

 **MYANMAR-LUXEMBOURG** 
DEVELOPMENT COOPERATION

**A REVIEW OF TOURISM ENTERPRISES
(RESEARCH STRAND 3)**

**Myanmar Tourism Human Resource Development
Strategy & Action Plan
2017-2020**



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Strategy and Action Plan (2017-2020)

Ministry of Hotels & Tourism
2017

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A REVIEW OF TOURISM ENTERPRISES (RESEARCH STRAND 3)

Myanmar Ministry of Hotels and Tourism (MOHT),

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FOREWORD

This Human Resource Development Strategy and Action Plan (HRDSAP) is the outcome of wide-ranging national research on the capacity of Myanmar's tourism stakeholders, undertaken in 2015 and 2016. The study was conducted by the Ministry of Hotels and Tourism (MOHT), with valuable support Project MYA/001 – "Development of Human Resources in the Hotel and Tourism Sector and Capacity Development of the Ministry of Hotels and Tourism" implemented by LuxDev, the Luxembourg Development Cooperation Agency.

The strategy guides and informs future work programmes of Myanmar's tourism and hospitality industry in a wide range of areas. It identifies policy actions and emphasises the urgent need for effective capacity building across three important areas namely, public sector governance, education and training, and the private sector.

I want to thank all those individuals, companies and organizations from the private and public sectors, non-governmental organisations (NGOs) and development partners who contributed their time, energies and ideas to the Strategy. I also acknowledge the strong role of MOHT's Training and Education Department and our counterparts from LuxDev who carried out all field work in a professional and timely manner. I would also like to thank the Myanmar Tourism Federation (MTF) and industry associations for supporting and joining the many consultation workshops and meetings.

Tourism is a labour intensive activity that will likely provide more jobs in Myanmar than any other sector. The sector's diverse activities offer a wide range of employment embracing, for example, airport services, taxi drivers, hotel staff, tour guides, tour operators, travel agencies and transport services, restaurants, handicraft producers and suppliers, as well as government staff. People employed in each of these areas need training, and it is fundamentally important for the government and private sector to work closely together to develop quality training and education facilities, and deliver tourism and hospitality skills training. As part of this process, coordination and cooperation between the government, private sector and development partners is essential to build synergy and strengthen human resource planning and management across the sector.

It is with the intention of meeting these training, education and capacity building needs that the HRDSAP has been prepared, and it is my view that the Strategy is a major contribution to the human resource development of Myanmar's Tourism Industry.

Please continue to share your thoughts and ideas on tourism human resource development in Myanmar with my colleagues and myself at the MOHT. You can contact me through email at mo.moht@mptmail.net.mm

H.E. U Ohn Maung

Union Minister

Ministry of Hotels and Tourism

Republic of the Union of Myanmar

Nay Pyi Taw

Tourism is one of the most important economic activities in the world today. It directly generates services, products, employment and investments. In countries like Myanmar, where tourism is becoming a more and more flourishing service industry, the sector bears an important potential for gainful employment across the society and the country, but especially for young people.

Myanmar possesses great tourist potential and many attractions to be made further accessible in the future. In order for the possibly far-reaching economic and social impact on national development to materialize, human resources for the tourism and hospitality sector are essential.

Luxembourg's Development Cooperation has a solid track record in promoting skills development for tourism globally and in South East Asia, notably in Vietnam and in Lao PDR. We are proud to put the expertise acquired at the disposal of Myanmar.

The Government of the Grand Duchy of Luxembourg, through its Luxembourg Ministry of Foreign and European Affairs is therefore very pleased to support the Government of the Republic of the Union of Myanmar in the development and publication of the strategic plan for human resource development for tourism in Myanmar through its first bilateral project, entitled Development of Human Resources in the Hotel and Tourism Sector and Capacity Development of the Ministry of Hotels and Tourism, or MYA/001.

The Myanmar-Luxembourg cooperation will continue to expand its range of training and capacity development at all levels of the tourism and hospitality sector. On behalf of the Luxembourg Ministry of Foreign and European Affairs I wish to thank all those who participated in the data collection, focus groups and meetings, as well as the Ministry of Hotels and Tourism and the Myanmar Tourism Federation associations who contributed their time and expertise to coordinating and supporting the research which enabled the drafting of the present HRD Strategy and Action Plan.

We look forward to an on-going partnership with the Ministry of Hotels and Tourism and others to enable Myanmar to develop a professional and high quality tourism industry, and we believe that this strategy will lay strong foundations and directions for the future development of the sector, which will greatly contribute to Myanmar's striving economy. However, most importantly it will allow the next generations to fulfil their potential and to seek decent work and gainful employment.

Mr. Claude Jentgen

Chargé d'affaires a.i.,

Head of Development Cooperation Office in Vientiane, Laos

Ministry of Foreign and European Affairs

Luxembourg

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EXECUTIVE SUMMARY

This report, focusing on a questionnaire survey of tourism enterprises (accommodation providers and tour operators), is one of ten research and training needs assessments to underpin the design of a tourism Human Resource Development Strategy and Action Plan (HRDSAP).

59 accommodation providers and 86 tourism businesses participated in the survey, conducted online, in early 2016. The results indicate that staff retention is the biggest challenge facing human resource managers, and suggest that effective training may be the most effective strategy to meet that challenge.

Key findings from the report include:

- Staff turnover is a significant problem for both accommodations and tourism enterprises. Tourism in Myanmar has grown substantially in the last four years, and accordingly, so has the demand for qualified tourism personnel.
- Demand for qualified staff is currently far greater than the supply in all tourism and hospitality sectors. Prospective employees can easily find work, which creates a situation where employees will leave their current job for only a slight salary increase or change in benefits (according to one comment, it only takes an extra \$5 a month to lure someone away from their job).
 - o Qualified employees are not only leaving for other jobs within the tourism industry or within the traditional boundaries of the sector. Skills learnt in tourism, especially English language and computer skills, are highly sought in other sectors.
- There is no single certification or training that is required or provided by managers, although the private sector associations have a broad reach with their training programmes.
- Online learning presents an important opportunity for training in the tourism sector as computer proficiency and internet connectivity improves.
- Youth and women: A high percentage of employers recruit from unemployed youth and women.
- Recruitment in tourism happens through a variety of sources, including informal channels such as social media.
- The right attitude and character are most important to employers when recruiting a new employee. They believe that the hard skills can be taught, so long as the candidate has a good disposition and displays a willingness to learn.
- There is little interest in niche tourism products (such as cycling and bird watching) from the tourism enterprises. This may point to the need for differentiation and diversification, in order for Myanmar's tourism businesses to keep pace with global competition.

These findings are further detailed in the body of this report.

1. Introduction and background

The Republic of the Union of Myanmar is undergoing political, economic and social change. The tourism industry has been identified by the Government of Myanmar (GOM) as one of seven economic pillars to support reform processes, create jobs and stimulate the expansion of the wider economy. The 2013–18 Myanmar Tourism Master Plan (MTMP), produced by the Ministry of Hotels and Tourism (MOHT), sets out a framework for sector expansion, and calls for the design of a tourism human resource development strategy to facilitate its implementation.

Tourism is a labour intensive industry, forecast in the MTMP's high-growth rate scenario to generate over a million new jobs by 2020. Most of these jobs are direct employment in the food and beverage, transport services and accommodation sectors. The industry also generates indirect employment through a wide variety of supply chain activity, which in comparable economies is roughly equal to the direct employment generated, meaning Myanmar's tourism industry could generate roughly two million new jobs by 2020.

This report, focusing on a questionnaire survey of tourism enterprises (accommodation providers and tour operators), is one of ten research and training needs assessments underpinning the design of a tourism Human Resource Development Strategy and Action Plan (HRDSAP).

2. Methodology

This section details the methodology used to deploy the surveys. First, two surveys were developed from previous workforce development work; one for the accommodation sector and one for tourism enterprises (mainly tour operators and travel agents, but also boat operators, transport companies, etc). The surveys are included as Annex 1 and Annex 2.

One of the objectives of the surveys was to reach areas of Myanmar that were difficult to access for consultants carrying out in-person interviews. As such, surveys were deployed online, using Lime Survey, an open-source software. Surveys were first deployed in December 2015.

An incentive, in the form of a lucky draw where the prize was two nights at a high-end resort, was provided to encourage responses. Participants had the option of answering the survey anonymously, although if they wanted to qualify for the lucky draw they were required to provide a name and email address. Approximately half opted to identify themselves.

Initially, a two-week period for responses was given. However, due to December being high tourist season and perhaps also an unfamiliarity with online surveys, plus the generally high amount of email people receive on a daily basis, an initial response rate of around 28 percent was recorded. To improve the response rate, a team of enumerators called and individually emailed potential respondents. This activity increased the number of responses by 15%.

3. Findings

3.1. Accommodation

This section provides a summary of the findings from the accommodation survey.

3.1.1 Profile of Respondents

The survey garnered 59 responses. Not all respondents answered every question. The majority of respondents came from hotels and resorts: the average size of their hotels was 58 rooms, and the average number of beds was 83.

Table 1: Types of accommodation

Response Options	Percentage of respondents
Hotel	46%
Guesthouse	1%
Resort	16%
Apartment	1%
B&B	1%
No answer	22%

Hotel respondents were distributed across the country, with heavier representation from the major tourism destinations of Yangon, Mandalay and Nay Pyi Taw. The majority of resorts (81%) who responded to the survey are located in Rakhine State, mostly along the coast of Ngapali Beach, a special tourism zone.

Figure 1: Location of hotels

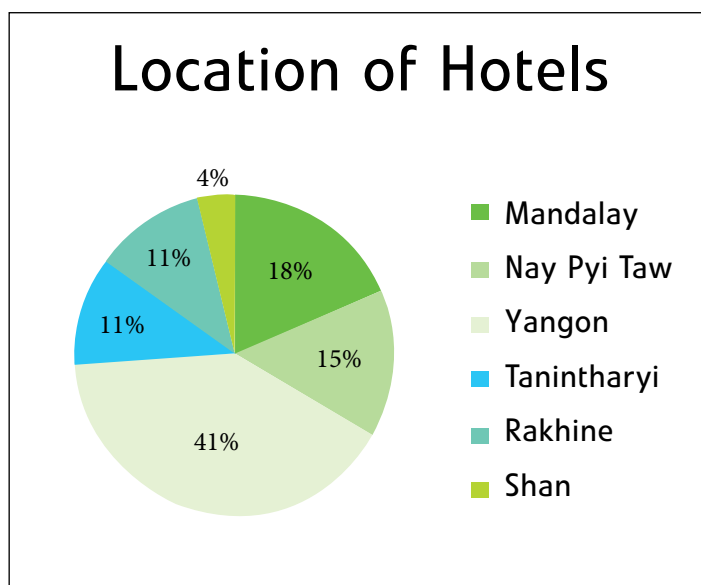
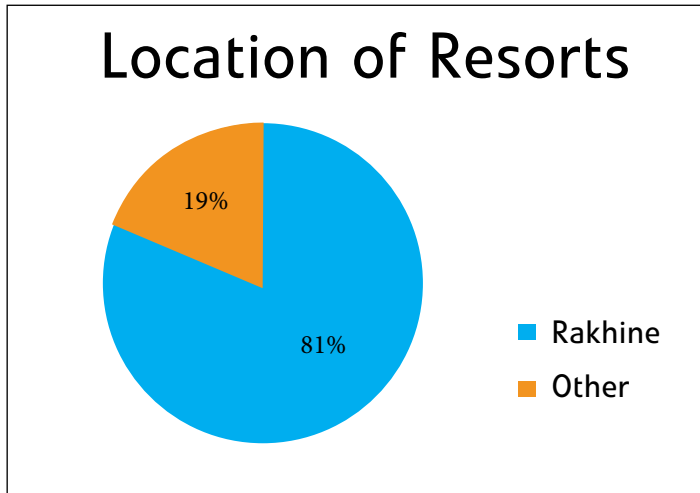


Figure 2: Location of resorts



The largest accommodation provider, located in Nay Pyi Taw, had 215 rooms and 350 beds. The smallest, a resort located in Rakhine, had 14 rooms with 30 beds. On average, providers had twice as many beds as rooms.

