

BOOSTING TOURISM REVENUE IN TAIWAN, PERSPECTIVE OF MARKET DIVERSIFICATION

Htin Shar

I. INTRODUCTION

Taiwan became a popular destination in Asia and the tourism become one of the principal industries for Taiwan economy. The Taiwan tourism Bureau planned the “Taiwan’s 2015-2018 Tourism Action Plan” for the development of “quality, uniqueness, intelligence, and sustainability” of tourism. The Bureau targeted to receive 11.7 million of tourists and NT\$ 830 billion (about US\$ 265.6 billion) of tourism revenue¹ (spending by tourists) by 2018. Taiwan’s tourism industry was developed well and generating higher income than Myanmar’s tourism industry. In 2019, Taiwan received 1.1 million of international tourists, this amount is over one time higher the number of tourist arrival that received by Myanmar tourism business. Moreover, Taiwan has been improved their good image of democracy and human rights on the international stages. In 2019, Bureau of Democracy, Human Rights, and Labor United States Department of State reported that Taiwan is good at the improvement of freedom of religious and gender issue, tourism bureau of Taiwan also showing up the Taiwan’s goodness of democracy and human right thought tourism promotion activities.

In October 2015, Myanmar had been fabricated as a country which is in the final stage of ethnic cleansing. Positive image of political reformed was damaged and the number of tourist arrival was significantly declined in December 2015 and continued to the whole year of 2016. Although, number of tourist arrival (NoTA) was increased again to 3.4 million in 2017, the tourist arrival form Europe, America, and Oceania (EAO) countries were decreasing, and it was continuously declined in the whole year of 2018. The declining number of tourist arrival form EAO countries to Myanmar is apparent by comparing with the increasing number of tourists from EAO countries to other ASEAN countries such as Thailand, Vietnam, Indonesia, and Cambodia. The country’s image and local political issues are the predominately effecting to the tourism industry in recent years. Although the quality of our products is improving as the competitive level among the regional tourism Market, the country’s image can change almost every things of tourism benefits for the country especially for Myanmar. As the decreased of tourist arrival form EAO countries, the TR also declining in recent years. Consequently, the image up policies and activities are the essential needs for the tourism industry in Myanmar to improve the tourists form those declining countries.

Among Taiwan’s tourism policies, Market diversification is the one of the important policies for tourism promotion. Market diversification was started in 2015 and Taiwan raise the action of market diversification after the whole period from 2016 to 2020. The above-mentioned points are the reasons of this research. This research will discuss mainly focusing on the diversification policies of Taiwan which has to be implicated for Myanmar policy makers to improve the country image by using the tourism promotion strategies.

¹ <https://www.ecct.com.tw/taiwans-tourism-action-plan/>

II. TAIWAN'S TOURISM INDUSTRY

2.1. Taiwan's Tourism Policies Trends (2009-2019)

Taiwan has been planned for development since 1956. The committee of tourism was set up in 1960, as the next step, the committee was transformed into the tourism council of Taiwan. The final stage for trying up for the development of tourism was the establishment of the Tourism Bureau under the Ministry of Transportation & Communications in 1972. According to the president of Taiwan (Tsai Ing-wen), The SMEs in Taiwan are the backbone of the economy and employ 80 per cent of Taiwan's workforce (Taiwan Today, September 11, 2018²). In line with the so-called new southbound policy (NSP), the tourism industry has been selected as a key focus of the Taiwanese SME sector and its development, alongside the agriculture, cultural business, tourism, trade, and education sectors. With appropriate, SMEs have the potential to substantially boost employment and revenue generation in Taiwan's tourism sector.

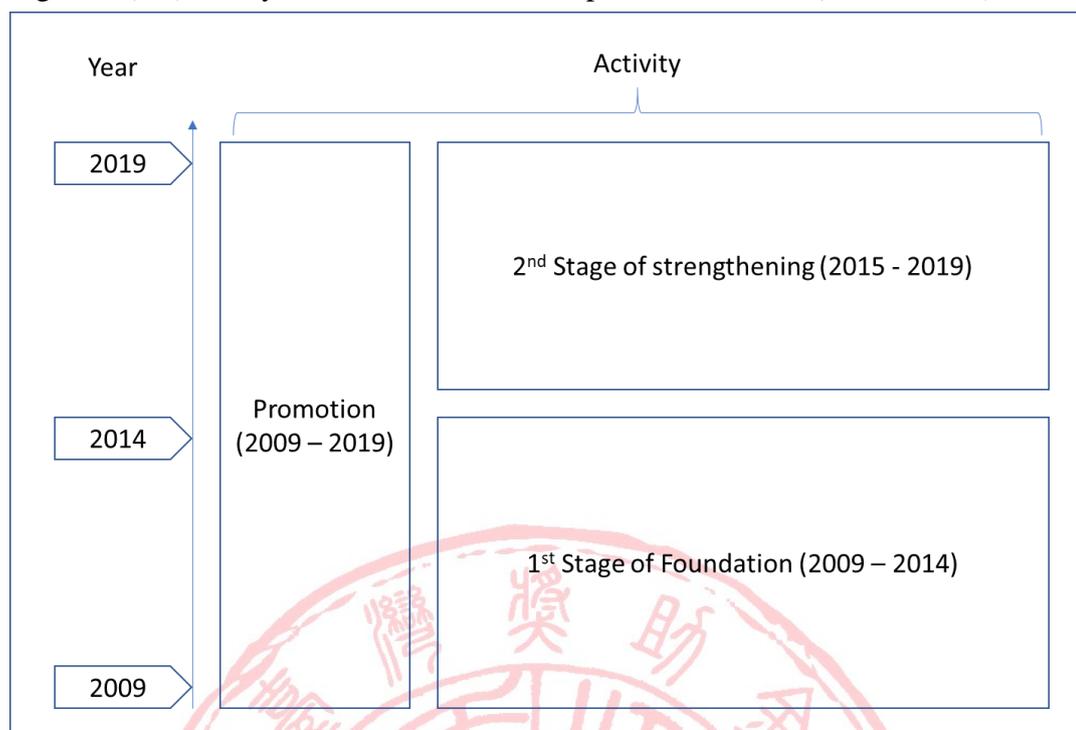
Figure 2.1 shows the policies timeline in the building-up of the tourism industry in Taiwan. In this figure, the Taiwan tourism trend was classified in two stages as the 1st stage of foundation and 2nd stage of strengthening of the industry stage. Several promotion activities were added along with the tourism policies trend in the period from 2009 to 2019. After 2018, Taiwan is emphasizing on the industry promotion more than the industry building-up.

The first stage (foundation for tourism development) started in 2009 and seen to be ended in 2014. In this stage, the renovation of tourist sites, construction of tourism infrastructure, preparing for a regulatory framework, implementation of a tourism information system, creating of tourism data-based and development of quality tourism product were included to be excellent industry of the economy. Taiwan implemented a foundation project called Project Vanguard for Excellence in Tourism (2009-2014). In 2012, Taiwan upgraded its tourism infrastructure, building a country image as a tourism destination, and other foundation process had been done in this year. In 2013, Taiwan continued the implementing tourism plan and added the performance of upgrading quality and quantity of tourism industry of Taiwan as a portion of Executive Yuan's "Economic Power-Up Plan". Moreover, the marketing campaign called "Time for Taiwan", Building of a barrier-free travel environment and strengthening of Taiwan Tourist Shuttle and Taiwan Tour Bus services. Additionally, the implementation of tourism data-based system had been started in this time. The construction of major tourist sites, expansion of the cruise market as well as the focusing on the newly affluent from five Southeast Asian countries market were the other important activities of 2014 tourism policies timeline of Taiwan.

