novelty could have already worn off with some regional markets (e.g. increase in negative comments on Internet)
- Very few appropriate or unique cultural night time activities/events that showcase local culture to promote as uniquely Yangon
- Lack of unique cultural events or festivals, aside from Buddhist ones
<table>
<thead>
<tr>
<th>Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>- There is still scope to position and project a more coherent image of Yangon</td>
</tr>
<tr>
<td>- Could attract more and longer staying long haul tourists to Yangon with more targeted destination marketing and a supply of new cultural tourism products</td>
</tr>
<tr>
<td>- New products could also potentially appeal to Asian regional tourists, Burmese Diaspora and regionally based expats</td>
</tr>
<tr>
<td>- Potential to offer innovative themed walking and street-based arts/heritage leisure experiences to tourists based on living culture and history that could be the envy of the region</td>
</tr>
<tr>
<td>- Youth of Yangon who love its arts and heritage could be a strong foundation for a sustainable cultural tourism industry by coming up with new and fun products for their visiting peers that do not cause negative impacts</td>
</tr>
<tr>
<td>- Possibility to leverage slow travel products, such as river cruises, to include more Yangon activities</td>
</tr>
<tr>
<td>- Possible new markets in the long term for product categories such as, art tourism, tea tourism, wedding tourism, photography tourism</td>
</tr>
<tr>
<td>- Themed products for Aung San (father and daughter), Rudyard Kipling, Tiger Balm discovery and any film or popular culture specifically associated with Yangon regionally and internationally</td>
</tr>
<tr>
<td>- Future potential for self-drive tourism (e.g. from Bangkok)</td>
</tr>
<tr>
<td>- Weekend/one week culturally themed stress breaks for Asian independent youth tourists</td>
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<tr>
<td>- Volunteer conservation tourism activities and projects could also be a new product category to assist in the conservation of YHT buildings and/or their reuse</td>
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<table>
<thead>
<tr>
<th>Threats</th>
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<tbody>
<tr>
<td>- Inappropriate infrastructure such as generic oversized hotels, retail, restaurants, conference and leisure facilities in Downtown Yangon damage destination image/experience (e.g. more Shangri-La’s, Sakura Towers and Junction Cities)</td>
</tr>
<tr>
<td>- Globalisation of streetscape with more signage and franchise/chain food and retail brands</td>
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<tr>
<td>- Loss of more historic buildings to neglect or aggressive redevelopment could reduce the market appeal of the Downtown area for photography and walking tours</td>
</tr>
<tr>
<td>- Hostility to tourists by host community could appear, if planning is not inclusive, destination image does not match destination identity (their reality) or benefits from tourism are few</td>
</tr>
<tr>
<td>- Inappropriate markets could dominate, such as hedonistic backpackers/flashpackers, which alienate other markets and host community by causing negative social impacts</td>
</tr>
<tr>
<td>- Hanthawaddy International Airport project proposed to open 2022. Yangon maybe downgraded to a domestic airport, if the project is completed as planned</td>
</tr>
<tr>
<td>- Could lose ground to Mandalay, if tourists find it better value to fly there directly as more authentic and pleasant to walk around</td>
</tr>
<tr>
<td>- Market share could erode as other destinations offer more novel experiences that are better value, easier to access and more closely matched to destination image</td>
</tr>
<tr>
<td>- Other Myanmar international airports could attract more visitors</td>
</tr>
<tr>
<td>- Border restrictions have eased on Chinese package tours and budget tourism dominates</td>
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</tbody>
</table>
4. Planning Vision

The Trust’s current publicly stated vision is that it “advocates for heritage protection, develops clear and sustainable policy options, engages with government, business and civil society, communicates its ideas to the widest possible audience, undertakes specific conservation projects, and facilitates research and training.” The recommendations in this report have been made in line with that vision of the Trust as a communicator, facilitator and where resources are available for it to be an actuator.

Yangon is a multicultural and multi-religious city with a long history and a diverse set of cultural assets to present to tourists. This Master Plan aims to provide the foundation for the Trust and other stakeholders to implement sustainable cultural tourism in Yangon. After all, with a good foundation, both city’s cultural assets and its people can begin achieve a balance between short terms gains and long-term impacts.
5. Tourism Development Goals (100 days, 2 years, 5 years)

5.1 Goals to achieve in next 100 days

15. Feedback to Trust from government regarding priorities highlighted in Special Development Plan (including tourism management and marketing).
16. Trust to deciding what immediate priorities for implementation and seeking funds
17. Contact with stakeholders, potential partners and other contacts regarding feedback on Plan (keep the relationship going with the Shwedagon Pagoda Board of Trustees that this study has built up and make more contacts within the organisation)
18. Also contact sources named for more information (e.g. contact Lawrence Brahm, Red Capitalist Club, re ideas potential developers for saving and renovating Pegu Club and what stakeholders would support a maritime museum). Also, contact the Lonely Planet Guide to make sure they get latest information, before their next update due to be completed in the next few months.
19. After consideration of the above and feedback on the Special Development Plan, priorities for implementation are amended and initial work begins.

5.2 Goals to achieve in next 2 years

20. Trust to seek involvement in any destination planning for Yangon, especially should MOHT seek to run a study for a plan based on actions coming out of the National Master Plan (2013). Trust should strongly advise that MOHT use that study as an opportunity to design a distinct destination marketing organization for Yangon to coordinate its image development with all sectors and plan for better tourism management and coordination to support that image.

21. Trust to provide support and advice to developer at the Secretariat and those for other hotel, food and beverage related projects in heritage buildings, as per recommendations and as required.

22. Two years should be long enough to make any necessary changes or improvements to the Trust’s tours and souvenirs, while adding new routes and possibly working with a tour operator towards establishing a regular volunteer tourism heritage conservation programme.

23. Encourage the Shwedagon Pagoda Board of Trustees to seek a partner temple in Thailand to run exchange programmes and assist staff in building visitor management capacity by undertaking language courses in order to provide on-site supervision/guidance to tourists.
24. Provide advice and advocacy as required to fulfill the needs of product
development requirements in Appendix 1. Although Yangon is still a working
port, the idea of setting up a maritime museum should be heavily promoted so that
oral history and intangible heritage programmes can set up now to document
ready for exhibition later (and in case the traditional shipyards start dying).

5.3 Goals to achieve in the next 5 years

Most of the implementation for actions will fall into this category, because much needs to
happen outside the Trust’s control, before significant advances can be made.

25. The Secretariat could be completed or close to completion in 2020. The Trust
should monitor the situation and add more tours of its own as the opening nears.

26. The Waterfront may have undergone some enhancement at the Trust’s urging.
More pushing and coordinating will be needed to add appropriate cultural tourism
and leisure experiences, as this occurs.

