Inbound tourism in Bangladesh: The trend of competitiveness

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ABSTRACT

This study presented an overview of Bangladesh's tourism sector, which also strived to identify the opportunities and challenges that warrant policy interventions. Both primary and secondary data were used in this research. It was found that the frequency of inbound tourists' arrival showed a declining trend. The tourism sector's growth cannot keep pace with national growth domestic product though Bangladesh's global rank and score showed an increasing trend. Despite economic upsurging and vast potentiality, Bangladesh could not be a popular destination for foreign tourists. Cultural and natural resources and tourist and airport infrastructure have been identified as the disadvantaged pillars. The country cannot offer cheaper and more comfortable accommodation and transportation facilities. There is a lack of diversity in tourism events and fun-making elements. Online tourist platforms, booking, and financial transactions are not widely available and accessible. Supermall and safe food providing agencies have not been developed across the country. The study advocates for formulating a holistic national tourism policy eyeing achieving sustainable development goals. There is ample scope for developing a regional tourism hub taking Bhutan and Nepal.

Keywords: *Inbound tourism, competitiveness, a regional hub, SDGs, decent work, public policy*

INTRODUCTION

Tourism is considered one of the fastest-growing industries globally and an essential source of foreign currencies for many developing countries (Cucculelli & Goffi, 2015). Tourism has become an integral component of lifestyle and a significant part of economic development across the world. Simultaneously, tourism offers public satisfaction, improved quality of life, nature conservation, and enhanced cultural pride. Likewise, tourism has become a useful tool for employment generation, poverty reduction, cultural and environmental protection. WEF (2019) reported that the growth in global

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tourism exports (+4%) surpassed the growth in merchandise exports (+3%) in 2018, which dispenses the enormous potential for the tourism sector and economies. Emerging economies contribute the lion share to the global trend, becoming more desirable because of greater tourism competitiveness. Therefore, tourism competitiveness has turned into a robust economic growth driver.

There is inwardness among tourists' expectations, destination attributes, amenities, and competitiveness (Dwyer *et al.,* 2014). Therefore, analyzing the challenges and opportunities has become vital essential tourism services and management (Madhavan & Rastogi, 2011). Successful identification of the factors embedding in the tourism sector is crucial to managing tourism appropriately and improving competitiveness. A country's competitiveness depends on its openness, naturalness, climate, recreational amenities, infrastructure, historical and cultural attractions, and available information about the destinations (Madhavan & Rastogi, 2011). The quality of roads and highways, transport facilities, and telecommunication technology influences destinations' selection (Hueng *et al.*, 2001). The tourists perceive many socio-demographic factors before selecting a destination (Mohsin & Ryan, 2004). On the other hand, nature-based tourism is expanding at a faster pace globally (Balmford *et al.*, 2009). Consequently, the underdeveloped and developing countries typically have been receiving more nature lovers. The tourist's *ex-ante* expectations are deeply rooted in tourist amenities, available services, and competitiveness. Nowadays, the tourism industries face tremendous challenges in providing and sustaining tourists' satisfaction (Fang *et al.*, 2020).

Bangladesh is characterized by various destinations like sandy beaches, mangroves, hill tracts, and archaeological sites. Hence, the delightful prettiness of Bangladesh can fascinate foreign tourists. Similarly, Bangladeshi people are famous for their historical hospitality. Consequently, the country has a vast potential to attract foreign tourists (Ahmed *et al*., 2010). The riverine country has ample natural and cultural resources for heightening this industry. The *Sundarbans*, a UNESCO world heritage site, is the largest single block of tidal halophytic mangrove forest globally. Similarly, Cox's Bazaar sea beach is the global longest unbroken sea beach. The south-facing marine line of the Bay of Bengal can tantalize the tourists (Datta, 2018). Besides, the country has developed other cultural, historical, and archaeological sites in different areas. On the flip side, *Bangladesh Parjatan Corporation* (BPC) has developed many hotels, motels, restaurants, picnic spots, duty-free shops, cottages, and other infrastructure. Consequently, Bangladesh has a huge potentiality of attracting foreign tourists and can increase competitiveness.

