

ASEAN Overseas Travel Awareness Survey Report <Myanmar>

March 2021



Survey conducted by:

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[Survey Overview]

Method	<ul style="list-style-type: none"> • Internet survey • Screening survey (preliminary survey) was first conducted by the Internet survey firm (Micromill, Inc.) utilizing survey monitor panel the firm maintains and actual survey conducted to qualified respondents.
Survey Period	<ul style="list-style-type: none"> • Friday, January 22 and Saturday, January 23, 2021
Sample Qualification	<ul style="list-style-type: none"> • Male/female 20 years old or older. Travels abroad at least once every 3 years and intends to travel abroad in the future. <p>*For each country, ensure to include at least 30 samples with experience of visiting the country.</p>



- Of the 10,000 males/females aged 20 and over who took part in this nationwide survey (including people with no intention of overseas travel), **2.9% had visited Myanmar**, with 1.5% stating their purpose as sightseeing, and 0.7% as business.
 - The group that had visited Myanmar the most was males in their 20s at 9.0%, and purposes of visits were “Sightseeing” (3.3%), “Business Trips (2.7%), “Visiting friends/acquaintances”, and “Long-term stay” (2.0%).

[Questions for people who have visited Myanmar]

- **53.5% of respondents had visited Myanmar once**, and 22.5% had visited twice, **with approximately half being repeat travelers to Myanmar**.
- The highest purpose of visiting Myanmar was “Sightseeing/leisure” (58.1%), with the second highest purpose being “Business Trips” (13.2%), followed by “Visiting Family and Friends” (12.4%), then “Wedding/honeymoon (10.1%).
- In terms of points of satisfaction upon visiting Myanmar, **“History and culture (42.6%)”** ranked highest, followed by “Scenery and atmosphere” (38.8%), then “Places of interest/historical sites” (35.7%). **There was notable support of cultural aspects, historical places/sites, scenery, and natural scenery.**
- **The highest percentage of respondents (14.7%) answered they were not satisfied with the aspect of “Good public security” and “Interaction and contact with locals,”** followed by “Access” (14%). **The older the age group, the higher percentage of respondents answered they were dissatisfied with “Nothing in particular.”**
 - A comparison of points of satisfaction and points of dissatisfaction showed that the level of satisfaction was high for cultural and historical sites, natural scenery, and scenery, however a certain number of respondents answered “Not satisfied” for all other aspects of travel to Myanmar.



[Questions for all respondents with intention to travel overseas]

- Regarding impression of Myanmar, most respondents (22.0%) answered “Rich in history and culture,” followed by “Beautiful nature and scenery” (19.7%).
 - A gap in response rate was evident depending on whether the respondent had visited Myanmar previously. In particular, **24.0% of those who had visited answered “Has unrivaled charming places” compared to only 8.7% of those who hadn’t visited, which is a gap of over 15 percentage points.** This suggests that Myanmar offers a charm that people who actually visit can sense.
- Regarding intention to travel to Myanmar, **42.8% of respondents answered “I want to go.”** A high percentage of those who had visited **wanted to go again (over 70%).** 25.5% of males in their 40s responded “I definitely want to go,” which was higher than any other age group.
 - As for what they’d like to do in Myanmar, 50.1% answered “See places of interest and historical sites”, and 45.6% answered “Enjoy nature and scenery.”
 - Of people who’d previously visited Myanmar, a high percentage responded “Have a cross-cultural experience such as interaction with locals” and “Stay at a famous hotel.”
- As for the reason why people had no intention to travel to Myanmar, **the highest percentage of people (44.2%) answered “The level of public security concerns me.”** A significant gap was apparent depending on whether or not respondents had been to Myanmar or not (people who’d visited: 10.5%, people who hadn’t visited: 46.5%), indicating that people may have the impression of Myanmar as being less safe than it actually is.
- Of Myanmar’s major five tourism resources, **the highest percentage of respondents answered “I’ve heard of it and I know what kind of place it is” for Yangon at 25.5%**
 - **For all tourism resources, awareness was higher in males,** with females answering “I’ve never heard of it, I don’t know” for all tourism resources at a response rate of 10 or more percentage points higher than males. Moreover, awareness of Yangon increased as the age group got older, and a significant gap was evident depending on age group for the other four tourism resources also.



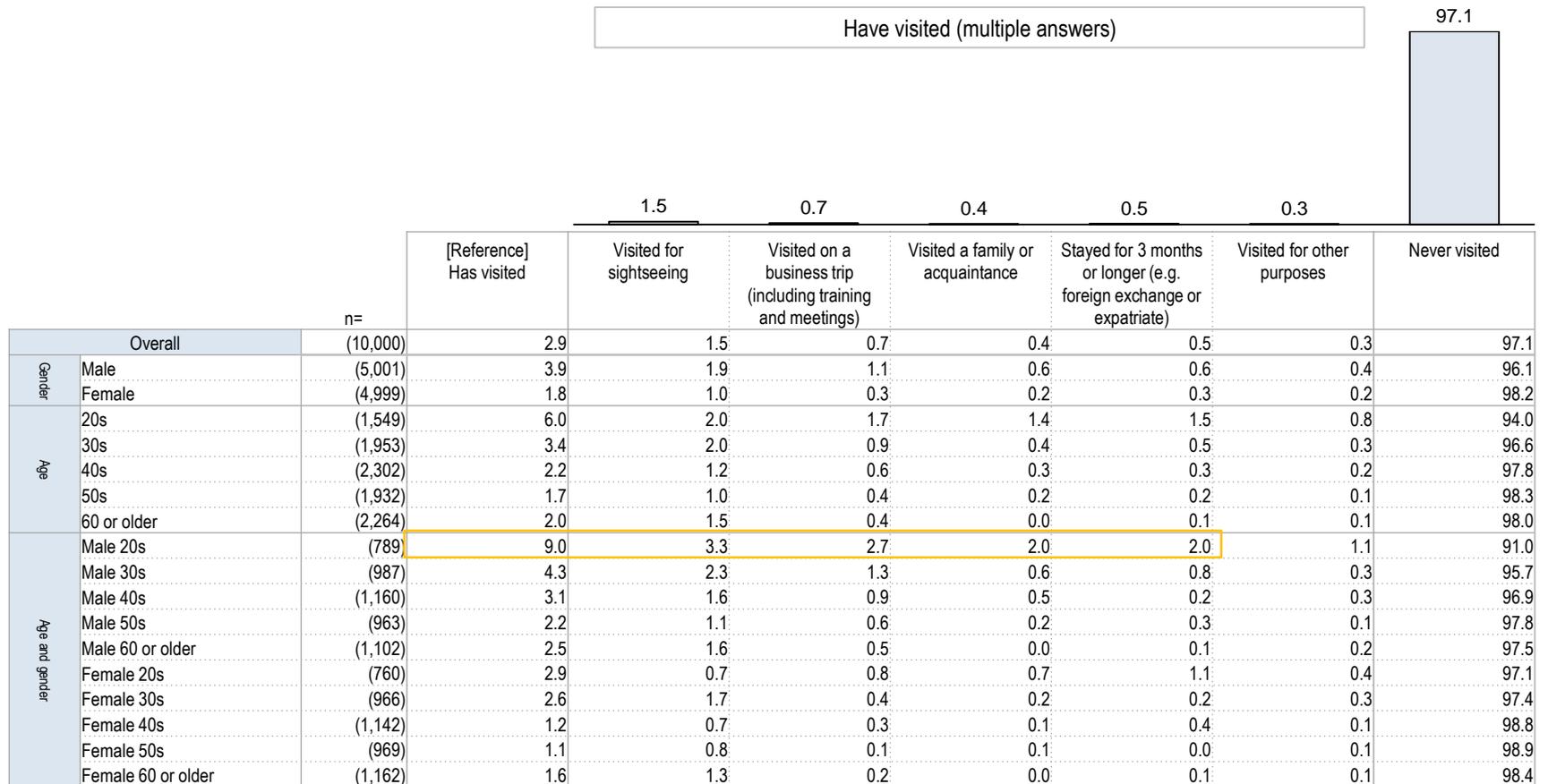
Survey Results [Screening survey]

1. Visit experience (details)

- Of the 10,000 males/females aged 20 and over who took part in this nationwide survey (including people with no intention of overseas travel), 2.9% had visited Myanmar, with 1.5% stating their purpose as sightseeing, and 0.7% as business.
 - The group that had visited Myanmar the most was males in their 20s at 9.0%, and purposes of visits were “Sightseeing” (3.3%), “Business Trips (2.7%), “Visiting friends/acquaintances”, and “Long-term stay” (2.0%).