27. The Shwedagon zone should also have undergone some improvement for walking
and cycling amenity over this period through the Trust’s advocacy and gentle
persuasion. Further additions of a path of contemplation and conversion of the
timber mansions may also have started to attract tourists to walk along the
corridor, instead of always travelling by vehicle to the main Pagoda.

28. Provide advice and advocacy as required to fulfill the needs of product
development requirements in Appendix 1.
### 6. Strategies and Actions

<table>
<thead>
<tr>
<th>Area</th>
<th>Strategy</th>
<th>Action</th>
<th>Responsible Authority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultural assets</td>
<td>Continue to highlight the importance / uniqueness of these assets (local, regional, national, international)</td>
<td>Create more tours/itineraries/events for revealing diverse religious other heritage assets; new museums and other cultural spaces</td>
<td>Trust/tourism sector/government/site managers</td>
</tr>
<tr>
<td></td>
<td>Highlight Secretariat and the Waterfront as potential icon tourist attractions</td>
<td>Continue to provide technical support/advocacy for sustainable development</td>
<td></td>
</tr>
<tr>
<td>Tourism activity at destination</td>
<td>Link the way the destination is positioned in the marketplace to cultural tourism and Yangon’s brand identity</td>
<td>Advocate for the designation of a responsive destination marketing organization</td>
<td>Trust, tourism sector and government</td>
</tr>
<tr>
<td></td>
<td>Ongoing advocacy and research on cultural or heritage tourism activity for marketing and management purposes</td>
<td>Work with universities and other training institutions to conduct research. Provide advice on sensitive historical narratives</td>
<td>Trust</td>
</tr>
<tr>
<td></td>
<td>Improve awareness and access to handicrafts, performing and visual arts</td>
<td>Support and facilitate discussion on new museums and festivals; support arts/handicrafts not-for-profits and social enterprises</td>
<td>Trust/social enterprises/government</td>
</tr>
<tr>
<td>Enhance sensitivity to socio-historical setting</td>
<td>Create awareness of impact of changes in socio-cultural context on management of cultural and religious tourism</td>
<td>Facilitate more multi-stakeholder discussions; show sensitivity to various cultural groups</td>
<td>All</td>
</tr>
<tr>
<td></td>
<td>Maintain awareness of building friendships or better relationships from constructive stakeholder discussion; facilitate more cultural exchange</td>
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<td></td>
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<tr>
<td>Improve conservation of cultural values and improve visitor</td>
<td>Facilitate dialogue between those responsible for heritage</td>
<td>Encourage Shwedagon Pagoda to implement a more active visitor</td>
<td>Trust/religious site managers in Myanmar and</td>
</tr>
<tr>
<td>experience (site specific projects)</td>
<td>assets</td>
<td>management regime/lead by example/ run exchange programmes to build capacity</td>
<td>Thailand</td>
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<td>-----------------------------------------------------------------------------</td>
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<tr>
<td></td>
<td></td>
<td>Work with site managers of other religious places</td>
<td></td>
</tr>
<tr>
<td><strong>Development of new tourism products</strong></td>
<td>Advocate for the enhancement of visitor experience at the site level</td>
<td>Promote selection of products provided in this report as a way to ensure better visitor experience</td>
<td>All</td>
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<tr>
<td></td>
<td>Facilitate actions to spread the positive impacts of tourism</td>
<td>Use and advocate principles for responsible and sustainable tourism</td>
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<td></td>
<td></td>
<td>Implement own themed products for tourism and advise on others</td>
<td></td>
</tr>
<tr>
<td><strong>Stakeholder involvement</strong></td>
<td>Facilitate inclusive and transparent stakeholder involvement</td>
<td>Identifying all relevant stakeholders as early as possible in the process</td>
<td>All</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Inviting their participation throughout the process</td>
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<td></td>
<td></td>
<td>Dealing with dominant stakeholders with controlling interests in the asset</td>
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<td></td>
<td></td>
<td>Understanding and finding ways to accommodate their different involvement expectations and capabilities</td>
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<tr>
<td></td>
<td></td>
<td>Noting any history of conflict or collaboration</td>
<td></td>
</tr>
<tr>
<td><strong>Providing a foundation</strong></td>
<td>Acting as a conduit for technical and coordination to ensure best practices in sustainable cultural tourism are adopted</td>
<td>Endorse relevant sets of principles and best practices</td>
<td>Trust</td>
</tr>
</tbody>
</table>
Appendix 1 Potential Tourism Products

1.1 List of possible products (self-guided, guided and unstructured)

Commodification for tourism does not necessarily mean the authenticity or intrinsic value of a cultural asset will be destroyed. It is the process by which cultural expressions and aspects of heritage become ‘cultural goods,’ because they have been transformed into commodities to be consumed easily by tourists. Most archaeological, engineering and intangible heritage assets, for instance, require some level of commodification (through site interpretation) to make their cultural values easily understandable to outsiders and provide a memorable tourist experience. This section will focus on the product development issues for the following:

- Tours/itineraries for revealing diverse religious heritage (example will be provided)
- Tours/itineraries incorporating other attractions around Yangon (and series of themes provided)
- Night tours (cycling and walking)
- Tours/itineraries incorporating Dhala attractions
- Itineraries/times for cycling
- Jump on/off bus
- Potential buildings for heritage hotels (list of hospitality needs for conversion)
- Potential buildings for museums (see below)
- Themed restaurant experiences (some tasteful suggestions)
- Repeatable cultural events for tourists (traditional and contemporary)
- Light and sound show (potential spaces/buildings – themes)
- Other: Initiatives to create new souvenirs, new cultural spaces/pedestrian areas, sculpture trails, wall mural painting and digital info sources

1.1.2 Multi-religious Yangon walking itinerary

Currently, no tour operators or guides are offering a tightly themed tour that celebrates the diversity of Yangon’s religious places and associated intangible heritage. An opportunity exists for the Trust to offer a stand out product features these assets with cultural sensitivity. An underlying theme could also be one about social harmony between multi-ethnic multi-religious groups that has mostly prevailed throughout the history of the city.

A brief outline of a possible walking itinerary for 1.5 to 2 hours is provided in the box below. Advantage of this route is it presents a diverse range of non-Buddhist religious sites with a few key sites, such as the Sule Pagoda. It allows some discretion to incorporate or miss a walk through the congestion around the main market during the day. Start either at Merchant Street end after visit to Sule Pagoda/MahaBandoola Gardens
(very active on a Sunday) OR after a trip to/being dropped off at BogyokeAung San Market. Two mosques and the Agakhan building at the latter make it the area with some interesting South Asian Muslim heritage.

