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Measuring the Competitiveness of Travel and Tourism Sector of Bangladesh

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ABSTRACT

The intensity of competition among the travel and tourism destinations is increasing all over the world. As Bangladesh would like to draw attention of the world tourism community, it should have clear understanding about its competitive dimensions. This study aimed to address such issues of the travel and tourism sector of Bangladesh. The objectives were (i) to sketch the current competitive scenario of Bangladesh as a tourism destination; (ii) to identify the competitive strengths of the sector; and (iii) to investigate the major weaknesses that hinder Bangladesh to be converted into an attractive travel destination. The study has been carried out based on the secondary data and information. Those have been collected from reports, journals, books, newspapers, and online sources. Nature of the data is quantitative; some qualitative observations have been added to supplement the data. Till now Bangladesh is not a significant player of the sector in the global or even Asian perspective. In the South Asian context, the competitive position is getting better slowly. The contribution to the GDP and employment generation is increasing. International tourism receipts also have a positive trend. Ground port and infrastructure, Cultural resources and business travel, Price competitiveness, Business environment, and International openness have been identified as the key strengths. Inadequate quality hotel rooms, Particulate matter concentration, Low airport density, Comprehensiveness of relevant data, Absence of major car rental companies etc. have been traced out as the weaknesses. Concerned policymakers, travel agents, tour operators, tourism investors, and researchers will gain insights which might help them to formulate further tourism planning and strategies.

1. INTRODUCTION

The mentionable advancement of transportation and communication technologies has reduced the complexities of travel and tourism. Now people can roam around the world with lower stress and limited budget. These facilities have accelerated the pace of travel and tourism business worldwide. As a result, the intensity of competition among the tourism destinations has also been increased. The industrialist nations regularly keep, maintain, and analyse concerned data to formulate effective strategies. As a dynamic field of study, they also conduct travel and tourism research regularly. It helps them to initiate different (short, mid, and long) term planning for the sectorial development. It also helps them to monitor the expected outcomes.

The less developed and developing countries like Bangladesh cannot do it regularly. In that case, the travel and tourism competitiveness index (TTCI) is treated as one of the useful sources to the active stakeholders. To compile, compare, and dig out the meaningful insights, this study has been carried out. Based on the different editions of TTCI and other relevant documents, this study has attempted to measure and present the competitive scenario of travel and tourism sector of Bangladesh.

A. Theoretical Background

Consumption of service products like tourism is gradually increasing all over the world. Now many people keep separate budget each year to travel in diverse destinations of home and abroad. In spite of having many alternative spots, competition is increasing among some specific tourism destinations of each country. The image, costs, convenience of travelling and promotional efforts of the destination management organizations (DMOs) generally determine its level of intensity. In earlier days, only the international competitions would be taken into consideration. But gradually the domestic competitions are also being intensified. For this reason, most of the destinations are working hard to win in the stiff competition – inside and outside of the country – which has been an unavoidable factor to many of them.

i. Understanding Travel, Tourism, and Competitiveness

Most of the cases, travel and tourism are used as synonymous. But to the tourism practitioners, travel is a part of tourism activity. Nowadays competition is very wide and diverse in nature in the tourism sector. Because concerned industries have to face their competition separately as well as part of tourism sector. So, in the tourism focused countries basically the tertiary data are used to understand the scenario of competition of the travel and tourism industry. To some extent, it is about impossible to separate the fields. For this reason, they talk about the issues jointly.

Tourism is considered as a significant contributor to the employment creation, foreign exchange earnings, tax revenue and many other indirect sectors of a nation. Many countries have shifted their focus to the tourism and its related fields as it is treated as the 'smoke free' industry all over the world. Tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes (UNWTO, 1995).

Traveling is the one of the most ancient tasks of human civilization. The features of travel activities change gradually. Especially the move from mass tourism to customized tourism has made it diverse in nature. Nowadays, for the different purposes, the people are travelling around the world. A significant portion of them is travelling only for tourism purpose. Their travel behaviour is also being changed in a mentionable volume (Fesenmaier & Xiang, 2014, p. 556).

Competitiveness of a destination depends on many factors like understanding and co-creating values with its active stakeholders (e.g. tourists, tour operators). When these tasks will be more functional, the destination will become more competitive (Li, 2014, p. 22). As the market environment constantly changes, to keep the clients satisfied 'innovation' is highly required (Neuhofer & Buhalis, 2014, p. 130). Otherwise, the competitors might offer improved something in better ways. To enhance competitiveness and attractions, understanding the nature of competition is highly needed. If someone fails to do so the confusion among the target market might be created which is much harmful for winning in the competition (Sangsue, 2014, p. 240). Best combination of resources and leadership might bring the best outcomes from the competition of tourism destinations. In this case, leadership in tourism bodies and closely related organizations has significant role.

ii. Competitiveness factors in the travel & tourism industry

The notion 'competitive destination' contains two elements: destination and competitiveness (Kozak & Andreu, 2006). Comparative (availability of resources) and competitive (ability to utilize the resources effectively) both aspects are generally taken into consideration to determine competitiveness of any destination. Before formulating strategies for any destination, the policymakers would like to visualize the overall and specific competitive scenario. The industrialist nations generally do it for domestic and international market places separately. Nowadays, competitiveness has become one of the common concepts to explain as well as practice the sustainable tourism development worldwide (Kozak & Andreu, 2006). With the intensity, the characteristics of competition are being diversified. It is said that the long term competitiveness of a tourism destination is determined in great extent by the balance between cooperation and competition of business in tourism industry (Wang & Krakover, 2008). For this reason, to win in the competition, the travel and tourism business organizations have to work through mutual understanding.