People who have visited Myanmar (Screening survey)

Q. Have you ever visited the below country or region? Please give all applicable answers for each country/region. **[Myanmar]**





Survey Results

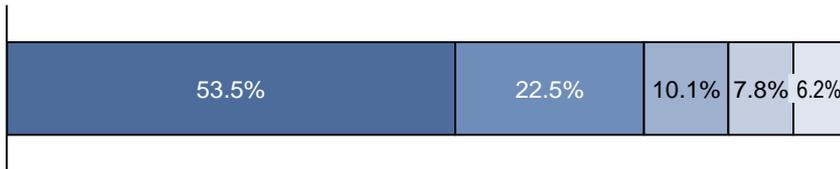
2. [People who have visited] Number/timing of visits

- **53.5% of respondents had visited Myanmar once**, and 22.5% had visited twice, **with approximately half being repeat travelers to Myanmar.**
- The most recent timing of visits to Myanmar was 2016 or earlier (30.2%) however around half had travelled there within the last 3 years (around 2018 onwards)

[People who have visited] Number of visits

Q. How many times have you visited each country? Please only give one applicable answer for each country.
*Regardless of purpose – e.g. sightseeing, business, etc. [Myanmar]

Once Twice 3 times 4 times 5 times or more

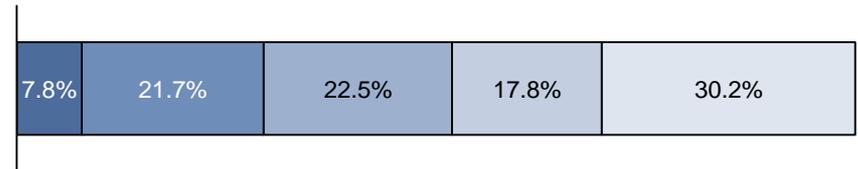


		n=	Once	Twice	3 times	4 times	5 times or more
Overall		(129)	53.5	22.5	10.1	7.8	6.2
Gender	Male	(97)	49.5	25.8	12.4	8.2	4.1
	Female	(32)	65.6	12.5	3.1	6.3	12.5
Age	20s	(24)	33.3	33.3	12.5	12.5	8.3
	30s	(37)	48.6	24.3	13.5	10.8	2.7
	40s	(13)	76.9	7.7	0.0	7.7	7.7
	50s	(23)	52.2	21.7	17.4	0.0	8.7
	60 or older	(32)	65.6	18.8	3.1	6.3	6.3
	Age and gender	Male 20s	(21)	38.1	33.3	14.3	9.5
Male 30s		(29)	48.3	27.6	13.8	10.3	0.0
Male 40s		(9)	77.8	11.1	0.0	11.1	0.0
Male 50s		(15)	40.0	26.7	26.7	0.0	6.7
Male 60 or older		(23)	56.5	21.7	4.3	8.7	8.7
Female 20s		(3)	0.0	33.3	0.0	33.3	33.3
Female 30s		(8)	50.0	12.5	12.5	12.5	12.5
Female 40s		(4)	75.0	0.0	0.0	0.0	25.0
Female 50s		(8)	75.0	12.5	0.0	0.0	12.5
Female 60 or older		(9)	88.9	11.1	0.0	0.0	0.0

[People who have visited] Timing of visit

Q. When did you take the trip? Please only give one applicable answer for each country.
*If you have visited a country more than once, please tell us the purpose of your most recent trip. [Myanmar]

2020 or later Around 2019 Around 2018 Around 2017 2016 or earlier



		n=	2020 or later	Around 2019	Around 2018	Around 2017	2016 or earlier
Overall		(129)	7.8	21.7	22.5	17.8	30.2
Gender	Male	(97)	6.2	24.7	20.6	18.6	29.9
	Female	(32)	12.5	12.5	28.1	15.6	31.3
Age	20s	(24)	16.7	29.2	29.2	20.8	4.2
	30s	(37)	5.4	21.6	21.6	18.9	32.4
	40s	(13)	7.7	23.1	15.4	23.1	30.8
	50s	(23)	0.0	13.0	30.4	8.7	47.8
	60 or older	(32)	9.4	21.9	15.6	18.8	34.4
	Age and gender	Male 20s	(21)	14.3	33.3	23.8	23.8
Male 30s		(29)	6.9	20.7	24.1	17.2	31.0
Male 40s		(9)	0.0	33.3	11.1	22.2	33.3
Male 50s		(15)	0.0	13.3	33.3	6.7	46.7
Male 60 or older		(23)	4.3	26.1	8.7	21.7	39.1
Female 20s		(3)	33.3	0.0	66.7	0.0	0.0
Female 30s		(8)	0.0	25.0	12.5	25.0	37.5
Female 40s		(4)	25.0	0.0	25.0	25.0	25.0
Female 50s		(8)	0.0	12.5	25.0	12.5	50.0
Female 60 or older		(9)	22.2	11.1	33.3	11.1	22.2



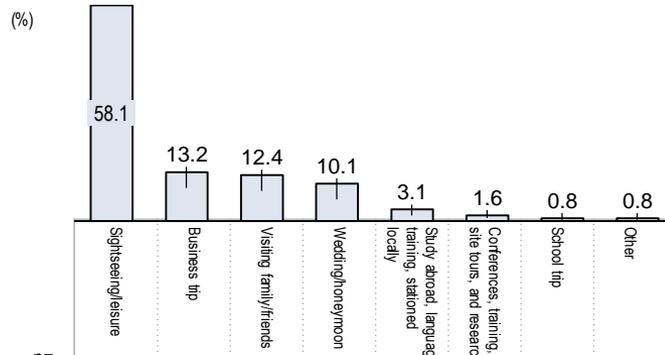
Survey Results

3. [People who have visited] Purpose/companion

- The highest purpose of visiting Myanmar was “Sightseeing/leisure” (58.1%), with the second highest purpose being “Business Trips” (13.2%), followed by “Visiting Family and Friends” (12.4%), then “Wedding/honeymoon” (10.1%).
- In terms of travel companion, the highest was “Spouse/partner” (32.6%), followed by “Friends and acquaintances” (24.0%), then “Company colleagues and stakeholders” (21.7%).

[People who have visited] Purpose of visit

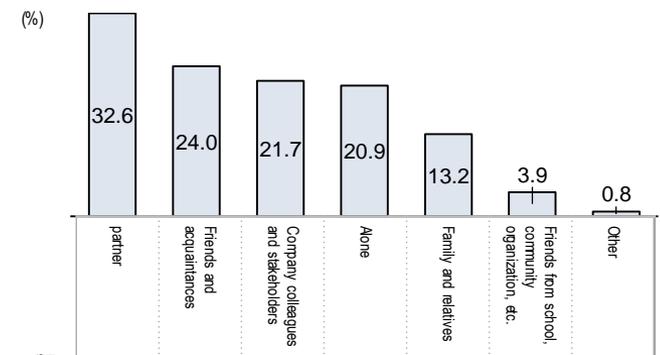
Q. What was the main purpose of the trip? Please only give one applicable answer as the purpose of visiting each country. *If you have visited a country more than once, please tell us the purpose of your most recent trip. [Myanmar]



	n=	Sightseeing/leisure	Business trip	Visiting family/friends	Wedding/honeymoon	Study abroad, language training, stationed locally	Conferences, training, site tours, and research	School trip	Other
Overall	(129)	58.1	13.2	12.4	10.1	3.1	1.6	0.8	0.8
Gender	Male (97)	54.6	15.5	14.4	10.3	2.1	2.1	1.0	0.0
	Female (32)	68.8	6.3	6.3	9.4	6.3	0.0	0.0	3.1
Age	20s (24)	37.5	4.2	16.7	29.2	8.3	4.2	0.0	0.0
	30s (37)	48.6	10.8	21.6	10.8	2.7	2.7	2.7	0.0
	40s (13)	84.6	7.7	7.7	0.0	0.0	0.0	0.0	0.0
	50s (23)	73.9	13.0	4.3	4.3	4.3	0.0	0.0	0.0
	60 or older (32)	62.5	25.0	6.3	3.1	0.0	0.0	0.0	3.1
Age and gender	Male 20s (21)	42.9	4.8	19.0	23.8	4.8	4.8	0.0	0.0
	Male 30s (29)	44.8	13.8	20.7	10.3	3.4	3.4	3.4	0.0
	Male 40s (9)	77.8	11.1	11.1	0.0	0.0	0.0	0.0	0.0
	Male 50s (15)	73.3	13.3	6.7	6.7	0.0	0.0	0.0	0.0
	Male 60 or older (23)	56.5	30.4	8.7	4.3	0.0	0.0	0.0	0.0
	Female 20s (3)	0.0	0.0	0.0	66.7	33.3	0.0	0.0	0.0
	Female 30s (8)	62.5	0.0	25.0	12.5	0.0	0.0	0.0	0.0
	Female 40s (4)	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Female 50s (8)	75.0	12.5	0.0	0.0	12.5	0.0	0.0	0.0
Female 60 or older (9)	77.8	11.1	0.0	0.0	0.0	0.0	0.0	11.1	

[People who have visited] Travel companion

Q. Who accompanied you on the trip? Please give all the answers that are applicable for each country. *If you have visited a country more than once, please tell us about your companion on your most recent trip. [Myanmar]



	n=	partner	Friends and acquaintances	Company colleagues and stakeholders	Alone	Family and relatives	Friends from school, community organization, etc.	Other
Overall	(129)	32.6	24.0	21.7	20.9	13.2	3.9	0.8
Gender	Male (97)	32.0	22.7	22.7	24.7	9.3	4.1	0.0
	Female (32)	34.4	28.1	18.8	9.4	25.0	3.1	3.1
Age	20s (24)	33.3	25.0	16.7	12.5	25.0	8.3	0.0
	30s (37)	18.9	21.6	29.7	24.3	13.5	5.4	0.0
	40s (13)	53.8	30.8	7.7	7.7	0.0	0.0	0.0
	50s (23)	30.4	34.8	26.1	21.7	17.4	4.3	0.0
	60 or older (32)	40.6	15.6	18.8	28.1	6.3	0.0	3.1
Age and gender	Male 20s (21)	33.3	23.8	19.0	14.3	19.0	9.5	0.0
	Male 30s (29)	20.7	24.1	31.0	24.1	10.3	6.9	0.0
	Male 40s (9)	44.4	33.3	11.1	11.1	0.0	0.0	0.0
	Male 50s (15)	33.3	20.0	20.0	33.3	6.7	0.0	0.0
	Male 60 or older (23)	39.1	17.4	21.7	34.8	4.3	0.0	0.0
	Female 20s (3)	33.3	33.3	0.0	0.0	66.7	0.0	0.0
	Female 30s (8)	12.5	12.5	25.0	25.0	25.0	0.0	0.0
	Female 40s (4)	75.0	25.0	0.0	0.0	0.0	0.0	0.0
	Female 50s (8)	25.0	62.5	37.5	0.0	37.5	12.5	0.0
Female 60 or older (9)	44.4	11.1	11.1	11.1	11.1	0.0	11.1	