- If starting from the BogyokeAung San Market end, it could go:
  - Start at Market then cross BoyokeAung San Road and proceed east. There is a small Hindu Temple struggling with KFC for attention after 30th Street.
  - Return along BoyokeAung San Road to Shwe Bon Tha Street and see CholiaDarga Mosque on block that faces 29th Street. Then view front 1949 Agaghan Building nearby, which are the heart of “Arab Street”. Then 100m along on opposite side is JawoodBohraSaifeeMastio Building (1898) with optician shops below.
  - Return to BoyokeAung San Road and cross overhead walkway to market side and take in Holy Trinity Cathedral. Return across and head down BoyokeAung San Road to Shwedagon Pagoda Road, cross and head towards Anawratha Road.
  - There should be some Chinese restaurants on Shwedagon Pagoda Road, if a break is needed.
  - At Anawratha Road, cross and go right until 24th Street for MahaPinne Hindu Temple. Then back to Anawratha Road to Liao San Tao Chinese Temple. Return to Anawratha Road and head all the way down 20th Street to Guangdong Kun Iam (Kyan Yin) Goddess of Mercy Temple.
  - After visiting temple, cross MahaBandoola Road and head east to 26th Street to view MusmeahYeshua Synagogue (Plate 1). It is on the corner with MahaBandoola Road with entrance on 26th street. Only open 9.30 to 2.30pm daily and closed Sundays. Built 1893-6. Make sure you arrive before 2.30pm to see inside.
  - Head back to Anawratha Road and turn right to head east again back to Shwe Bon Tha Street. A large green building, the Suri Sunni Jamah Mosque, takes the whole block between 28th street and Shwe Bon Tha Street (see Plate 2). It may be of interest to Muslim tourists as well as others. The tall Victorian era tenements and commercial buildings line the road in the block heading to Merchant Road.
  - A third of the way down on the opposite side to the Mosque is the Sri Mugaparumen Hindu Temple (112-122 ShweBothna Road). Also take note of small Hindu tree shrines with bird feed boxes and hangings, mainly on the left side of the street heading south to Merchant Road (see Plate 3). There is one Buddhist tree shrine too.
  - Turn left on Merchant Street\(^2\) to head east to MahaBandoola Park staying on the north side. Turn left up 29th Street to see Indian sweet shop (can break here) and nearby Sri Satanarayan Hindu temple on left. Continue up the narrow street to the Jain Temple (on the right near the end) and next to it the MughalShia Mosque. Then turn right onto MahaBandoola Road and walk east to the MahaBandoola Gardens/Sule Pagoda (see latter, if not already visited).

It may be possible to add more places to the tour such as those associated with the Sikhs and Gherkas brought to the city for ‘peacekeeping’ and by the British. The buildings may now have another use, but are still relevant.

\(^2\) Sign for the office of the All Myanmar Hindu Central Committee hanging from a tree – 77 Shwe Bon Tha Street, ph. 245 201/255/601. This is probably the stakeholder that should be contacted at some stage for better getting access to the temples.
1.1.3 Issues and themes for other possible tour routes/itineraries

There are two types of structured experience for tourists for walking in a city: organic and planned. Organic routes have evolved over a period of time and are used by local residents, while planned routes are specifically designed for tourists and incorporate appropriate markers (e.g. symbols/signage, being featured in guidebooks and Aps) to assist their use in this way. Timothy and Boyd (2015) have called the latter type “purposive routes”. They key elements of a purposive route are zones of thematic interest (e.g. the Secretariat and surrounds) and the linkages between them. They can be one single direct route or comprise many segments with mini-routes, which can be experienced or not at the discretion of the tourist, guide or tour operator, depending on the situation. Some are successful with tourists and some fail. It is important to consider that changing trends in demand from tourists is one factor to consider in their continued success, as well as issues such as: ease of access to important elements; quality of the experience; setting and stakeholder support (du Cros and Jolliffe forthcoming, and Timothy and Boyd 2015).

Routes, mini-routes and zones of thematic interest

The impact of new developments, such as the Yangon Central Railway Station redevelopment, on the surrounding area and walking routes to and from the Secretariat zone will have to be taken into account in designing any new routes. This new construction will most probably have a negative impact on access, the setting and quality of visitor experience. It is also likely that as the Waterfront comes back to life with some landscaping and other actions it will have a positive impact, so that more routes and itineraries will begin or end there.

Meanwhile, primary attractions such as, Sule Pagoda, Bogyoke Aung San Market, Kheng Hock Keong Temple and Shwedagon Pagoda can be used as starting/ending points for most routes/itineraries in and around Downtown Yangon. The Secretariat is yet to open, however, it can be used as a landmark and place to view in the meantime. When access is possible, it will become a very important zone of thematic interest and node in a network of mini-routes to other points of interest. There is also potential to encourage tourists to self-guide and mix and match with different forms of transport, such as Circle Train or river ferry to Dhala, instead of always taking taxis.

There is also rising demand for products based on curiosity thanks to the recent film “The Lady” and the general buzz about Daw Aung San Suu Kyi entry into parliament. The Trust has considered designing tours concerning Daw Aung and her father General Aung San, but do not currently have the resources (Moe Moe Lwin pers. comm). Perhaps working together with a research project from one of the universities could give a route and itinerary some depth and detail. Where possible, there should a link to General Aung San’s Museum (hopefully after it has seen some changes – see section 1.2.3)
In regard to Yangon’s military history, Tourists ask about the development of Yangon and how it came under British control. For instance, that MahaBandoola Parkis named after General MahaBandula, who fought against the British in the First Anglo-Burmese War (1824–1826), although there is discussion of the Independence Monument, an obelisk erected in commemoration of Burmese independence from the British in 1948. The park was formerly named Fitch Square (or Fytche Square) after English trader Ralph Fitch. The park is currently featured in a number of Exotravel and Pronitittravel tours because its history, however, there are no tours or itineraries which specifically bundle places associated with this crucial period in colonial history.

Current tours are also not available to present a broad range of places associated with Yangon’s World World II related sites for the Burmese campaign, such as the Former War Office on Shewdagon Pagoda Road and any remaining reminders of British Cantonment in the Embassy area. There are visits to thecommonwealth cemeteries in Kamaryut Township and to the north of Yangon at Taukkyan, which Pegu Travels run. They also are developing a special tour that also goes to the new museum near the border at Thanbyuzayatfor the Burma-Siam Death Railway related sites. There is a possibility that they will focus their tour entirely on this area and its importance to Burma campaign and drop out the Yangon sites (Slow 2016). Hence there is an opportunity to provide some kind of tightly themed mini-route for War Office, the Cantonment and cemeteries for World War II buffs to either prevent this happening or fill a void for this kind of heritage tourism.