Michael Porter has tried to explain why some nations are more competitive than others; why some regions within countries are also more competitive than others (Evans, Campbell, & Stonehouse, 2003, p. 184). The most comprehensive framework so far has been developed by Ritchi and Crouch (Ritchie & Crouch, 1993). Their model distinguishes comparative and competitive advantages on five key layers. Those are: qualifying and amplifying determinants; destination policy, planning and development; destination management; core resources and attractors; and supporting factors and resources. They have developed a comprehensive list of indicators combining subjective consumer measures and objective industry measures for each of 32 destination competitiveness components (Mazanec, Wober, & Zins, 2007). For this reason, many countries have measured their competitiveness by using this model.

On the other hand, Dwyer & Kim (2003) have introduced another model for measuring destination competitiveness. They have focused on endowed resources, supporting factors, destination management, situational conditions, demand factors, and market performance indicators. In another study, Enright & Newton (2004) tried to determine the weight of tourism attractors and business characteristics of any destination's competitiveness. According to their study in Hong Kong, Singapore, and Thailand: 15 attractors and 37 business factors generally determine the level of competitiveness of a destination.

Different elements are taken into consideration to determine the level of competition. Some researchers use a set of six factors to determine the competitiveness of any tourism destination. Those are: natural and cultural resources, amount and quality of accommodation and restaurants, accessibility to transportation system, all the activities available at the destination, tourist safety, and behaviour of the local residents (Cracolici & Nijkamp, 2008). In case of MICE tourism (conference site selection) Go and Govers have identified seven attributes which determine the level of competitiveness: facilities, accessibility, quality of service, overall affordability, location image, climate and environment, and attractiveness (Kozak & Andreu, 2006).

Another study shows that tourism destination, as a unique experiential product, is also judged by tourists on its price competitiveness. In this case, two major categories of prices are included: travel cost and ground cost (Meng, An Examination of Destination Competitiveness from the Tourists' Perspective: The Relationship between Quality of Tourism Experience and Perceived Destination Competitiveness, 2006). As the tourism authorities of Bangladesh do not carry out rigorous study on competitiveness, the reports of global organizations become helpful to gain an overall idea of the on-going competitive scenario in the regional as well as global perspective.

iii. Competitiveness among the destinations

As the trend of travelling has been increased worldwide, the characteristics of competitive forces have also been changing continuously. Such changes in the competitive environment have forced tourism destinations to provide higher quality services and added value to the travellers (Martinez, Galvan, & Lafuente, 2014). Now competitive destinations are trying their best to offer maximum value so that the tourists become delighted. Service providers intend to offer such services that the tourists become loyal to their spot and travel the place repeatedly. Besides, their word of mouth (or viral marketing) can play significant role to enhance the destination image.

One of the most significant advancement in destination marketing, in recent years, is the use of destination vision as a framework for the marketing process (Avraham & Ketter, 2016). Tourism oriented different nations are setting their visions for the 2030 or 2050. They are also working hard to achieve that position. It makes the task more specific, measurable, attainable, realistic, and time-bound. In this case, well-planned marketing program is essential to attract tourists in heritage destinations (Hasan & Jobaid, 2014). According to the responsible authorities, Bangladesh is trying to develop tourism sector as one of the persuasive instruments to increase the competitiveness in the local and global market (Bhuiyan & Alam, 2014). But the irregular and non-integrated initiatives are clearly noticed. Competitors are always offering new, lucrative, and distinctive features. The tourists are also being interested to 'try' new things. Studies show that the current competitiveness in the marketplace makes it very difficult to create brand loyalty (Reid & Bojanic, 2006).

Though many factors play significant role to determine the level of competitiveness, price is always considered as the key determinant (Mazanec, Wober, & Zins, 2007). But in another 'cause-effect' study, the mechanism of non-price competition has been revealed (Mangion, Durbarry, & Sinclair, 2005). To ensure competitiveness of a destination, continuous monitoring is very important. Gooroochurn & Sugiyarto (2005) have condensed 23 monitoring criteria under 8 main indicators of competitiveness of any tourism destination.

When several competitors aim at the largest segments, the inevitable result is heavy competition (Kozak & Andreu, 2006). For the inabilities to fight with large companies, the small competitors find 'niche market' to gain desired growth. Technological evolution, consumerism, and the internationalization of competition are merely some of the market conditions which impose the increased levels of rivalry in the industry. Dealing with such challenges requires that companies become more adaptive to their market environment (Gounaris, Panigyrakis, & Chatzipanagiotou, 2007). To do so, the plans must be updated time to time by understanding the trends of the market. Without doing so, isolated development programs will not give expected results as the tourists compare the alternative options before selecting a spot for their next tour.