Respondents also provided identifying details for their businesses, including company name and email address.

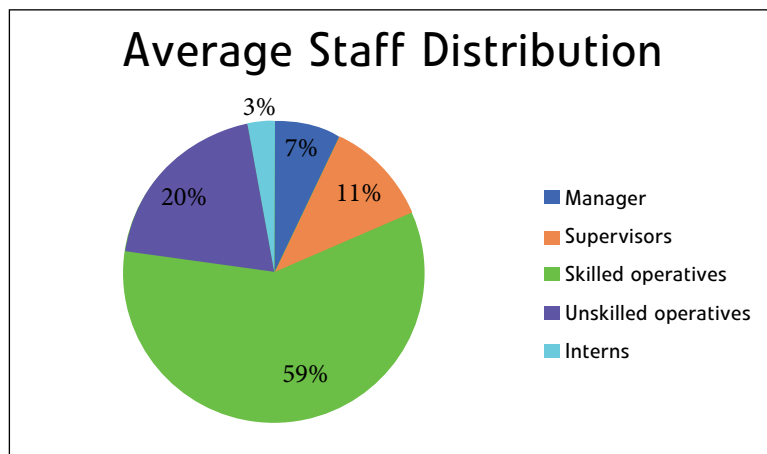
The survey required respondents to provide a detailed breakdown of the number of staff working at their property. The tables below indicate the number of full time staff only, as the number of part time staff is extremely low. Interns are rare, with the exception of one large hotel in Nay Pyi Taw which employed 30 and therefore brought up the average. Casual labour is not common and is not included in the table below.

Table 2: Number of full time staff at all accommodations

Position	Min	Max	Average	Median	Mode
Manager	1	30	5	5	7
Supervisors	1	42	8	7	12
Skilled operatives	2	148	41	30	30
Unskilled operatives	0	110	14	7.5	0
Interns	0	34	2	0	0
TOTAL	1	200	69	66	117

Figure 3 illustrates the average staff breakdown at an accommodation in Myanmar. The majority of the staff are categorised as skilled operatives, and 18% of staff are in supervisory roles as either managers or supervisors.

Figure 3: Average staff distribution



This study was conducted as a contributory component of the development of the Human Resource Development Strategy and Action Plan (HRDSAP) for the tourism sector in Myanmar.

To compare the staffing of hotels versus resorts (the two largest groups of respondents), their responses have been divided into the following two tables:

Table 3: Number of full time staff at hotels

Position	Min	Max	Average	Median	Mode
Manager	1	30	5	4	2
Supervisors	1	42	8	5	4
Skilled operatives	2	148	33	30	30
Unskilled operatives	0	110	15	7	0
Interns	0	34	3	0.5	0
TOTAL	4	364	64	46.5	36

Table 4: Number of full time staff at resorts

Position	Min	Max	Average	Median	Mode
Manager	5	10	7	7	7
Supervisors	7	12	9	12	12
Skilled operatives	30	98	62	90	90
Unskilled operatives	5	53	13	8	8
Interns	0	8	1	0	0
TOTAL	47	181	92	117	117

The average distribution of staff at hotels and resorts does not differ greatly, as demonstrated by Figures 4 and 5. The largest group is skilled operatives, representing the majority of employees at any accommodation provider regardless of type and location.

Figure 4: Average staff distribution at hotels

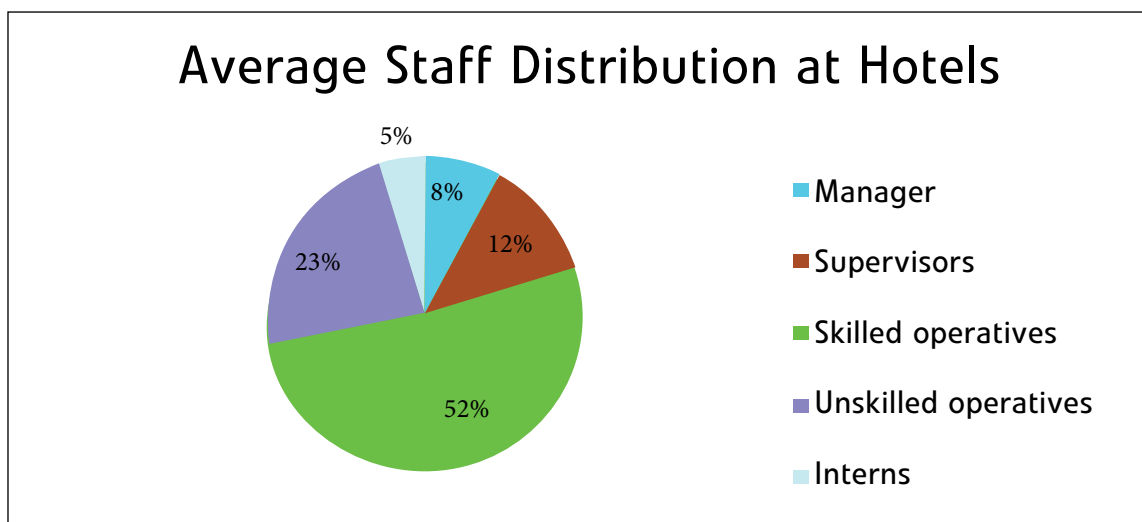
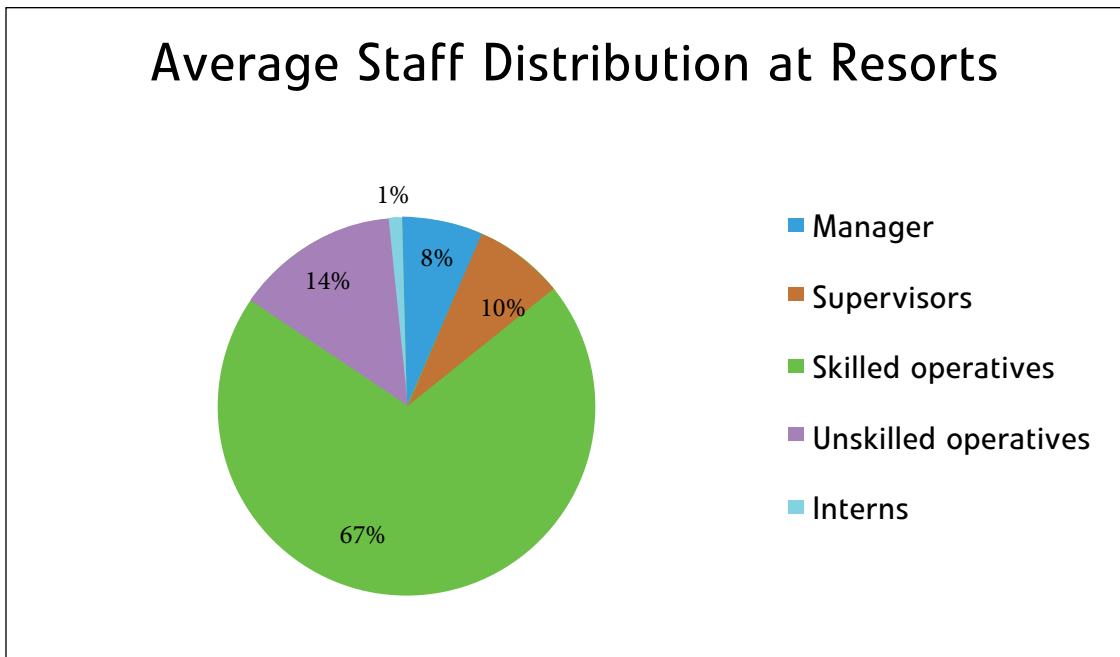


Figure 5: Average staff distribution at resorts



Multi-skilling refers to the practice of staff working in more than one department at a time. This practice is not common in Myanmar’s accommodation sector.

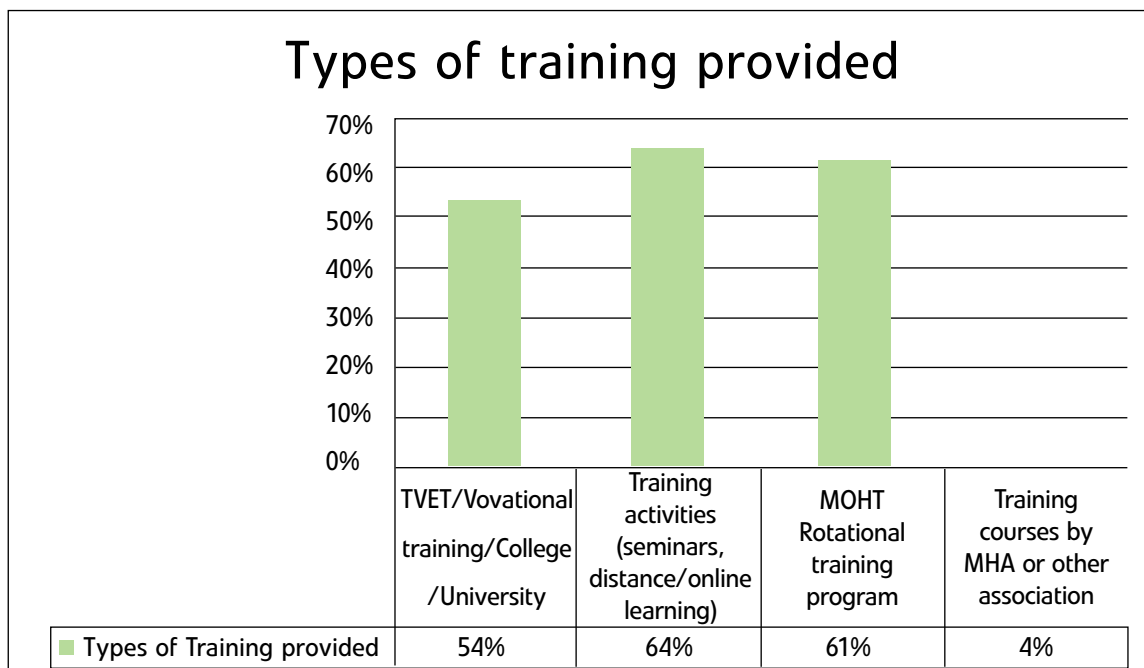
38% of respondents indicated that staff in their hotel are involved in multi-skilling: the percentage of staff involved was between 3% and 9%. Properties that indicated higher percentages of multi-skilling staff were larger hotels, with the exception of one hotel that had a total staff count of 17.

3.1.2 Training

To understand the type of training that staff in the accommodation sector received, the survey asked several questions about the various courses provided to employees and received by managers.

Although training from the Myanmar Hoteliers Association (MHA) or other professional associations was not common, other types of training have good reach: over half of respondents had participated in one or more courses. 7% of respondents had participated in every single type of training.

