MYANMAR
2020 ANNUAL RESEARCH: KEY HIGHLIGHTS

GLOBAL DATA 2019

While the global economy grew by 2.5%, Travel & Tourism grew significantly more at 3.5%

1 in 4 net new jobs were created by Travel & Tourism over the last five years

Global GDP impact by sector (2018 data). Share of total economy GDP

<table>
<thead>
<tr>
<th>Sector</th>
<th>Share of Total Economy GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining</td>
<td>0%</td>
</tr>
<tr>
<td>Automotive</td>
<td>5%</td>
</tr>
<tr>
<td>Agriculture</td>
<td>10%</td>
</tr>
<tr>
<td>Travel &amp; Tourism</td>
<td>15%</td>
</tr>
<tr>
<td>Retail</td>
<td>20%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>25%</td>
</tr>
</tbody>
</table>

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

10.3% Total GDP contribution

330MN Jobs globally (1 in 10 jobs)

MYANMAR 2019 KEY DATA

CONTRIBUTION OF TRAVEL & TOURISM TO GDP

4.6% OF TOTAL ECONOMY
Total T&T GDP = MMK5,337.2BN (USD3,671.1MN)

+4.5%
2019 Travel & Tourism GDP growth vs +6.3% real economy GDP growth

CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT

1,073.5 JOBS (000's)
(4.8% of total employment)

INTERNATIONAL VISITOR IMPACT

MMK2,427.4BN in visitor spend (10.3% of total exports)
(USD1,669.7MN)

INBOUND ARRIVALS

- 1. THAILAND 48%
- 2. CHINA 25%
- 3. JAPAN 3%
- 4. INDIA 3%
- 5. UNITED STATES 2%
- REST OF WORLD 19%

OUTBOUND DEPARTURES

- 1. CHINA 73%
- 2. THAILAND 11%
- 3. TAIWAN, CHINA 3%
- 4. SINGAPORE 3%
- 5. SOUTH KOREA 2%
- REST OF WORLD 8%

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

SECTOR CHARACTERISTICS (2019)

- LEISURE SPENDING 55%
- BUSINESS SPENDING 45%
- DOMESTIC SPENDING 42%
- INTERNATIONAL SPENDING 58%

1All values are in constant 2019 prices & exchange rates
As reported in March 2020