The second stage started in 2015, this stage could be named as "upgrading stage" of the industry because Taiwan deeply started to expend the tourism industry as a quality product of the economy. The Taiwan tourism action plan 2015-2018 was implemented in this stage. Along the mid-term plan (2012-2015), Taiwan continued the construction of the Major Scenic Sites of the industry.

², <https://taiwantoday.tw/news.php?unit=2,6,10,15,18&post=141324>

Figure – (2.1) Policy trend of tourism development in Taiwan (2009 – 2019)



Source – Based on the Taiwan Tourism Policies (2009-2019)

As the additional performance, Taiwan promotes the tourism industry in core promotional program called "Time for Taiwan" which included by the theme of quality, uniqueness, intelligence, and sustainability. The tourism information system has been started to improve for the easy assessment of travel information for international tourists. Some ongoing projects which have begun in 2014 were carried in 2015. In 2016, Taiwan added the project of improving tourist facilities and tourism regulations. The market segmentation and policy differentiation strategy has begun in this year. In 2017, Taiwan formulated a new tourism strategy called 2020 – A sustainable tourism development strategy for Taiwan, targeted to the development of innovation and sustainability of the tourism industry. In this program, Taiwan used the five major development strategies namely (i) Development of Diversified Markets, (ii) Promotion of Domestic Travel, (iii) Guidance for Industrial Transition, (iv) Development of Smart Tourism, and (v) Expansion of Experiential Tourism. In 2018, added the multi-marketing program to different segments of the tourism market and focused on the promotion of major target market such as muslim tour market in south-east Asia countries (Brunei, Indonesia and Malaysia). In 2019, Taiwan emphasized on the differentiation of the tourism market and promoted the main target market. There are five main tourism development strategies in 2015. They are (i) increase of market diversification, (ii) actively support domestic tourism, (iii) encourage industry transformation, (iv) develop smart tourism and (v) promote experiential sightseeing.

III. MARKET DIVERSIFICATION AND TOURISM PROMOTION

Market diversification is a strategy of marketing which can be defined as the introducing new products to the new markets. This is a risky strategy of marketing because the product and the market are new. Taiwan started the market diversification strategy since 2016,

the diversification drive in the tourism industry as further developed with the "Tourism 2020-Taiwan Sustainable Tourism Development Program" (Summary of 2019 Tourism Policies). In this program, Taiwan focuses on five main strategies, namely (1) increase market diversification, (2) actively support domestic tourism, (3) encourage industry transformation, (4) develop smart tourism and (5) promote experiential sightseeing. There are 21 different implementation efforts under these five major strategies. Taiwan mainly targeting to 5 markets namely new southbound countries market, North-East market, Oceania market, USA and Canada market, UK and EU market.

The tourism bureau using the several ways of marketing to introduced tourism in Taiwan in target markets. The first strategy is using the print media and internet media in target markets. Tourism bureau placed the ads and promotion image of Taiwan tourism in newspaper, magazine, Facebook page in target market language and others. The second one inviting the TV station to Taiwan to make the TV shows about the Taiwan destination and tourist attractions such as food tour in Taipei, Temple, and National scenic spots. The next strategy is outdoor advertising, which is advertising from outdoor LED well display, placing advertising posters in public are, showing in cinemas. Public relation activities were also the strategy of tourism marketing in Taiwan. Taiwan also invited the height profile travel vloggers and celebrities to Taiwan's destination and attracted the tourists form target markets.

The tourism bureau promoted Taiwan as an excellent and new destination in Asia. Taiwan introduced the new tourism product such as Muslim tour and LGBT tourism to Muslim traveller and LGBT tourists. The current promotional slogan is "Taiwan; Heart of Asia". Starting from 2017, Taiwan created the four themes of tourism product namely "Year of Eco-Tourism in 2017, Year of bay tourism in 2018, year of small-town tourism in 2019 and year of mountain range tourism in 2020, along with the 2020 – Taiwan Sustainable Tourism Development Plan. These introducing of four themes it could be recognized as creating new tourism product annually and introducing to the customers who interested in those tourism themes in each year. The promotion focused on the high potential market such as mainland China market, the Muslim market, the Southeast Asian market, Europe and America market. Currently, Taiwan targeting mainly on the 27 markets namely 18 markets of New South Bound Countries, South Korea, Japan, Hong Kong, Germany, France, UK, USA, Canada, China and the Middle East.

Taiwan tourism bureau improved the industry's brand as a muslim friendly destination. Most Taiwanese people are Buddhism and Taoism. Therefore, it is not only a part of market diversification but also it can reflect Taiwan's image as the development of democracy, freedom of religious and human right. Since 2017, Tripzila.com reported that Taiwan is one of the muslim destinations because there are too many Halal Restaurants and payers' room in the number of hotels and ranked Taiwan as a best fourth destination for muslim travelers. Since 2016, Taiwan installed the payers' room for muslim traveler at the transportation spots such as Taipei main station, Taiwan High-Speed Rail Corp.'s Taichung Station and Taoyuan International Airport. In 2018, The tourism bureau work with Chines muslim association to

fulfil the requirements for muslim tourists such as payer rooms, cleansing fatalities at the visitor centre of the national scenic area which under the administration of the Bureau. In 2019, Taiwan continue the promotion of Muslim friendly tourism, “Slam Taiwan” Slogan has been used in promotion and placed the Slam Taiwan video in Social Medias and tourism bureau website.

As a result, Taiwan ranked as fifth best tourist destination for muslim tourists outside of muslim countries by the Mastercard 2018 Crescent Rating Global Muslim Travel Index (GMTI) survey, it is the increased of the tenth position in 2015 and seventh position in 2016 (GMTI 2016 Report). In 2016, Taiwan today showed the report of tourism bureau that the number of tourists from muslim majority countries has been increased 11.1 per cent and reached to 200,000 visitors in 2015 but in 2018, the traveller form muslim majority countries were declined to 170,000 visitors (Nov 2019 – Taiwan News).

3.1. Japan, South Korea and Hong Kong

In 2017, Taiwan continued its marketing in the Japanese tourist market by using the several ways of strategies. Tourism bureau placed the advertisements and promotional images in 13 local newspapers and monthly published Taiwan tourism in travel magazines in Japan and 18 newspapers and magazines in South Korea. TV advertisements were broadcasted in more than 16 TV channels in Japan and more than 4 channels in South Korea. The Facebook pages and Taiwan tourism bureau website were organized in Japan and Korea languages. Billboard advertisements, LED well display and other public area focused promotion camping were being used in Taiwan tourism promotion in those countries. Taiwan invited the height profile celebrities and travel vloggers from Japan and Korea promoted the Taiwan tourism by getting the advantages of soft power and let the people form targeted market understand Taiwan as a good destination of Asia. Taiwan tourism bureau organized the public tourism seminar and participated in travel fairs in Japan and Korea.