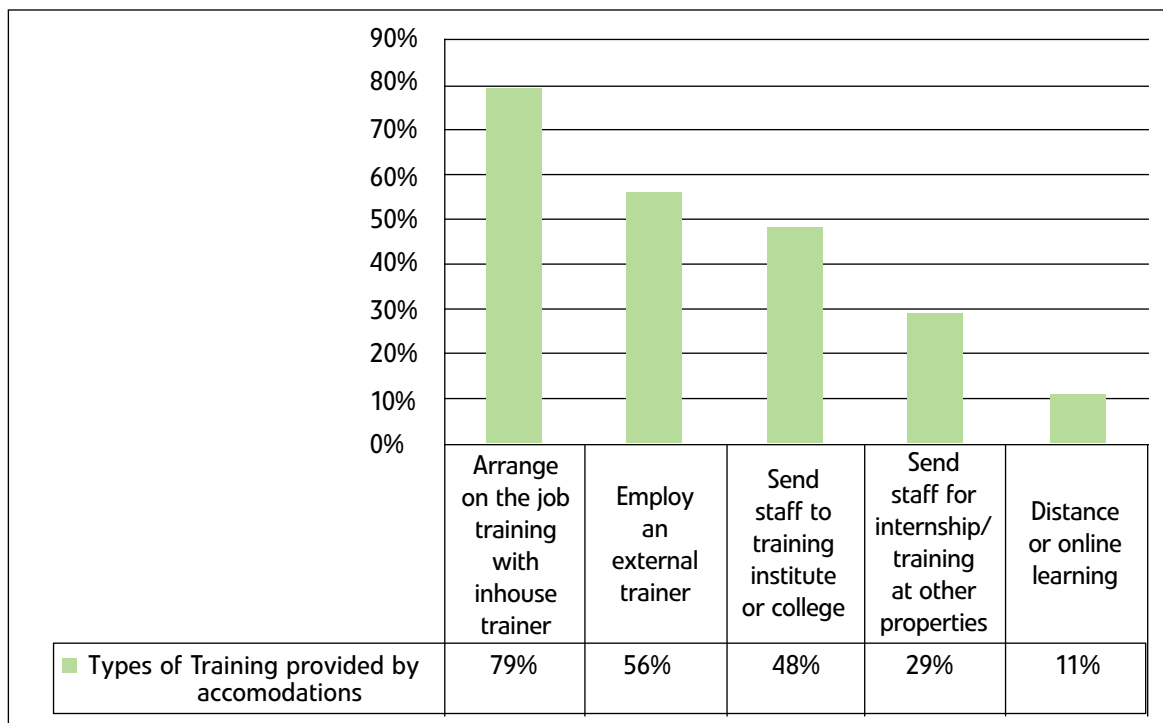
Figure 6: Types of trainings completed



The most common type of training offered by accommodations is with an in-house trainer. 64% of hotels employed an external trainer, compared to 20% of resorts.

96% of respondents indicated they would be interested in using online training at their business. This represents an opportunity for the training sector, as only 11% of respondents indicated their staff currently use online learning.¹

Figure 8: Types of training provided by accommodation providers



A number of respondents noted that training is rarely delivered outside the larger hubs of Yangon and Mandalay. For smaller properties located in remote parts of the country, it is difficult to spare staff for days at a time to visit these places and receive training.

3.1.3 Staff turnover

83% of respondents indicated that staff turnover is a problem at their organisation.

The most cited cause of staff turnover is salary and remuneration issues. Currently, the demand for jobs in the accommodation sector is much greater than the supply, and there is little loyalty to employers. Staff trained at an accommodation can easily get jobs at other hospitality establishments, such as the increasing number of amusement parks and restaurants, or even in offices where their foreign language skills are in demand.

The second most frequently cited cause of staff turnover is the working environment. This relates to the long hours that are characteristic of jobs in hospitality.

There were several other reasons for staff turnover listed by respondents. These included:

- Probation periods, which are typically offered by employers for the first three months with the aim of testing a prospective employee. Probation periods in Myanmar pay a lower salary. The practice is unpopular among employees: one respondent noted that it serves as a disincentive to take a job.
- Poor human resource management.
- Lack of professional development: from various questions in the survey, it can be inferred that management is reluctant to train staff for fear that they will simply leave for a higher paid job with a competitor. As a result, staff do not feel that they are developing skills and may choose to leave their current position regardless.
- Hotels in Nay Pyi Taw noted that it is a challenge to attract qualified staff willing to move to the capital city, as the quality of life is lower.

¹ In Question 6, the online learning option is bundled together with seminars, which are offline and fairly common in Myanmar.

When it comes to staff turnover, management believed that skilled operatives were the most problematic. The table below indicates the number of times each type of position was mentioned by respondents.

Table 5: Positions prone to staff turnover

Type of position	Number of responses (respondents could only pick one option)
Managers	3
Supervisors	0
Skilled operatives	10
Unskilled operatives	5

3.1.4 Recruitment

As the number of accommodation providers rises in Myanmar, recruitment of qualified staff is becoming a major challenge for employers. The survey asked several questions about methods of recruitment, skills required in prospective employees, and skills that will be needed in the future.

The table below indicates the sources that employers turn to for recruiting new staff.

Table 6: Sources of recruitment

Where do you recruit your staff from?	Number of times it was mentioned (respondents could pick more than one option)
High schools	5
Other hotels	7
College	9
Unemployed youth/women	18

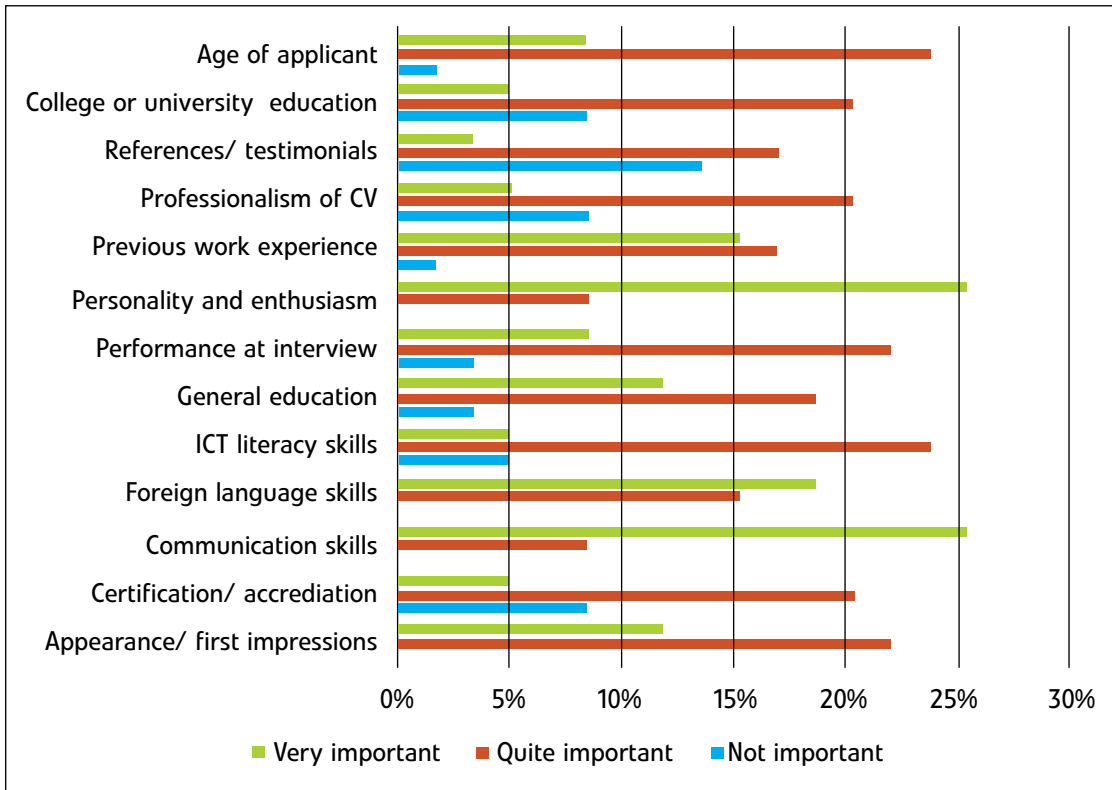
This question had a low response rate, likely due to the fact that recruitment in Myanmar often takes place through more informal channels such as social media or word of mouth. 18 respondents indicated that they recruited from 'unemployed youth/women'. This is reiterated in a later question about the importance of the 'age of an applicant', which was by and large rated as 'quite important', and to which one respondent commented: "We try to give a chance to the younger generation."

With regards employable skills, employers are looking for the right attitude and personality rather than hard skills or a certain amount of past experience. This is demonstrated by the way qualities like 'personality and enthusiasm' are marked as 'very important', compared to qualities like 'references/testimonials' and 'professionalism of CV' (both marked as 'not important'). In other words, there is a belief that skills can be taught if the prospective employee has the right outlook and is enthusiastic. One respondent commented: "The applicant's mindset, attitude and character are the most important parts of our recruiting system."

While the right attitude is sought after for the majority of positions, one respondent mentioned that references were important when hiring staff that required certain skills, like an engineer: they were not as important when hiring a waitress. However, the respondents also noted that they do not rely on references, as it is assumed that applicants will submit the name of someone who is guaranteed to say something positive about them regardless of their past performance.

The most important attributes sought by employers include good appearances and first impressions, communication skills, personality and enthusiasm.

Figure 9: Important skills for prospective employees



Looking to the future, anticipated human resource needs include candidates able to assume higher-level positions, such as managers and supervisors. In addition, a number of respondents indicated that skilled chefs would be needed in the coming three years.

Table 7: Anticipated demand for vocational positions

Position	Number of times it was mentioned (respondents could pick more than one option)
Chefs/cooks	13
Receptionists	7
Supervisors	15
Managers	17
Spa therapists	4
Meeting coordinators	2

The survey asked respondents to identify any new and emerging skills that training institutions should consider integrating into their curriculum in order to prepare the next generation of hospitality workers for the realities of the market.

Answers fell into two broad categories: 'hard skills', which can be taught, and 'soft skills', which represent more of the positive, can-do attitude that so many respondents referenced in question 13. Here are some of the relevant answers that were submitted in each of the two categories:

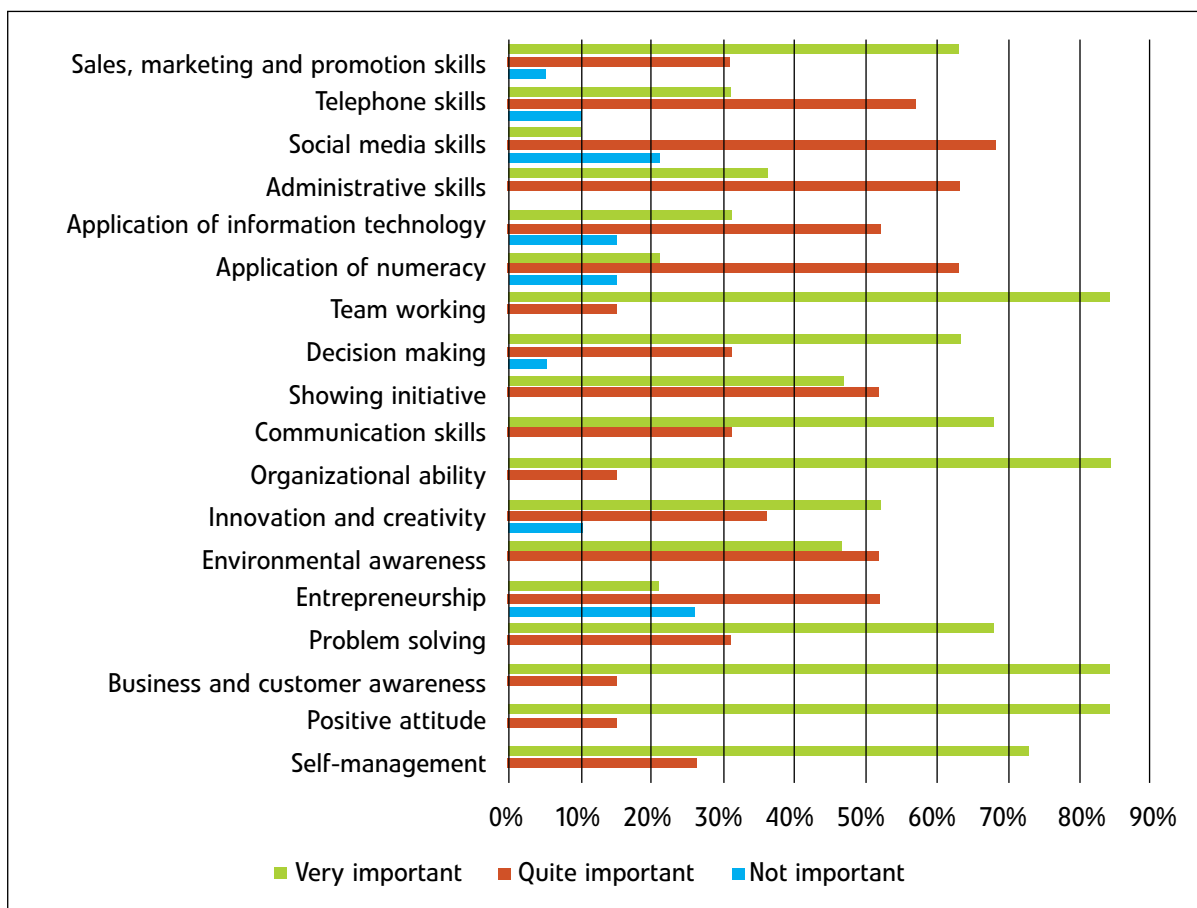
Hard skills	Soft skills
<ul style="list-style-type: none"> • Human resource management • Internet marketing • Pastry chef • Foreign language skills • Sommelier 	<ul style="list-style-type: none"> • Taking responsibility • People management skills • Good attitude • Good etiquette

In order to understand the type of skills that are important for the accommodation sector, the survey provided a list of skills divided into four sections (employability, management, hospitality and foreign language) and asked respondents to rate the importance of these skills to their organisation.