Despite that, Bangladesh has been receiving a smaller number of inbound tourists than other neighbors compared to the neighboring countries, and the ratio of inbound and outbound tourists is inconsequential (Hasan, 2019). The tourism sector could not keep equal pace with overall economic development. The Gross Domestic Product of Bangladesh grew 8% in 2018 compared to last year; in contrast, the tourism sector rose only 2.59% (BBS, 2019). The local

and domestic tourists' arrival is gradually uprising (WEF, 2019). As a potential ground for domestic and international tourism, Bangladesh also necessitates proper and effective policies (Sayeda *et al.*, 2020; Hassan & Burns, 2014). Hence, this study aimed to assess the growth of this sector over time. The growth of the tourism industry plays a significant role in the booming economy of Bangladesh. Analyzing the trend of the competitiveness index can indicate the development of this sector in the changing environment. Therefore, the paper strived to grasp a glimpse of the current status of inbound tourists. Secondly, the identification of the challenges implanted with inbound tourism is highly necessitated for policy interventions.

CONCEPTUAL FRAMEWORK

World Economic Forum considers 14 pillars: business Environment, safety and security, health and hygiene, human resources, ICT Readiness, prioritization of Travel and Tourism, international openness, price competitiveness, environmental sustainability, air transport infrastructure, ground and port infrastructure, tourist service infrastructure, natural resources, cultural resources and business travel in measuring the competitiveness score. The pillars are categorized into four subindexes: enabling environment, tourism and travel policy and enabling conditions, and natural and cultural resources. Furthermore, these pillars comprise 90 indicators enumerated based on qualitative data generated from the opinion survey and quantitative data from other sources. The responses are coded into a numerical value ranging from 1 (worst) to 7 (best). Finally, the index is calculated as an arithmetic mean of the four subindexes, which are individually enumerated as arithmetic means of their pillars. Each pillar is scored by an unweighted average of the individual components.

Figure 1: Weighing of the pillars (Source: WEF, 2019)

MATERIALS AND METHODS

This study was conducted based on both primary and secondary data. At the outset, a review of literature on tourism in Bangladesh was reviewed to understand where challenges lie for the tourism sector's growth. The time-series data collected from the website of the World Economic Forum (WEF), World Tourism Organisation (UNWTO), and the World Travel & Tourism Council (WTTC). Primary data was collected through key informants' interviews (KKI), which is useful for the researcher who faces confusion in concluding and feels the need for experts' opinions (Ali *et al.*, 2013)**.** A total number of 10 key informants, including academicians and line experts, were interviewed to identify the significant challenges. Beforehand, a loosely structured checklist, including a list of issues to be discussed, was prepared. A free flow of ideas and information was exchanged during KKIs. The content analysis was done considering its uniqueness, which supports qualitative (Dooley, 2016) and quantitative research (Krippendorf, 2004; Neuendorf, 2002; Spencer *et al.*, 2003) in an inductive and deductive way. The collected data was coded into different categories and variables.

RESULTS AND DISCUSSIONS

Growth for the period of 2009-2019

The study revealed that Bangladesh had made progress over the last decade in scaling the global rank and score. In South Asia, India outperformed in developing the tourist sector, followed by Nepal (Table 1). Sri Lank did not develop further though it is in an elevated position historically compared to Bangladesh. Pakistan shows a declining trend staying at the lower place. Considering the incremental growth of domestic products and the Least Developed Countries (LDC) graduation, Bangladesh could not make a noticeable change in the tourism sector.

Table 1: Comparative performances of the South Asian Countries (Source: WEF 2009, 2019)

Country	Rank		Score		Growth since 2009 (%)	
	Year 2019	Year 2009	Year 2019	Year 2009	Rank	Score
India	34	62	4.4	4.09	22.2 (+)	7.6 (+)
Sri Lanka	77	78	3.7	3.82	3.65 (-)	3.1 (-)
Nepal	102	118	3.3	3.25	14.3 (+)	1.6 (+)
Bangladesh	120	129	3.1	3.02	11.3 (+)	2.7 (+)
Pakistan	121	113	3.1	3.33	1.4 (-)	6.9 (-)