Meanwhile, current art gallery tours for the city would benefit from the Secretariat opening with the proposed large private contemporary arts gallery that has been rumoured. It is possible it will be supplied by developer’s collection. A similar attraction in Hobart, Tasmania, has been a huge success. The Museum of Old and New Art (MONA) has become a primary attraction for not just art lovers, but many other types of tourists because of the type of arts/leisure experience offered. The highlight of the year for the host community is the annual art festival with many free entry events sponsored by the collector and other private benefactors (MONA 2016).

Another way of approaching the design and planning of new routes and itineraries is to advise tourists to conduct unstructured wandering through the narrow streets of Downtown with access to a better tourist map or some kind of city Ap. This will give them the opportunity to discover its hidden gems for themselves, especially as street life in Yangon is always changing. Where you might find an eccentric egg garden today (empty eggshells stuck on pot plant leaves) might be gone and tomorrow down the street is a man painting himself black for no apparent reason (really). Some idea of the best streets in terms of tourist experience is given in Table 2.9. However, giving too many specific details may mean that some streets are over-visited and some under-visited leading to social and environmental impacts.

Another gap is what experiences to bundle into a tour/itinerary for families. While there are not a lot of families visiting Yangon long-haul, there are usually some coming short-haul, particularly those of Expats based in the region. Suggestions by Extravel and from
looking around indicate that there are a few interactive experiences that would interest children while shopping at BogyokeAung San Market, such as trying on longyis and testing thanaka. More interactive experiences such as paper cutting workshops at art galleries or opportunity to visit a skate park should be developed to suit different tastes. It is unlikely that history themed tours would suit young children, so again the market is more mature.

1.1.4 Specific issues for successful night tours featuring colonial buildings

Night tours would seem an obvious choice for Yangon, however, before much can be done there are a number of issues to resolve. Most tour operators leave the tourists to their own devices after dinner and do not have a culture of leading them around afterwards. Tourists may already be too tired and there is not the flexibility in the itinerary for swapping afternoon for evening. This is an issue also for managing congestion at Shwedagon Pagoda – lack of tour itinerary flexibility.

Even if, some flexibility could be arranged for package tourists and FITs could be made aware of night wandering too what would they see? The consultant did a large amount of investigation in early evenings and found that street life was still apparent until 8 or 9pm after activity died down providing different experience. However, one key issue was lighting. This is both in the way that buildings are lit so they can be appreciated and photographed and how the street are lit so that pedestrians are not in danger. Low or inappropriate lighting of aspects currently makes this a long-term product to develop though it could be quite a strong one if done well. It was interesting to note that while in Patiala, India, a few years ago the city had lit most of the colonial buildings even when they did not expect anyone to put bundle them into a tour experience. Sometimes it is just a matter of civic pride.

1.1.5 Ideas for enhancing river crossing to/trishaw experience of Dhala

Some different attractions are available for bundling into an itinerary that would be a good counterpoint to that for Downtown Yangon, for instance, a visit to some of the traditional shipyards, the fishing village, and the bamboo-walled village (see Plate 4 and 5). Also, monasteries, pagodas and markets and a handicraft workshop can be included in the experience, as desired. Challenges for self-guiding include: lack of locational information on attractions, relatively high cost of the ferry and low level of English and service provided by Trishaw drivers (tendency to take tourists to their own village then ask for money to get back or for the village). Even so, FITs are going over there and having some sort of experience – not necessarily a good one.

The Trust could advise the proposed Yangon destination marketing authority that the following are needed to ensure a consistently good experience of Dhala and nearby attractions. The DMO needs to:
1. Discuss with the ferry operator the best way to reform the current system and make the reason for a separate charge more apparent (signage explaining why there is a separate entrance and supposedly separate seating on the upper deck of the ferry). If tourists do not want these ‘benefits,’ they should be allowed to purchase a lower priced ticket.

2. Provide funding to offer basic guide training to Trishaw riders or make it known that it is better for tourists to take a licensed guide with them.

3. To make Dhala part of tourist maps and city Aps and work with local stakeholders to provide more on-site interpretation.

### 1.1.6 Jump on/off bus

Most cities in Asia these days have such a service, even if it does not always stick exactly to a schedule (e.g. Kuala Lumpur). That said, it is better than having tourists competing with the host community and causing resentment, as has happened in Macau where videos have appeared on Youtube of budget tourists from China grabbing seats ahead of elderly residents. It may be tempting to direct tourists to the new BRT system, however, indications are that the existing routes are already at capacity.

It is recommended that the Trust advise the proposed Yangon DMO and the public transport authority to:

1. Engage a private operator to provide a suitable service where tourists can access key attractions in and near Downtown Yangon.

2. Provide dedicated and clearly signposted stops (English, Burmese and Chinese) near primary and secondary attractions

3. Promote the service in all destination marketing materials.

### 1.1.7 Hospitality needs for conversion of heritage hotels

Yangon currently needs more budget to midrange hotels to be developed from small vernacular and mid-size colonial buildings. It may be that some of this development is already happening (see Plate 6 terraces) for the former and it is not necessarily safe, consistent, protecting cultural values or even seeking a government license.

One reasonably good example of a local hotel chain working on vernacular buildings for budget tourists is On the Wing in Hong Kong. The property in Wanchai is a 2 star walk up with a sensitive approach to the interior of a 1930s tenement building or tong lau (see Mingle by the Park 2016). The same city has offers boutique hotel conversion of a former police station on Lantau Island that offers an example of a more high-end conversion of a colonial building as a boutique hotel (Hong Kong Development Bureau 2016). Already known the Trust is the example from Penang of Cheong FattTze Mansion hotel/club. It is foremost a house museum and has created a special business arrangement where tourists
need to join a club to when they check in order to legally stay. The rooms are carefully
decorated to match the building’s history with many authentic items.

Historical theming is also important in the case for the Red Capitalist Guesthouse with
décor collected from around the 1950s in China when powerful cadres from communist
party secretly led opulent home lives with access to Russian caviar, vodka and Cuban
cigars. In modern China, this theming is not seen as offensive (probably too early to do
similar for the generals here). Anyway, the concept could be useful for renovating the
Pegu Club, where guest would need to feel same level of exclusiveness for a restoration
project to succeed fully. Strangely, the Guesthouse has also hosted more recent cadres
and ex-politicians such as Bill Clinton (du Croset. Al 2005).

Suggestions have already been made by the AMA(2012) that the consultant fully
supports are:

1. A boutique hotel 4 star – State Fine Arts School. The building is still in use as a school
   or arts college.

2. Club/Hotel 4-5 star – Pegu Club. As yet there is no developer, despite some publicity
   and the site being listed in various guidebooks and websites as a deteriorating attraction.