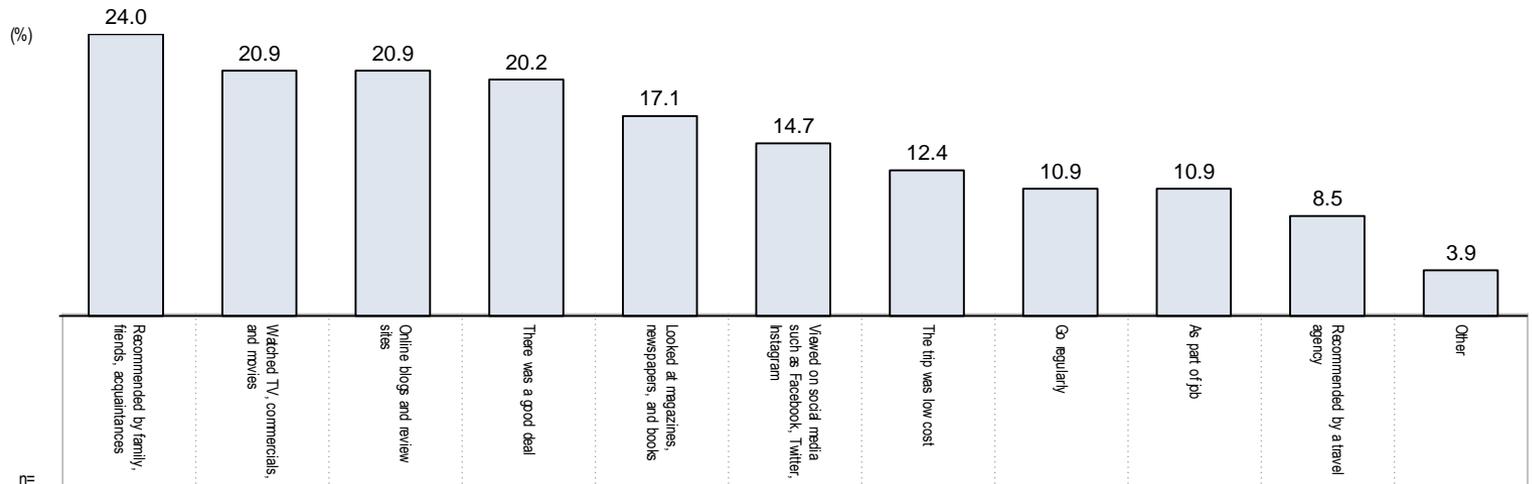
Survey Results

4. [People who have visited] Deciding factor in choosing travel destination

- Regarding deciding factor in choosing travel destination, 24.0% responded “Recommended by family, friends, acquaintances,” followed by “Watched TV, commercials, and movies” and “Online blogs and review sites” (both 20.9%).
- More females than males answered “Watched TV, commercials, and movies” and “Online blogs and review sites” with the response of “Viewed on social media” being particularly high for those in their 20s.

[People who have visited] Deciding factor in choosing travel destination

Q. What was the deciding factor in choosing your travel destination? Please give all the answers that are applicable. *If you have visited a country more than once, please tell us about your most recent trip. [Myanmar]



		N	24.0	20.9	20.9	20.2	17.1	14.7	12.4	10.9	10.9	8.5	3.9
Overall		(129)	24.0	20.9	20.9	20.2	17.1	14.7	12.4	10.9	10.9	8.5	3.9
Gender	Male	(97)	22.7	16.5	19.6	18.6	17.5	15.5	12.4	8.2	13.4	6.2	3.1
	Female	(32)	28.1	34.4	25.0	25.0	15.6	12.5	12.5	18.8	3.1	15.6	6.3
Age	20s	(24)	8.3	12.5	25.0	20.8	16.7	25.0	16.7	8.3	4.2	8.3	0.0
	30s	(37)	24.3	24.3	10.8	18.9	10.8	10.8	8.1	13.5	8.1	5.4	2.7
	40s	(13)	61.5	15.4	30.8	23.1	23.1	15.4	15.4	7.7	7.7	30.8	7.7
	50s	(23)	30.4	26.1	39.1	17.4	17.4	17.4	21.7	4.3	13.0	8.7	0.0
	60 or older	(32)	15.6	21.9	12.5	21.9	21.9	9.4	6.3	15.6	18.8	3.1	9.4
	Age and gender	Male 20s	(21)	9.5	9.5	28.6	23.8	19.0	23.8	14.3	4.8	4.8	4.8
	Male 30s	(29)	24.1	27.6	10.3	20.7	6.9	13.8	10.3	10.3	10.3	6.9	0.0
	Male 40s	(9)	55.6	11.1	33.3	11.1	22.2	11.1	11.1	0.0	11.1	33.3	11.1
	Male 50s	(15)	26.7	13.3	33.3	13.3	20.0	20.0	20.0	0.0	13.3	0.0	0.0
	Male 60 or older	(23)	17.4	13.0	8.7	17.4	26.1	8.7	8.7	17.4	26.1	0.0	8.7
	Female 20s	(3)	0.0	33.3	0.0	0.0	0.0	33.3	33.3	0.0	33.3	0.0	0.0
	Female 30s	(8)	25.0	12.5	12.5	12.5	25.0	0.0	0.0	25.0	0.0	0.0	12.5
	Female 40s	(4)	75.0	25.0	25.0	50.0	25.0	25.0	25.0	25.0	0.0	25.0	0.0
	Female 50s	(8)	37.5	50.0	50.0	25.0	12.5	12.5	25.0	12.5	12.5	25.0	0.0
	Female 60 or older	(9)	11.1	44.4	22.2	33.3	11.1	11.1	0.0	11.1	0.0	11.1	11.1



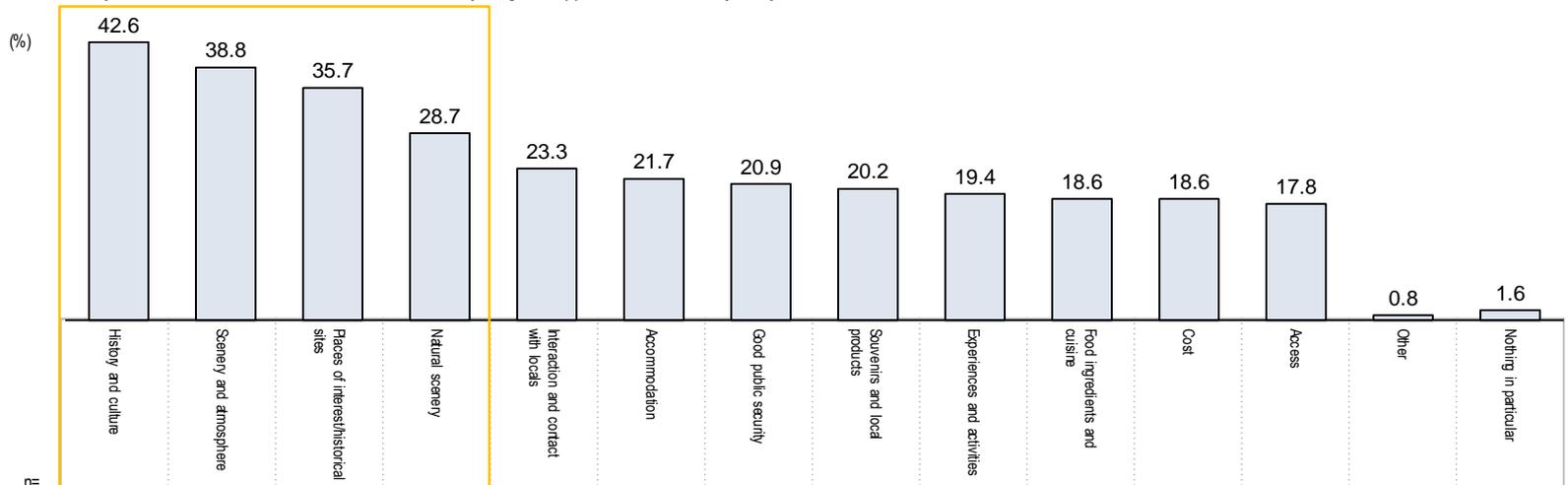
Survey Results

5. [People who have visited] Points of satisfaction

- In terms of points of satisfaction upon visiting Myanmar, “History and culture” (42.6%) ranked highest, followed by “Scenery and atmosphere” (38.8%), then “Places of interest/historical sites” (35.7%). There was notable support of cultural aspects, historical places/sites, scenery, and natural scenery.