Price competitiveness showed the highest score (5.3/7), followed by safety and security (4.9/7), health and hygiene (4.5/7), and business environment (4.2/7) in 2019 (Figure 2). The pillars of health and hygiene and business

environment stood above 100th position out of 140, which indicates that the other countries have also made progress in these pillars simultaneously. The price competitiveness includes airfare ticket taxes and airport charges, which decreases the flight tickets and attracts more tourists to avail flights. Safety and security take into account the prices of everyday crime, violence, and terrorism. Health and hygiene consider access to improved drinking water and sanitation and prevalence to the high prevalence of HIV and malaria. The business environment focuses on foreign direct investment and the cost and time required for construction permits. The pillars like cultural resources and business travel, tourist service infrastructure, air transport infrastructure and natural resources painted a disappointing picture.
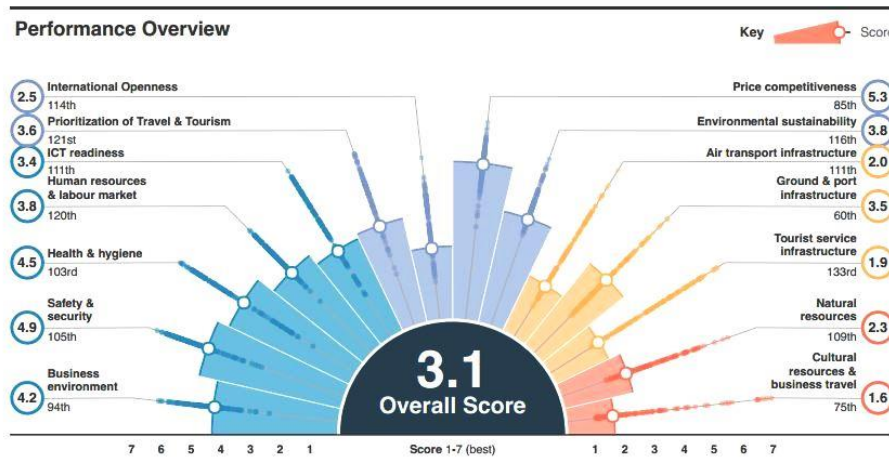

Figure 2: Score of the index components (Source: WEF, 2019)

The trend of inbound tourism

In 2007, Bangladesh received 289000 international tourists, which declined to 125000 in 2019 (Table 2). By benchmarking 2007, it can be argued that the number of international tourists is sharply decreasing. Despite turning down the number, the country is earning more money than in the past. Moreover, 97% of the revenue comes from domestic tourists (WEF, 2019), indicating that Bangladesh is not a popular destination for international tourists.

Table 2: Statistics of inbound arrival and earning trend (Source: WEF, 2009, 2019)

Items	In 2007	In 2017	Change since 2007
International tourist arrivals (k)	289	125	-164
International tourism receipts (M-USD)	76	148.4	+72.4

Challenges for attracting inbound tourists

Among 140 nations, Bangladesh still stands in 109th position in government prioritization of travel and tourism (Table 3). Bangladesh has no clearly defined regulatory and institutional framework for managing tourism (Rahman, 2020a, b; Rahman & Hossain, 2019; Rahman & Alam, 2020). National Tourism Policy 2010 cannot cope with the changing environment, which lacks any guidelines, spelled out the public departments' responsibilities and monitoring tools (Hassan *et al.,* 2020). Bangladesh Tourism Board was founded in 2010, but its allocation of business has been included in its parental ministry to date. *Bangladesh Parjatan Corporation* (BPC) has been providing accommodation and restaurant facilities since 1973 but could not satisfy the tourists due to a lack of professionalism (Rahman & Zaman, 2020). Branding local products are not well familiar though the government has taken initiatives for district and nation branding. The Sustainable Development Goals calls for the branding of local culture and products to create decent employment generations. Tourism development can support local culture conservation by selling local cultural products (Honey & Krantz, 2007). The sustainability of the tourism industry has not been flourished significantly. Without an increased number of inbound tourists, it is difficult for enterprises to sustain for a long time.

Table 3: List of disappointing indicators (WEF 2019; WEF 2009)

Index Component	Rank in 2019	Previous Rank
Government prioritization of travel and tourism industry	109	111
Effectiveness of marketing and branding to attract tourists	128	123
Sustainability of travel and tourism industry development	121	124
The comprehensiveness of annual T&T data	135	129
Natural tourism digital demand	113	115
Automated teller machines number/100,000 adult pop.	120	113
Quality of roads	111	111
Quality of air transport infrastructure	115	113
Airport density airports/million pop.	138	134
Hotel room number/100 pop.	140	135
Quality of tourism infrastructure	116	115
Presence of major car rental companies	121	129
Number of international association meetings (3-year average)	103	95
The stringency of environmental regulations	101	94
Threatened species % total species	112	112
The attractiveness of natural assets	126	116