To enhance competitiveness of Bangladesh, the responsible bodies are Ministry of Civil Aviation and Tourism, Bangladesh Tourism Board, and Bangladesh Parjatan Corporation (Hassan & Burns, 2014). Different academic publications do the claim that they are not effective enough to play their role like its competitors. Even the tourism policy is drafted only in Bengali language. It creates communication barriers to the interested foreign investors, network partners (Embassies, travel agents, tour operators etc.), and potential tourists. The lack of integrated approach in this regard is clearly noticed.

B. Research Questions and Research Objectives

Based on the above discussion, to find out answer of the following research questions, the study has been conducted: What is the competitive position of Bangladesh in global and regional perspective? And what are the key competitive strengths and weaknesses of the tourism sector of Bangladesh? To address these pertinent questions, three research objectives were set. Those are – (i) To sketch the current competitive scenario of the travel and tourism sector of Bangladesh; (ii) To identify the competitive strengths of the travel and tourism sector of Bangladesh; and (iii) To investigate the major weaknesses that hinder to enhance the travel and tourism competitiveness of Bangladesh.

C. Rationale of the Study

Before formulating effective strategies, the competitive scenario of the industry must be sketched properly. If that can be done, further tasks become easier. It would be better if specific research could be carried out to explore the actual scenario, of the travel and tourism competitiveness of Bangladesh, to draw a complete picture. But till now, such initiatives have not been taken by the concerned authorities. In that case, the TTCI can be taken into consideration to get an overall idea about the potential industry.

As the representative authority, United Nations World Tourism Organization (UNWTO) is regularly publishing reports from 2007. Around 140 nations–based on the availability of data–are included in the indexes which actively take part in the travel and tourism business. These reports present overall scenario of the tourism competitiveness of the included countries. Based on those data, the study has organized, compared, and presented available data which can be helpful to draw a rough picture of competitiveness of Bangladesh as a tourism destination.

2. MATERIALS AND METHODS

The study has been carried out based on secondary data and information. Those have been taken from international reports, academic journals, books and some other sources. Nature of the data is quantitative. But some qualitative observations have been reflected to supplement the available data. To understand the intensity of competition among the (data available) countries, an index is published regularly from 2007 by the United Nations World Tourism Organization (UNWTO) with the collaboration of World Economic Forum (WEF). Initially they would publish it annually, now they do publish its each edition after two years. The jointly published reports of these two organizations have been taken as the basis of the study. Besides, some other published materials have been taken into consideration.

To prepare the index, they take help of the selected representatives of each country who collect and analyse data on behalf of them. They provide similar guidelines to the partner institutions so that the outcomes become homogenous and comparable to each other. In case of Bangladesh, Centre for Policy Dialogue (CPD) works, from the very beginning, as the partner institution and provides required supports to produce the competitive index.

Based on the 14 pillars of tourism competitiveness the assigned institution collects data and integrate them in an organized manner. It also categorically mentions the changes in the current situation from the previous edition. So the gradual changes are clearly noticed in each version of the report. It also forecasts the potential changes (contribution) of the sector in the long-term like 2020, 2025 and 2030. UNWTO (Madrid, Spain) and WEF (Geneva, Switzerland) have published 7th edition of the report in 2017. Earlier editions were published in 2007, 2008, 2009, 2011, 2013, and 2015. It collects data of approximate 140 countries and presents the findings under the pre-set pillars.

Based on the availability of data, the total number of participating nations slightly varies in its different editions. To some extent, they use the data of Travel and Tourism Council (London) and some other organizations with due credit. As Bangladesh does not conduct such sort of research at its own management, TTCIs at least give overall assumptions on the changes regarding competitiveness of the tourism sector and its closely related issues. The main limitation of the study is: the data is taken from a single source. It would be better if the data of different sources could be used but the challenge of 'comparison' is very high in that case. For this reason, this approach has been used.

3. RESULTS AND DISCUSSION

Tourism system is subject to many influences and pressures that arise outside the system itself. It consists of a vast array of phenomena which broadly impact all human activities and which are therefore not specific to the travel and tourism industry in their effects (Kozak & Andreu, 2006). But in a single study, only a limited scope can be covered. Here, to attain the research objectives the following analyses and findings are presented:

A. Top Ranked Global and Asian Competitive Countries in Travel & Tourism Business

Before talking about Bangladesh, It is better to have a look on the global and regional leading competitive countries; it will help to understand the overall scenario. As the industrialist countries emphasize on becoming more competitive, their positions also changes in the different editions of the index. The following table has presented the scenario:

Table 1
Top 10 countries in global travel & tourism competitive index

Rank	2007	2008	2009	2011	2013	2015	2017
1	Switzerland	Switzerland	Switzerland	Switzerland	Switzerland	Spain	Spain
2	Austria	Austria	Austria	Germany	Germany	France	France
3	Germany	Germany	Germany	France	Austria	Germany	Germany
4	Iceland	Australia	France	Austria	Spain	USA	Japan
5	USA	Spain	Canada	Sweden	UK	UK	UK
6	Hong Kong	USA	Spain	USA	USA	USA	USA
7	Canada	UK	Sweden	UK	France	Australia	Australia
8	Singapore	Sweden	USA	Spain	Canada	Italy	Italy
9	Luxemburg	Canada	Australia	Canada	Sweden	Japan	Canada
10	UK	France	Singapore	Singapore	Singapore	Canada	Switzerland

Source: All editions of World Travel & Tourism Competitiveness Report, jointly published by United Nations World Tourism Organization (Madrid) and World Economic Forum (Geneva).