[People who have visited] Points of satisfaction

Q. What were you satisfied with when you visited the destination? Please answer everything that applies to each country. [Myanmar]



	n	42.6	38.8	35.7	28.7	23.3	21.7	20.9	20.2	19.4	18.6	18.6	17.8	0.8	1.6	
Overall	(129)	42.6	38.8	35.7	28.7	23.3	21.7	20.9	20.2	19.4	18.6	18.6	17.8	0.8	1.6	
Gender	Male	(97)	38.1	35.1	29.9	19.6	18.6	19.6	18.6	18.6	17.5	18.6	16.5	14.4	1.0	2.1
	Female	(32)	56.3	50.0	53.1	56.3	37.5	28.1	28.1	25.0	25.0	18.8	25.0	28.1	0.0	0.0
Age	20s	(24)	20.8	16.7	33.3	20.8	16.7	8.3	16.7	25.0	8.3	8.3	16.7	16.7	0.0	4.2
	30s	(37)	27.0	32.4	18.9	18.9	27.0	13.5	18.9	16.2	13.5	10.8	8.1	16.2	0.0	0.0
	40s	(13)	38.5	46.2	53.8	23.1	38.5	38.5	30.8	38.5	23.1	46.2	15.4	23.1	0.0	0.0
	50s	(23)	73.9	52.2	43.5	43.5	21.7	43.5	21.7	17.4	39.1	30.4	34.8	30.4	4.3	0.0
	60 or older	(32)	56.3	50.0	43.8	37.5	18.8	18.8	21.9	15.6	18.8	15.6	21.9	9.4	0.0	3.1
Age and gender	Male 20s	(21)	23.8	19.0	28.6	23.8	19.0	9.5	19.0	23.8	9.5	9.5	19.0	14.3	0.0	4.8
	Male 30s	(29)	31.0	31.0	17.2	13.8	17.2	10.3	20.7	20.7	10.3	13.8	6.9	17.2	0.0	0.0
	Male 40s	(9)	33.3	44.4	44.4	11.1	22.2	33.3	22.2	33.3	22.2	44.4	11.1	22.2	0.0	0.0
	Male 50s	(15)	66.7	46.7	40.0	26.7	13.3	46.7	20.0	13.3	40.0	26.7	33.3	26.7	6.7	0.0
	Male 60 or older	(23)	43.5	43.5	34.8	21.7	21.7	17.4	13.0	8.7	17.4	17.4	17.4	0.0	0.0	4.3
	Female 20s	(3)	0.0	0.0	66.7	0.0	0.0	0.0	0.0	33.3	0.0	0.0	0.0	33.3	0.0	0.0
	Female 30s	(8)	12.5	37.5	25.0	37.5	62.5	25.0	12.5	0.0	25.0	0.0	12.5	12.5	0.0	0.0
	Female 40s	(4)	50.0	50.0	75.0	50.0	75.0	50.0	50.0	50.0	25.0	50.0	25.0	25.0	0.0	0.0
	Female 50s	(8)	87.5	62.5	50.0	75.0	37.5	37.5	25.0	25.0	37.5	37.5	37.5	37.5	0.0	0.0
	Female 60 or older	(9)	88.9	66.7	66.7	77.8	11.1	22.2	44.4	33.3	22.2	11.1	33.3	33.3	0.0	0.0



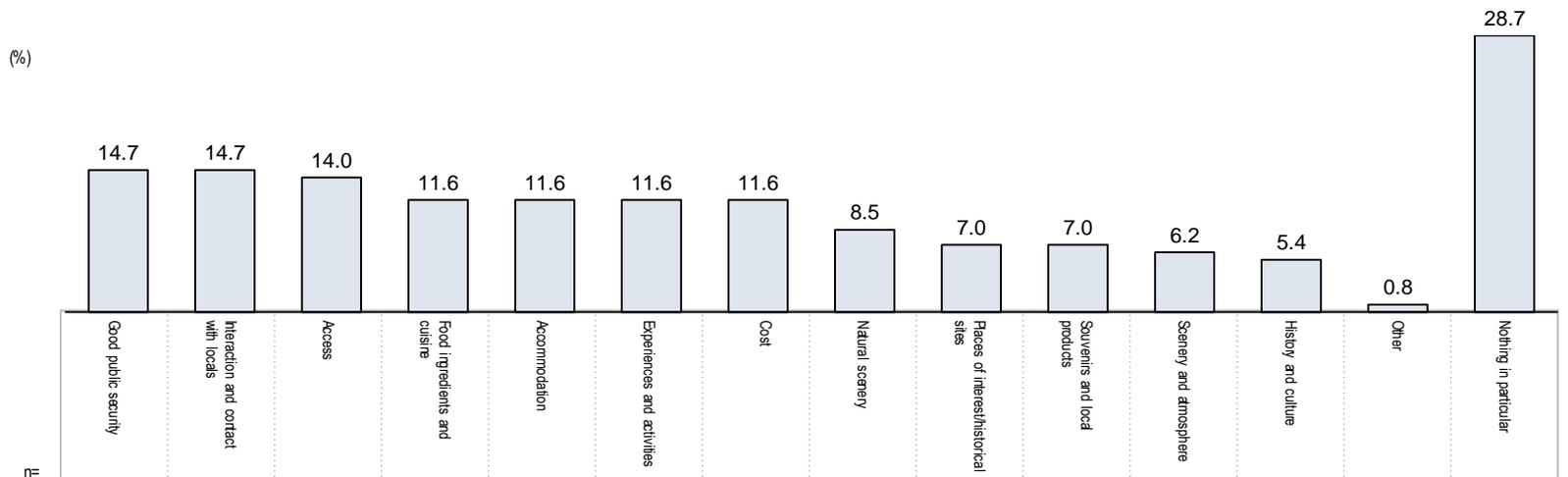
Survey Results

6. [People who have visited] Points of dissatisfaction

- As opposed to the previous page, when asked what they were dissatisfied with upon visiting Myanmar, the highest percentage of respondents answered they were not satisfied with the aspect of “Good public security” and “Interaction and contact with locals” (14.7%), followed by “Access” (14%).
- The older the age group, the higher percentage of respondents answered they were dissatisfied with “Nothing in particular.”

[People who have visited] Points of dissatisfaction

Q. What were you not really satisfied with when you visited the destination? Please answer everything that applies to each country. [Myanmar]



		n	Good public security	Interaction and contact with locals	Access	Food ingredients and cuisine	Accommodation	Experiences and activities	Cost	Natural scenery	Places of interest/historical sites	Souvenirs and local products	Scenery and atmosphere	History and culture	Other	Nothing in particular
Overall		(129)	14.7	14.7	14.0	11.6	11.6	11.6	11.6	8.5	7.0	7.0	6.2	5.4	0.8	28.7
Gender	Male	(97)	16.5	15.5	17.5	9.3	13.4	9.3	14.4	9.3	7.2	7.2	8.2	5.2	1.0	25.8
	Female	(32)	9.4	12.5	3.1	18.8	6.3	18.8	3.1	6.3	6.3	6.3	0.0	6.3	0.0	37.5
Age	20s	(24)	12.5	8.3	20.8	12.5	33.3	16.7	16.7	4.2	0.0	8.3	12.5	16.7	0.0	8.3
	30s	(37)	13.5	16.2	13.5	8.1	10.8	13.5	13.5	16.2	10.8	2.7	5.4	0.0	0.0	13.5
	40s	(13)	7.7	0.0	0.0	15.4	15.4	23.1	15.4	0.0	7.7	7.7	7.7	0.0	0.0	46.2
	50s	(23)	21.7	30.4	17.4	17.4	0.0	4.3	8.7	8.7	8.7	13.0	8.7	4.3	4.3	26.1
	60 or older	(32)	15.6	12.5	12.5	9.4	3.1	6.3	6.3	6.3	6.3	6.3	0.0	6.3	0.0	56.3
Age and gender	Male 20s	(21)	14.3	9.5	23.8	14.3	33.3	9.5	19.0	4.8	0.0	9.5	14.3	14.3	0.0	9.5
	Male 30s	(29)	17.2	13.8	17.2	6.9	13.8	10.3	13.8	17.2	13.8	3.4	6.9	0.0	0.0	13.8
	Male 40s	(9)	11.1	0.0	0.0	11.1	11.1	22.2	22.2	0.0	11.1	11.1	11.1	0.0	0.0	44.4
	Male 50s	(15)	20.0	40.0	20.0	6.7	0.0	0.0	13.3	6.7	6.7	6.7	13.3	0.0	6.7	26.7
	Male 60 or older	(23)	17.4	13.0	17.4	8.7	4.3	8.7	8.7	8.7	4.3	8.7	0.0	8.7	0.0	47.8
	Female 20s	(3)	0.0	0.0	0.0	0.0	33.3	66.7	0.0	0.0	0.0	0.0	0.0	33.3	0.0	0.0
	Female 30s	(8)	0.0	25.0	0.0	12.5	0.0	25.0	12.5	12.5	0.0	0.0	0.0	0.0	0.0	12.5
	Female 40s	(4)	0.0	0.0	0.0	25.0	25.0	25.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	50.0
	Female 50s	(8)	25.0	12.5	12.5	37.5	0.0	12.5	0.0	12.5	12.5	25.0	0.0	12.5	0.0	25.0
	Female 60 or older	(9)	11.1	11.1	0.0	11.1	0.0	0.0	0.0	0.0	11.1	0.0	0.0	0.0	0.0	77.8