Table 3.1 – Number of tourist arrival and percentage changes of Japan and Korea Market

Year	Japan		South Korea		Hong Kong	
	Arrival number	Year on year growth rate	Arrival number	Year on year growth rate	Arrival Number	Year on year growth rate
2014	1,634,790	15.00%	527,684	50.21%	1276039	15.46%
2015	1,627,229	-0.46%	658,757	24.84%	1389529	8.89%
2016	1,895,702	16.50%	884,397	34.25%	1474521	6.12%
2017	1,898,854	0.17%	1,054,708	19.26%	1540765	4.49%
2018	1,969,151	3.70%	1,019,441	-3.34%	1506536	-2.22%

source – Tourism Bureau of Taiwan

Therefore, Taiwan made a focus of tourism promotion in Japan and South Korea very deeply. As a result, Taiwan's tourist arrival from Japan and South Korea market were being increased in recent years. In 2017, tourist arrival from Japan market was 0.17% more than the number in 2016 and it was continuously increased 3.7% in 2018. The tourist arrival from Korea market was also increased in 2017 and 2018, 34.25% and 19.26% respectively. Table 1.1 shows

the increased of tourist arrival from Japan and South Korea market from 2014 to 2018. In this table, even the tourist was increased in 2017, the number was decreased by 3.34% in 2018 from South Korea Market. In Japan Market, the growth rate of the number of tourist arrival was very small but this market could be recognized as the gradually increasing market for Taiwan tourism industry because the arrival number was gradually increasing since 2016 to 2018 continuously.

Taiwan Tourism Bureau also targeted to the Hong Kong Market through the market diversification policy. Tourism bureau placed the advertisements 12 printed media of Hong Kong and broadcasted the promotional programs in Hong Kong's local TV channels including Viu TV and TVB. The bureau got the collaboration of HutchGo, Hong Kong's leading online travel agency and conducted the promotional video on their website. Taiwan got the placement of advertisements in Flyagain and meetHK.com to improve the hot-spring travel market in Taiwan. Participating in Hong Kong's international travel expo to get the high attention not only Hong Kong market but also the international travel market.

In table 3.1, the tourist arrival and year on year growth rate form Hong Kong tourist market in Taiwan, in this table, tourism bureau reported that the tourist arrival of Hong Kong Market was continuously increasing since 2007 with the growth rate over 10% except 2011 but after 2014 the growth rate was declined to 8.89%, 6.12% and 4.49% in the period from 2015 to 2017. In 2018, the tourist arrival of Hong Kong was shown minus sign as its growth rate. Therefore, the promotion in Hong Kong did not affected to the market development of Taiwan tourism industry as much as expected.

3.2. New Southbound Market (NSM)

New Southbound Policy officially launched on 5 September 2016. Tourism is one of the focus areas of Corporation with the New Southbound Policy Countries, 10 ASEAN countries, 6 East Asia countries and 2 Oceania countries. The Taiwan government liberalized the visa assess for New Southbound Policy country citizens. Tourism Bureau of Taiwan also targeting to New Southbound Market as their new potential markets for more tourist arrival and tourism revenue.

Tourism bureau placed the advertisement that showing the beauty of Taiwan's major destination in local Newspapers of 18 New Southbound Countries. Tourism Bureau promoted in ASEAN market by using the "Time for Taiwan" slogan which represents the fine dining, romance, LOHAS (Lifestyles of Health and Sustainability), and shopping, targeted to a group tour, muslim travellers and independence tourists, repeat traveller and newly affluent market. In 2017, Taiwan placed the advertisement at 10 printed media in Singapore, the number of printed media in Malaysia. Taiwan tourism bureau used the multi-channel marketing strategy to promote Taiwan in NS markets. As the public relation activities, Taiwan bureau held the tourism fair and participated in Taiwan expo in Singapore and Malaysia. Later of 2017, Taiwan held the Tourism Expo and fair in other New Southbound Market and participated in the several tourism and trade fair in those markets. Tourism bureaus also used other methods of promotion such as outdoor advertising, print media, Internet Media to promote the Taiwan image as Asia's

destination. The Tourism Bureau invited the high-profile travel bloggers and celebrities from ASEAN and other new southbound market and get the celebrities endorsements on those markets.

Taiwan received a total of 2.5 million of tourist in 2018 from as of New Southbound Market. Tourist arrival continuously increasing since 2014 and increased was increased from 1.79 million in 2016 to 2.28 million in 2017. Since 1956, Taiwan received tourist from Malaysia and Singapore and those market were the target of Taiwan tourism industry. In 2017 Taiwan deeply focus on the promotion to those two markets by using several ways of advertisements such as printed media, outdoor ads, tv program and tourism fair. As a result, the total number of tourist arrival from Malaysia and Singapore were much more than the average arrival number of New Southbound Markets in recent years. In 2017, Taiwan expend the tourism promotion to VTPBI³ market as emerging ASEAN markets. The CLM⁴ market was added in 2018 as Taiwan's target market for the tourism development. Table 3.2 shows the tourist arrival and year on year growth rate of ASEAN countries market from 2011 to 2018. Even Taiwan's promotion seems to be more in Malaysia and Singapore market, tourist arrival number did not increase appreciably, moreover, tourist arrival from this market was 0.03 per cent decreased in 2018. The tourist arrival from other ASEAN markets were increased.

Table 3.2. Tourist arrival and year on year growth rate of ASEAN Market

Year	Malaysia and Singapore		VTPBI*		CLM*	
	Arrival number	Year on Year Growth Rate	Arrival number	Year on Year Growth Rate	Arrival number	Year on Year Growth Rate
2011	607497	15.26%	458156	20.90%	6229	22.45%
2012	668285	10.01%	457725	-0.09%	6451	3.56%
2013	759059	13.58%	495445	8.24%	7040	9.13%
2014	815475	7.43%	564505	13.94%	8211	16.63%
2015	824518	1.11%	590781	4.65%	10094	22.93%
2016	881687	6.93%	758080	28.32%	13909	37.79%
2017	953596	8.16%	1158598	52.83%	24808	78.36%
2018	953351	-0.03%	1443367	24.58%	33258	34.06%

source – Taiwan Tourism Bureau

*VTPBI – Vietnam, Thailand, Philippine, Brunei, and Indonesia

*CLM – Cambodia, Laos and Myanmar

The tourist arrival was increased 52.83% in 2017 and 24.58% from VTPBI market and 78.36% in 2017 and 34.06% increase from the CLM market. The noticeable point is the year on year growth rate in 2017. This year is after visa liberalize to those market, the tourist arrival much increased in VTPBI market and CLM market, increased 52% and 78% respectively.

3.3. Other Asia Market of New Southbound Policy Countries

³ Vietnam, Thailand, Philippine, Brunei and Indonesia

⁴ Cambodia, Laos and Myanmar

This market included by India and the other five countries of new southbound policy namely Bhutan, Pakistan, Sri Lanka, Bangladesh and Nepal. The total tourist arrival form that market was very few and it was a very small within 11 years (2008 – 2018). India is a core market in those countries because Indian tourist arrival was six-time higher than the total of other markets as the average number within 11 years. The tourism bureau focus India since many years ago. In 2017, the tourism bureau promoted the industry by advertising in 43 printed media including top newspapers and magazine. Tourism bureau broadcasted Taiwan travel program on the three India TV channels and several internet media such as YouTube Facebook and Twitter. The getting celebrities' endorsement method was the main strategy in digital marketing for the India market. In 2019, Tourism bureau became the partner with Mumbai Metro to promoted tourism by using the outdoor advertisement. In this campaign, the slogan “Taiwan, the heart of Asia” and many Indian celebrities’ endorsements were the core promotional tools to expand the information of Taiwan's destination to the Indian people in the wide of Mumbai Metropolitan city.