(1) Employability skills

The answers provided for employability skills are consistent with an earlier question on skills sought after in prospective employees. 'Positive attitude', 'self-management' and 'customer awareness' are all rated as 'very important', whereas skills like 'entrepreneurship', 'numeracy' and 'social media' are not rated so highly:

Figure 10: Importance of employability skills

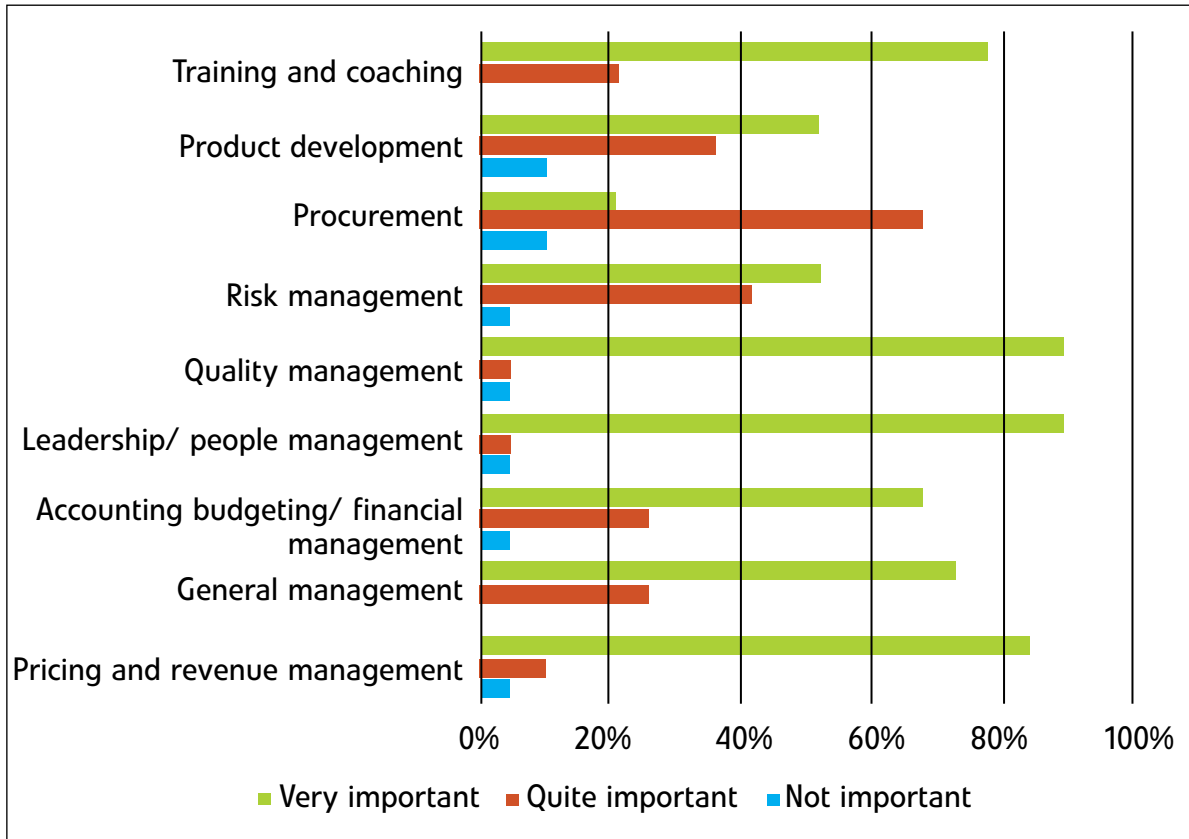


(2) Management skills

Respondents saw value in every management skill in the list, with nearly all of them garnering a majority response of 'very important'. It is clear that typical business skills like 'budgeting' and 'quality management' are in high demand for managerial candidates at accommodations in Myanmar.

Procurement and product development were rated the lowest in the list. This could be due to the fact that these are not tasks done at the individual hotel level:

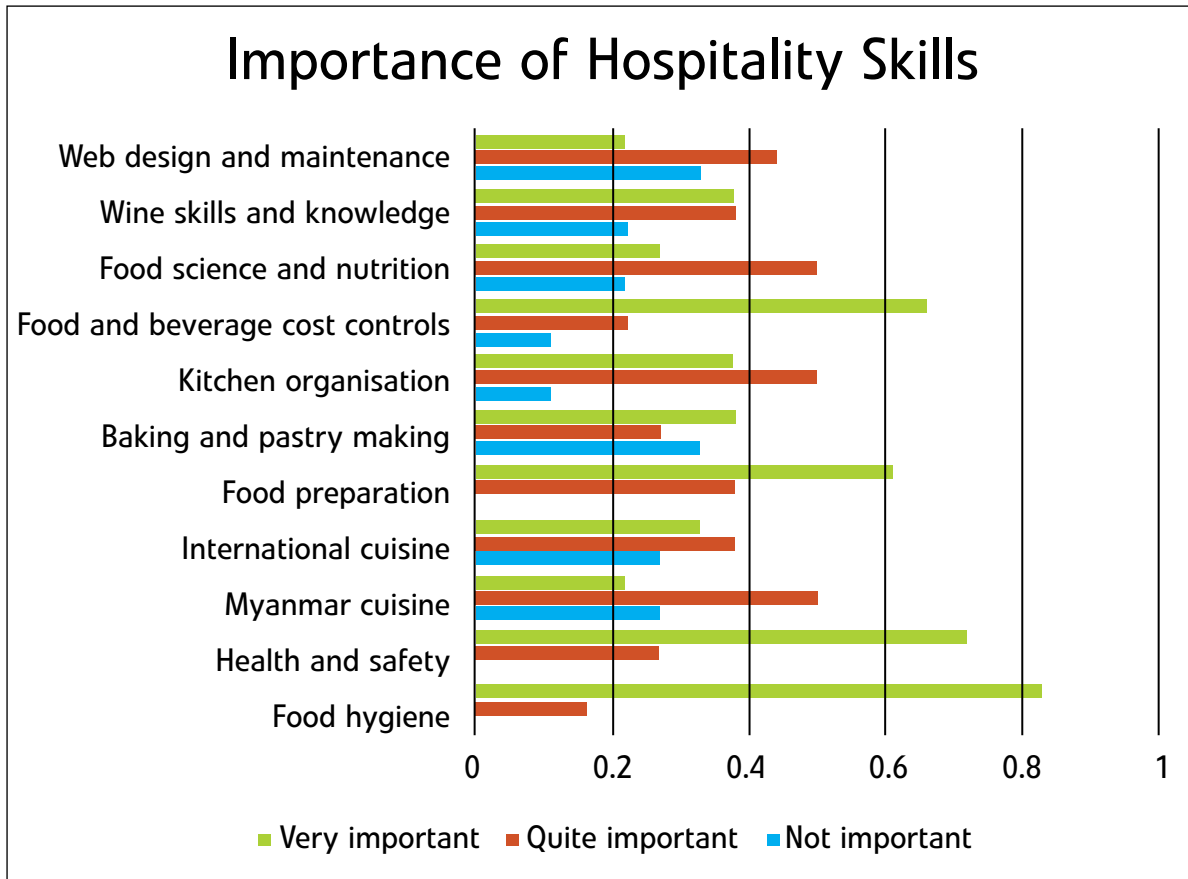
Figure 11: Importance of management skills



(3) Hospitality skills

Skills related to hygiene and food preparation are viewed as important for hospitality workers: 'food hygiene', 'food preparation' and 'health and safety' were rated the most highly by respondents. By comparison with international cuisine, Myanmar cuisine was not rated very important by respondents:

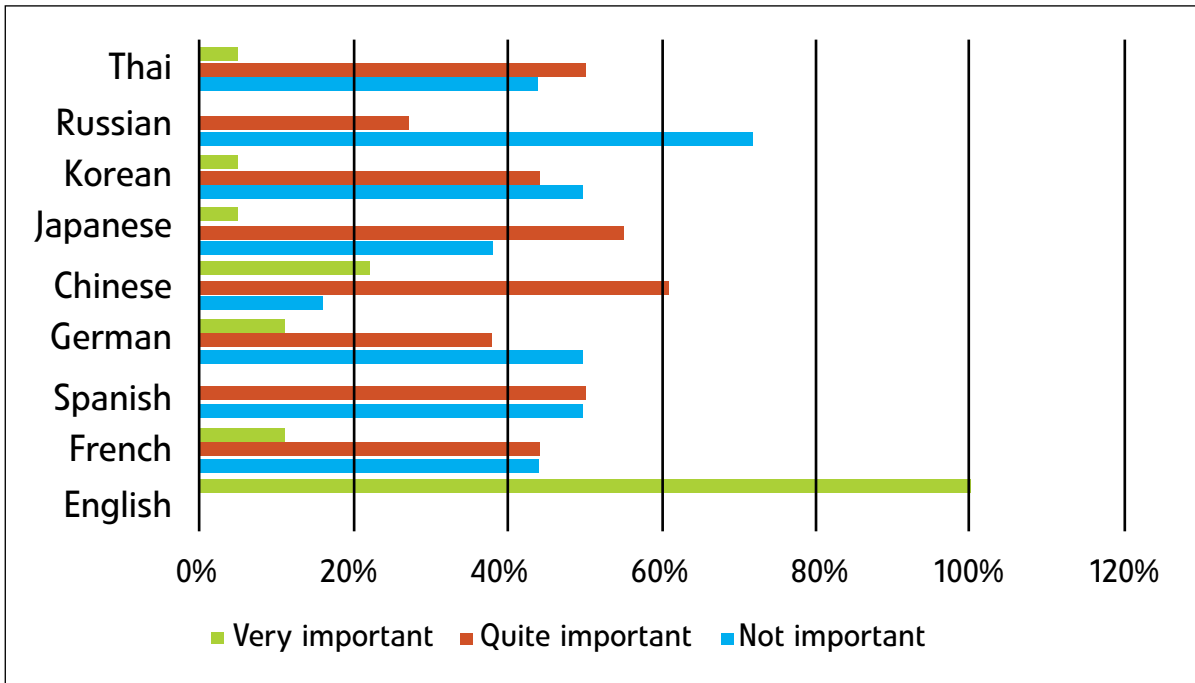
Figure 12: Importance of hospitality skills



(4) Foreign language skills

English is seen as the most important language required by all respondents. Other foreign language skills seem to be seen as more niche: the next most important language was considered to be Chinese, with 22% of respondents marking it as 'very important'. Spanish, Japanese, Korean, Russian and Thai were not seen as important language skills.

Figure 13: Importance of foreign language skills



3.2. Tourism enterprises

The second questionnaire was designed for tourism enterprises. 86 respondents from various sectors of the tourism industry provided responses.

3.2.1 Profile of respondents

Respondents came predominantly from travel agencies and tour operators.

Travel agencies are described as small businesses that don't own any assets (such as vehicles). They primarily book flight, bus and train tickets, and occasionally also book hotels. Tour operators are larger operators that sell tour packages, which they coordinate and run; they typically employ guides and own their own vehicles.

