An Analysis of Destination Attributes to Enhance Tourism Competitiveness in Bangladesh

Md. Kaium Hossain*
School of Business and Economics
United International University, Dhaka, Bangladesh
Email: mdkaiumh2626@gmail.com

and

Saiful Islam
Department of International Business
University of Dhaka
Bangladesh

Corresponding author*

Abstract

Tourism destination competitiveness (TDC) has become an important research topic and has received considerable attention from many researchers. However, according to the authors, no study has yet been conducted to measure the perception of the supply-side stakeholders concerning the TDC of Bangladesh. The purpose of this study is to measure the perceived destination competitiveness by identifying the attributes appropriate to Bangladesh. The defined attributes were empirically inspected by importance-performance analysis (IPA) tool through primary data from 303 practitioners. A stratified sampling method was used in this regard. The IPA findings reveal there are only a few attributes like physiography and climate, hospitality, geographic location, and cuisine in which Bangladesh tourism is performing well against its major perceived competitive destinations like India, Malaysia, Nepal, and Thailand. However, having important destination attributes mainly from nature, destination Bangladesh is still behind its perceived competitors. This research creates the value of accepting a destination's competitiveness attributes that advances destination theory. The findings offer significant implications for Bangladeshi policymakers for developing a strategic marketing plan and identifying priorities for resource allocation in tourism. The study concludes with mentioning few limitations while highlighting areas for further research aimed at developing a tourism destination competitiveness (TDC) model for destination Bangladesh.

Keywords: Destination attributes; destination competitiveness; importance-performance analysis; Tourism; Bangladesh.

Introduction

Destination's competitiveness mostly depends on its ability to provide services and add or create value for the tourists' experiences by the public and private-sectors management activities, and by being better than that in other destinations (Dwyer and Kim, 2003). Such activities vary in their importance and may be performed well or poorly, thereby impacting on the competitiveness of a destination with consequences for market share (Dwyer et al., 2016). The product of the tourism sector is usually the experience that is delivered by a destination to its visitors where various players are involved in the supply and delivery of tourism experience and thus makes the management of the destination product more complex compared to the management of most simple products produced by single firms (Crouch, 2007).

Service providers who make decisions on the supply side that do not match changing customer needs will experience a 'strategic drift' (Dwyer and Edwards, 2009), resulting in a short-term or even long-lasting competitive disadvantage. The specific challenge for tourism service providers is to account for these changes in customer needs proactively so as to attain and keep the competitive advantage for their organisations. Mainly, tourism stakeholders should act strategically as 'future makers' rather than 'future takers' (Ellyard, 2006), asking not 'what will the future be?', But rather 'what should the future be'? And 'how can we meet that future'? (Dwyer et al., 2009). A robust strategic management effort needs to employ to generate and retain competitiveness of a specific destination by identifying and evaluating the importance and relative performance of various destination attributes.

Thus, tourism destination competitiveness (TDC) has become a significant topic of discussion in the gradually competitive tourism industry. It is evident from the previous literature that, no universal set of attributes are commonly applied to all destinations (Enright and Newton, 2004). As far as the authors know, there is no study in Bangladesh on destination competitiveness which measures of perception of supply-side stakeholders. Therefore, there is a contextual gap to measure the TDC of Bangladesh. Besides, inspired by the work of Enright and Newton (2005) and Gomezelj and Mihalič (2008), also their appeal for further research on a particular destination, the study aims to measure the perception of destination competitiveness of Bangladesh from the supply-side. Broadly speaking, this research can contribute to the refinement of existing theoretical knowledge of destination competitiveness as a whole, and will provide useful directions for the inquiry of strengths and weakness of Bangladesh tourism for policymakers.

This article has two main objectives. First, to identify the attributes of destination competitiveness appropriate to Bangladesh. Second, to measure the importance and performance of the identified attributes comparing it to its major competing destinations. Completion of these objectives will help policymakers in developing a strategic plan and identifying priorities for resource allocation in tourism. This article is organised into five sections wherein section 1 gives an introduction along with the objectives of this study. The rest of the article is ordered as follows: the next section provides a summary of destination Bangladesh and reviews the relevant literature on destination competitiveness; Section 3 describes the methodology; Section 4 presents the results, while Section 5 concludes by discussing the findings with managerial and policy implications and highlights areas for further research.