In a perfect world, the developer with the right vision for renovating the Pegu Club as a
Hotel and Recreation Club would be Lawrence Brahm, known for the Red Capitalist Club
and Guesthouse in Beijing and eco-lodges in Shangrila (formerly Zhongdian, China)(see

It is recommended that the Trust consider approach Brahm or someone like him to see if
something can be done.

The Trust may be in a position to comment on or oversee plans for heritage hotel
conversions. In such an instance, the key considerations are:

- note how many stars are proposed for the hotel rating
- review whether the branding fits with the building’s history and cultural values
- note the amenity/setting/views
- review the positioning of parking and pickup/drop off areas
- note whether the size, type, number of rooms (with ensuite bathrooms) and layout
design is appropriate for maintaining the building’s cultural values.
- request that rewiring is adequate to load required and not a fire risk
- review whether bathroom design and plumbing is adequate and not requiring too
great an intervention with the building’s fabric
- comment on whether proposed lifts or stairs are sensitively and practically placed
- advise that locally owned companies are used in the conversion and where
possible locally supplied products
- keep and provide a list of skilled local craftspeople and workers for renovation,
where developer’s need advice on this topic
- review whether additions should be allowed or needed
- review designs for in-house restaurants, gym or other facilities needed
- review kitchen designs (especially for Chinese restaurants) to make sure they are using fire safety standards of practice (SOPs)\(^3\)
- if necessary, assist with facilitating funding required
- advocate a plan and budget are available for scheduled and ongoing maintenance
- advocate that hotel operator develop a plan for emergency situations (fire, earthquake and so on)
- advise strongly that local people are employed as staff and food and beverage comes from local suppliers (where this is safely available)

1.1.8 Possible themed restaurant experiences (some tasteful suggestions)

Local restaurants and tea/houses seem to be doing reasonably well with theming. Care and some vigilance may be needed with the budget or more mass market offerings, such as Feel Myanmar do not go spinning off in the wrong direction. The main outlet for the ShwePuZun Bakery in the suburbs of Yangon, looks like it could in either direction.

If the Trust feels the need to advise on any such projects, such as more outlets for ShwePuZun Bakery, closer to Downtown. There is a good example of a purpose-built roadside restaurant or haveli from Punjab India that could be used for a heritage themed restaurant on the edge of the Downtown Yangon, which combines high standards of hygiene with local cuisine and displays (see Plate 7). Besides the host community, it is very popular with both domestic and international tourists.

1.1.9 Suggestions for repeatable cultural events for tourists

Yangon already has held some excellent events, however, there needs some advocacy and support for these to become more regular events from which tourists could benefit (see Section 2.11). The Trust could choose which ones to facilitate, from this list keeping in mind some might work really well within planned pedestrian areas (see Section 1.1.12).

While watching the television one night, some footage from an arts event flashed on that turned out to be the 2013 Peace Festival held in Yangon. It was a one time only event, although such an event has potential for community development and tourism, if held more regularly.

1.1.10 Light and sound show

Many cities still offer this kind of night performance even though it is no longer novel. Hong Kong and Singapore offer it is purely a light show with musical soundtrack

\(^3\) Talk to Ronnie Kywe Thiyam at Nath Inc about how the development of these SOPs and any others for the hospitality industry are progressing.
available in some public places. The World Heritage cities Rhodes, Greece and Quebec City in Canada offer outdoor and indoor versions, respectively. What might be possible for Yangon and will certainly play well with the Asian regional market is one more like the Rhodes example. The reconstructed medieval castle wall is used as the backdrop and a historical narration of key events in the Island’s history (on PA) runs over a series of spotlight, flashing lights and even some minor pyrotechnics to evoke the more dramatic parts, such as the battle between the Christian knights and the Muslim warriors.

For Yangon, it is proposed that permission be sought to use the façade of Yangon Division Courts (former currency building), which has already has evidence of the war damage to present some history of the colonial development of Yangon, various battles in Yangon in the nineteenth century and particularly those from WWII. The Trust could advise on how to do this in a way that works with host community and various nationalities of tourists (as it will have to in regard to the Secretariat).

Alternatively, there may be a possibility of using the Secretariat as an alternative and finish with independence.

1.1.11 Suggested initiatives to create new souvenirs

The most impressive souvenirs seen so far have come from shops have a good relationship with suppliers that espouse some kind of responsible tourism programme or are a not-for-profit with a mission to provide a fair return to producers. Currently, there is nothing quite on the level of Arts d’Angkor in Siem Reap or Jim Thompsonsilkgoods from Bangkok. Discussions with local tourism experts indicate this may be some way off. In the meantime, there could be more information provided by state souvenir shops about where the items are sourced and biographical information about artisans that can help tourists gain a greater connection with the host community. The Trust could begin with having talks with the nearest shop, Myanmar House, in Pansodan Road.

The Trust could offer support for greater copyright protection and protection of intellectual property rights, however, it may be more useful for other organizations more arts-based organization to lead on this issue with the government.

1.1.12 New cultural spaces/pedestrian areas for sculpture trails, wall mural painting and craft markets

Various interviewees have suggested Bank Street as the first possible experiment for the city in weekend pedestrianisation. Pedestrianisation is becoming more common in cities where the car is not king and a balance has been achieved. The city seems to be heading in the direction of Hong Kong and some parts of Singapore and Macau, where the solution is to create overhead walkways to join up with all the overpasses and keep traffic flowing. After a while, such overpasses lose their attraction for tourists, who feel removed from street life, and are especially irritating as there are few escalators to assist in the heat.
Another potential site is the eastern side of MahaBandoola Park, where residents keen for a game of soccer sometimes informally block the road in front of the High Court. Taking that further would be no problem, as a precedent has already been set and the Park nearby is bursting with activity.

In the long-term, it is hoped that Trust’s vision for the Waterfront comes true and this area is open for development as an cultural and arts/leisure space. One possibility if the hygiene issue can be worked on and clean water is readily available is a food street upgrading the existing stalls as kiosks offering safer comestibles. Taiwan has many such streets where residents and tourists can walk along and enjoy the choice (see Plate 8).

Meanwhile, until the port can be relocated, a community development project could be funded to create some spectacular wall murals (as in Melaka, Malaysia, where some dull walls along a canal were suddenly brought to life.

Finally, there are examples from around the region of street art and/or night crafts markets in streets pedestrianised for the purpose. The above are just a few ideas that the Trust could bandy about with stakeholders to try to bring some life to southern side of Downtown and draw people to waterfront. More celebration of and activity in this area will assist in the public and tourists appreciating its heritage and the setting more.