Table 8: Profile of respondents

Sector	Percentage of respondents
Travel agencies	44%
Tour operators	31%
Tourism handicrafts or souvenir shops	0
Transport/taxi	1%
Boat operator	1%
Other	2% (guides)

70% of respondents were located in Yangon, which is the main entry and exit point for tourists to Myanmar as well as the key commercial city. The remaining 30% of respondents were located in the following regions:

- Chin State (guide)
- Kayah State (tour operator)
- Mon State (tour operator)
- Naypyidaw (travel agency)
- Shan State (tour operator)
- Tanintharyi Region (tour operator)

The average size of a tourism enterprise is 11 employees. The table below indicates the average number of employees in each employment category:²

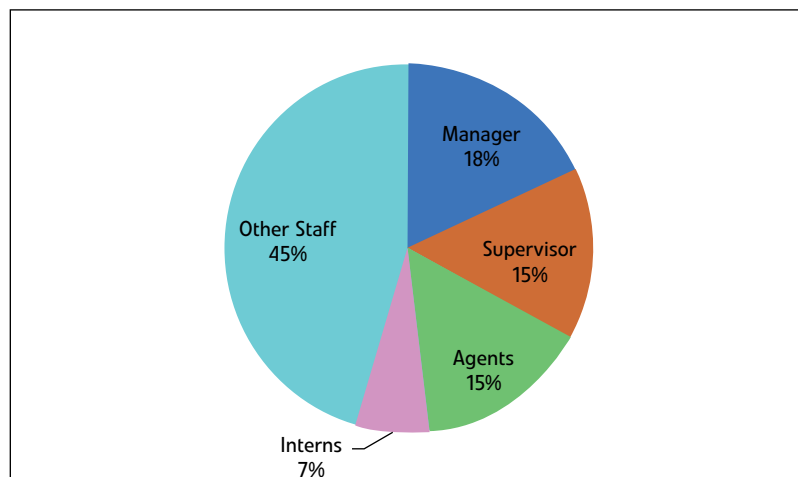
Table 9: Staff distribution

POSITION	Total	Full time	Part time	Casual
Manager	2.13	1.90	0.33	0.11
Supervisor	1.77	1.74	0.40	0.27
Agents	1.76	1.70	0.36	0.07
Interns	0.77	0.70	0.44	0.11
Other Staff	5.34	5.06	0.41	0.24
TOTAL	11.01	10.66	1.17	0.70

The most commonly cited number in each category was frequently 0 or 1: this means that there isn't a standard make up of companies, but overall the respondents can be classified as small businesses.

Interns are not common, and neither are casual staff. This aligns with findings from other parts of the survey about the difficulty of staff retention – if an organisation wants to retain its staff, it must employ them year round and not only in the high season.

Figure 14 demonstrates the average staff makeup of a tourism enterprise in Myanmar.



3.2.2 Training

As with the accommodation sector, providing an in-house trainer is the principal way that new employees are trained. Within travel agencies, the procedures are fairly similar, as they relate to booking domestic airlines tickets, bus tickets etc. This is not necessarily the case for tour operators, whose competitive advantage lies in their delivery and development of different products and niche activities.

As the table below indicates, 43% of respondents also send their staff to training institutes or colleges to help them improve their skills.

² An outlier who indicated they had 1,320 managers was removed.

Table 10: Types of training provided

Type of training	Percentage of respondents that offer this type of training (respondents could check more than one option)
Send staff to training institute or college	43%
Employ an external trainer	19%
Arrange on the job training with in-house trainer	51%
Send staff for internship/training at other properties	24%
Distance or online learning	29%

About 50% of employees have some kind of higher education or certification. The associations and the Ministry of Hotels and Tourism reach about half of the respondents with their training activities. However, tourism enterprises do not engage in online learning or in seminars.

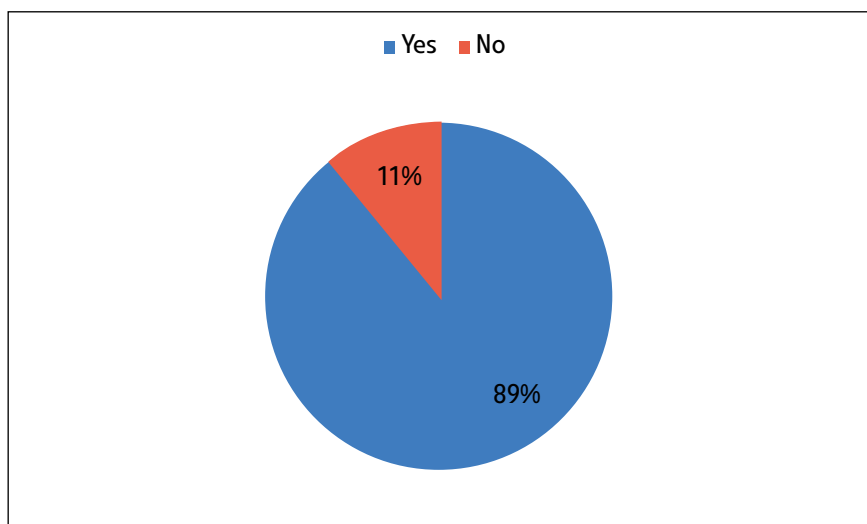
Table 11: Types of training for managers and staff

Type of training	Percentage of respondents that offer this type of training (respondents could check more than one option)
TVET/vocational training/college/university	47%
Training activities (seminars, distance/online learning)	20%
MOHT rotational training programme	49%
Training courses by one of the tourism associations	49%

(1) Online training

89% of respondents indicated they would be interested in using online training for their staff. The 11% that responded 'no' were all located in Yangon, possibly due to the availability of other types of training that are readily available in Yangon.

Figure 15: Would you be interested in online training?



(2) Multi-skilling

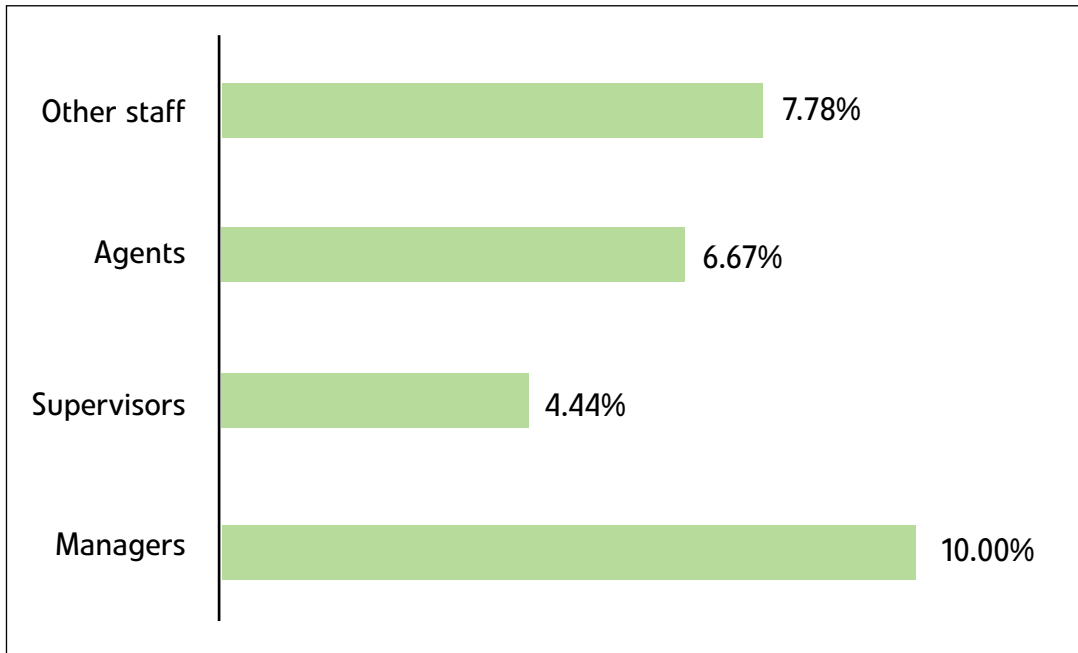
The survey revealed that 22% of employees in tourism businesses need to use 'multi-skilling' in their everyday job.

3.2.3. Staff turnover

55% of respondents found staff turnover to be a problem. Reasons listed for staff turnover included salary and issues related to salary, as well as responses related to the skill level of employees. One respondent noted: "[Staff turnover is due to employees] not having enough skills, or having higher expectations in terms of salary with limited skill." Some respondents noted that as the cost of living in Yangon, especially transportation, is rising each year, employees are seeking higher wages.

Staff turnover is a problem that exists at every level of the organisations, with respondents indicating that agents, managers, supervisors and other staff are all impacted.

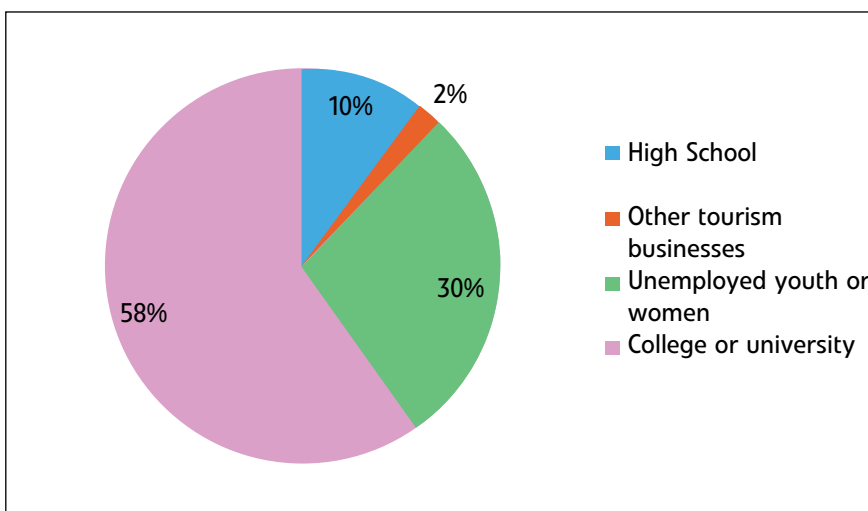
Figure 16: Staff positions most prone to turnover



3.2.4 Recruitment

53% of respondents indicated they recruit staff from colleges or universities: therefore, having a tertiary education is more important in the tourism business than in the accommodation sector. The tourism sector does not recruit from youth and women as much as the accommodation sector, which may reflect the fact that entry level requirements are lower for accommodation providers than for tour and travel operators.

Figure 17: Sources of recruitment for tourism businesses



An open-ended option allowed respondents to provide other sources of recruitment for candidates. The following were mentioned:

- Social media
- Acquaintances
- Recruiting agencies (including online job centers)
- Word of mouth
- Newspaper ads/classifieds

As with the accommodation sector, it is clear that in recruiting for tourism enterprises the most important factors are the personality, enthusiasm and willingness to learn of the applicant. Qualities such as communication skills are rated highly, while previous work experience is not. As one respondent put it in the comment section:

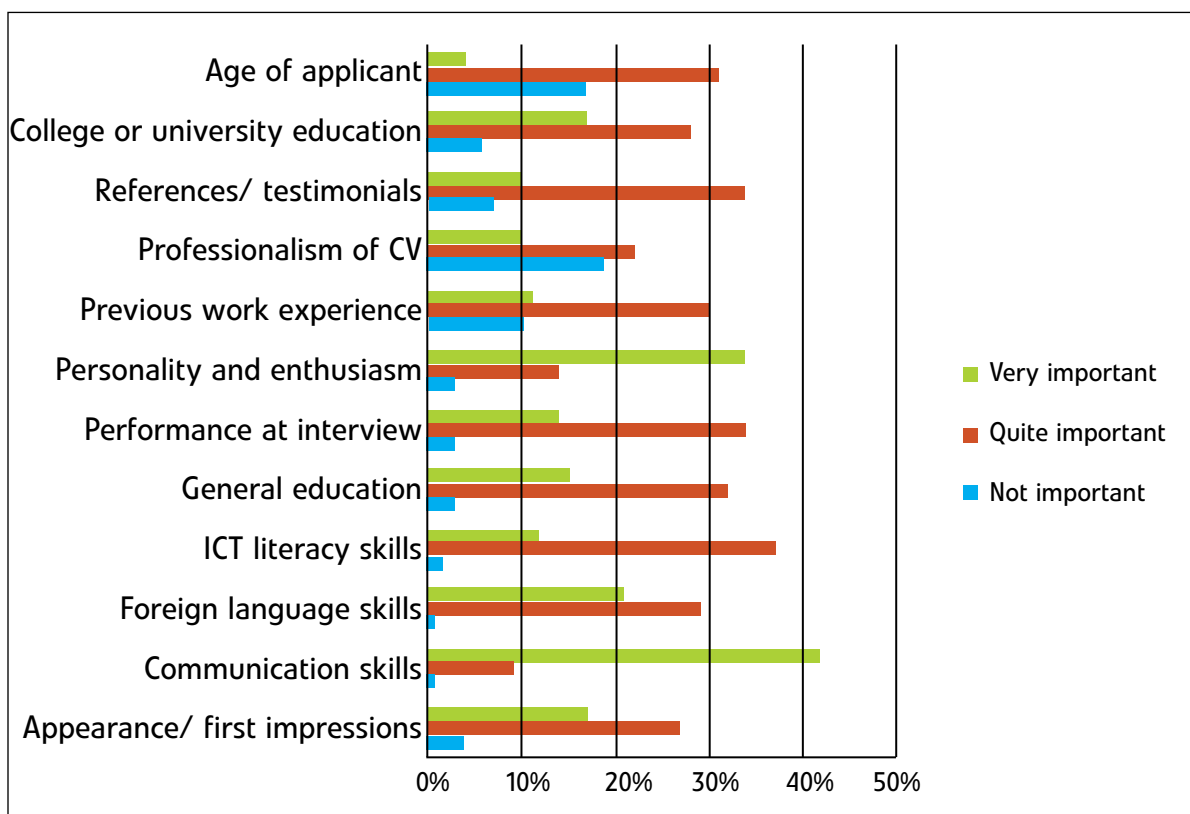
The most important thing for the staff is that they must have good awareness for the environment and be willing to learn new things. They must love their job while working. They should work because of interest in the job, not because of the salary.