Survey Results

[Reference] Comparison of points of satisfaction/dissatisfaction

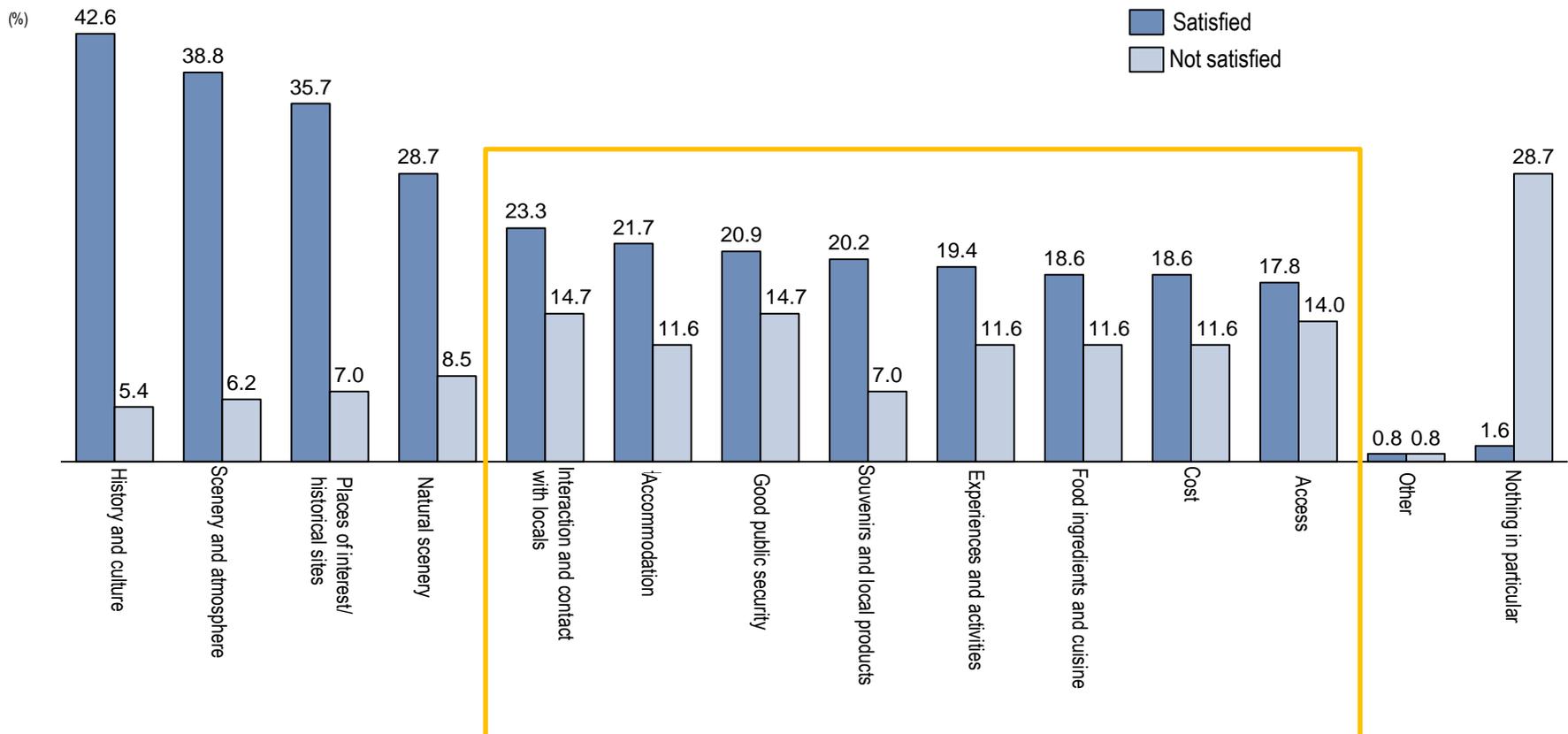
- A comparison of points of satisfaction and points of dissatisfaction showed that the level of satisfaction was high for cultural and historical sites, natural scenery, and scenery, however a certain number of respondents answered “Not satisfied” for all other aspects of travel to Myanmar.

[People who have visited] Points of satisfaction/dissatisfaction

Q. What were you satisfied with when you visited the destination? Please answer everything that applies to each country. [Myanmar]

Q. What were you not really satisfied with when you visited the destination? Please answer everything that applies to each country. [Myanmar]

(n=129)





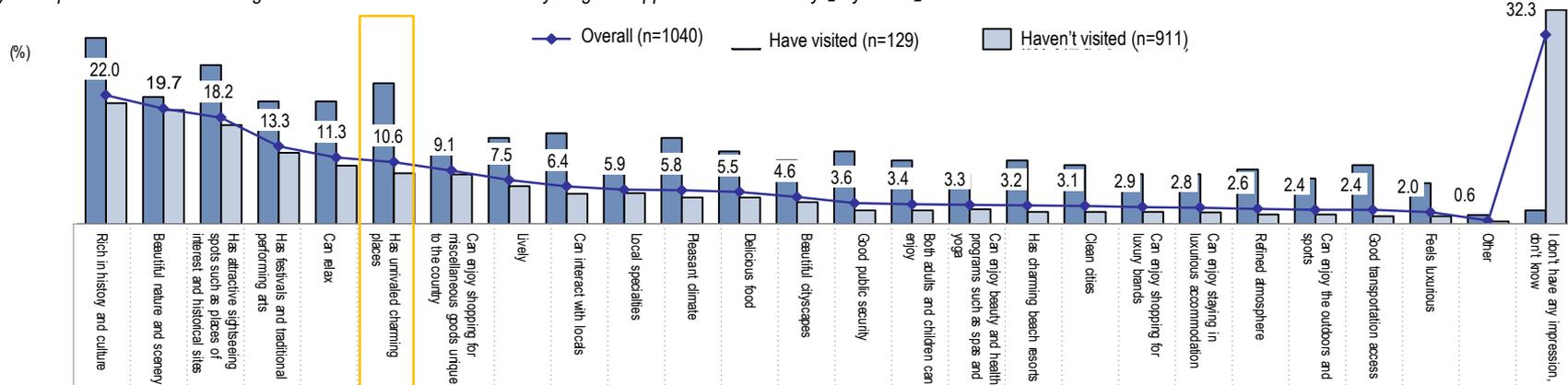
Survey Results

7. Impression of Myanmar

- When all respondents were asked their impression of Myanmar, most respondents (22.0%) answered “Rich in history and culture,” followed by “Beautiful nature and scenery (19.7%).
- A gap in response rate was evident depending on whether the respondent had visited Myanmar previously. In particular, 24.0% of those who had visited answered “Has unrivaled charming places” compared to only 8.7% of those who hadn’t visited, which is a gap of over 15 percentage points. This suggests that Myanmar offers a charm that people who actually visit can sense.

Impression of Myanmar

Q. What are your impressions of the following 10 countries? Please answer everything that applies to each country. [Myanmar]



N		Rich in history and culture	Beautiful nature and scenery	Has attractive sightseeing spots such as places of interest and historical sites	Has festivals and traditional performing arts	Can relax	Has unrivaled charming places	Can enjoy shopping for miscellaneous goods unique to the country	Lively	Can interact with locals	Local specialties	Pleasant climate	Delicious food	Beautiful cityscapes	Good public security	Both adults and children can enjoy	Yoga	Can enjoy beauty and health programs such as spas and yoga	Has charming beach resorts	Clean cities	Luxury brands	Can enjoy shopping for luxurious accommodation	Can enjoy the outdoors and sports	Refined atmosphere	Good transportation access	Feels luxurious	Other	I don't have any impression, I don't know
Overall	(1,040)	22.0	19.7	18.2	13.3	11.3	10.6	9.1	7.5	6.4	5.9	5.8	5.5	4.6	3.6	3.4	3.3	3.2	3.1	2.9	2.8	2.6	2.4	2.4	2.0	0.6	32.3	
Gender																												
Male	(577)	22.5	18.2	19.4	13.7	12.0	12.1	9.0	7.5	6.8	6.1	6.4	7.1	6.6	4.7	4.3	3.6	2.9	3.6	4.0	3.5	2.8	3.5	2.8	2.1	0.5	28.1	
Female	(463)	21.4	21.6	16.6	12.7	10.6	8.6	9.3	7.6	6.0	5.6	5.0	3.5	2.2	2.2	2.2	2.8	3.5	2.4	1.5	1.9	2.4	1.1	1.9	1.9	0.6	37.6	
Age																												
20s	(162)	14.8	11.7	14.8	17.9	11.1	13.6	10.5	10.5	6.8	7.4	6.2	7.4	6.8	3.7	4.3	6.2	6.2	8.0	3.7	4.9	4.3	3.7	4.9	3.1	0.0	28.4	
30s	(192)	22.4	18.2	13.5	11.5	13.5	9.4	8.9	9.4	6.3	8.3	6.8	7.8	5.2	4.7	5.7	5.2	3.1	3.1	5.2	3.6	3.6	2.6	2.1	3.1	0.0	24.5	
40s	(192)	25.0	24.0	15.6	15.1	14.1	11.5	8.9	9.9	6.8	4.7	7.8	6.8	4.2	3.6	3.1	2.6	2.1	2.6	3.1	2.6	3.6	4.7	3.1	2.6	0.5	31.3	
50s	(212)	22.6	22.2	23.6	13.2	9.0	9.4	11.3	5.7	10.4	6.1	6.1	4.2	4.2	3.8	3.3	3.3	3.8	2.4	2.4	2.4	2.4	2.4	1.9	2.4	2.4	1.4	32.5
60 or older	(282)	23.4	20.6	20.9	10.6	9.9	9.9	7.1	4.3	3.2	3.9	3.2	2.8	3.5	2.5	1.4	0.7	1.8	1.1	1.1	1.4	0.4	0.4	0.7	0.0	0.7	40.4	
Age and gender																												
Male 20s	(81)	14.8	11.1	17.3	16.0	13.6	21.0	13.6	9.9	8.6	8.6	8.6	12.3	11.1	3.7	7.4	8.6	6.2	12.3	4.9	6.2	4.9	7.4	8.6	2.5	0.0	19.8	
Male 30s	(112)	17.0	15.2	12.5	12.5	15.2	9.8	8.9	10.7	7.1	8.9	8.0	10.7	7.1	8.0	7.1	7.1	2.7	3.6	8.0	5.4	4.5	3.6	3.6	4.5	0.0	17.0	
Male 40s	(102)	26.5	18.6	19.6	16.7	15.7	11.8	8.8	14.7	7.8	6.9	10.8	9.8	6.9	4.9	3.9	2.9	2.0	3.9	4.9	3.9	4.9	4.9	6.9	3.9	2.9	1.0	25.5
Male 50s	(123)	23.6	22.0	23.6	12.2	7.3	9.8	10.6	4.9	8.1	4.9	6.5	4.1	5.7	4.1	4.9	2.4	2.4	2.4	2.4	1.6	1.6	1.6	0.8	1.6	0.8	30.1	
Male 60 or older	(159)	27.0	20.8	22.0	12.6	10.1	11.3	5.7	1.3	3.8	3.1	1.3	2.5	4.4	3.1	0.6	0.0	2.5	0.0	1.3	1.9	0.0	0.6	0.0	0.0	0.6	40.3	
Female 20s	(81)	14.8	12.3	12.3	19.8	8.6	6.2	7.4	11.1	4.9	6.2	3.7	2.5	2.5	3.7	1.2	3.7	6.2	3.7	2.5	3.7	3.7	0.0	1.2	3.7	0.0	37.0	
Female 30s	(80)	30.0	22.5	15.0	10.0	11.3	8.8	8.8	7.5	5.0	7.5	5.0	3.8	2.5	0.0	3.8	2.5	3.8	2.5	1.3	1.3	2.5	1.3	0.0	1.3	0.0	35.0	
Female 40s	(90)	23.3	30.0	11.1	13.3	12.2	11.1	8.9	4.4	5.6	2.2	4.4	3.3	1.1	2.2	2.2	2.2	2.2	1.1	1.1	1.1	2.2	2.2	2.2	2.2	2.2	0.0	37.8
Female 50s	(89)	21.3	22.5	23.6	14.6	11.2	9.0	12.4	6.7	13.5	7.9	5.6	4.5	2.2	3.4	1.1	4.5	5.6	2.2	2.2	3.4	3.4	2.2	4.5	3.4	2.2	36.0	
Female 60 or older	(123)	18.7	20.3	19.5	8.1	9.8	8.1	8.9	8.1	2.4	4.9	5.7	3.3	2.4	1.6	2.4	1.6	0.8	2.4	0.8	0.8	0.8	0.8	0.8	0.0	0.0	0.8	40.7
Visited/Not visited																												
Have visited	(129)	31.8	21.7	27.1	20.9	20.9	24.0	14.0	14.7	15.5	10.1	14.7	12.4	10.9	12.4	10.9	8.5	10.9	10.1	8.5	8.5	9.3	7.8	10.1	7.0	1.6	2.3	
Haven't visited	(911)	20.6	19.4	16.9	12.2	10.0	8.7	8.5	6.5	5.2	5.3	4.5	4.5	3.7	2.3	2.3	2.5	2.1	2.1	2.1	2.0	1.6	1.6	1.3	1.3	0.4	36.6	