In this table, it is shown that Germany is doing well from the very beginning. Though in the beginning Spain was not listed as the top ten countries, within eight years, it has gained the top position in 2015. And till now it holds the position with pride. Just the opposite condition is noticed for the Switzerland. It was top rated from the beginning. In 2015, suddenly it falls in 6th place and lastly downed to the 10th position!

The progress of France is also noticeable. It was included in the top ten countries in 2008 edition. By facing different ups and downs it owns the 2nd position in the 2015 edition. It has been maintained in the following edition. USA and UK have maintained their middle position without major fluctuation. Austria was doing very well in the beginning stage but now it has lost its leading position. Among the Asian nations, Japan has occupied the 4th position in the latest edition. Though Singapore was doing well in the initial years, now it is out of the top ten countries.

In case of Asian countries, only one or two nations can include themselves in the global top ten competitive ranking. Initially the index was comparatively stable but now the rate of fluctuation is high. It indicates that some Asian countries are also being attentive to enhance their competitiveness in tourism business. List of the major (earlier and current) players of this region is as follows:

Table 2
Top 10 Asian countries in global competitive index

Rank	2007	2008	2009	2011	2013	2015	2017
1	Hong Kong	Hong Kong	Singapore	Singapore	Singapore	Japan	Japan
2	Singapore	Singapore	Hong Kong	Hong Kong	Japan	Singapore	Hong Kong
3	UAE	Japan	Japan	Japan	Hong Kong	Hong Kong	Singapore
4	Japan	Korea Rep.	Korea Rep.	UAE	Korea Rep.	China	China
5	Taiwan	Malaysia	Malaysia	Korea Rep.	UAE	Malaysia	Korea Rep.
6	Malaysia	Qatar	UAE	Malaysia	Taiwan	Korea Rep.	Malaysia
7	Qatar	UAE	Qatar	Taiwan	Malaysia	Taiwan	Thailand
8	Korea Rep.	Thailand	Thailand	China	Qatar	Thailand	India
9	Thailand	Bahrain	Bahrain	Bahrain	Thailand	Qatar	Indonesia
10	Jordan	Taiwan	Taiwan	Thailand	China	Indonesia	Qatar

Source: All editions of World Travel & Tourism Competitiveness Report, jointly published by United Nations World Tourism Organization (Madrid) and World Economic Forum (Geneva).

Though Japan was in the third or fourth position in the earlier editions of TTCI, in last two reports it owns the top position among the Asian countries. Singapore and Hong Kong both nations have downgraded in the recently published indexes. Korea Republic is holding the mid level position every time. With noticeable ups and downs Malaysia is also holding the same level position. Thailand, more or less, stands in the bottom of the top ten lists. In the latest edition, India has placed 8th position among the Asian countries. Taiwan, Indonesia, and Bahrain do struggle to be in the top ten lists. Qatar was doing well in the initial stage but now they are out of the Asian top ten ranks.

As Bangladesh basically competes in the regional market, a comparative scenario has been presented below from the different editions of TTCI:

Table 3
Competitive position of Bangladesh among the South Asian countries

Country/Year	2007 (124)	2008 (130)	2009 (133)	2011 (139)	2013 (140)	2015 (141)	2017 (136)
India	65	65	62	68	65	52	40
Sri Lanka	79	73	78	81	78	63	64
Pakistan	103	111	113	112	112	125	124
Nepal	106	116	118	125	122	102	103
Bangladesh	120	127	129	129	123	127	125
Bhutan	---	---	---	---	---	87	78
Maldives	---	---	---	---	---	---	---

Note: Maldives is not included in the TTC ranking. Bhutan has been included in last two editions. Source: All editions of World Travel & Tourism Competitiveness Report, jointly published by United Nations World Tourism Organization (Madrid) and World Economic Forum (Geneva).

In South Asia, India and Sri Lanka holds the first and second position consecutively from the very beginning. But in last two editions, they have achieved mentionable progress in the world ranking. In 2011, India was 68th in the global index whereas they have achieved 40th place in the 2017 report. On the other hand, Sri Lanka has placed 64th in the latest report from the 81st position in the year 2011. Pakistan is losing its competitiveness gradually in each edition. They started in 103rd position in 2007 but now their position is 124th in the world ranking.

Nepal has also done badly (especially after the massive earthquake) in the ranking. After mentionable ups and downs, now it holds 103rd position which is the 4th place among the South Asian countries. Bhutan was not included from the beginning of this report, they have been incorporated in last two editions and just in second edition it has stepped nine steps ahead within two years. Though Maldives have a reputation for the tourism business (39.6% direct contribution to the GDP in 2017) they are not included in the index yet (World Travel & Tourism Council, 2018). The concerned authority generally excludes the countries where the required data are not available for evaluation and comparison.