Table 3.3 – Tourist arrival and year on year growth rate for India and other NSP market

Year	India	Year on Year Growth Rate	Other NSP Market	Year on year Growth Rate
2008	19,976		3062	
2009	18,555	-7.11%	3285	7.28%
2010	23,849	28.53%	4184	27.37%
2011	23,927	0.32%	4438	6.07%
2012	23,251	-2.83%	4578	3.15%
2013	23,318	0.29%	4425	-3.34%
2014	30,168	29.38%	4891	10.53%
2015	32,198	6.73%	5419	10.80%
2016	33,550	4.20%	6240	15.15%
2017	34,962	4.21%	6887	10.37%
2018	38,385	9.79%	7501	8.92%

Source – Taiwan Tourism Bureau

Taiwan's tourism fair and expo were held in India and Tourism Bureau participated in the trade expo that held in India since 2018. By looking back to the short period (2018 – 2016), Taiwan tourism promotion was very weak in the other five counties of this market. Almost no promotional activity is running targeting to those markets. Therefore, Taiwan received very few numbers of tourist arrival form these markets, only the 54610 tourists were visited to Taiwan within the eleven years form those five countries. The number of tourist arrival and year on year growth rate are presented in Table 3.3. As the year on year growth rate, it was increasing gradually, the average growth rate was 9.63% within the period between 2008 to 2018, it is showing that there is a potential for more tourist arrival form these countries.

3.4. Australia, New Zealand and other Oceania Market

According to the tourism statistics of Taiwan tourism bureau, this market is one of the most important markets for the industry because Taiwan received many tourists since 1956 from Australia and 1963 from New Zealand. The total tourist arrival of Australia and New Zealand was around 98 per cent of total tourist arrival of Oceania Market withing 10 years (2010 to 2020). Among these markets, Australia is the biggest market for Taiwan's tourism industry because the tourist arrival number of Australia market was around 85% in 10 years period. According to the tourism statistics, the growth of tourist arrival number was not stable along the history, increasing and decreasing were shown repeatedly. Therefore, Taiwan target to this market several years ago promoted Taiwan's tourism by using of the multiple way of advertisements to this market. In 2017, the advertisements for Taiwan tourism were published in the Weekend Australian newspaper, seven printed magazines and two Australia TV channels. Promotional activities were being presented in social media such as Facebook, Instagram and Twitter. The outdoor advertisement was also placed in downtown areas of the cities. The public relation activities were the main method of promotion in this market. Taiwan held and participated in several number of public relation event in this market.

Table 3.4 – Tourist arrival and year on year growth rate of Australia and New Zealand

Year	Australia		New Zealand		Other Oceania	
	Arrival number	Year on year growth rate	Arrival number	Year on year growth rate	Arrival number	Year on year growth rate
2008	58,199	12.44%	9,111	3.99%	1245	-2.66
2009	57,147	-1.81%	8,011	-12.07%	1015	-18.47%
2010	62,254	8.94%	8,644	7.90%	1055	3.94%
2011	60,067	-3.51%	9,436	9.16%	1037	-1.71%
2012	63,597	5.88%	10,734	13.76%	1083	4.44%
2013	65,777	3.43%	10,694	-0.37%	1251	15.51%
2014	78,674	19.61%	12,886	20.50%	1559	24.62%
2015	76,122	-3.24%	12,805	-0.63%	1886	20.94%
2016	82,361	8.20%	13,676	6.80%	2189	16.07%
2017	90,892	10.36%	14,639	7.04%	2813	28.51%
2018	102,541	12.82%	16,362	11.77%	2789	-0.68%
2019	134860	10.82%	111,788	9.02%	3241	16.00%

Source – Taiwan Tourism Bureau

Therefore, the tourist arrival number of this market was continuously increasing since the starting year of the diversification policy. In table 3.4, tourist arrival and year on year growth rate from 2008 to 2018 have been presented. Even though the 2015 tourist arrival was decreased from both countries, the tourist arrival was increased again in 2016, 8% from Australia and 7% from New Zealand respectively. The increased number covered the decreased number of 2015 in both countries but this increasing number cannot assume as the effects of

diversification policy. The more duration shall be watched in the future to measure the effects of diversification policy. Even this cannot assume as the reason for the increasing number, it shows that the good potential of policy changes and targeting to this market.

3.5. AMERICAS MARKET

In this market, United State of America (USA) and Canada are the main source of tourist arrival for Taiwan. The average tourist arrival in 64 years (1956-2019) of USA and Canada was 96.7 per cent of the average tourist arrival of the whole market. Therefore, this paper will discuss focusing on the USA and Canada in the Americas market. Taiwan tourism has been advertised to the USA and Canada market by mostly used of public relation campaign and tourism fair. Tourism bureau held the Taiwan tourism fair in the cities of those countries. Moreover, Taiwan promotional activities have participated in the international trade fair held in these countries. The internet media is another mostly used for Taiwan tourism into these countries, the opening of Taiwan promotional pages in social media and collaboration with the famous travel website are noticeable strategies of Taiwan tourism promotion. The celebrities were also invited to Taiwan for the celebrity's endorsement about Taiwan's destination. Printed media, radio program, TV program and outdoor advertisement are the other focus methods of Taiwan's tourism promotion in the USA and Canada market.

Table 3.5 – Tourist arrival and year on year growth rate for Americas market

Year	USA Market		Canada Market		Other America Market	
	Arrival Number	Year on Year growth	Arrival Number	Year on Year growth	Arrival Number	Year on Year growth
2014	458,691	10.78%	88,601	21.88%	18,083	15.23%
2015	479,452	4.53%	90,666	2.33%	18,074	-0.05%
2016	523,888	9.27%	106,197	17.13%	19,252	6.52%
2017	561,365	7.15%	117,687	10.82%	22,997	19.45%
2018	580,072	3.33%	128,456	9.15%	23,950	4.14%
2019	605,054	4.31%	136,651	6.38%	24,549	2.50%

Source – Taiwan Tourism Bureau

The residents of the USA visiting to Taiwan since 1956 and the other Americas resident were visiting starting from 1963. The tourist arrival gradually increasing year on year, it was 766254 persons in 2019 as the total arrival of Americas. In this number the 79 per cent is the arrival of USA resident, 18 per cent is from Canada and only 3 per cent is the total number of other America countries. The tourist arrival number and year on year growth rate are presenting in table – 3.5. The tourist arrival from USA, Canada and other America were continuously increasing in recent years. In 2015, the other America market was decreased by 0.05 per cent of the previous year but it was very small, and the tourist arrival number recovered again in 2016. Therefore, the America market could be assumed as another potential market for the tourism industry of Taiwan.

3.6. EUROPE AND UK MARKET

The EU and the UK market is very important for the tourism industry of Taiwan. Taiwan tourism bureau tried hard to promote this market. The promotion of Taiwan tourism was focusing on the Germany, French and United Kingdom. By looking back to 2017, the tourism promotion activities were more in those countries than the other EU countries. Tourism bureau advertised Taiwan's beauties in 33, 16 and 4 printed media of Germany, UK and French. TV channel programmer were invited to Taiwan for the broadcasting of promotional TV program of Taiwan. The tourism bureau placed the ads in outdoor media and internet media. Taiwan promotional activities we're participating in a lot of travel fair and expo that held around the EU and UK market.