Particulate matter (2.5) concentration micrograms per cubic meter	140	134

Despite development in the IT sector, there is no national database on the tourism sector from where an annual comprehensive picture can be gained. The status of natural tourism digital demand has been increased significantly. There is a positive relationship between tourism destination and digital demand (Kumar & Kumar, 2020). In contrast, gaps in data adversely affect tourists' destinations and increase the risks of projected failure. The number of automated teller machines number/100,000 adult population decreased in 2019 compared to the past. The roads, air transport, and airport density airports/million people deteriorated slightly in 2019. Hotel room number/100 population is the worst globally. The car rental companies have not been developed significantly. The number of international association meetings decreased than in the past.

The compliance with the environmental laws by the tourists has deteriorated over time. The threatened species' status remains steady, indicating a lack of initiatives in conserving the endangered species. The attractiveness of natural assets fell off rapidly. The natural habitats are confronting climatic (Rahman, 2020b) and anthropogenic pressures (Rahman, 2009; Rahman *et al.*, 2009, Rahman, 2021a, b). The particulate matter (2.5) concentration micrograms per cubic meter are the worst globally, which indicates the waste is increasing day by day. Tourism can be correlated to natural heritage, biodiversity conservation, and communities' revitalization and beautification. Due to increased pressure on the local tourists, the natural habitats become green mayhem (Rahman & Vacik, 2009)**.**

Additional challenges identified by the key informants

The key informants identified many additional challenges that curb the arrival of international tourists (Figure 3). On the other hand, the country could not build any partnership with the neighbors. Therefore, the inbound tourists cannot avail of a single package to visiting multi-countries.
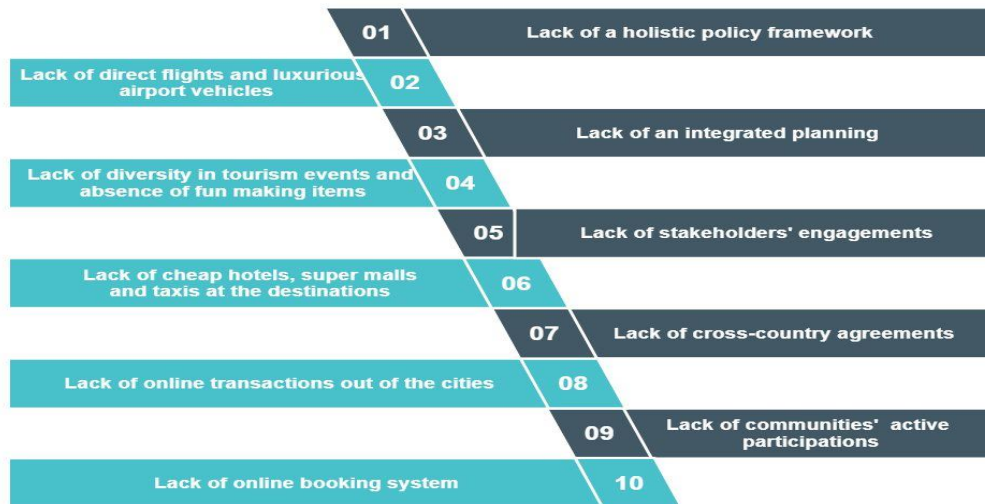
Figure 3: Additional challenges identified by the key respondents

The conservative social prejudice is one of the challenges to attract inbound tourists. According to key informants' perceptions, the country has no strong tourism policies and strategic planning, which play a crucial role in shaping a country's tourism sector. Many developing countries have incorporated international practices in their strategic plans. On the other hand, the active participation of different stakeholders ranging from level to national has not been built up. However, it is highly essential for sustainable tourism, promoting innovation, and building destination capacity. Similarly, the responsibilities of diverse stakeholders are not clearly defined neither in institutional nor policy framework. The engagement of multi-stakeholders in this tourism industry provides additional funding, accelerating developments (Dwyer, 2015). Besides, NGOs and civil society cannot play a prominent role, albeit they can help build capacity (Honey & Krantz, 2007). Likewise, academia, researchers, and training institutes are not visible, developing a skilled tourism-oriented workforce. There is a lack of a structured communication platform that allows all relevant stakeholders to share vision and challenges. Such a platform mainstreams tourism through sharing the best practices (Hoegh-Guldberg, 2015).