B. Competitiveness of Bangladesh in Travel & Tourism Sector

To understand the competitive position of any country, some key information should be seen at a glance. The

TTCI presents these data in the first two sections to give an overall idea about the discussed country. In case of Bangladesh, the key facts are organized in the following way:

i. Key Indicators of the Travel & Tourism Economy and Industry:

Table 4
Key indicators of the economy of Bangladesh

Years	2005	2006	2007	2009	2011	2013
GDP (US$ billions)	60.8	64.9	73.7	94.6	113.9	---
GDP (PPP, US$) per capita (estimates)	2011	2130	1311	1487.3	1909.5	3167
Real GDP Growth (per cent)	6.2	6.4	6.3	5.6	6.5	6.1

Note: The years vary because of the dissimilarity of published economic data. Latest available data have been used to prepare the index. Source: All editions of World Travel & Tourism Competitiveness Report, jointly published by United Nations World Tourism Organization (Madrid) and World Economic Forum (Geneva).

The table shows that there are ups and downs in the economy of Bangladesh. The size of the GDP is gradually expanding; purchasing power of the people is far better now than other underdeveloped and even developing countries. The real GDP growth rate is really mentionable as it is always above 6% for last 10 years. The economy of Bangladesh is getting solid foundation gradually which is the pre-condition for the expansion of travel & tourism economy of any country.

Table 5
Travel & tourism economy of Bangladesh (estimates)

Years	2006	2007	2008	2010	2012
GDP (US million)	2350	2601	2964	3786	5775
Percentage of total GDP	3.7%	3.9%	3.9%	3.9%	4.7%
Employment(1000 jobs)	2181	2024	2065	2373	2992
Percentage of total employment	3.0%	3.1%	3.1%	3.1%	4.1%

Note: From the 2015 edition, data related to the tourism economy are not provided in the report. Source: All editions of World Travel & Tourism Competitiveness Report, jointly published by United Nations World Tourism Organization (Madrid) and World Economic Forum (Geneva).

The table shows that the size of the travel & tourism economy of Bangladesh is expanding gradually. Contribution of the travel & tourism in GDP and employment both are following the same trend. Within six years (2006-2012) the GDP has been more than double. The rate of contribution has also increased from 3.7% (2006) to 4.7% in 2012. The rate of employment has also been increased from 3.0% to 4.1% in this tenure. In last two editions of the reports this information is not provided. Rather, they are emphasizing on presenting the tourism economy.

Table 6
Travel & tourism industry (estimates)

Years	2006	2007	2008	2010	2012	2013	2017
GDP (US$ million)	945	998	1185	1613	2756.2	2845.8	5193
Percent of total GDP	1.5%	1.5%	1.6%	1.7%	2.3%	2.1%	2.4%
Employment (1000 jobs)	851	752	801	984	1377	1328.5	1138.7
Percent of total employment	1.2%	1.2%	1.2%	1.3%	1.9%	1.8%	2.0%

Source: All editions of World Travel & Tourism Competitiveness Report, jointly published by United Nations World Tourism Organization (Madrid) and World Economic Forum (Geneva).

Size of the travel & tourism industry of Bangladesh is expanding regularly. In last 10 years, it has been six times more. In 2006, the travel & tourism GDP was US$ 945 million whereas in 2017 it has been US$ 5193 million. On the other hand, employment of the sector has not been increased in the same level. In the both cases, the rate of contribution has grown up. For GDP, it has been 2.4% which started at 1.5%. Earlier travel & tourism employment was 1.2% (8,51,000 jobs) which is not 2.0% (1,13,87,000 jobs). Employment opportunities have not been created as per the growth of the industry.

Table 7
International tourist arrivals and tourism receipts

Years	2005	2006	2007	2008	2010	2013	2017
International tourist arrivals (Thousands)	208	200	289	467	303	148	125
International tourism receipts (US$ millions)	70	80	76	69	87.1	128	148.4
Average receipts per arrival (US$)	---	---	---	---	---	864.9	1187.2

Source: All editions of World Travel & Tourism Competitiveness Report, jointly published by United Nations World Tourism Organization (Madrid) and World Economic Forum (Geneva).

High fluctuation is noticed in the number of international tourist arrivals in the different editions of the TTCI. It was 208 thousands in the 2005. With some ups and downs in the year 2008, it goes to the peak (467 thousands). After that it starts declining the number of arrivals. In this phase, Bangladesh has been host of World Cup Cricket (2011) and it has celebrated the tourism year (2016). But the number of arrivals has been decreased (only 125 thousands in 2017)! The receipts have the similar fluctuation in the earlier editions of the report. After 2010 the trend is upward. In 2008, it was in the lowest position with US$ 69 million. In the latest report, it was US$ 148.4 million. Last two editions of the TTCI have added additional useful information (average receipts). In 2015, the volume was US$ 864.9 and in the latest edition (2017) it has been US$ 1182.2 which indicates that the per tourist expenditure in increasing in a mentionable volume. It is also much better than some other South Asian countries.