Another respondent wrote:

A person who is willing to learn new things and take challenges, yes, we give them an opportunity to work with us. Honesty and loyalty are of more concern; as for the rest, we can train them to be the person we want them to be. As in the accommodation sector, references and CVs are either not trusted or not up to date:

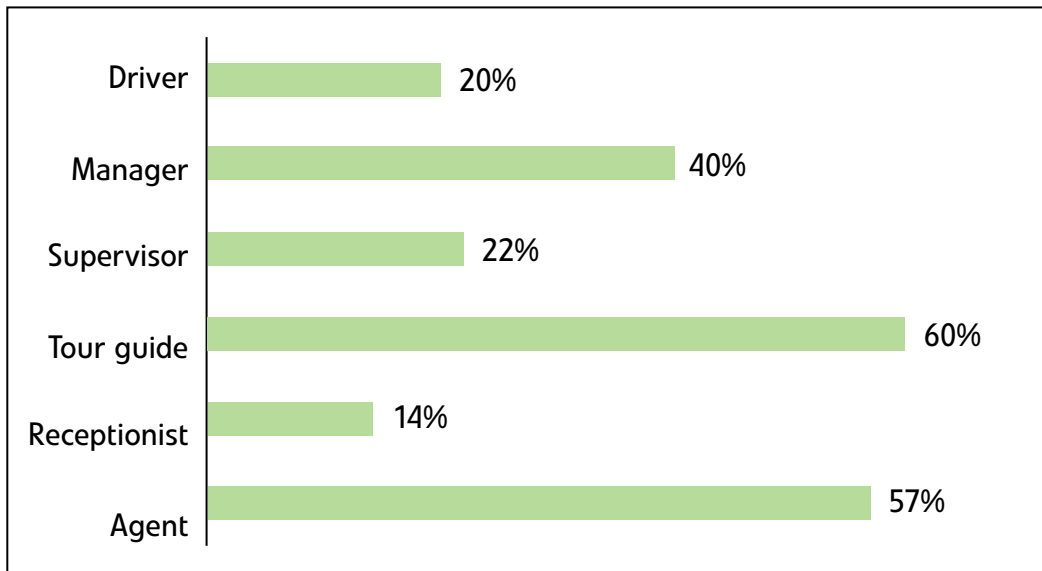
CVs and resumes have no information other than name of parents, race and date of birth. There is a lack of description of duties performed in each role. It is common to receive resumes from candidates who are applying for a highly skilled position with no experience.

Figure 18: Important skills for prospective employees



Respondents were asked to identify which technical skills will be of growing importance in the coming three years. 60% of respondents indicated that tour guides are likely to be the most important industry positions for the future, while 57% indicated that candidates with the necessary skills to be effective travel agents would be needed in the future.

Figure 19: Positions in demand among tourism businesses



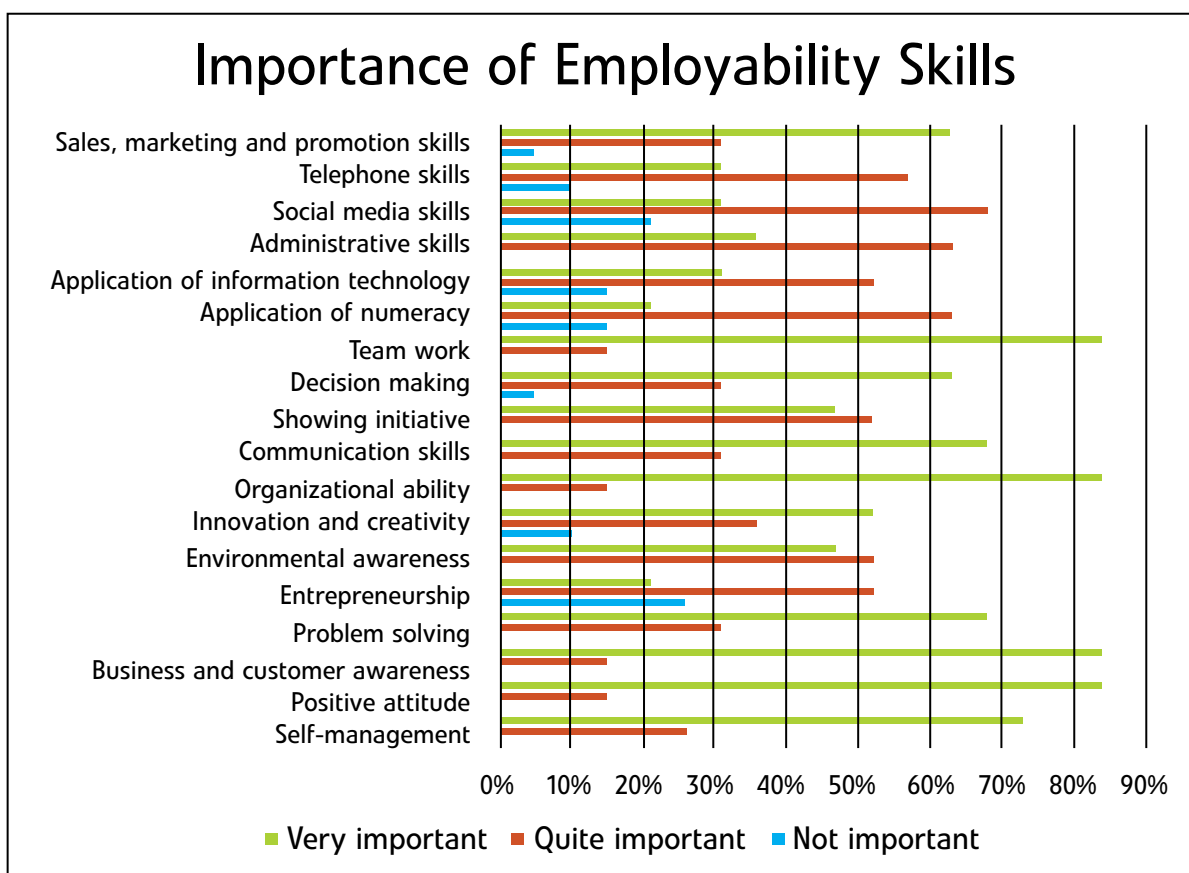
(1) Employability skills

The survey asked respondents to indicate which skills will be needed to meet the realities of the tourism sector in Myanmar in the coming years, that should therefore be taught at colleges and universities.

When employers recruit new candidates, they seek applicants with a can-do, positive attitude over hard skills like ICT or numeracy. The skills of 'positive attitude' and 'teamwork' ranked the highest, whereas 'application of numeracy' and 'entrepreneurship' ranked the lowest. Again, this seems to be a case of employers believing that skills can be taught on the job, as long as the candidate has the right outlook.

Figure 20 indicates the skills that employers are seeking when they hire for new positions at tourism enterprises. The top five most important skills sought by employers are positive attitude, problem solving, communication skills, teamwork, and sales, marketing and promotion skills.

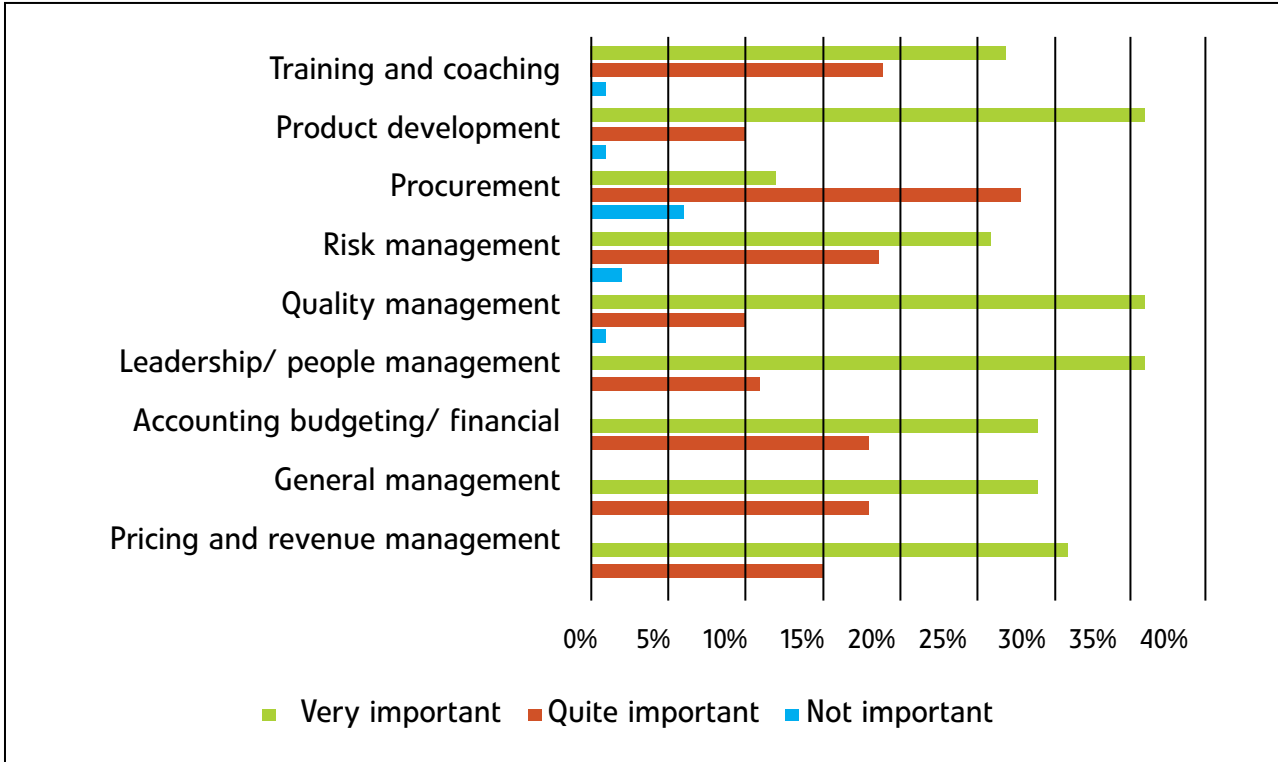
Figure 20: Employability skills for tourism businesses



(2) Management skills

When hiring for managerial positions, it is clear that a complete skill set is desirable and that hard skills are necessary for successful candidates to be considered. The most important skills that employers seek in managers are leadership, people management, product development and quality management. Training and coaching were not ranked as highly as might have been expected.