1.1.13 Creating digital information sources for tourists

There has been some brief discussion at the Trust about developing history Aps for Yangon by YHT, as a result of a recent Hackers event in Yangon. It is understood that the Trust itself lacks technical expertise but would be interested in providing information, if a university or NGO were able to provide tech support (Moe Moe Pers. Comm). Rajasthan’s destination marketing organization in India is currently developing a city Ap, the progress of which could be of interest to the Trust.

It is recommended that the Trust advise that the proposed destination marketing organization for Yangon make developing a similar Ap and setting appropriate geofencing a high priority in their first year of operation. The Trust could develop additional Aps or provide information for this Ap while it is being developed.
1.2 Site specific recommendations

1.2.1 Secretariat zone

The Secretariat zone includes the area around the complex where additional attractions and potential attractions made be found (see Figure 1). Existing attractions include: St Mary’s Cathedral (already a strong secondary attraction in its own right), Yangon Railway Station, Sewage Pumping/Compressor Station, Myanmar Times Building, B.E. High School (former St Pauls School) and the Government Press building. To the south of the Secretariat are a series of narrow streets with fairly good building integrity in terms very little modern infill. Some of the older terraces in BogalayZay Street have been repainted recently and may be being developed as guesthouses (official or not). A few small cosmopolitan restaurants and bars have opened on the Western side of the complex in Bo AungKyaw Street. The northern side boasts the widest pavements experienced in the Downtown area. None of this development seems coordinated or planned in any way, but could be considered early indications of a tourist zone or gentrification occurring close to the Secretariat. Planned or organically derived, more such activity will arise as a result of the Secretariat becoming a growing attraction.

Streets around the complex are largely one way, so traffic can move in and out of the property without crossing lanes. Not much parking has been forecasted. Underground facilities or some kind of resolution of the parking issue needed urgently, before the project gets too much further. Although, this is not specifically an issue for tourism, it would affect the tourist experience, if car parks are allowed within the complex.

Another issue is that crossing streets to the complex can be a rather fraught. A sign of congestion is that some of the streets around the complex have been made one way. It is hoped that vehicles for pick up and drop off can move in and out of the property without crossing lanes. Bus parking should not be encouraged as again, it will use up space and be visually intrusive.

Otherwise, with the sketchy information available of the multi-use proposal, it seems like it would have high tourism potential. It would also provide a focus of mini-routes, arts and culture tours, small art galleries and so on for the arts leisure market. It is not clear from the conservation plan (Simpson and Brown 2015) much space will be devoted to the historical interpretation beyond the memorial for General Aung Sun in the room where the assassination happened. The conservation plan also made some good suggestions for interpretation in a general way. The document does mention that it is expected that an advisory group (comprising the Trust and some senior historians) be established to oversee an interpretation consultant to be engaged by the complex’s developer. There is no clear indication as who is the intended audience. There was also no consideration of what tourist market segments it is marketed toward, because this was not a business plan.

There could be danger that internationally branded retail outlets could out compete local ones on rent and quality. This would affect the ambience for tourists who might perceive
it as just another converted Victorian building that they might have seen in their home
countries, especially in London, Sydney or Melbourne. The Queen Victoria Building in
Sydney is a great example of where international global brands have been allowed to run ramp.

The Secretariat

The Secretariat’s potential visual values for tourism are very strong. Accordingly, like
other colonial buildings, it could be presented well at night for photography and outdoor
events, if appropriately lit. It will also have major appeal to the wedding tourism market
for photography and holding receptions.

Recommendations for the Trust to advocate that the retail space manager/property
operator:

1. Should manage rents to allow local shops to compete more fairly with international
branded outlets, and/or have space or a quota set for locally owned galleries and other
businesses
2. Sponsor a space for an artist in residence for short stays of up to three months to
produce and display work (see Gillman Barracks, Singapore) as corporate social
responsibility measure to support local arts

Recommendations for the Trust (whilst as a part of the proposed Interpretative Advisory
Group) to advise the developer’s interpretation consultant:

1. To avoid overly political themed narratives that may be perceived as accusatory
by some visitors. It is fine to challenge a visitor to think about things more deeply,
but not to accuse them of being associated in any way with past events.
2. The historical narrative chosen for the interpretative should be fair and balanced.
3. There should be consultation with the descendants of the nine families affected by
the assassination event about the nature of the interpretation.
4. Audio tours and Aps should be developed for the complex in Burmese, English,
Japanese, Korean, Chinese, Thai, German and French. Products for other languages
could be developed as becomes necessary.
5. Directional signage in Burmese, English and Chinese (the latter are keen on
shopping).

Recommendations for the Trust to pass on to the building developer/operator:

1. Buildings should be appropriately lit at night (for an example in Yangon, see the
current Australian Embassy and The Strand Hotel)
2. The historic gardens should not be sacrificed for more private car or bus parking.
Other arrangements should be made.
3. To liaise with the Trust and Yangon’s new destination marketing organization
(once set up) about how to use the complex’s image in marketing materials to
actively promote Yangon to tourists.
**Around the Secretariat**

Currently, around the Secretariat is a mix of private and publicly owned buildings, but no parks. It is an area where scale varies immensely from large rambling complex of the former St Paul’s school to the cramped nature of the terraced houses on streets running north to south. Hence, it offers a very diverse setting and visitor experience for those venturing out of the Secretariat on foot.

The standout secondary attractions that could benefit from the renovation and conversion of the Secretariat most would be St Mary’s Cathedral and possibly Yangon Railway Station (if it remains accessible). At this point, these are also the only two buildings that openly welcome visits from tourists. The Sewage Pumping/Compressor Station, Myanmar Times Building, B.E. High School (former St Pauls School) and the Government Press building are all dedicated to another use with no real thought to becoming part of the sector in any way. Accordingly, care will have to be taken in opening up the eyes of whichever responsible authority runs them to this possibility. First, the advantages would be more revenue, if access to each is ticketed. Second, they could feel some civic pride that tourists are admiring their architecture or being fascinated by their engineering heritage, where relevant.

The downside of having outsiders in a working space will have to be carefully managed, however. Some of the above may not want to give access other than by appointment, while others may only allow certain hours, if at all. That is, there will need to be some coordination between stakeholders to come up with an appointment schedule that suits all involved (including tourists), especially if they are to be included in a single tour route.

Once it agreed that these places are interested in becoming part of the zone’s tourism and in being open at certain times, some changes could be suggested by the Trust their owner/managers to improve their amenity for visitation.

Recommendations for the Trust to consider passing on when advising the responsible authority on tourism development:

1. In the case of the Pumping/Compressor Station, maintenance of the building, machinery and surrounding yard so that it does appear more loved to outsiders. Engage current staff who are already enthusiastic in presenting the site rather than leave it all to guides. Further development could be considered once the site has received some basic conservation works, directional signage (Burmese and English) and has been added to various mini-routes and tourism itineraries.