ii. Competitive Indicators of Travel & Tourism Industry of Bangladesh:

Table 8

The basic pillars of the tourism competitiveness of Bangladesh

Index components	South Asian Best (out of 7.0)	BGD Score (out of 7.0)	BGD Position (out of 136)
Ground port and infrastructure	4.5 (India)	3.1	74
Cultural resources and business travel	5.3 (India)	1.6	74
Price competitiveness	6.0 (Bhutan)	4.7	89
Business environment	4.7 (Bhutan & Sri Lanka)	4.1	104
International openness	3.7 (India)	2.5	104
Health and hygiene	5.3 (Sri Lanka)	4.3	107
Natural resources	4.4 (India)	2.4	107
Air transport infrastructure	3.9 (India)	1.9	113
ICT readiness	3.9 (Bhutan)	3.1	116
Human resource and labour market	4.5 (Sri Lanka)	3.8	121
Safety and security	6.1 (Bhutan)	3.7	123
Prioritization of travel and tourism	5.2 (Sri Lanka)	3.2	127
Environmental sustainability	4.6 (Bhutan)	3.4	128
Tourist service infrastructure	3.2 (Sri Lanka)	1.9	133

Source: The travel & tourism competitiveness report, 2017.

In the competitiveness aspect the position of Bangladesh is 125th out of 136 nations (Crotti & Misrahi, The Travel & Tourism Competitiveness Report, 2017). It was 127 out of 141 countries in the previous (2015) edition (Crotti & Misrahi, The Travel & Tourism Competitiveness Report, 2015). Three areas have been marked as the strong side of Bangladeshi tourism as a destination.

On the other hand, 11 areas have been marked as the weaker area. Strengths are Ground and port infrastructure (74th), Cultural resources and business travel (74th), and price competitiveness (89th) (Crotti & Misrahi, The Travel & Tourism Competitiveness Report, 2017). Major weaknesses are Tourist service infrastructure (133rd), Environmental sustainability (128th), Prioritization of travel and tourism (127th), and Safety and security (123rd) (Crotti & Misrahi, The Travel & Tourism Competitiveness Report, 2017). Other seven factors hold the middle position among the participating countries. Those are between 104th to 121st positions of the ranking.

Among the South Asian countries, India, Sri Lanka and Bhutan all are showing strong competitive abilities in the given score. Though Nepal is considered as an attractive tourism destination, regarding competitiveness, it has not gained top position even in a single case. As Maldives is not included in the index, their level of competitiveness is not determined.

Table 9

Trend of the basic pillars of tourism in Bangladesh in TTCR

Index components/Year	*2007*	*2008*	*2009*	*2011*	*2013*	*2015*	*2017*
Safety and security	3.1	2.8	3.1	4.2	4.4	4.4	3.7
Health and hygiene	3.3	2.1	2.3	2.6	2.8	4.29	4.3
Human resource and labour market	4.3	4.3	4.3	4.1	4.3	3.9	3.8
ICT readiness/ infrastructure	1.7	1.5	1.6	1.8	1.7	2.7	3.1
Prioritization of travel and tourism	2.4	2.8	3.3	3.1	3.0	3.2	3.2
Affinity for travel & tourism	---	4.0	4.1	3.9	4.0	--	2.5
Price competitiveness	5.3	5.4	5.4	4.8	5.2	4.4	4.7
Environmental sustainability	3.0	3.7	3.6	3.7	3.6	3.01	3.4
Air transport infrastructure	2.0	2.1	2.3	2.2	2.3	1.9	1.9
Ground port and infrastructure	2.8	3.6	3.7	3.9	3.8	3.3	3.1
Tourist service infrastructure	1.3	1.3	1.0	1.3	1.6	2.3	1.9
Natural resources	3.7	2.6	2.6	2.7	3.2	2.3	2.4
Cultural resources and business travel	1.5	1.4	1.5	1.5	1.5	1.6	1.6
Policy rules and regulations	3.7	3.3	3.5	3.7	4.0	---	---

Note: The indicators have been modified in different editions. So, the key words have taken for comparison. All indicators were not available in all editions of the report. For this reason, some data are not found.

Safety and security has a positive trend in latest editions. The highest score were in 2013 and 2015 (4.4 out of 7.0). After that the performance in this category is being declined (3.7 in 2017). Recently, health and hygiene has scored higher than the earlier editions (4.3 out of 7.0). The up gradation is obviously noticeable (4.29 from 2.8 just within two years). The performance of environmental sustainability is staying about in the same level of the all editions of the report. Slight fluctuations are noticed.

In the year 2008 and 2011, it scored the highest (3.7 out of 7.0). But in the latest report the score was 3.4 which indicate that we are not respecting the sustainability issues properly. Prioritization of travel and tourism has little ups and downs in the different editions. The score was highest in the years 2009 (3.3 out of 7). In the recent years the level of prioritization of travel and tourism shows moderate.

Air transport infrastructure has scored quite low in all editions of the report. Even in the recent years like 2015, 2017 this pillar has scored 1.9 out of 7. The declining trend indicates that required steps have not been taken to improve the level of competitiveness of this area. On the other hand, ground transport infrastructure is running with ups and downs. The highest score in this area was in 2011 (3.9 out of 7.0). After that the score has declined gradually.