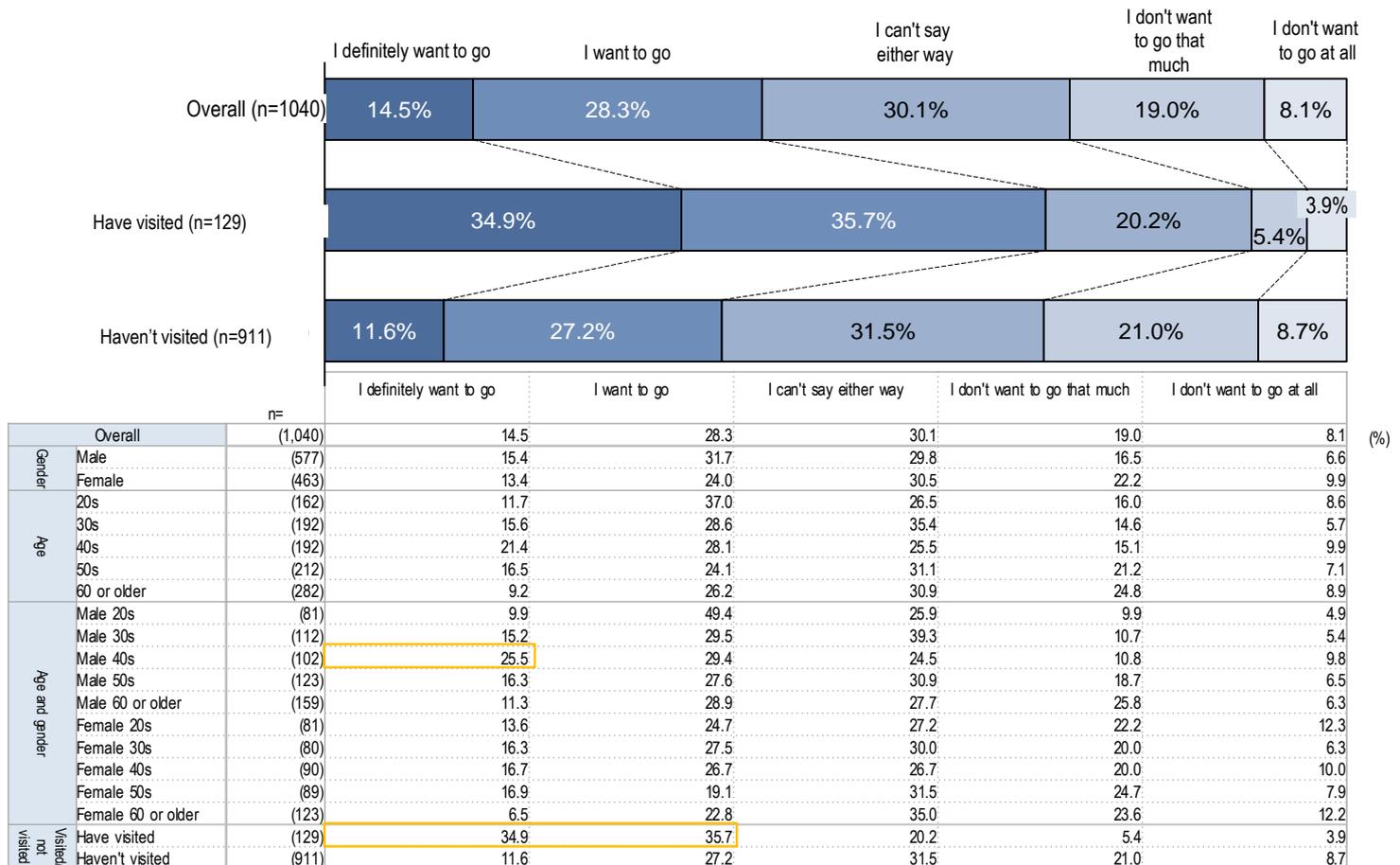
Survey Results

8. Intention to visit (sightseeing)

- Regarding intention to travel to Myanmar, 42.8% of respondents answered “I want to go.” (“Definitely want to go” & “I want to go”)
- A high percentage of those who had visited wanted to go again (over 70%). 25.5% of males in their 40s responded “I definitely want to go,” which was higher than any other age group.

Intention to visit Myanmar (sightseeing)

Q. Would you like to travel to the following countries for sightseeing? Please give one applicable answer for each country. [Myanmar]



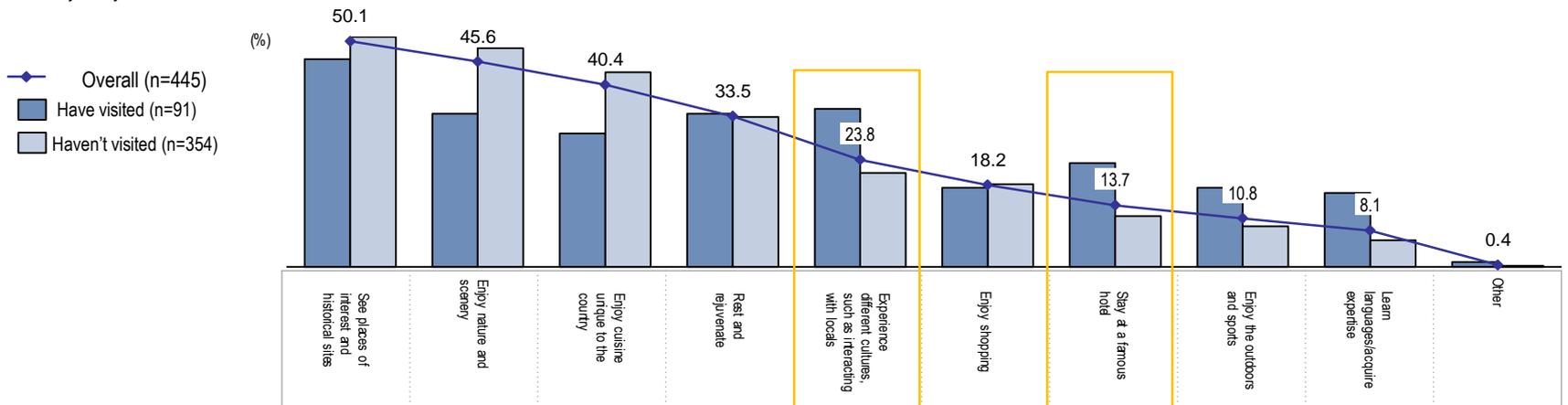


9. [People with intention to visit] What respondent wants to do at destination

- When those respondents who answered "I definitely want to go" or "I want to go" in the previous question were asked what they want to do in Myanmar, most answered "See places of interest/historic sites" (50.1%), followed by "Enjoy nature and scenery" (45.6%).
- Of people who'd previously visited Myanmar, a high percentage responded "Have a cross-cultural experience such as interaction with locals" and "Stay at a famous hotel."

