



MTSRR BRIEFING NOTE #6

Tourism Research & Development

MYANMAR TOURISM STRATEGIC RECOVERY ROADMAP (2020-2025)

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Tourism research and development (R&D) is an essential component of any NTO such as the Ministry of Hotels & Tourism. Tourism research, including market research, should be relevant, timely and accurate in order to support all tourism stakeholders in making informed decisions and plans for new products, infrastructure and business based on accurate data and reports. R&D activities will ensure more systematic and creative work based on new and trusted knowledge that then can be used to formulate tourism plans and products.

INTRODUCTION

The economic and COVID-19 environment has a major impact on Myanmar's potential to attract new visitors and maintain market share in relation to other regional destinations. How the economies are performing in the source markets will naturally affect the number of tourists coming from those markets to Myanmar for some time, perhaps 3-4 years.

The tourism industry is changing rapidly and has become increasingly competitive: more tourism destinations are emerging worldwide, and travellers now have a greater number of locations from which to choose.

For Myanmar tourism to remain competitive, the Ministry must be even more strategic when understanding its market and competition, planning its operating strategies and ensuring strategic research and development is conducted.

Research is the process of finding and analysing information. Among other things, it consists of gathering information about people's behaviours, ideas, attitudes and preferences regarding various topics or concepts.

The Ministry can use research to measure and assess this information for decision-making purposes. When a decision is based on reliable facts and relevant information, it is usually far more effective and credible.

The Ministry should be conducting various research and developmental activities including market research, marketing research, product research, competitive research and economic research.

TOURISM MARKET RESEARCH

Market research is an organized effort to gather information about markets or tourists. It is focused on people (i.e. markets): what people want, need or believe, and how they act or behave.

After information is gathered, it can be used to determine how to market and sell products, services or experiences.

TOURISM MARKETING RESEARCH

Tourism marketing research deals more specifically with marketing processes, including advertising.

It is the systematic gathering, recording and analysis of data about issues relating to tourism marketing products and services. The goal of marketing research is to identify and assess how changing elements of the marketing mix affect tourism behaviour.

TOURISM PRODUCT RESEARCH

Tourism product research can be used to gather and review information about products and services. This type of research focuses on information to assist in the development and provision of tourism experiences that meet or exceed visitor's expectations.

COMPETITIVE RESEARCH

Competitive research is used to look at the position and actions of regional competitors in the marketplace.

ECONOMIC RESEARCH

Economic research is used to examine economic and business data and information, including revenues, expenditures and their impacts. For tourism researchers, this type of research often focuses on the spending patterns of visitors within a tourism area.

MOHT RESEARCH CAPABILITY

A small research sub-unit under the MoHT Supervision Department are responsible on different tasks including: conducting online surveys, producing economic impact reports, compiling and collating data on tourist arrivals received from different line ministries, and working towards achieving the goal of a fully established Tourism Satellite Account System.

Additionally, the department is highly involved in the process of digitalizing the Hotel Guest List system to obtain real time data on the number of guests received by Hotels.

This is an important research activity which allows the Ministry to have a deeper understanding of the situation on the ground, and ensure that relevant policy decisions are made with little delay and through the use of real-time data.

Although progressive steps have been taken by the department, there are some challenges in achieving the research goals. The following recommendations are made which could lead to overall development of the R&D capacity of the MoHT.

RECOMMENDATIONS

Improve Human Resource Capacity

For the ground breaking work of research, data collection and data analysis, and to push the move towards a rigorous Satellite Accounting System, the department will need more human resources and capacity. More staff assigned to the research department would also mean more needs for resources such as scanners, research software and computers.

Work Closely with other Departments

The research department is producing a number of reports for the Ministry, however, there is a need for more integrated research and reporting, and a stronger inter-departmental coordination in research would be of better value for the Ministry.

The research department can provide robust data and produce important research-backed recommendations for relevant departments to enhance their current work activities.

For instance, the research department can coordinate with the digital marketing department to collect data and provide insights on travel behaviour, trending destinations and changing preferences for both the domestic and international markets.

Market research data can help the digital marketing department design relevant marketing materials based on data received, i.e. in which language the content should be, which social media platform should be used for which market, which destinations are self-promoting and which destinations needs more promotion and marketing.

Furthermore, the research department can support in analysing the impact of a particular marketing strategy by cross-checking the effects of a particular campaign on hotel bookings etc.

Produce Short Briefs

Currently, the department is producing monthly Economic Impact reports to monitor the impact of COVID-19 on Myanmar's tourism sector, which includes detailed data and explanation. However, policy makers such senior management and Departmental Directors do not have sufficient time to fully go through such detailed research findings.