Table 3.6 – Tourist arrival and year on year growth rate of Europe and UK market

Year	EU + UK Total		Germany + French		Other EU		UK	
	Arrival number	Year on year growth rate	Arrival number	Year on year growth rate	Arrival number	Year on year growth rate	Arrival number	Year on year growth rate
2010	203,301		68901		89970		44430	
2011	212,148	4.35%	73726	7.00%	95003	5.59%	43419	-2.28%
2012	218,045	2.78%	76506	3.77%	98763	3.96%	42776	-1.48%
2013	223,062	2.30%	78917	3.15%	101707	2.98%	42438	-0.79%
2014	264,880	18.75%	88886	12.63%	117793	15.82%	58201	37.14%
2015	274,035	3.46%	93318	4.99%	121933	3.51%	58784	1.00%
2016	299,756	9.39%	102178	9.49%	137711	12.94%	59867	1.84%
2017	330,090	10.12%	112805	10.40%	152427	10.69%	64858	8.34%
2018	350,094	6.06%	118017	4.62%	161047	5.66%	71030	9.52%
2019	386,752	10.47%	130101	10.24%	179747	11.61%	76904	8.27%

Source - Taiwan Tourism Bureau

Visitor from EU countries visited Taiwan since 1956, the arrival number was 931 persons as the total of EU and UK market. Among this market Germany, French and UK are the top three arrival number for Taiwan, the 32.87% of total arrival was Germany and French, the 37.16 % of tourist were from UK market and the 29.97% are from other EU countries in 1956. The arrival number was gradually increasing year by year and the share arrival number from other EU countries were also increasing gradually, it reached to 46% of total arrival number in 2019. In table 3.5, the total arrival number of EU and UK market was continuously increasing starting from 2010, as the tourist arrival of Germany, French and Other EU countries, it was no decreased rate in this period but the tourist arrival of UK market was continuously decreased from 2010 to 2012 and recovered in 2013. The diversification policy was started in 2016. Tourist arrival from EU market was continuously increasing till 2019. Even the diversification policy could not describe as the reason for increasing tourist arrival from EU and UK market, this policy could be assumed as the answer of stabilizing of tourist arrival for Taiwan.

3.7. Cruise Market

According to the cruise market watch, the 26.0 million passengers were carried by cruise ships worldwide and earn 45.6 billion USD in 2018. Taiwan is an island, named historically as Formosa. It has 1566.3 km length of the coast and has four main sea entry ports. The tourist arrival from seaports were over 0.6 million, it was a 5.6 per cent of total inbound tourist arrival by the resident. Therefore, the cruise market is one of the important markets for Taiwan's international tourism market. The tourist arrival number from seaport entry points in 2016 was 12% lower than the number of 2015. Tourism bureau Produced the Asia Cruise Cooperation (ACC) handbook in 2017 and place ads in Cruise Travel magazine and handed out ads to enhance the Taiwan image in cruise travel market. Taiwan tourism bureau participated in world largest cruise trade shows and provided subsidies to international cruise business to get the passengers positive impressions. Therefore, the declined tourist arrival number in 2016 was recovered again in 2017, it was 11 per cent higher than the number of 2016 and the arrival number was continuously increasing in 2018 and 2019.

There are four main sea entry port to Taiwan namely Keelung, Taichung, Kaohsiung and Hualien. Among the seaport of Taiwan, Keelung sea port is the most important one because it's tourist arrival number from Keelung sea port was 19% of total arrival number visiting from sea entry points. The other seaport were becoming important since 2000, the share number of tourist arrival was increasing gradually, the arrival number in 2019 was 472101, it was a over 70% of arrival number from sea entry points. The market opportunities and geography advantages are the good opportunities for the development of the cruise industry for Taiwan.

IV. HOW TOURISM INDUSTRY CHANGED DUE TO MARKET DIVERSIFICATION

4.1. Interest of People on Taiwan as A Destination

To understand them of tourism market condition and consumer behaviours of Taiwan tourism market, the Taiwan tourism bureau collected the annual tourism survey. This survey also provided the information to plan international tourism advertising and marketing strategies. The survey reports were published in Tourism Bureau website. In this paper, annual tourism survey data were used to analyze the effectiveness of tourism promotional activities in each target market.

The Tourism Bureau adopted the method of "Quota Sampling" in the survey. Quota Sampling is a one of non-probability sampling technique, that help to research the specific characteristic of each group of the total population. Even it is not a good sampling method for a good representation of the population, it has some advantages such as (i) researcher can control the character of the target groups (ii) it is cheap (iii) it can be done in a short period and (iv) researcher do not build the sampling frame.

The survey results were presented for the period from 2014 to 2018 in table 4.1. The sample size of tourism survey was 6033 persons in 2014. The survey result shows, 3563 persons (59.06% of sample size) were making their decision to visit by seeing the advertisements and tourism report of Taiwan's destination. In 2015, 4181 people saw the ads

and reports of Taiwan tourism promotion before their trips to Taiwan; it was a 57.76 per cent of total sample size. The number of visitors who saw the promotional items were 4398 persons in 7212 persons in 2016; it was 60.98% of the sample of this years. In 2017, the sample was increased to 7320 foreign visitors, the percentage of tourists seeing the advertisements became 60.33% of the sample population. In 2018, the survey showed that the 60.39% of the sample population saw the ads before their trip to Taiwan. Among the people who see the advertisement, over 57 per cent of foreign visitors were seeing the advertisements form internet media in the period from 2014 to 2018. The traveller rate who saw the ads form Tv and radio was declined year by year. It was 47 per cent in 2014 and gradually declining in 2015, 2016, 2017 and 2018 as 41%, 41%, 34% and 27% respectively. Tourist was got the information form their friends or relatives; the rate who hear about Taiwan form their relatives was stable in around 36 % in 5 years. Therefore, the internet net marketing activity namely ads on social media, internet webpage and travel blog which posted in internet media were the most effective method of promotion for Taiwan tourism industry from 2014 to 2018.

Table 4.1: the number of people who saw the ads before their trip to Taiwan

Year	sample size	Made decision By Ads and report (Person)	Source of ads		
			Internet ads (persons)	Tv/Radio (persons)	Recommendati on from others (persons)
2014	6033	3563(59.06%)	3801	2836	2172
2015	7239	4181 (57.76%)	4561	2968	3185
2016	7212	4398(60.98%)	4688	2957	2741
2017	7320	4416(60.33%)	4758	2489	2489
2018	7225	4363(60.39%)	4696	1951	2168

Source – Annual tourism survey of Tourism bureau (2014, 2015, 2016, 2017, 2018)

The visitors who visited Taiwan with the main purpose of sightseeing were assumed the main target of tourism promotional activities in this paper. The influence of sightseeing visitors is shown in table 4.1; around 65 per cent of sightseeing visiting seen the ads and reports before their trip to Taiwan within five years (2014-2018). Therefore, the tourism promotion activities were decided as effected to the traveler decisions for the vacations. The annual tourism survey was done to analysis of visitors' influences on different sources of information about Taiwan. According to the reports of Tourism bureau, in the period from 2014 to 2018, the travelers done by their decision to visit Taiwan by five major sources of travel information namely (a) ads and promotional activities on internet media (b) word-of-mouth recommendations from friends or relatives (c) advertisements on Tv/radio (d) printed media and (e) tourism leaflets of travel agencies. Among them, the printed media were not reported for 2015 and 2016. The visitor also recommended to obtain the travel information in the airport arrival hall, internet media and hotels.