[People with intention to visit] What respondent wants to do in Myanmar

Q. This question is for respondents who answered "I definitely want to go" or "I want to go" in the previous question. What would you like to do if you take a sightseeing trip to the country? Please give all applicable answers for each country. [Myanmar]



		n	See places of interest and historical sites	Enjoy nature and scenery	Enjoy cuisine unique to the country	Rest and rejuvenate	Experience different cultures, such as interacting with locals	Enjoy shopping	Stay at a famous hotel	Enjoy the outdoors and sports	Learn languages/acquire expertise	Other
Overall		(445)	50.1	45.6	40.4	33.5	23.8	18.2	13.7	10.8	8.1	0.4
Gender	Male	(272)	46.7	41.2	36.8	32.7	23.9	15.1	12.9	12.1	8.8	0.4
	Female	(173)	55.5	52.6	46.2	34.7	23.7	23.1	15.0	8.7	6.9	0.6
Age	20s	(79)	40.5	27.8	26.6	30.4	22.8	20.3	15.2	20.3	10.1	0.0
	30s	(85)	44.7	43.5	32.9	34.1	16.5	15.3	12.9	10.6	11.8	0.0
	40s	(95)	38.9	44.2	44.2	31.6	30.5	23.2	13.7	11.6	7.4	1.1
	50s	(86)	61.6	57.0	51.2	41.9	24.4	20.9	20.9	10.5	8.1	1.2
	60 or older	(100)	63.0	53.0	45.0	30.0	24.0	12.0	7.0	3.0	4.0	0.0
Age and gender	Male 20s	(48)	39.6	25.0	27.1	29.2	22.9	22.9	14.6	22.9	12.5	0.0
	Male 30s	(50)	30.0	40.0	28.0	38.0	18.0	16.0	14.0	14.0	14.0	0.0
	Male 40s	(56)	39.3	39.3	42.9	30.4	32.1	21.4	17.9	12.5	7.1	0.0
	Male 50s	(54)	55.6	46.3	44.4	37.0	20.4	9.3	14.8	11.1	7.4	1.9
	Male 60 or older	(64)	64.1	51.6	39.1	29.7	25.0	7.8	4.7	3.1	4.7	0.0
	Female 20s	(31)	41.9	32.3	25.8	32.3	22.6	16.1	16.1	16.1	6.5	0.0
	Female 30s	(35)	65.7	48.6	40.0	28.6	14.3	14.3	11.4	5.7	8.6	0.0
	Female 40s	(39)	38.5	51.3	46.2	33.3	28.2	25.6	7.7	10.3	7.7	2.6
	Female 50s	(32)	71.9	75.0	62.5	50.0	31.3	40.6	31.3	9.4	9.4	0.0
	Female 60 or older	(36)	61.1	55.6	55.6	30.6	22.2	19.4	11.1	2.8	2.8	0.0
Visited/not visited	Have visited	(91)	46.2	34.1	29.7	34.1	35.2	17.6	23.1	17.6	16.5	1.1
	Haven't visited	(354)	51.1	48.6	43.2	33.3	20.9	18.4	11.3	9.0	5.9	0.3



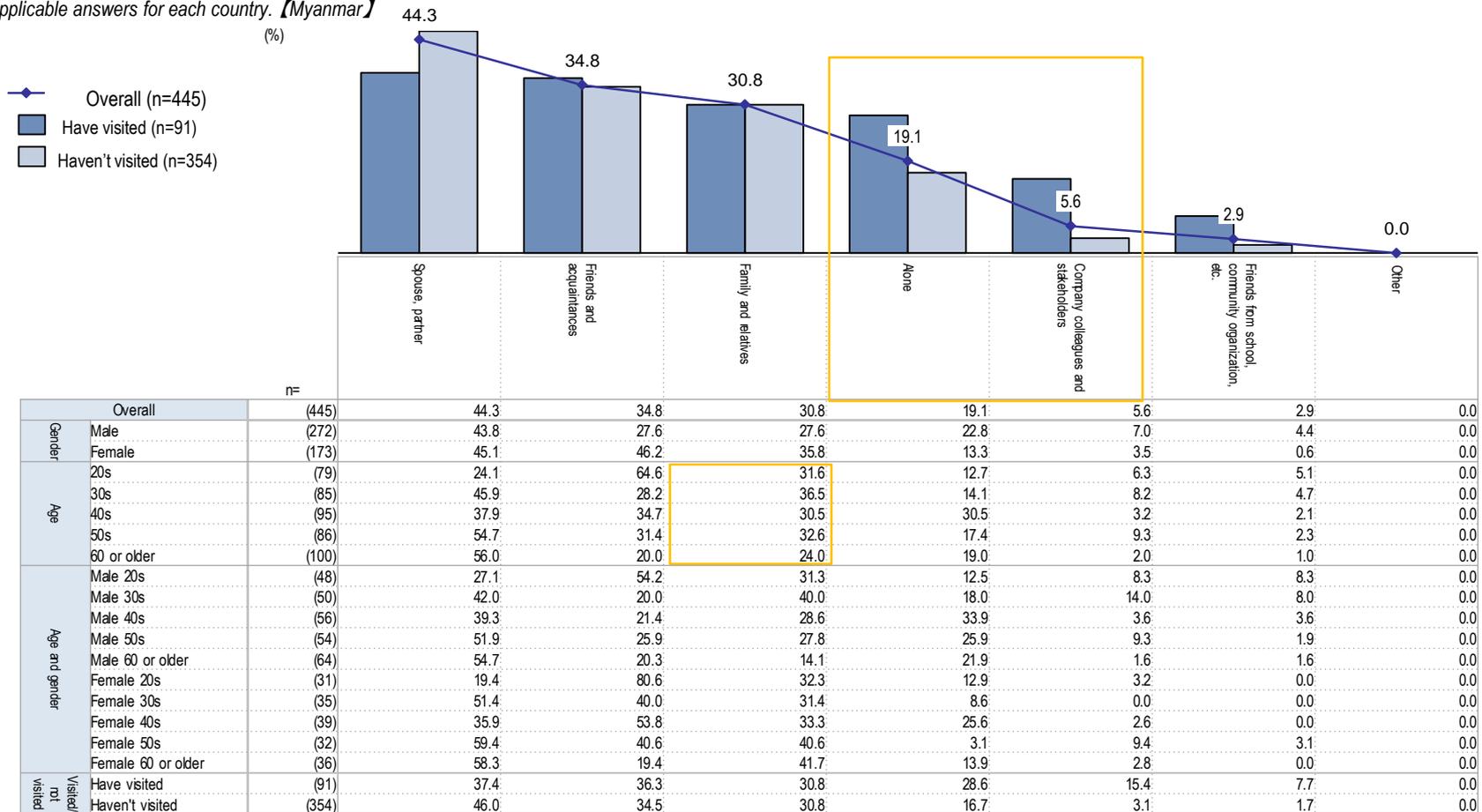
Survey Results

10. [People with intention to visit] Who respondent wants to go with (Travel companion)

- When asked who they'd like to travel to Myanmar with, the highest percentage of respondents answered "Spouse/partner" (44.3%), followed by "Friend/acquaintance" at 34.8%.
- Many respondents who had previously visited answered "Alone" or "Company colleagues and stakeholders." Moreover, there was no major gap evident in the response of "Family and relatives" depending on age group, indicating Myanmar may be a candidate destination for family travel.

[People with intention to visit] Preferred travel companion to Myanmar

Q. This question is for respondents who answered "I definitely want to go" or "I want to go" in the previous question. If you were to make the trip, who would you like to travel with? Please give all applicable answers for each country. **[Myanmar]**