To assist internal communication, tools such as infographics and short briefing notes could be used to illustrate research findings and be more impactful. The use of case studies to illustrate best practices and lessons learnt from other countries is another informative form of research relevant for the Ministry.

Use secondary data

The research department does not need primary data to conduct research work and draw lessons learnt. Research information drawn from relevant secondary data can also be very useful.

For example, in previous economic reports, the Department shared critical information about the impact of increased mass Chinese tourism on Myanmar's economy. Additional secondary research could, for example, focus on how to attract non-zero-dollar Chinese tourists by exploring relevant case studies from neighbouring countries on how they have been similar challenges that Myanmar is facing.

Provide more Support to MSMEs

In addition to understanding the market and responding to the needs of the market through providing impactful recommendations to relevant departments, it is very important for the research department to also understand the needs of MSMEs and work closely with them.

MSMEs are heart of the tourism sector as they bring creative and innovative activities to the industry, attracting more tourists to Myanmar and boosting the country's revenue.

The research department can therefore look into the needs of the MSMEs in the tourism sector especially during times like these when they are struggling to survive the impacts of COVID-19.

Similarly, the department can draw lessons from international practices of supporting tourism MSMEs.

Once the department has rigorous data on businesses in each geographical area, loan decisions could be made based on this data and businesses in certain areas could be prioritized for loans.

For instance, Bagan more likely to be affected as international tourist numbers fall. However, during the reopening period June-August 2020, hotels in Kalaw and Hpa An have been doing well with domestic tourism this year.

These statements could be backed up through the data from the hotel guest list system and arrival data for each destination.

Research reports currently produced by the Department can also act as a very important means of support for MSMEs as the Ministry can provide critical information on which markets tourism businesses should focus on, understand which languages would be valuable for their staff, and what skills would be essential in the new post COVID-19 era.

SUMMARY OF MARKET RESEARCH METHODS

Methodology	Qualitative or Quantitative?	Typical Cost	Typical Time	Comments
Secondary Research	Can be either	Typically free or low cost	Short	Usually a great place to start, but often not detailed or specific enough
Surveys	Quantitative	Varies widely. Key costs include participant incentives, survey design, & survey administration	Medium	Excellent for measuring attitudes across a large population and for answering specific questions
Focus Groups	Qualitative	Medium. Key costs include focus group moderation and participant incentives	Medium	Good for exploratory research
Interviews	Qualitative	Similar to focus groups, but can be much cheaper depending on the audience and # of interviews	Short-Medium	Also good for exploratory research, along with deep dives into specific topics
Experiments & Field Trials	Quantitative	Often the most expensive method	Usually Long	Used for scientifically testing specific hypotheses
Observation	Usually Qualitative	Medium, relative to the other options	Medium	Good for measuring actual behavior, as opposed to self-reported behavior

POSSIBLE RESEARCH TOPICS & RESEARCH METHODS

Research Topic	Research Method	Status
Domestic Tourism Surveys	Mixed Method (Quantitative and Qualitative) <ul style="list-style-type: none"> Data from Hotel Guest List system can be used 	On-going
Understanding Myanmar's Customers and Recommendations on how to expand the current tourist base	Secondary data analysis of current statistics on tourists coming in to Myanmar <ul style="list-style-type: none"> Secondary research to understand more about the behaviours of these tourists [Thai, Chinese etc.] - how to best approach them? What services do they look for? Which destinations do they prefer to visit? How can their travel be eased even further? 	Recommended to start immediately
Tourism MSME Surveys	Mixed Method (Quantitative and Qualitative) <ul style="list-style-type: none"> Data from Hotel Guest List system can be used to understand the impact on businesses [hotels] A specific number of businesses in each geographical region should be collected, and loan decisions could be made accordingly by supporting more businesses in most affected areas 	Tourism surveys could be used to collect data on tourism businesses in each geographical area to compare impacts and needs
Best Tourism Practices	<ul style="list-style-type: none"> Secondary data collection of lessons learnt from different countries There could be many briefs under this such as product development brief, marketing brief, human resource development brief etc. Presented in form of case studies 	This briefing note could be used as a starting point but more international best practice case studies should be considered

RESOURCES FOR THE DEPARTMENT

1. Design Software: www.canva.com can be used for making free infographics
2. PowerPoint slide infographics can be downloaded from different sources online
3. Work closely with UNWTO and other organizations to obtain data on tourism from other countries to understand the spending power of different visitors
4. World Bank's Economic Impact: <http://pubdocs.worldbank.org/en/654571593143671027/MEM-June-2020-PPT.pdf>
5. World Bank impact survey on Myanmar: <https://www.worldbank.org/en/news/infographic/2020/08/13/firm-level-impact-of-the-covid-19-on-myanmar>