Finally, it was 3.1 which denote the less competitiveness of the pillar. Tourism infrastructure has scored very low always. In the 2015 edition, it scored the highest (2.3 out of 7.0)! In the recent edition, it has scored 1.9 which indicates the declining situation of this most important pillar. The score of ICT infrastructure is not also so impressive. In the 2017 edition it has risen to 3.1 which was only 1.5 (out of 7.0) in 2009. To get attention of international tourism community the standard of ICT readiness is mandatory. Price competitiveness in travel &tourism industry was really good in the previous years with the score 5.4 (out of 7.0) in 2008 and 2009. But the performance of this area has become less competitive in the recent years.

Table 10

Basic pillars of South Asian countries

Index components	*BGD*	*IND*	*SLK*	*PAK*	*NEP*	*BHU*
Business environment	4.1	4.3	4.7	3.9	4.1	4.7
Safety and security	3.7	4.1	5.5	3.1	4.8	6.1
Health and hygiene	4.3	4.4	5.3	4.5	5.0	4.6
Human resource and labour market	3.8	4.4	4.5	3.1	4.2	4.3
ICT readiness/infrastructure	3.1	3.2	3.7	2.5	2.6	3.9
Prioritization of travel and tourism	3.2	3.9	5.2	3.4	4.8	5.0
International openness	2.5	3.7	3.1	2.2	2.8	2.9
Price competitiveness	4.7	5.8	5.6	5.4	5.6	6.0
Environmental sustainability	3.4	3.1	3.9	3.1	3.4	4.6
Air transport infrastructure	1.9	3.9	2.6	2.1	2.0	2.7
Ground port and infrastructure	4.1	4.5	3.9	3.0	1.9	2.5
Tourist service infrastructure	1.9	2.7	3.2	2.3	2.3	2.7
Natural resources	2.4	4.4	4.1	2.2	4.2	3.5
Cultural resources and business travel	1.6	5.3	1.6	1.9	1.3	1.3

Note: BGD=Bangladesh, IND=India, SLK=Sri Lanka, PAK=Pakistan, NEP=Nepal, and BHU=Bhutan. Data of Maldives were not available.

Based on the latest edition of TTCI the above mentioned table has been developed. Out of 14 pillars, Bangladesh has stayed in the bottom line of 5 pillars. Those are Health and hygiene, Prioritization of travel and tourism, Price competitiveness, Air transport infrastructure, and Tourist service infrastructure. Earlier Bangladesh had strong price competitiveness advantage. But in recent years, the cost of travelling in our country has increased in so much high level that is has declined to the last position among the South Asian countries! Pakistan has placed lowest position in 7 pillars. On the other hand, Bhutan, Sri Lanka, and India own the top position in 5, 4, and 3 pillars respectively.

iii. Competitive Strengths of Bangladesh as a Tourism Destination

Based on the latest edition of the TTCI, the following sub-index components have been identified and presented:

Table 11

Competitive strengths of Bangladesh as a tourism destination

Serial	Sub-index components	Score/ number/ point	Position (out of 136)
1.	HIV prevalence (% adult pop.)	0.1	1
2.	Fuel price levels (US $ cents/liter)	90.0	30
3.	Purchasing power parity (PPP $)	0.4	33
4.	Hiring and firing practices	4.3	35
5.	Effect of taxation on incentive to work	4.3	40
6.	Forest cover change (% change)	0.0	43
7.	Oral and intangible cultural heritage	3	43
8.	Visa requirements (0-100)	42.0	46
9.	Number of world heritage sites	1	46
10.	Total known species	784	47
11.	Sports stadiums	7	50
12.	Available seat kilometres (domestic airlines/millions)	7.4	53
13.	Total tax rate (% profits)	34.4	56
14.	Available seat kilometres (int. airlines/millions)	257.4	56
15.	Costal shelf fishing pressure (tonnes/km^2)	0.2	58
16.	Mobile network coverage (% pop.)	99.4	59
17.	Effect of taxation on incentive to invest	3.7	60
18.	Homicide rate (/1.00.000 pop.)	2.8	63
19.	Paved road density	--	67
20.	Quality of railroad infrastructure	2.7	68

Note: There is a practice to count first half (up to 136/2=68th) as strength side and the last half as the weaknesses side. Based on that criterion the pillars have been categorized. Among the 14 pillars, in case of tourism in Bangladesh, no one is in advantageous position. Even the most fundamental pillar Tourist service infrastructure is in the weakest position.

Bangladesh has achieved first place in one sub-category and that is the rate of HIV prevalence. Though it is not so mentionable factor in our country perspective, the tourists of industrialist nations give it much value. During their tour planning, they take it seriously and it works as a determining factor in many cases. Besides, the purchasing power parity (PPP $) is a very significant consideration to the international tourism where Bangladesh holds a strong position. It is the third strong points for Bangladesh. Though Bangladesh owns three UNESCO World heritage sites (Somepur vihara, Sunderbans, and Mosque city Bagerhat), in the report only one has been shown. It has reduced some points undoubtedly.

iv. Competitive weaknesses of Bangladesh as a tourism destination

Actually, tourism destination is a network of relations between different actors that, together, create the tourist product (Camprubi, Guia, & Comas, 2008). For many practical reasons, Bangladesh has not been able to build such strong network in home and abroad. If that could be done, many sides of tourism development would be stronger.