Visa and immigration services are very vital to attract tourists from other countries. Ironically, Bangladesh has a severe lacking to provide quick assistance in this regard. Consequently, the number of foreign tourist's arrival is decreasing gradually. Bangladesh cannot offer cheap and comfortable accommodation like a guest house, private house, youth hostel, backpackers, and *Airbnb*. The beforehand online booking via booking dot com, Agoda, TripAdvisor, kayak, and *Expedia* are not familiar in Bangladesh. Very few numbers of hotels have websites describing the amenities they offer. Due to inadequate accommodation facilities, Bangladesh can't explore its beauty to the full brim to the rest world (Akhter & Roy, 2020).

Biman Bangladesh has minimal abroad destinations; consequently, international tourists have come via other countries by spending more money, time, and pain. It is challenging to transact cash by credit card in the local destinations. The international tourists are interested in bearing cash with them. Global fast-food companies like MacDonald, KFC, Starbucks, Pizza Hut, Donuts Dunkin, King Burger, and Subway have not been developed. Likewise, the lounge, supermall, and banquet facilities are not available out of the cities. The key informants also opined that the taxi fare in Bangladesh is highly costly and not easily accessible. People are not trusted with organic food products (Rahman, 2021c). Even at the airport, luxurious taxies are not available. The country cannot offer travel using BMW, limousine, and Mercedes-Benz at a cheaper rate.

Tour information is highly essential for disabled and older tourists during decision-making. They want to know the infrastructure and physical accessibility. A tourist spot must have parking areas, signage, elevators, public toilets, ramps, friendly accommodation, accessible transportation services, smooth entrance, easy paths, distant hand dining, and bars.

The transports are not friendly for the disabled and older people. Though Bangladesh is a signatory country of "United Nations Conventions on Rights of People with Disabilities (UN CRPD)," transport facilities and other infrastructures are mostly inaccessible for the people with disabilities, prohibiting their frequent movements (Akter & Rahman, 2018). The marketing promotion tools like advertising, personal selling, sales promotion, and public relations are not well developed, which have vital roles in upsurging tourism (Latif, 2015). Considering medical tourism, Bangladesh not only lags, but it also loses its patients every year in a continuous stream. The Bangladesh health care system has diminished medical treatment perception (Hassan *et al.*, 2015).

Most people have a lack of English proficiency, which is vital for communication with foreign tourists. This sector's rapid development is related to the English language's practice and fluency, which helps deliver quality service (Zahedpisheh *et al.*, 2017). According to the key informants' opinions, foreign tourists are not happy only with sightseeing. They need fun-making facilities like bar, *shisha*, saloons, spa, massage parlor, disco, night club, men's club, striptease, and even sex service at a cheaper cost. Those are neither available nor accessible to the tourists in our perspectives. There are a few scopes to avail the tourist events like festivals, outdoor games, firework, rides, hiking, biking, swimming, angling, skiing, sailing, diving, canoeing, rowing, kayaking, trekking, snorkeling, underwater scooter, rafting, and skating.

POLICY INTERVENTIONS

A national tourism policy considering the globally changing environment and overarching development programs is warranted to boom the tourism sector.

The policy should be created or reviewed through a highly consultative process that takes all stakeholders, including public departments, private sectors, civil society, NGOs, environmentalists, conservationists, and line experts. Beforehand, the problem should be defined based on evidence-based reliable data. The policy should consider the incremental pressures and opportunities side by side. Any development decoupling environment should not be appraised. Establishing a knowledge and solution-based national tourism platform would be a giant leap to disseminate knowledge and skill across the country. Tourism strengthens local employment and supply chains, but the community loses control of its resources in some cases. Capacity building, accompanied by providing incentives, may bring tangible positive changes to the host communities. Special attention is needed to create decent jobs eyeing local prosperity, equity, and wellbeing. The policy should emphasize environmental and biodiversity sensitivities. The collected revenue may be used for the local development to aspire the community. Initiation of community-based tourism may improve their living standards and unity, helping minimize local disputes and crimes.

Massive institutional reform of Bangladesh *Parjatan* Corporation is advocated to upgrade the services they offer at a cheap rate. India has developed roadside eating joints, *Dhabas* stationed on highways, which provide the authentic taste of the food at a more reasonable rate. The *Dhabas* are considered popular stopovers as well as destinations for travelers, including foreigners. Bangladesh *Parjatan* Corporation can follow the Dhabas' concept to offer cheaper and tasty food. The competency of the staff should be enhanced by imparting more professional training. Bangladesh Tourism Board can be proactive in branding the nation and the locality simultaneously. A crash program is necessitated to boost up the branding and marketing activities. Therefore, the "Beautiful Bangladesh" campaign should be overhauled. This board can play the role of coordinator and focal point of sustainable tourism.