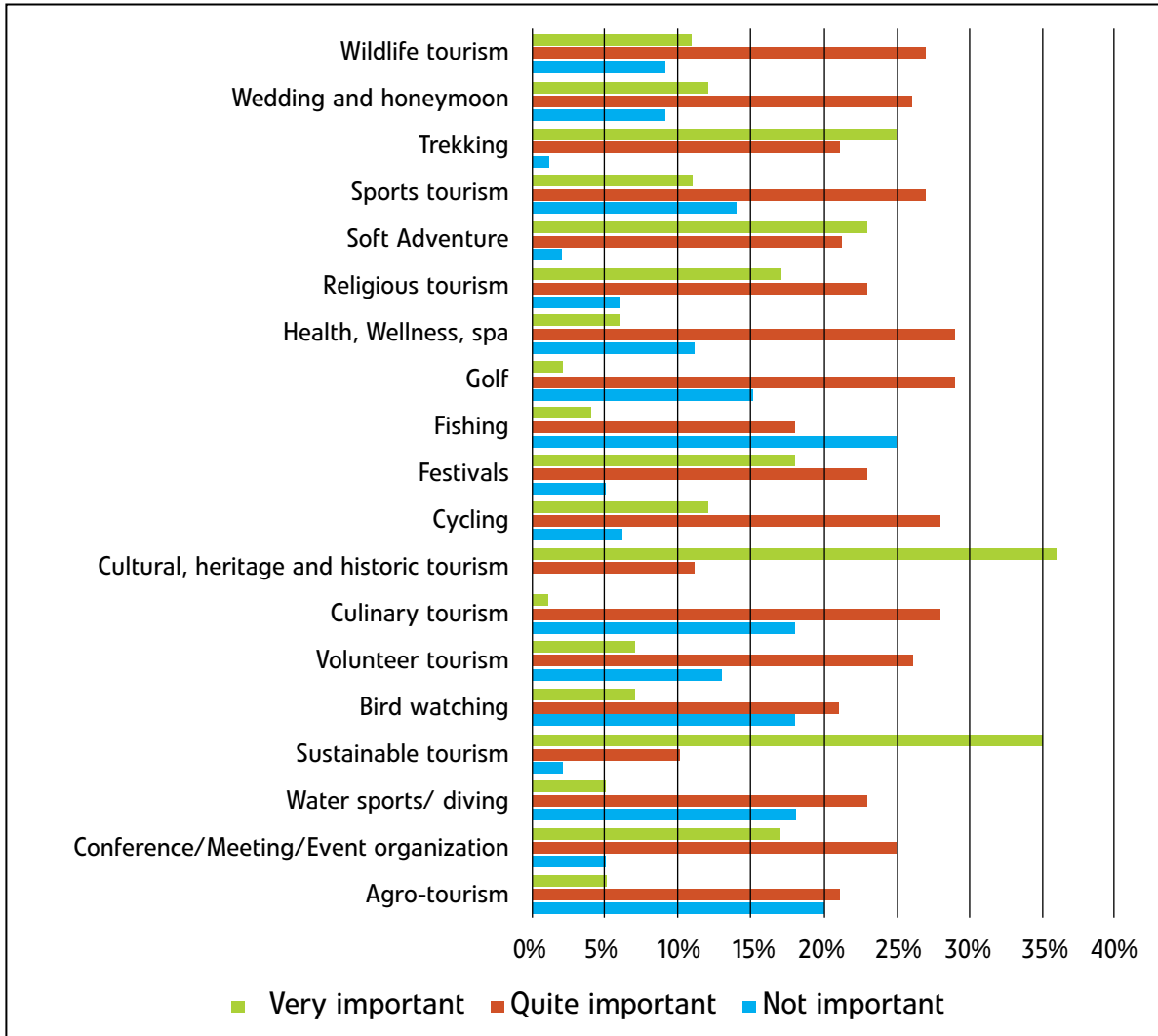
Figure 21: Management skills required by tourism businesses



(3) Niche tourism products

As the tourism sector in Myanmar continues to grow, demand for niche products can be expected to increase. Respondents were asked to identify which niche products were most important to their business. Cultural heritage tourism, trekking and sustainable tourism ranked the highest – this is in line with the current product offering of the majority of providers.

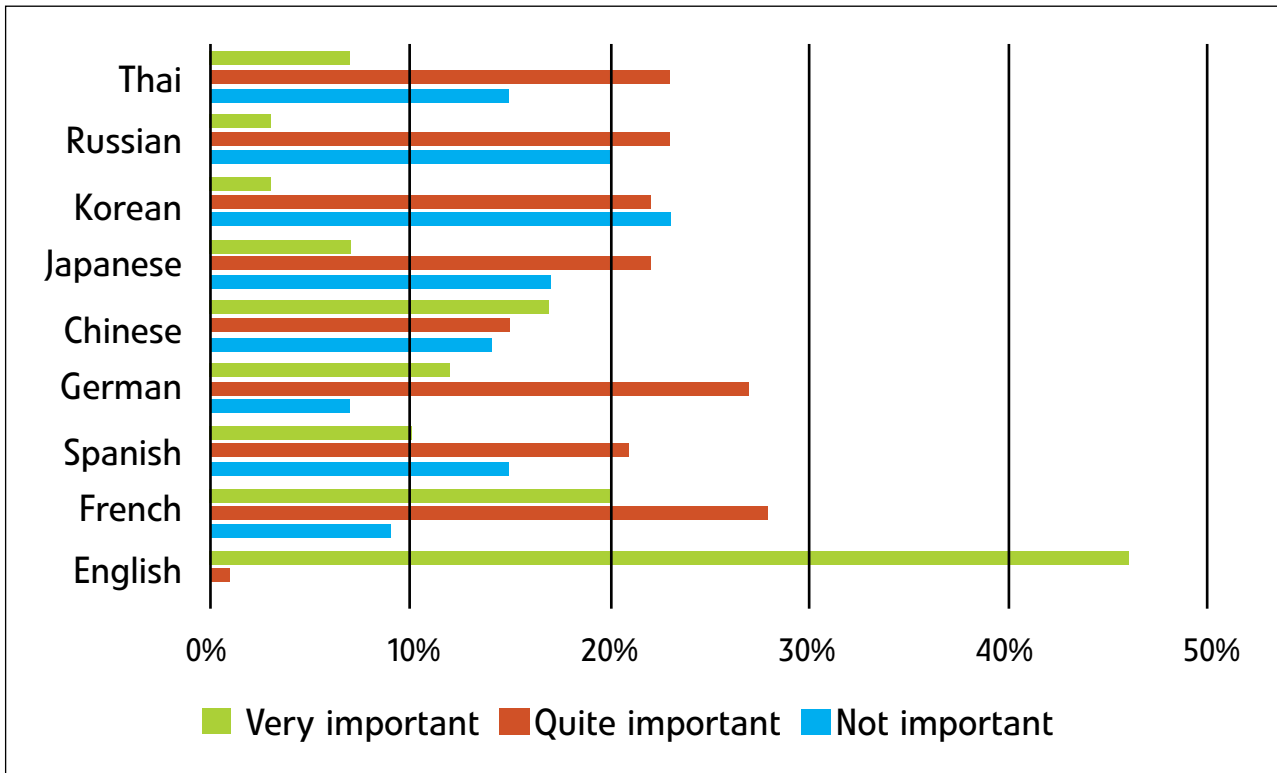
Figure 22: Important niche tourism products



(4) Foreign language skills

As with the accommodation sector, English remains the most important language for tourism enterprises.

Figure 23: Foreign language skills required by tourism businesses



4. RECOMMENDATIONS

This section provides an overview of recommendations based on key findings.

(1) Pursue online training

There is a notable interest in using online learning to train staff in both the accommodation and the enterprise sectors. With the increased Internet speed across the country, as well as increased familiarity with mobile phones and computers, the Internet offers a training solution that didn't exist even one year ago, allowing people in even the most remote parts of Myanmar to improve their skills.

Trainers could investigate the possibility of contracting an established online training hospitality programme, and getting it updated and amended for their local context (a best case example from South Africa is Lobster Inc.), or creating a new online training program. The program should contain various modules, allowing a user to progress and reach different levels. Accommodations could set up a training room, with a few computers, where employees can spend a few hours per week working on their courses. Accommodations could also 'compete' against each other, over the course of a year, to see which property has the most 'trained staff'. These types of programs can be downloaded onto hard drives and completed offline.

Another possibility is creating an intranet for HR managers across Myanmar, where resources such as webinars and cases of best practice can be posted, providing a forum for people in the same positions to share experiences. Ideally, these types of resources would be disseminated from the ministry level.

Finally, English lessons should be a priority. English remains the most important language in tourism and employees themselves are surely keen to improve their skills. It is possible to buy rights to an English language-learning app and distribute it freely to anyone, or even to develop an app and do the same. In any case, English language learning can be scaled greatly if delivered by mobile phones.

(2) Prioritising tour guide training

Tourism enterprises noted that in the next three years, more than any other profession, there will be a need for qualified tour guides. Training for tour guides should be prioritised, both within private businesses and at the government level, in order to meet the demand of a growing market.

(3) Train the trainers/train the employers

In-house training is the most common method by which employers, both in the accommodation sector and in the small business sector, train their staff.

As many travel agencies in Myanmar are operated by their owners, training the operators to provide training to their own staff, as well as on retention techniques, will benefit their organisations and ultimately their employees.

(4) Support owners and managers to identify staff retention techniques

Staff turnover was identified as a major challenge for both accommodations and enterprises. One way to support both employees and employers in meeting this challenge is to help employers to identify staff retention techniques that are realistic in terms of the capacity of their organisation. Specifically, this could include:

- Agreements about requirements to stay at an organisation after receiving training: a major cause of lack of training or professional development on the part of employers is fearing that staff will leave after receiving it.
- 'Stay interviews' conducted on a regular (bi-annual) basis to check on the working environment and workload of employees. The objective with a 'stay' interview (as opposed to an 'exit' interview) is to listen to employees and understand why they continue to work with the organisation.
- Provide perks or incentives to reward effective performance.
- Train employers on implementing performance-based positions or promotions.

(5) Ensure geographic spread of training for accommodation providers

Most tour operators and travel agencies are located in Yangon, which makes the city the logical place to hold any trainings for that sector. However, several respondents from accommodations noted that it was difficult for them to reach Yangon or Mandalay for training due to the distance. Smaller accommodations will struggle to spare staff during the high season. However, during the low season, most resorts in Rakhine close. Therefore, it is important for training providers to accurately survey accommodations and ask them when and where they would like to receive training, in order to offer it at a time and place that is as easy as possible for them to attend.

(6) Encourage employers to hire and retain college graduates

Myanmar has a 95% literacy rate, but only 10% of the population has a college or university degree. The benefits of hiring staff with a higher level of education should be clear to employers, but the survey indicates that colleges and universities are not a main source of recruitment (although tourism enterprises do some recruiting from tertiary institutions). Additionally, managerial positions were identified as lacking suitable candidates. Hiring recent graduates from universities or colleges (and understanding that a higher salary needs to be paid to these candidates) may provide a long-term benefit to businesses.

(7) Support professional development path for young professionals

Young, ambitious professionals may not turn to tourism if they cannot easily see a career development path. It can be difficult to see the path of future opportunities from a front desk or housekeeping job, and turn to other opportunities instead. Employers could use support to map out professional development paths for their staff, which will motivate them and thus encourage them to stay. Additionally, 'promoting from within' is a tactic that should be prioritised among organisations.

(8) Training on benefits of fair remuneration

The survey did not ask employers about benefits or salary. However, 'salary and remuneration' was listed as a factor of high staff turnover. Providing training to employers on what remuneration is fair for each staff level, and how to create a package of benefits, might be useful for businesses.

(9) Training for small businesses

The mode number for the number of employees in a business indicates that the majority are small businesses. Future trainings should take that into consideration, as the HR needs of a small business and the resources available to it are markedly different from those of large companies or hotels.

(10) Survey the employees

These surveys looked at the opinions of employers. It may be worth conducting a similar survey to understand the needs and interests of the employees: for example, they may believe a different skill set is needed for the future of tourism in Myanmar.