2. Government Press *(awaiting information from Thurein)*

3. Myanmar Times Building – *some interiors of interest?*
4. The Former St Paul’s School run by Catholic Christian brothers is currently a working public high school. It could however receive some limited visitation after hours for photography. The Trust could advise the school’s management on appropriate signboard interpretation and lighting.

1.2.2 Shwedagon Pagoda zone

The Shwedagon Pagoda Zone comprises an area, which is a few kilometers radius to include Pegu Club and Kandawgyi Lake and access to the south through either gardens or along Shwedagon Pagoda. The Pegu Club to West could become a standout secondary attraction, if a developer could be found to give it a sensitive restoration. Currently, there is a vague interest in it on TripADvisor and elsewhere on the Internet given its vivid history and that it recently had a cocktail named after it in New York (Guyitt 2013). The Kandawgyi Lake comprising the beginnings of an organically developing local amusement park with a mix activities from having your tarot read to “Photo with animal”. The consultant was not game test what kind. It appears to be receiving tourists as the ticketing and souvenir shops attest. There is also a floating restaurant on a reconstruction of a romanticised royal barge which features a cultural show.

Some attractions and restaurants are to be found north of the Pagoda, for instance:

- The Savoy Hotel is a converted colonial mansion with restaurant themed to Rudyard Kipling.
- Sharkeys original outlet: There are is one on Pansodan Road that the Trust has already commented on and they are opening two more outside Yangon at Bagon and Mandalay
- House of Memories -(see Plate 9) - a quirky restaurant with an historic association to General Aung San
- People’s Park –which has local amusement park features and a happy zone for small children (a bit lame).

The zone contains too many separate elements to make individual recommendations for each one, so some general guidelines and suggestions are offered that the Trust can use as a basis for discussions about its use for tourism. The three key action areas are: cycling and walking around the zone; ideas for Shwedagaon corridor; and more active visitor management at the Main Pagoda.

Cycling and walking around the zone

Cycling should appeal to young, fit individuals; groups and families who can contend with the heat and those who might want to live dangerously and battle the traffic. The rest may consider some late night cycling, as is becoming popular in Singapore, where groups of cyclists go out between 2am and 4am to cycle around the core of the city. The latter also has a restaurant themed to cycling called “Wheelers” (a converted wrought iron warehouse on one of the canals), which has become very popular with the younger Singaporean set of fitness enthusiasts. There appears to be nowhere evident currently
within the Shwedagon zone to rent bicycles or places to park them. Both of these were evident at domestic tourist attractions, such as the National Races Village.

That said, the most appealing are for cycling presently would be along U Wisara Road and to the West of Yangon. Tourists could take in the buildings round the embassy district, National Museum, Pegu Club, Governor’s Residence, Defense Museum, Kyer Ku Monastery and so on. The Trust could recommend to YCDC the installation of bike parking wracks near these attractions.

The area hosts a diverse sample of Restaurants: Feel Myanmar, Oriental House, Sharkeys, Kipling’s Restaurant at the Savoy Hotel, House of Memories and many more for cyclists to stop and refresh themselves. Finally, it is advised that if a cycling is promoted as a tourist activity that tourists be reminded to bring a change of clothing with them to visit Shwedagon or prepare to be charged a deposit for renting clothes.

I\textit{deas for Shwedagon zone and corridor}

The Shwedagon Pagoda Road will need landscaping and a pavement upgrade to be a more pleasant experience for both pedestrians and cyclists. Looks like someone has already started some kind of mosaic paving project on left hand side from St Johns Catholic Church towards Shwedagon. The continuation of this work and widening on both sides of the road would add to the experience. Shade trees should also be planted and maintained, where they currently do not exist.

The entrances to the Shwedagon Pagoda Road walking route would be at either end of it e.g. the Pagoda and the Downtown area (either at Holy Trinity Cathedral or further down). Alternatively, there is route through some parkland behind the Former War Offices.

A walking route could also join it at St Johns Church on Shwedagon Pagoda Road from the National Museum in the west. Another route could feed into the corridor near the Pagoda from the direction of Kandawgyi Lake from the east. Views across the lake from the east towards the Pagoda are stunning (see Plate 10). Photography tourists would certainly appreciate this route.

Meanwhile, reuse proposals and proponents are needed to save two timber colonial mansions on right side facing toward Shwedagon (see Plate 11). One possible use would be as themed restaurants/cafe for walking tourists to visit for a high tea in the afternoon, before witnessing sunset at the Pagoda, alternatively they could walk down for dinner after it. Another use would be as headquarters for a wealthy expatriate association or club (e.g. the Asia Society headquarters in Hong Kong).

Once the Shwedagon Pagoda Road zone/corridor is established with a wider pavement, resting street benches with shade, bike path with locational signage a trial could be made here of digital interpretation/location information for drawing people to and from Shwedagon from the Downtown area. A possible theme would make it a path of
contemplation to approach the pagoda backed by information and quotes.

In the past, it was a path of pilgrimage with more history than is currently apparent. More should also be available about rituals/relics/how to behave that could also include effigies/public sculptures of key Buddhist saints and bodhisattvas known in Myanmar and their stories closer to the pagoda to get people in the right frame of mind. Alternatively, it could be a more festive and celebratory path with quotes and information about the strong continuity of tradition in Yangon.

Shwedagon Pagoda Board of Trustees should be involved in the project and hopefully provide some sponsorship as it could encourage tourists to develop in a more mindful and respectful manner before they reach the pagoda. The Trust could find out if the Shwedagon Pagoda Trust would like to do the sculptures and in what style and materials. It may even be possible for them to do it all themselves from their own workshops/seminaries.

Other questions that the Trust should put to the Shwedagon Pagoda Trust could include:

1. Would the Shwedagon Pagoda Board of Trustees have any concerns about changes to the zone round Shwedagon?
2. What they would like to see or not?
3. What involvement would they want in planning new products e.g. edutainment examples from Hong Kong on the Lake side (e.g. a path of contemplation with the aforementioned sculptures or others).

Within the zone, there are issues with how to integrate existing restaurants and shops into Shwedagon experience more. Current offerings are starting to tend towards fastfood cafeterias. There needs to be more local tea houses, bakeries, art galleries, bookshops, handicrafts shops rather than large unsightly jewelry shops.

Visitor management at the Main Pagoda

The Trust and the consultant have observed that the worst traffic and visitor congestion at the main pagoda occurs at sunset. The Shwedagon Pagoda Board of Trustees representative observed during an interview that tourists were creating bottlenecks queuing to walk past groups of worshippers, being loud and arguing with caretakers. Other problems revolved around the lack of language skills other than English or Burmese on the side of the Trust’s staff.