Table 4.2 – Percentage of a visitor who had seen Taiwan's tourism promotion ads

Year	all-purpose	Main purpose of travelling Taiwan		
		Sightseeing	Business	Conferences
2014	59.06%	66.02%	31.95%	49.26%
2015	57.76%	63.85%	32.85%	38.61%
2016	60.98%	65.72	41.87	37.65
2017	60.33%	65.95	36.18	42.35
2018	60.39%	65.92	33.55	39.74

Source – Annual tourism survey of Tourism bureau (2014, 2015, 2016, 2017, 2018)

According to the tourism annual survey, in 2014, the higher percentage of visitors who has seen the ads and read reports were sightseeing visitors from Japan, Hong Kong/Macao, Malaysia, Singapore, Mainland China and South Korea. The Korea left to form the list in 2015 and 2016 and included again in 2017. As shown in table 4.3, during diversification policy, Indonesia, Thailand, Philippines and Vietnam were included in the list. For this reason, this paper decided that the ads and tourism promotional activities were most effective in those countries and the interesting of visitor was increased during the period of market diversification policy in Taiwan.

Table 4.3, percentage of sightseeing visitor by countries who have seen ads and read reports about Taiwan before coming to Taiwan

Year	Japan	Hong Kong /Macao	Malaysia	Singapore	Mainland China	Korea	Indonesia	Thailand	Philippines	Vietnam
2014	70.10	68.97	65.53	61.40	61.34	58.43				
2015	68.44	61.66	62.91	61.16	63.10					
2016	70.19	65.85	68.04	59.70	66.78					
2017	71.11	62.30	71.19	73.05	59.38	54.52	64.67	63.39	51.67	
2018	69.57	58.66	69.9	76.29	59.51		57.81	64.88	62.42	76.30

Source – Annual tourism survey of Tourism bureau (2014, 2015, 2016, 2017, 2018)

4.2. Tourism revenue and tourist arrival

Taiwan preparations for Market diversification policy was in 2016, the policy has begun implementation in 2017. In 2018, Taiwan increased the action on the market diversification to promote the tourism industry and it was continued to 2019 and 2020. In this section, the main factors of tourism revenue namely Tourist arrival by resident, Visitors expenditure per person per day and the average length of stay will be compared by before diversification and during diversification. The data set were selected as three years before 2016 and three years starting from 2016. The period during diversification policy is from 2016 to 2018 and the before diversification policy is from 2013 to 2015. In table 5.1, the indicators for tourism revenue were compared by the periods; the total tourist arrival by resident is continuously increasing but the year on year growth rate was declined in the period of during diversification. The tourism revenue or tourists' expenditure has declined in 2016 and 2017; it was increased again

in 2018 but the value of tourists' expenditure of 2018 was still lower than the value in the period before diversification policy. The average length of stay did not change too much but the value of tourism spending per person per day was declined and the spending per person also declined in the period during diversification.

Therefore, this paper concludes that the market diversification policy does not affect on the tourism revenue positively. The

Table 4.4. Indicators of tourism revenue (2013 – 2018)

Three Year before Market diversification Policy (2013-2015)							
Year	No. of Visitors	Growth Rate (%)	Visitor Expenditures (US\$)	Growth Rate (%)	Spending Per Person (US\$)	Spending Per Person Per Day (US\$)	Average Length of Stay (Nights)
2013	8,016,280	10	12,321,985,916.856	4.70	1537.120	224.07	6.86
2014	9,910,204	24	14,614,617,479.616	18.61	1474.704	221.76	6.65
2015	10,439,785	5	14,387,883,055.709	-1.55	1378.178	207.87	6.63
Three Year During Market Diversification Policy (2016-2018)							
Year	No. of Visitors	Growth Rate (%)	Visitor Expenditures (US\$)	Growth Rate (%)	Spending Per Person (US\$)	Spending Per Person Per Day (US\$)	Average Length of Stay (Nights)
2016	10,690,279	2	13,374,365,387.567	-7.05	1251.077	192.77	6.49
2017	10,739,601	0	12,314,944,742.486	-7.92	1146.686	179.45	6.39
2018	11,066,707	3	13,704,810,748.074	11.29	1238.382	191.70	6.46

Source – Taiwan tourism bureau of Taiwan

V. MYANMAR TOURISM INDUSTRY: OVERVIEW

5.1. Tourist arrival number and tourism revenue in Myanmar

In Myanmar, tourism sector saw improvement with the political reforms that began in 2011. In 2012, tourist arrivals to Myanmar saw a 29% growth rate and reached to 1 million. Tourist arrivals continuously increased to 4.6 million in 2015 and the visitor number was reached to the highest level among the recent years. The NoTA (Number of tourist arrival) was declined again in 2016 and increased again in 2017 and 2018. Even through the total tourist arrival number was increasing in 2017 and 2018 the NoTA from EAO (Europe, America, Oceania) market was decreasing in those years (Box 1). The TR (expenditure by international tourists in the country) was gradually increased to 1.71 of USD in 2017 form 1.02 billion of USD in 2010. The NoTA significantly declined starting from December 2015 and continuing throughout the whole year of 2016, but the TR was not decline in end of December 2015 and the whole year of 2016. The TR was declined in 2017 to 1.97 billion of USD from the amount of 2016, 2.19 billion of USD. In this case, the increase of tourist arrival cannot recover the decrease of TR in Myanmar in 2017. That is why, tourism industry in Myanmar could be recognized as an industry which cannot generate the income for the country in 2017.

5.2.

Box 1 Increase of tourist arrival in 2017 and 2018

In 2017 the international tourist arrival number was increasing to 3.4 million from 2.9 million in 2016. The tourist's arrival number from Asia countries were increased in 2017, it was 10% larger than the number of 2016. Only about a third of arrivals were from the Europe, America and Oceania (EAO Countries) in 2017, tourist arrivals from EAO countries continuously declined till December 2018 due to negative press coverage regarding the problems in northern part of the Rakhing state. The tourist arrival number in 2017 from EAO countries were less than 0.66% of 2016. According to the tourism statistics by MoHT, the decrease of tourist arrival number from those countries were continuing throughout the whole year of 2018, which starting from 2017. The number of tourist arrival in border area was nearly 60.4% of total tourist arrival number and it was the 27.26% increase of the arrival number in 2016. Therefore, the increase of total tourist arrivals could be specified as the increase of arrival from Asia countries and border areas.

Current development policies and tourism industry: MSDP & SDGs

The economic policy of the government of Myanmar (GOM) is based on the people centered, inclusive and continuous development. The twelve economic policies of GOM generally aim to improve the sustainable economic growth and balancing national resource allocation among states and regions. The Myanmar Sustainable Development Plan (MSDP) following the international development goals and to realize the full potential for living happy and productive lives for all Myanmar Citizens (Daw Aung San Su Kyi, MSDP - 2018). The tourism sector of Myanmar has become a priority for contributing to the development of Myanmar's economy. Specifically, tourism can directly contribute to implementing the Goal 3, Goal 4, and Goal 5⁵ and indirectly contributed to the other development's goals in MSDP. However, it needs to be established in good practices of sustainability⁶, implementing in the condition of stable political situation and positive image of the country.

The United Nation targeted “by 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products”⁷ as the target of the Goals 8 “Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all”. To implement this Sustainable Development Goals (SDGs) the countries must improve the “Tourism direct GDP as a proportion of total GDP and in growth rate (SDG indicator 8.9.1)” and “Number of jobs in tourism industries as a proportion of total jobs and growth rate of jobs, by sex (SDG indicator 8.9.2)”.