Biman Bangladesh Airlines should increase the outside destination coverage to decrease the inbound cost of transportation. An easy entry channel is a prerequisite to attract international tourists. The country should host more international events to promote inbound tourism. Road safety is a highly essential element of flourishing tourism and for achieving SDGs. Special attention is also warranted to minimize the number of road accidents. Bangladesh should develop affordable accommodation for foreign tourists. Initiatives are required to make *Airbnb* more popular. The peer-to-peer accommodation system can motivate disabled foreign tourists to visit Bangladesh.

Together with Bangladesh can an initiative to build a regional hub taking Bhutan and Nepal, visa-free countries for Bangladeshis. Therefore, foreign tourists shall be able to visit these three countries under a single arrangement. The country should follow a global standard visa and immigration policy to ensure the availability and accessibility of quicker facilities and services.

Hence, the policy planners should formulate effective and automated visa and immigration system networks across the country. The kiosk system may be installed in remote tourist spots to access online information rapidly. '*Omotenashi*', Japan's customer service culture, can be adopted for the tour operators to change their behavioral psychology. The automated vending machine in the spot can quickly provide essential items like snacks, beverages, cigarettes, and different lottery tickets to the tourists, which are very important to upscale the tourism (Latif *et al.,* 2014).

From the religious and social points of view, society may not accept fun-making items here and there. Considering the potentiality and natural beauty, *Cox's Bazar-Teknaf* Marine Drive can be developed as a foreign tourist's warm spot like Cancun, Mexico, Casablanca, Morocco Denpasar, Bali, Indonesia, which will offer all international tourist facilities. Cultural exchange and contact between different races and nationalities can underscore the tourism sector. Cultural Tourism can help in cementing cooperation among nations and build bridges among people of different cultural backgrounds. The culture and heritage of tribal people can be an excellent source of cultural tourism. *Pahela Baishakh* (the first day of the *Bangla* New Year) and *Halkhata* (opening a new business) can be a national branding culture to attract international tourists. Promoting cross-cultural exchange can build new regional and global gestures of understanding between states. Correspondingly, emphasis should be given to hosting more academic and scientific regional and international workshops, symposia, conferences, summits, and congress. The scientific conference is an essential platform for scientists to present their research to the scientific community, receive feedback, publish and disseminate them. Bangladesh has greater scope to be a venue of T-20, one-day series, and test series of cricket taking the regional countries like India, Pakistan, and Sri Lanka. As a national game, Bangladesh can arrange the *Kabaddi* World Cup for both males and females. Bangladesh should develop a higher quality health care system to develop inbound tourism and minimize outbound medical tourists' flow. Constructing improved infrastructure can attract more devotees from different countries in the *Bishsho Ijtima*.

CONCLUSIONS

Inbound tourism has vast potential for earning foreign currencies throughout the country. However, there are many challenges to attract more international tourists. Cementing coordination among public departments, private sectors, and the communities can expedite acceptable management practices and ensure sustainability. The private sector should be encouraged to create other tourism enterprises that can create an ample opportunity for the community and nature conservation. A collective mindset shift is highly essential to be opportunistic on an equal basis. SCP (structure, conduct, performance) framework can be developed through Public-Private Partnership (PPP) to

harness the full potential of tourism in Bangladesh, which in turn will enhance "know-how."

Bangladesh is considered a forerunner in achieving agenda 2030. The country has taken the aspiration of a 'whole society approach" and "no one is left behind" to achieve environmental, social, and economic sustainability. The growth of the sustainable tourism sector is deeply rooted in these aspirations. The SDG's target 12.b stressed developing and implementing tools to monitor sustainable tourism's impact on job creation and promoting local culture and products. Tourism can play a vital role in conserving local culture by selling local products and increasing employment. On the flip side, target 8.9 calls for devising and implementing national policy to promote eco-tourism to generate decent jobs. The growth of tourism is not only interconnected to economic and social development but also with achieving SDGs. An updated and holistic national tourism policy is warranted to incorporate the zeal of the 'whole society approach" and "no one is left behind."

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