Table 12
Competitive weaknesses of Bangladesh as a tourism destination

Serial	Sub-index components	Score/number/point	Position (out of 136)
1.	Hotel rooms (num/100 pop.)	0.0	135
2.	Particulate matter (2.5) concentration (pg/m^3)	31.4	134
3.	Airport density (airports/million pop.)	0.1	134
4.	Comprehensiveness of annual T&T data (0-120)	21	129
5.	Presence of major car rental companies	1	129
6.	Index of terrorism incidence	1.0	126
7.	Time required to deal with construction permits (days)	269	125
8.	Internet users (% pop.)	14.4	125
9.	Sustainability of travel and tourism industry development	3.1	124
10.	Effectiveness of marketing and branding to attract tourists	3.0	123
11.	Hospital beds (/10,000 pop.)	6.0	122
12.	Extent of staff training	3.3	122
13.	Aircraft departures (/1000 pop.)	0.2	121
14.	Extent of market dominance	3.0	120
15.	ICT use for biz-to-biz transaction	3.9	120
16.	Openness of bilateral air service agreements (0-38)	6.2	120
17.	Enforcement of environmental regulations	3.0	120
18.	Ticket taxes and airport charges (0-100)	46.6	118
19.	Timeliness of providing monthly/quarterly T&T data (0-21)	3.0	118
20.	Quality of tourism infrastructure	3.6	115

Note: There is an international practice to count first half (up to 136/2=68th) as strength side and the last half as the weaknesses side. Based on that criterion the pillars have been categorized.

For the mentionable advancement in the transportation and the communication systems, the geographic distances have been largely minimized in this era of globalization. Though it is called international tourism, most of the visits are regional. Without having a specific job, very few people do visit to a distant or remote destination. When any one travels for business, job, treatment, or visiting friends and relative, they like to visit the nearest renowned places. Especially for the people of the developing countries, it is very much true.

For this reason, Bangladeshi tourists like to visit India, Nepal, Thailand, Malaysia, and Singapore. Most of our visitors are also Indian and Chinese. From that point of view, the expectations of the tourists of our neighbouring countries should get priority. For geographic convenience, they will try to start their journey from Bangladesh if we can create such environment for them. At the initial stage, expecting the tourists from developed nations might not work much. Through providing services to the domestic and regional tourists, our manpower will be efficient to provide services to the international tourists and our infrastructures will be up to the mark.

In the primitive stage, visiting only to the natural attractions would get priority to the tourists. But now they find alternative attractions to pass quality time in the visited place. In that case, entertainment is another category of destination core resources or attractors. The theatre, concerts, comedy festivals, operas, and circuses are examples of the contribution that the entertainment sector can make toward a destination's competitiveness (Kozak & Andreu, 2006). A destination is more competitive when transportation systems are reliable, efficient, clean, safe, frequent, and able to take travellers to the locations and attractions of greatest interest (Kozak & Andreu, 2006).

4. POLICY SUGGESTIONS

According to the international perspectives it is said that the competitions have to be converted into the form of 'cooperation' to exist or win in the long run. Otherwise, the travel and tourism business will be at risk in the upcoming days (Kozak & Andreu, 2006). So enhancing bi-lateral and multi-lateral relations with the partners (e.g. travel agents, embassies, and investors) is a must. Without taking this initiative, it is tough to get attention of the international tourism community.

Government policymakers should understand its potential and scope of contribution and bring it as an integral part of key policy considerations. In the highly populated countries like Bangladesh, tourism could be blessing for employment generation. But without enhancing competitiveness in major areas, it will not give desired feedback. So, affinity toward tourism and international openness both should be activated together. Without following traditional approach of tourism marketing, the trend of developed nations can be followed. Today as competition and costs increase and as productivity and quality decrease, more marketing sophistication is needed (Kozak & Andreu, 2006).

Skills such as public management, customer relations, foreign languages and new technology should be the priority areas to improve competitiveness (Holloway, 2004). When a country will be in competition, it has to win through offering better products at reasonable price. In this case, long term plan for human and tourism resources development should be taken. For practical reasons, the concerned authorities should consider the opinion: Increased competition or an ineffective positioning strategy can make repositioning necessary (Kozak & Andreu, 2006).

Finally, to convert the tourism board and concerned ministry as more effective bodies, professional and experienced people in tourism should be incorporated. Like the private sector companies, experienced executives should be employed for enhancing the competitiveness in travel & tourism sector. Otherwise, the desired results will not come in near future.

5. CONCLUSION

To get international recognitions, getting higher scores in the different indexes is important. Because the international community gives it value. The development initiatives of Bangladeshi tourism are not aligned with such requirements yet. For this reason, the concerned policymakers should be caring and sincere enough to enhance the position of 'competitive' aspects of the travel & tourism sector of Bangladesh.

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