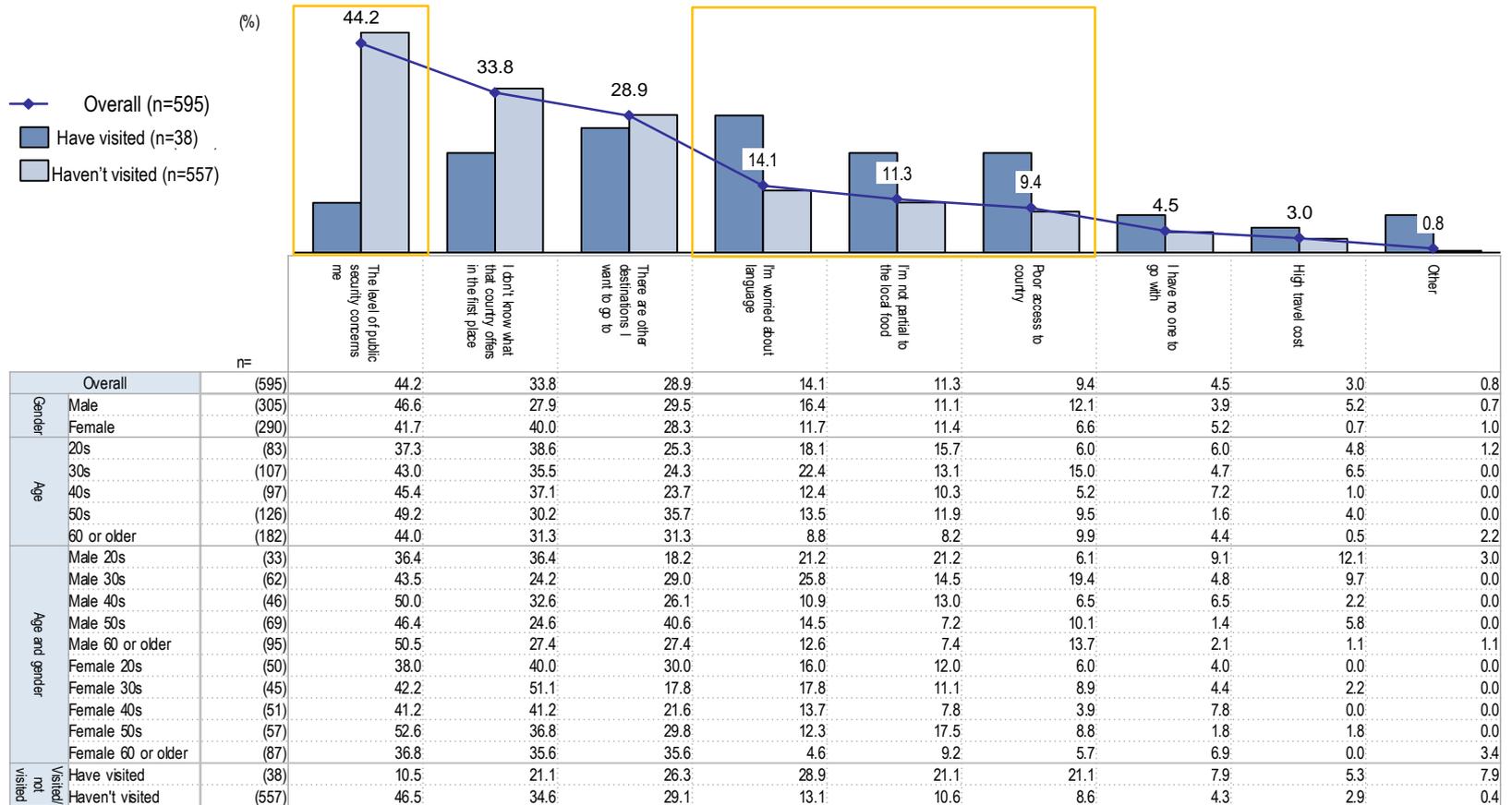
Survey Results

11. [People with no intention to visit] Reasons for having no intention to visit

- When respondents who answered “I can’t say either way,” “I don’t want to go that much,” or “I don’t want to go at all” regarding their intention to visit Myanmar were asked the reason why, the highest percentage answered “The level of public security concerns me” (44.2%), followed by “I don’t know what that country offers in the first place” (33.8%).
- A significant gap was apparent depending on whether or not respondents had been to Myanmar or not, indicating that people may have the impression of Myanmar as being less safe than it actually is. People who’d previously been to Myanmar responded “I’m worried about the language barrier,” “I’m not partial to the local food,” and “Poor access to country.”

[People with no intention to visit] Reasons for having no intention to visit Myanmar

Q. This question is for respondents who answered “I can’t say either way,” “I don’t want to go that much,” or “I don’t want to go at all” in the previous question. Why don’t you want to take a sightseeing trip to that destination? Please give all applicable answers for each country. [Myanmar]





12. Awareness of tourism resources

- Of Myanmar's major five tourism resources, the highest percentage of respondents answered "I've heard of it and I know what kind of place it is" for Yangon at 25.5%.
 - For all tourism resources, awareness was higher in males, with females answering "I've never heard of it, I don't know" for all tourism resources at a response rate of 10 or more percentage points higher than males. Moreover, awareness of Yangon increased as the age group got older, and a significant gap was evident depending on age group for the other four tourism resources also.

Awareness of tourism resources

Q. Do you know the following places and tourist spots? Please give one applicable answer for each. [Myanmar]

			Yangon			Inle Lake			Ngapali			Mandalay			Bagan		
			I've heard of it and I know what kind of place it is.	I've heard of it, but I don't know what kind of place it is.	I've never heard of it, I don't know.	I've heard of it and I know what kind of place it is.	I've heard of it, but I don't know what kind of place it is.	I've never heard of it, I don't know.	I've heard of it and I know what kind of place it is.	I've heard of it, but I don't know what kind of place it is.	I've never heard of it, I don't know.	I've heard of it and I know what kind of place it is.	I've heard of it, but I don't know what kind of place it is.	I've never heard of it, I don't know.	I've heard of it and I know what kind of place it is.	I've heard of it, but I don't know what kind of place it is.	I've never heard of it, I don't know.
		n=	(1,040)														
Overall			25.5	45.1	29.4	8.9	18.8	72.3	6.3	13.2	80.6	10.4	25.1	64.5	11.7	20.0	68.3
Gender	Male	(577)	31.2	47.1	21.7	10.7	22.7	66.6	8.5	16.6	74.9	12.5	32.2	55.3	15.1	26.0	58.9
	Female	(463)	18.4	42.5	39.1	6.7	13.8	79.5	3.5	8.9	87.7	7.8	16.2	76.0	7.6	12.5	79.9
Age	20s	(162)	13.0	39.5	47.5	8.0	20.4	71.6	7.4	16.0	76.5	11.7	22.2	66.0	11.7	21.6	66.7
	30s	(192)	26.6	39.6	33.9	8.9	21.9	69.3	8.9	20.3	70.8	11.5	25.5	63.0	12.5	22.9	64.6
	40s	(192)	33.3	46.9	19.8	13.5	19.3	67.2	7.3	12.5	80.2	9.9	29.7	60.4	13.0	19.8	67.2
	50s	(212)	27.4	44.8	27.8	8.0	17.9	74.1	6.1	12.7	81.1	10.4	23.6	66.0	12.3	19.3	68.4
	60 or older	(282)	25.2	51.1	23.8	7.1	16.0	77.0	3.2	7.4	89.4	9.2	24.5	66.3	9.9	17.7	72.3
Age and gender	Male 20s	(81)	17.3	50.6	32.1	13.6	34.6	51.9	13.6	27.2	59.3	17.3	35.8	46.9	19.8	33.3	46.9
	Male 30s	(112)	33.0	40.2	26.8	9.8	28.6	61.6	12.5	25.9	61.6	14.3	33.0	52.7	15.2	30.4	54.5
	Male 40s	(102)	40.2	45.1	14.7	17.6	22.5	59.8	9.8	15.7	74.5	10.8	36.3	52.9	15.7	24.5	59.8
	Male 50s	(123)	32.5	46.3	21.1	7.3	19.5	73.2	5.7	14.6	79.7	12.2	28.5	59.3	14.6	23.6	61.8
	Male 60 or older	(159)	30.2	52.2	17.6	8.2	15.1	76.7	4.4	6.9	88.7	10.1	30.2	59.7	12.6	22.0	65.4
	Female 20s	(81)	8.6	28.4	63.0	2.5	6.2	91.4	1.2	4.9	93.8	6.2	8.6	85.2	3.7	9.9	86.4
	Female 30s	(80)	17.5	38.8	43.8	7.5	12.5	80.0	3.8	12.5	83.8	7.5	15.0	77.5	8.8	12.5	78.8
	Female 40s	(90)	25.6	48.9	25.6	8.9	15.6	75.6	4.4	8.9	86.7	8.9	22.2	68.9	10.0	14.4	75.6
	Female 50s	(89)	20.2	42.7	37.1	9.0	15.7	75.3	6.7	10.1	83.1	7.9	16.9	75.3	9.0	13.5	77.5
	Female 60 or older	(123)	18.7	49.6	31.7	5.7	17.1	77.2	1.6	8.1	90.2	8.1	17.1	74.8	6.5	12.2	81.3
Visited/not visited	Have visited	(129)	60.5	32.6	7.0	41.9	35.7	22.5	28.7	30.2	41.1	39.5	43.4	17.1	51.9	34.9	13.2
	Haven't visited	(911)	20.5	46.9	32.6	4.3	16.4	79.4	3.1	10.8	86.2	6.3	22.5	71.2	6.0	17.9	76.1



Survey Results

13. Photo preference

- When we asked respondents to choose the photo of Myanmar they like the most out of three photos, ① Kyaiktiyo Pagoda was the most popular overall at 36.9%, however responses were distributed, with 32.2% choosing ② Inle Lake and 30.9% choosing ③ Bagan.
- The percentage of males in their 20s/30s who chose the photo of ① Kyaiktiyo Pagoda was higher, while a high percentage of females aged 30 and over chose ③ Bagan.

Photo preference (Myanmar)

Q. There are 3 photos for each of the following 10 countries. Which photo do you like the most? Please tell us which photo you like the most for each country. *【Myanmar】*

(%)

① Kyaiktiyo Pagoda



② Inle Lake



③ Bagan



If n > 30
[Difference in ratio]
■ Total -10 points
■ Total +5 points
■ Total -5 points
■ Total -10 points

		n=	① Kyaiktiyo Pagoda	② Inle Lake	③ Bagan	
Overall		(1,040)	36.9	32.2	30.9	
Gender	Male	(577)	40.0	34.7	25.3	
	Female	(463)	33.0	29.2	37.8	
Age	20s	(162)	38.9	33.3	27.8	
	30s	(192)	35.4	34.9	29.7	
	40s	(192)	38.0	28.6	33.3	
	50s	(212)	36.3	30.7	33.0	
	60 or older	(282)	36.5	33.3	30.1	
	Age and gender	Male 20s	(81)	42.0	38.3	19.8
Male 30s		(112)	42.0	38.4	19.6	
Male 40s		(102)	41.2	28.4	30.4	
Male 50s		(123)	37.4	33.3	29.3	
Male 60 or older		(159)	39.0	35.2	25.8	
Female 20s		(81)	35.8	28.4	35.8	
Female 30s		(80)	26.3	30.0	43.8	
Female 40s		(90)	34.4	28.9	36.7	
Female 50s		(89)	34.8	27.0	38.2	
Female 60 or older		(123)	33.3	30.9	35.8	
Visited/N of visited		Have visited	(129)	42.6	33.3	24.0
		Haven't visited	(911)	36.1	32.1	31.8