5.3. Current documented tourism policies in Myanmar: 2012-2018

Tourism policies are being implemented for different kind of purposes in different sub-sectors of tourism industry. The (MoHT-Ministry of Hotel and Tourism) is the leading player for development of tourism industry in Myanmar. The Myanmar Tourism Federation and other tourism stakeholders are cooperating to MoHT in implementing the policies.

The policies by MoHT is focusing on the increase of contribution by tourism sector in national income, minimizing the negative impacts of tourism, improving the capacity of human resources and quality of tourism products, safety for tourists, stakeholder corporation, and building the nation's brand as tourist destination. The MoHT developing the tourism sector in

⁵ Goal 3: Job Creation & Private Sector Led Growth, Goal 4: Human Resources & Social Development for a 21st Century Society, and Goal 5: Natural Resources & the Environment for National Prosperity.

⁶ Good Practices of Sustainability = Sustainable in Economic, Social and Environment.

⁷ <https://sustainabledevelopment.un.org/sdg8>

six main policies and eight main objectives. According to these policies and objectives, the MoHT is focusing the tourism sector to be the most important contributing sector in National

Box 2: The Highlights of Myanmar's Tourism Marketing Policies

The tourism marketing policies were being implemented through the tourism master plan (2013-2020). In the strategic program six, MoHT planned to establish the nation's brand of tourism and to be well known Myanmar as a tourist destination among the global market. The four sub-strategic programs are including in this program. These all sub-programs are important to improve the tourism brand of Myanmar but the only one of the programs is directly relevant to the nation branding and tourism marketing. According to this tourism master plan, the MoHT estimated to spend 486.6 million of US\$ to implement the whole tourism master plan 2013-2030 and the very small amount of estimated budget was allocated for tourism branding and marketing. In this regard, the government spending for tourism marketing needed to be enough for more efficient in introducing Myanmar to our targeted tourism markets. In 2018-2019 fiscal years, the Myanmar Tourism Federation organized the six working committees for tourism promotion in target market such as Japan, Korea, China, ASEAN and Europe countries. The digital marketing committee and sub working committees had been also organized in 2018.

income and to develop the economic opportunities for local SMEs based on tourism sector. Additionally, tourism stakeholders are promoting visa liberalization for tourists who has willingness to visit to Myanmar.

Table 2 is presenting the main purpose of current tourism development policies and action plans in Myanmar and the tourism marketing policies and programs were highlighted in box 2. The three main policies and action plans are running for the development of tourism industry in Myanmar. If those policies were implemented efficiently, the quality of tourism products can be higher, and number of tourist arrival will increase up. On the other hand, the indicators are showing that the tourism revenue cannot be increased only by the improvement of international tourist arrival and quality of tourism products.

The Tourism Master Plan (2013-2020) was planned for the development of hotels and tourism sector since 2013. There are 58 action points under the six main strategic programs, assigned to achieve good result from the nine aims of the Myanmar responsible tourism policy and expected to reach 3.01 million NoTA in 2015 and 7.48 million in 2020. The high target of income generation is \$10.18 billion with 1.49 million jobs in 2020. The plan focusses on the improvement of quality tourism products and tourism institution, protecting environment and historical assets.

In 2018 October, the government tried to counteract the declining NoTA from Europe, America and Oceania countries by replacing with the increasing NoTA from Asia countries. Starting from October, government exempted the visa requirement for tourists from five Asian countries (Japan, South Korea, Macao and Hong Kong) and allowed visa on arrival for Chinese tourists. This helped increase of tourist arrivals in 2018 up to November by 10.91% compared with the same period in 2017 (MoHT). However, the tourist arrival from Asia country are already increasing again starting from 2017. As the above mentioned the condition of 2017, the increase of tourist arrival number cannot generate the income for the country. Therefore, the policy makers must develop the policies to boost the income generation of the tourism sector.

Table 5.1. Purposes of The Tourism Policies and Plans

Sri.	Policies/ Plans	Purpose
(1)	Myanmar responsible tourism policy (2012)	(a) To contribute to the national income by tourism with the huge percentage of contribution. (b) To minimize the negative impacts of tourism. (c) To improve the human resource capacity. (d) To improve the quality of tourism product. (e) To ensure the security for visitors. (f) Improvement of tourism management system. (g) Improving the corporation between tourism stake holders.
(2)	Policy on Community Involvement in Tourism	(a) To improve awareness of environmental and traditional conservation of communities in rural area. (b) To improve external income for communities in rural areas. (c) Improvement of community involvement in tourism and related development programmed
(3)	Myanmar Ecotourism Policy and Management Strategy for Protected Areas (2015-2025)	(a) To minimize the environmental impacts of tourism.
(4)	Myanmar Tourism Master Plan (2013-2020)	(a) To implement the tourism policies. (b) To build positive tourism image and nation brand
(5)	Myanmar Tourism Human Resource Development Strategy and Action Plan (2017 – 2020)	(a) For the improvement of the capacity of human resources in tourism industry.
(6)	Additional Policies and Plans	(a) Improving visa application system. (b) Visa liberalization. (c) Marketing and Nation branding

Source: Based on the current tourism policies of Ministry of Hotels and Tourism

5.4. Major Challenges of Myanmar Tourism industry

Many literatures describing tourism as one of the most important income generators for the countries. According to World Travel and Tourism Council (WTTC), travel and tourism (T&T) sector contributed 10.4% of the Global GDP and created 319 million of jobs in 2018. The Myanmar Sustainable Development Plan (MSDP) following the international development goals and to realize the full potential for living happy and productive lives for all Myanmar Citizens (Daw Aung San Su Kyi, MSDP - 2018). The Income from the tourism industry become a necessary for the implementation of the policies and goals in Myanmar. That

is why, United Nation (UN) targeted to improve the contribution of tourism sector to the countries' GDP and job creation by tourism industry. Another reason is the Ministry of Hotels and Tourism (MoHT) also targeted as one of their important objectives and policies to improve the economic contribution of tourism industry in national income.

The number of tourist arrival significantly declined starting from December 2015 and continuing throughout the whole year of 2016, but the tourism revenue was not decline 2015 and 2016. In 2017 the international tourist arrival number was increasing to 3.4 million from 2.9 million in 2016. The tourism revenue was declined in 2017 to USD 1.97 billion from the amount of 2016, USD 2.19 billion. In this case, the increase of tourist arrival did not recover the decrease of tourism revenue in Myanmar in 2017. In the previous year, tourism industry in Myanmar could be recognized as an industry which cannot generate the income for the country in 2017. As the result of declining income Myanmar tourism industry may not be maintained its employment opportunities in the country. Finally, the economic sustainability of tourism industry in Myanmar might be breakdown in the future. For this reason, Myanmar tourism development-stakeholder need to enhance their policies to boost the income generation of the industry for the national income.

In 2018 October, the government tried to counteract the declining number of tourist arrivals from Europe, America and Oceania countries by replacing with the increasing number of tourist arrival from Asia countries. Starting from October, government exempted the visa requirement for tourists from five Asian countries (Japan, South Korea, Macao and Hong Kong) and allowed visa on arrival for Chinese tourists. It helped increase of tourist arrivals in 2018 up to November by 10.91% compared with the same period in 2017 (MOHT), but the tourist arrival from Asia country were already increasing again starting from 2017 and the increase of tourist arrival number did not generate the income for the country. Another problem for Myanmar tourism industry is *“the weakness of enforcement on the rules and regulations”* in Myanmar. The world economic forum ranked the enforcement of environmental regulation of Myanmar as 125 in 141 countries in 2015. Therefore, the environmental problem could be a big issue in Myanmar's tourism Industry. Zero-dollar tourism, rush increasing, overcrowding in destinations, poor sanitation and other social problems are possible issues that should be considered issues as the impacts of enforcement weakness in rules and regulation. In this condition, higher tourists' number in lower revenue for the country is the big problem for Myanmar's tourism industry.