(11) Encourage differentiation

There is little importance placed on the majority of niche tourism areas by tourism enterprises. This points to the trend of all businesses selling the same circuits and the same products. It may be worth hosting a training programme to inspire tour operators and travel agencies to differentiate themselves, becoming experts on some of the niche areas which are trending globally. Examples of that would be cycling, bird watching, and MICE (Meetings, Incentives, Conferences and Events).

5. CONCLUSIONS

The outlook for tourism in Myanmar is promising; growth rates project a record number of visitors in 2017. In emerging economies like Myanmar, tourism presents exciting opportunities for development and skills enhancement; in fact, it is often many people's first entry into the workforce.

As tourist arrivals increase, so too will the number of accommodations and tourism businesses that service them. As this report demonstrates, in all sectors in tourism and hospitality, the demand for qualified staff is far greater than the supply: recruitment, retention and training remain challenges for human resource managers in this sector.

The findings from the report indicate that when it comes to recruitment, managers are seeking a 'can-do' attitude from an enthusiastic candidate over hard skills, believing that the latter can be taught on the job. On-the-job training therefore becomes of paramount importance. Training is required to professionalise and improve the sector, and managers need to be able to assess what type of training will best fit their particular business. The interest in online training is widespread, but adoption of e-learning will be dependent on the price of software and hardware.

As the report shows, staff turnover is one of the biggest issues due to the high demand for labour in the sector. The most cited reasons for turnover were salary and benefits, and managers will need to offer competitive remuneration in order to retain staff and ensure continuity at their organisations.

Overall, qualified staff who provide good service at both accommodations and tourism businesses improve both the brand of destination Myanmar and the efficiency and profitability of private tourism businesses in the country. The report supports the current understanding of where better human resource policies and processes are required in tourism. Improving these will ensure that employees are positioned for professional development, ultimately making greater contributions to their own companies and the development of tourism in Myanmar.

Annex A: Questionnaire Accommodation Sector



MYA/001
 Development of Human Resources in the
 Hotel and Tourism Sector and
 Capacity Development of the



ACCOMMODATION SECTOR

1. Accommodation type:				
<input type="checkbox"/> HOTEL; <input type="checkbox"/> GUESTHOUSE; <input type="checkbox"/> RESORT; <input type="checkbox"/> APARTMENT; <input type="checkbox"/> B&B OTHER (please specify)				
2. Organisation Details (optional)				
Name:		Business Name:		
e-mail:		Telephone:		
3. Size of property	(Number of bedrooms)		(Number of beds)	
4. In total, how many persons are employed in your property?				
Rank	Total	Full time	Part time	Casual
Manager				
Supervisors				
Skilled Operatives				
Unskilled Operatives				
Interns				
Total				
5. What type of training do you provide for your staff				
(a) Send staff to Training Institute or College				
(b) Employ an external trainer				
(c) Arrange on the job training with in-house trainer				
(d) Distance or online learning				
(e) Send staff for internship/training at other properties				
(f) Others				

6. Have you or your staff participated in any of the following training courses?			
(a) TVET/Vocational training /Colleges/universities	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
(b) Training activities (seminars, distance/online learning)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
(c) MOHT Rotational Training programme	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
(d) Training courses by MHA or other Association	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
7. Would you be interested in using online or distance learning for staff development and training?	<input type="checkbox"/> <input type="checkbox"/> Yes	<input type="checkbox"/> <input type="checkbox"/> No	
8. What percentage of the total staff work in more than one department or occupation on a regular basis (i.e. multi-skilling)?	%		
9. In general, do you find staff turnover a problem?	<input type="checkbox"/> <input type="checkbox"/> Yes	<input type="checkbox"/> No	
10. If you answered yes to question 9, what do you think are the main causes of the staff turnover?			
.....			
.....			
.....			
.....			
11. If you answered YES for question 9, for what types of staff position is the most problematic?			
<input type="checkbox"/> Managers; <input type="checkbox"/> <input type="checkbox"/> Supervisors; <input type="checkbox"/> <input type="checkbox"/> Skilled Operatives; <input type="checkbox"/> <input type="checkbox"/> Unskilled Operatives			
12. From where do you normally recruit new staff?			
<input type="checkbox"/> <input type="checkbox"/> Secondary/high schools <input type="checkbox"/> <input type="checkbox"/> College/ University <input type="checkbox"/> <input type="checkbox"/> Other hotels <input type="checkbox"/> <input type="checkbox"/> Unemployed youth or women			
13. When you recruit staff, how important are each of the following?	1 Not Important	2 Quite important	3 Very important
(a) Appearance/ first impressions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b) Certification/Accreditation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(c) Communication Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(d) Foreign Language Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(e) ICT literacy skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(f) General Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(g) Performance at Interview	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(h) Personality & Enthusiasm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(i) Previous work experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(j) Professionalism of CV	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(k) References / Testimonials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(l) College or University/ Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(m) Age of applicant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please add any other comments here:

14. Which vocational areas listed below will be of growing importance in the next 3 years?	
1. Chefs/cooks	<input type="checkbox"/>
2. Receptionists	<input type="checkbox"/>
3. Supervisors	<input type="checkbox"/>
4. Managers	<input type="checkbox"/>
5. Spa therapists	<input type="checkbox"/>
6. Meetings coordinators	<input type="checkbox"/>
7. Other (specify)	<input type="checkbox"/>

15. Are there any new and emerging skills in the accommodation sector which schools/ colleges/ universities should develop in their students?

16. How important are the following skills for your organisation?	1 Not Important	2 Quite important	3 Very important
Employability skills			
1. Self-management			
2. Positive attitude			
3. Business and customer awareness			
4. Problem Solving			
5. Entrepreneurship			
6. Environmental Awareness			
7. Innovation and Creativity			
8. Organisational ability			
9. Communication skills			
10. Showing Initiative			
11. Decision-making			
12. Team Working			
13. Application of numeracy			
14. Application of information technology			
15. Administrative Skills			
16. Social media skills			
17. Telephone Skills			
18. Sales, Marketing & Promotion Skills			
Management skills			
19. Pricing and Revenue Management			
20. General Management			
21. Accountancy Budgeting/ financial Management			
22. Leadership/ People management			
23. Quality Management			
24. Risk management			
25. Procurement			

26. Product Development			
27. Training and coaching			
Hospitality skills			
28. Food Hygiene			
29. Health & Safety			
30. Thai or Chinese Cuisine			
31. International Cuisine			
32. Food Preparation			
33. Baking & Pastry Making			
34. Kitchen Organisation			
35. Food and Beverage Cost Controls			
36. Food Science and Nutrition			
37. Wine skills and knowledge			
38. Web Design/Maintenance			
Foreign Language Skills			
39. English			
40. French			
41. Spanish			
42. German			
43. Chinese			
44. Japanese			
45. Korean			
46. Russian			
47. Thai			
48. Other			
Others skills (please specify)			

Thank you for your cooperation in completing the survey

Annex B: Questionnaire Tourism Enterprises



MYA/001

Development of Human Resources in the
Hotel and Tourism Sector and
Capacity Development of the



QUESTIONNAIRE – TOURISM SECTOR

1. Sector:				
<input type="checkbox"/> TRAVEL AGENCY <input type="checkbox"/> TOUR OPERATOR <input type="checkbox"/> TOURISM HANDICRAFTS/SOUVENIR SHOP <input type="checkbox"/> TRANSPORT/TAXI COMPANY <input type="checkbox"/> BOAT OPERATOR <input type="checkbox"/> OTHER (Specify)				
2. Organisation Details (optional)				
Name:		Business Name:		
e-mail:		Telephone:		
3. No of Units:		(Number of offices, agents, vehicles, craft etc)		
4. In total, how many persons are employed in this organisation?				
Rank	Total	Full time	Part time	Casual
Manager				
Supervisors				
Agents				
Interns				
Other staff				
Total				
5. What type of training do you provide for your staff				
(a) Send staff to Training Institute or College				
(b) Employ an external trainer				
(c) Arrange on the job training with in-house trainer				
(d) Distance or online learning				
(e) Send staff for internship/training at other properties				
(f) Others				

6. Have you or your staff participated in any of the following training courses?			
(a) TVET/Vocational training /Colleges/universities	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
(b) Training activities (seminars, distance/online learning)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
(c) MOHT Rotational Training programme	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
(d) Training courses by MHA or other Association	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
7. Would you be interested in using online or distance learning for staff development and training?	<input type="checkbox"/> <input type="checkbox"/> Yes	<input type="checkbox"/> <input type="checkbox"/> No	
8. What percentage of the total staff work in more than one department or occupation on a regular basis (i.e. multi-skilling)?	%		
9. In general, do you find staff turnover a problem?	<input type="checkbox"/> <input type="checkbox"/> Yes	<input type="checkbox"/> No	
10. In your opinion, what are the main causes of the staff turnover?			
.....			
.....			
.....			
.....			
11. If you answered YES for question 9, for what types of staff position is the most problematic?			
<input type="checkbox"/> Managers; <input type="checkbox"/> <input type="checkbox"/> Supervisors; <input type="checkbox"/> <input type="checkbox"/> Skilled Operatives; <input type="checkbox"/> <input type="checkbox"/> Unskilled Operatives			
12. From where do you normally recruit new staff?			
<input type="checkbox"/> <input type="checkbox"/> Secondary/high schools <input type="checkbox"/> <input type="checkbox"/> College/ University <input type="checkbox"/> <input type="checkbox"/> Other hotels <input type="checkbox"/> <input type="checkbox"/> Unemployed youth or women			
13. When you recruit staff, how important are each of the following?	1 Not Important	2 Quite important	3 Very important
(n) Appearance/ first impressions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(o) Certification/Accreditation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(p) Communication Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(q) Foreign Language Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(r) ICT literacy skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(s) General Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(t) Performance at Interview	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(u) Personality & Enthusiasm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(v) Previous work experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(w) Professionalism of CV	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(x) References / Testimonials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(y) College or University/ Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(z) Age of applicant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please add any other comments here:

14. Which professional/technical skills will be of growing importance in the next 3 years?

1. Agents

2. Receptionists

3. Tour guides

4. Supervisors

5. Managers

6. Drivers

7. Other (specify)

15. Are there any new and emerging skills in the tourism sector which schools/ colleges/ universities should develop in their students?

16. When you recruit staff, how important are each of the following?	1 Not Important	2 Quite important	3 Very important
Employability skills			
1. Self-management			
2. Positive attitude			
3. Business and customer awareness			
4. Problem Solving			
5. Entrepreneurship			
6. Environmental Awareness			
7. Innovation and Creativity			
8. Organisational ability			
9. Communication skills			
10. Showing Initiative			
11. Decision-making			
12. Team Working			
13. Application of numeracy			
14. Application of information technology			
15. Administrative Skills			
16. Social media skills			
17. Telephone Skills			
18. Sales, Marketing & Promotion Skills			
Management skills			
19. Pricing and Revenue Management			
20. General Management			
21. Accountancy Budgeting/ financial Management			
22. Leadership/ People management			
23. Quality Management			
24. Risk management			
25. Procurement			

26. Product Development			
27. Training and coaching			
Hospitality skills			
28. Agro-tourism			
29. Conference/ meetings/ event organisation			
30. Water sports/ diving			
31. Sustainable tourism			
32. Bird Watching			
33. Voluntourism			
34. Culinary (or Gastronomic) Tourism			
35. Cultural, Heritage and Historic Tourism			
36. Cycling			
37. Festivals			
38. Fishing			
39. Golf			
40. Health, Wellness and Spa			
41. Religious tourism			
42. Soft Adventure			
43. Sports Tourism			
44. Trekking			
45. Weddings and Honeymoons			
46. Wildlife Tourism			
Foreign Language Skills			
47. Thai			
48. French			
49. Spanish			
50. German			
51. Chinese			
52. Japanese			
53. Korean			
54. Russian			
55. Thai			
56. Other			
Others skills (please specify)			

17. How significant is the graduate skills mismatch with industry requirements and what should be done, and what should be taught to reduce the perceived graduate/industry skills mismatch?

Thank you for your cooperation in completing the survey



MYANMAR-LUXEMBOURG



DEVELOPMENT COOPERATION