Destination Bangladesh

Bangladesh emerged as an independent country in 1971 through nine-month long Liberation War against Pakistan and the bloodshed of three million people (EFSAS, 2017). Bangladesh covers an area of 148,460 sq. km. and is located in South Asia and boarded by India, Myanmar, and Bay of Bengal (CIA, 2017). Bangladesh is the 43rd largest economy in the world concerning gross domestic product (WB, 2018) and classified among the Next Eleven emerging market economies (Sachs, 2007). Bangladesh can be the 28th biggest economy by 2030 and has the prospect to become the world's 23rd leading economy by 2050, surpassing countries such as Netherlands, Australia, Spain, Thailand, and Malaysia (2017a). With this economic potential, Bangladesh also has excellent prospects in tourism with its sea, beaches, forests, hills, valleys, broad rivers, and sports. In particular, Cox's Bazar, the most prolonged unbroken sea beach, Kuakata, a wide sandy beach from where one can see both the sunrise and sunset and Sundarbans, the largest mangrove forest in the world (Islam et al., 2017). Destination Bangladesh specifically preserves unlimited potentials for nature-based tourism. Also, the scope of cultural tourism, recreation tourism, eco-tourism, adventure tourism, and sports tourism are quite distinct. However, having

all the resources mainly from nature, the tourism industry of Bangladesh is still unable to progress sufficiently.

The World Economic Forum (WEF) ranked Bangladesh 125th among 136 countries while its major competing countries are comparatively in higher positions, such as Malaysia 26th, Thailand 34th, India 40th, Sri Lanka 64th, Bhutan 78th and Nepal 103rd (2017c). Indeed, in the South Asian region, Bangladesh is still behind India, Sri Lanka, Bhutan and Nepal in competitiveness index. Thus in comparison with major competing neighbouring countries, such as for example, India, Malaysia and Thailand. Bangladesh requires significant efforts toward building tourism competitiveness where both private tour operators and government agencies should work together. Bangladesh needs to examine its strategies to meet changes and challenges occurring in the global and regional tourism markets. In this regard, Importance-performance analysis (IPA) is considered a useful tool in examining destination attributes. As a result, a more efficient allocation of limited resources could be achieved to improve tourist satisfaction and destination competitiveness.

Methodology

The IPA framework, based on the conceptual foundations of multi-attribute choice models, is a highly regarded technique established to develop firms' management strategies (Martilla & James, 1977). For the research purposes, 24 selected attributes of destination competitiveness were rated with two parallel five-point Likert scales to measure the importance and performance of the selected attributes. The attributes empirically were inspected by the importance-performance analysis (IPA) diagnostic tool. The survey was administered on 303 Bangladeshi tourism practitioners like tour operators, travel agents, five-star hotel managers, and selected foreign participants. A stratified sampling method used in this regard. Using I.P.A., this article inspects the fitness of the resources allocation and the opportunity of creating management strategies to increase the competitiveness of destination Bangladesh.

Researchers usually adopt relevant tourism attributes applicable to a destination of interest (Dwyer et al., 2014). The selection of tourism attributes applied for this study covers a two-stage process, where in the initial stage a wide range of 52 tourism attributes were derived from well-known relevant destination literature. The selection of these initial 52 attributes was facilitated by the major contribution of Crouch, (2011), Dwyer et al., (2014), and Enright and Newton, (2004). In the second stage, unstructured in-depth interviews were conducted with national experts and academicians of Bangladesh in order to come up with ideas and thoughts regarding appropriate attributes of Bangladesh tourism competitiveness.

Specifically, the academicians and experts included five professors in the tourism field, the CEO of Bangladesh Tourism Board (BTB), two top officials of Bangladesh Parjatan Corporation (BPC), two top association members from TOAB and the Association of Travel Agents of Bangladesh (ATAB) and Principal of National Hotel & Tourism Training Institute (NHTTI). Subsequently, some attributes are excluded and a few were altered according to their suggestions and opinions.

Finally, this process resulted in a total of 24 destination competitiveness attributes which are appropriate to Bangladesh. Accordingly, the final questionnaire was developed. However, before developing the final questionnaire for the survey, a great deal of effort was deployed to pretesting and pilot testing. The questionnaire was divided into four parts. As tourist destination cannot be compared in a vacuum (Enright and Newton, 2004) the questionnaire started with a list of major competitive tourism destinations of Bangladesh (Nepal, India, Malaysia, Thailand, Bhutan, Maldives, and Sri Lanka) is given in the option to the respondents to select the most preferred

perceived competitor/destination. The destinations were selected based on the information given by the national tourism experts. This approach followed the method adopted in (Dwyer and Kim, 2003). The following parts of the questionnaire were then classified into the assessment of importance, and the performance of all selected 24 attributes mentioned above. The last part of the questionnaire asked some basic questions were in order to formulate a demographic profile of the respondents like gender, age, education, and experience.

To measure the importance of 24 selected attributes, a 5-point Likert-type scale was used where the two extremes of the scale, 1 indicated as the "Not at all important" and 5 indicated "Extremely important." On the other hand, to measure the performance on the same attributes, a similar Likert scale was adopted where 1 indicated as the "poor" and 5 indicated "Excellent." Using a Five-point Likert scale in both importance and performance also supported by previous tourism researches (Dwyer et al., 2014; Zehrer et al., 2017). Attractiveness derived from the demand side and competitiveness elements derived from the supply side of tourism (Vengesayi, 2013), this study considered only the practitioners in the tourism industry of Bangladesh. In this consideration, Tour Operators Association of Bangladesh (TOAB) and Association of Travel Agents of Bangladesh (ATAB) considered as the most appropriate as it included the most representative portion of tourism practitioners in Bangladesh. Besides, foreign tourism top officials of Pacific Asia Travel Association (PATA) who attended PATA New Tourism Frontiers Forum (NTFF) 2016 held in Bangladesh from 23 to 25 November 2016 and managers of the five-star hotels and resorts also considered in the sample. BTB is a national tourism organisation responsible for formulation and implementation of national tourism policy, and BPC is a statutory board tasked to promote the tourism industry of Bangladesh. Therefore, the official database of BTB and BPC considered as the sample frame of this study.