In this regard, Myanmar tourism development stakeholders needing to develop the policies for different markets of tourism to be an efficient and beneficial industry for Myanmar economy.

VI. FINDING AND POLICY IMPLICATION FOR MYANMAR

5.1. Finding on Taiwan's Experiences

The three main findings are founded as the listed below by studying of Taiwan experiences on tourism promotion and market diversification policy.

- (1) In Taiwan, Market diversification policy can support the tourism promotion activities to be effective and efficient.
- (2) Destination's positive image can be improved through tourism promotion activities under the market diversification policy in Taiwan.
- (3) The implementation of policies, enhancing the tourism infrastructures supports the promotions activities to be effective.

5.2. Policy Implication for Myanmar

In 2018 October, the government attempted to counteract the declining number of tourist arrivals from Europe, America and Oceania countries by replacing with the increasing number of tourist arrival from Asia Market. Starting from October, the government exempted the visa requirement for tourists from five Asian countries (Japan, South Korea, Macao and Hong Kong) and allowed visa on arrival for tourists from mainland China. This, however, has had limited impacts so far, which makes it pertinent for Myanmar to adopt other policies based on international best-practices.

Studying on the Taiwan annual survey reports, market diversification policy cannot boost the tourism revenue in Taiwan. However, tourism promotion activities which implemented under the diversification policy could be recommended to boost the tourism revenue for Myanmar because Myanmar's major challenges are the needs of good strategies to improve the country's good image in democracy and human right issue. Taiwan's tourism promotion strategies lead to improve the implement to increase tourist arrival and tourism revenue for Myanmar, but the following tourism development strategies are recommended for Myanmar tourism development policymakers.

These are;

(1) To be planned step by step planning for tourism industry development. (1st step – planning for foundation of the industry, 2nd step – upgrading and building up the industry).

- According to the Taiwan's experiences, establishing industry step by step is the key of easy manage to get the straightness of the industry. Taiwan established the tourism industry in two stages. Under the "Project Vanguard for Excellence in Tourism (2009-2014)" Taiwan developed the tangible and intangible infrastructure such as renovation of tourist's sites, tourist facilities development and development of rules and regulations. This is a good example of an industry development and a good start for the next step "strengthening the tourism industry" and "Tourism promotion". The basic infrastructures that renovated in first stage supported to Taiwan tourism industry to get the people's recommendation to visit Taiwan in second stage of development. It can make the fulfillment of visitors' expectation on the Taiwan's destinations, as the result, the annual tourism survey shows that the visitor's recommendation is the most effective factors for the increase of tourist arrival number.

(2) To increase the online tourism marketing.

- According to the result of annual tourism survey, use of internet marketing in tourism promotion was the easiest way to inform the target visitors about Taiwan's tourism destination in five years. Moreover, the internet marketing is the easiest way and most suitable way for Myanmar tourism promoters. Inviting the high-profile social influencers is a recommended strategy in promotion activities.

(3) To repair the country's image through market diversification in tourism.

- Since Myanmar's major challenge in tourism industry is the impact of global media, country image is currently needing to be developed as the country which having the freedom of Human rights and religious issue. According to Taiwan's

experience, tourism promotion strategies can show up the country's situation of politics, community, and the others local characteristics. If the tourism is being promoted as the destination which has the goodness of democracy and human rights area, the pressure of major challenge could be declined. As just the author's suggestion, tourism promoters should promote Myanmar as a destination which has beauties of diversity of ethnic and religious instant of only promoting the golden pagodas as the Myanmar's attractions.

Conclusion

Market diversification cannot boost the tourism revenue directly. However, Market diversification policies made the Taiwan tourism promotion to be more effective. Moreover, studying on the market diversification founded that the country's good image could be improved by using the market diversification policies in tourism development. Therefore, this paper can recommend adopting the market diversification policies to repair the country's image for Myanmar.

References

- 2018 Tourism Bureau, R. o. (2018). *Global Focus, Multipronged Advance, Tourism Bureau*. Retrieved from Taiwan, The heart of Asia: https://admin.taiwan.net.tw/upload/contentFile/auser/b/annual_2017_htm/en/c01.html
- Bureau, T. T. (2017). *Eco Tourism*. Retrieved from Taiwan. Heart of Asia: https://admin.taiwan.net.tw/upload/contentFile/auser/b/annual_2017_htm/en/t02.html
- Bureau/Marketing, E. (2019, August 14). *Taiwan Tourism Bureau Partners with Mumbai Metro To Promote Taiwan Tourism*. Retrieved from EVENT FAQs.com: <https://www.eventfaqs.com/news/ef-16113/taiwan-tourism-bureau-partners-with-mumbai-metro-to-promote-taiwan-tourism>
- CrescentRating, M. &. (2016). *Global Muslim Travel Index 2016*. MasterCard & CrescentRating.
- Fulco, M. (2018, December 21). *Taiwan Is Striving to Attract Muslim Tourism From Southeast Asia* . Retrieved from The News Lens: <https://international.thenewslens.com/article/110616>
- Hsin-Yin, L. (2018, 11 23). *AIT designates 2019 as a 'travel year' for Taiwan, U.S.* Retrieved from Focus Taiwan: <https://focustaiwan.tw/politics/201811230018>
- Shan, S. (2018, July 10). *Bureau announces Malaysia, Brunei tourism ambassador*. Retrieved from Taipei Time: <http://www.taipeitimes.com/News/taiwan/archives/2018/07/10/2003696435>
- TAITRA. (2018, 03 29). *Taiwan Expo 2018 in Indonesia Starts on March 29*. Retrieved from Taiwan Trade Center, Jakarta: https://jakarta.taiwantrade.com/news/detail?id=26035&lang=en_US
- Taiwan Tourism Bureau. (2011,2012,2013,2014,2015,2016,2017,2018,2019). *Annual Survey Reports*. Taipei: Taiwan Tourism Bureau.
- Taiwan tourism industry welcomes Muslim travelers*. (2016, february 18). Retrieved from Taiwan Today: <https://taiwantoday.tw/news.php?unit=6,23,6,6&post=12484>

Taiwan, M. o. (2009, April). *Project Vanguard for Excellence in Tourism* . Retrieved from Slide Share: <https://www.slideshare.net/sbrnyak/project-vanguard-for-excellence-in-tourism>

Taiwan, T. B. (2017). *Promotion in Different Markets*. Retrieved from Taiwan, Heart of Asia: https://admin.taiwan.net.tw/upload/contentFile/auser/b/annual_2017_hm/en/a05.html

Taiwan, T. B. (2018). *STATISTICS*. Retrieved from Taiwan, The Heart of Asia: <https://stat.taiwan.net.tw/>

Trade, B. o. (2019, March 25). *Registration for first Taiwan Expo in Surabaya now open!* Retrieved from Taiwan Trade: <https://www.taiwantrade.com/news/registration-for-first-taiwan-expo-in-surabaya-now-open-1775231.html#>

Tzu-ti, H. (2019, 11 07). *Travel and Cuisine, Taiwan to double efforts to woo Muslim tourists*. Retrieved from Taiwan News: <https://www.taiwannews.com.tw/en/news/3812299>