It is recommended that the Trust advise the Shwedagon Pagoda Board of Trustees that the best solution towards building the capacity to deal with this issue is to liaise with the Royal Palace complex in Bangkok, which has just set up a new on site visitor management system to deal with such issues.

1.2.3 Enhance existing museums
Two existing museums that could offer a better tourist experience are the National Museum and the memorial house museum for General Aung San. Both cultural facilities need to offer a more stimulating experience to challenge and inform tourists, both domestic and international. The National Museum has just recently renovated a gallery for Bagan, however, there are still some problems even with display. If the Trust is concerned about the way the museum is conducting gallery updates, it could contact the museum and offer suggestions for where the curatorial staff could receive guidance, training or undertaken overseas exchanges. The International Council of Museums (ICOM) offers some limited assistance in this area and can be a good partner in updating skills, policy and programmes for better display, interpretation and provision of collections.

The memorial house museum for General Aung San should be advised by the Trust to rethink its approach to commemorating this man. Currently, the experience for any tourist is off-putting in that house is not well furnished or particularly informative about his life. One comes away feeling rather grim. The Trust could lead a discussion with the key stakeholders and concerned community members about whether this museum should remain open as it is or seek funding for a major upgrade or close.

1.2.4 Potential new museums

Performing arts centre and museum

On a more positive note, there is lots of scope for developing new museums. A museum with a suitable performance space could be devoted to Myanmar’s diverse traditional performing arts (drama, dance, music and puppets in particular). The museum could be attached to a school of performing arts or be a new use for one of the currently redundant colonial buildings downtown with the opportunity of putting on activities at night.

Literary museum

There could also be themed around local foreign writers inspired by Yangon themed around its literary history. If the ancient calligraphy/carvings are included in this project, it would showcase an incredibly long and diverse series of human written expression.

Maritime and city museum

Another possibility is to use one or more of the warehouses on waterfront to interpret the city’s development, its maritime history, boat building and trade. Proximity to the waterfront could also work well for having historic examples docked alongside, as in Sydney and Greenwich, London. Currently, Yangon lacks such a museum although it has obviously had a vital role in regional trade and has many traditional shipyards still extant across the river. Such a museum should be advised to build a close relationship with the shipyards include their history in its exhibitions and be a strong advocate (along with the Trust) for the continuance.
Accordingly, it is recommended that the Trust advocate for the funding of oral history and intangible heritage documentation programmes for the traditional shipyards and the operation of the port as soon as possible.

1.3 Yangon Heritage Trust’s own products

There is also scope to enhance and add to the Trust’s own products. This section will make some brief suggestions for new ways present tours and additions to the Trust’s souvenir line. Finally, some ideas for developing a self-funding volunteer tourism conservation project will be provided.

1.3.1 Tour operations

The student-guides have excellent English language skills and seem to be able to make themselves understood by tourists who are also have English as a second language. There does not seem to be the demand yet to add other languages, however, the Trust should monitor the situation, particularly in relation to Korean, Japanese, French or German. The guides showed that they had other skills during the study, such as basic data collection and processing. The Trust does not need to look too much further for research assistants to conduct any further research on tourists.

The way the tours were conducted received mostly favourable comments in the recent survey. The only suggestions for improvement were for more access to buildings, particularly the Secretariat and less standing in the sun. The Secretariat is a case of having to manage expectations and it should be made before the tour that it is still undergoing renovation. Some outline should be given of what it will be like when finished and even encouragement for the tourists to come back to Yangon to see it!

Meanwhile, as soon as access is possible to this jewel in the crown the better it will be for everyone.

As more guides are hired to lead the new tours, one of the more experienced guides could provide support to the Trust’s in-house tourism expert with the supervision of the tours with adequate financial compensation. The situation will need to be monitored to see when a whole new position needs to be created for this role. Accordingly, the Trust should conduct at least annual surveys of tourists on visitor satisfaction and adjust the tours and guiding to address any problems. Also, regular checking of the visitor book will indicate whether there is any dissatisfaction with the tour or any other aspect of the Trust’s provision of services.

Close attention should be paid the Trust’s market position in relation to other private tours. Currently, it is on the higher end of the price range, which is justifiable as it is mostly going to heritage conservation. This point should be clear to tourists without being too overbearing.
Finally, the Trust has an enviable position in that it has access to a deep understanding of
the cultural values and history of the heritage assets presented. It also deals with the key
stakeholders on a regular basis when they are seeking technical advice. More should be
made of the latter when seeking new arrangements for physical access to buildings.

1.3.2 Souvenir line and exhibitions

The Trust shop seems fine with a good range of simple well-made heritage themed
souvenirs promoting the heritage conservation message. If the Trust has concerns in this
area, it should develop a policy regarding what it considers useful to sell. One suggestion
is restrict any handicraft souvenirs to those sourced from not-for-profit social enterprises
that include some information about the tradition that produced the item, the producer
and their background. An annual stock take of books should be conducted and the older
guidebooks offered at a discount and new ones purchased for sale (guidebooks data really
quickly for this kind of destination where things are changing rapidly). Monthly
magazines should be kept up to date and if they are not selling well substitute with other
titles.

The current exhibition of photographs will have to be updated at some point and care
should be taken to integrate the new offerings with the new tours. There is potential leave
some space to promote Special Development Plan to locals, as well as tourists with the
exhibition. However, the Trust is presently the only body providing any kind of curated
exhibition on the historical development of Yangon. The other museums are not city
museums, hence the recommendation above for a new city and maritime museum that
would also cover its historical development that could complement the Trust’s good
work.

1.3.3 Volunteer tourism/student conservation projects

The Trust could consider assisting with building capacity in architectural materials
conservation or by having more hands to do the work, either as self-paid volunteer
tourists or exchange students. As architectural conservation is rising in popularity in Asia
(as has recently been seen by the visit by the Architectural Conservation students from
University of Hong Kong), there will be more synergy within the region. The Trust could
either run or facilitate the running (with a suitable tourism operator) of a regular
architectural conservation project on buildings it considers at risk with volunteer tourists
(preferably with heritage conservation experience) and student volunteers funding by an
outside agency.

N.B. Volunteer tourists commonly spend one to four weeks abroad, but, in some cases,
they may volunteer for up to a year. While volunteers come from all ages and many back-
grounds, most are young people between the ages of 18 and 25. Volunteer tourists
normally pay a fee to be placed in a volunteer position, which typically covers housing,
meals, project materials, on-site staff support and cultural and tourist type activities.
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