In the data collection process, the multiple phases of data collection efforts- an online questionnaire, a reminder email, reminder calls, SMSs and reminder SMSs and finally, physical data collection, made the collection process more challenging and very time-consuming. Thus, the total data collection period was of almost sixteen months, from July 2016 to October 2017, including in-depth interviews, a pre-test questionnaire, pilot survey and multiple phases of actual data collection. Moreover, as this study is the first- study on the supply side of Bangladesh tourism, respondents were reluctant to participate in the survey which caused a lower response rate than expected. The response rate of this study presented in the following table (Table 1). The response rate of TOAB and ATAB members are 51.79%, whereas PATA members are 35% and Five-star hotels and resorts are 50%. The overall response rate from the survey is 50.24%.

Table 1 Survey Response Rate			
Major Stakeholders	Sent questionnaires	Received Questionnaires (with no missing values)	Response rate (per stakeholder)
TOAB and ATAB Members	569	289	51.79 %
Five-Star Hotel Managers	14	7	50 %
Selected Foreign Participants	20	7	35 %
Overall Response	603	303	50.24 %

The data collected on 24 selected attributes for this study was then analysed on an Importance-Performance Analysis (IPA) map to measure the strengths and weakness of Bangladesh tourism. Though IPA was initially developed to determine firms' management strategies (Martilla and James, 1977), it can be reasonably applied to destination competitiveness as it points out the areas of improvement and directs strategic planning efforts and development (Sörensson and von

Friedrichs, 2013). The two-dimensional grid (Figure 1) of combining importance and performance of attributes generate four possible quadrants on which policymakers need to focus. These four quadrants named "concentrate here" (where importance is high, but performance is low), "possible overkill" (where importance is low, but performance is high), "keep up good work" (where both importance and performance are high) and "low priority" (where both importance and performance are low).
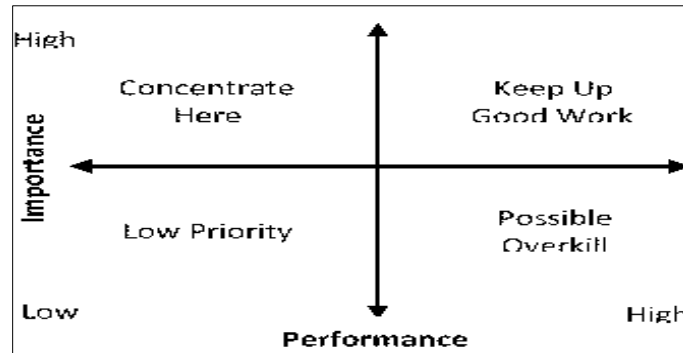

Figure 1: Importance-Performance Grid

Importance-performance analysis rated the destination attributes and determined what actions are required. Cronbach's Alpha coefficients were calculated to test the internal consistency and to measure of scale reliability for both importance ($\propto$=.94) and performance ($\propto$=.88) items. Thus, the alpha coefficient is suitable and excellent above the minimum value of 0.5 (Nunnally and Bernstein, 1994). For analysing data, Statistical Package for the Social Science (SPSS) version 20.0 was used.

Results and Discussion
Respondents' Characteristics
The majority (43.6%) of the respondents included to 36-45 age-bracket, mostly male (97.7%), and completed their undergraduate or postgraduate degrees (87.5%) and had considerable experiences. Table 2. Below shows us the characteristics of the respondents

Table 2. Respondents' characteristics							
Variables		**Frequency**	**%**	**Variables**		**Frequency**	**%**
Gender	Male	296	97.7	**Education**	SSC	7	2.3
	Female	7	2.3		HSC	31	10.2
	Total	**303**	**100**		Bachelor	116	38.3
Age (In Year)	26-35	74	24.4		Diploma	8	2.6
	36-45	132	43.6		Masters	136	44.9
	46-55	60	19.8		Ph.D.	5	1.7
	56-65	30	9.9		**Total**	**303**	**100**
	65+	7	2.3	**Experiences (In Year)**	0-9	162	53.5
	Total	**303**	**100**		10-19	91	30
					20-29	41	13.5
					30+	9	3
					Total	**303**	**100**

Competitive Destinations

Results suggested respondents perceived that India (47.85%), Malaysia (21.45%), Nepal (15.84%) and Thailand (7.26%) are the four major closest competitive destinations of Bangladesh respectively. Pleasure consider Figure 2.
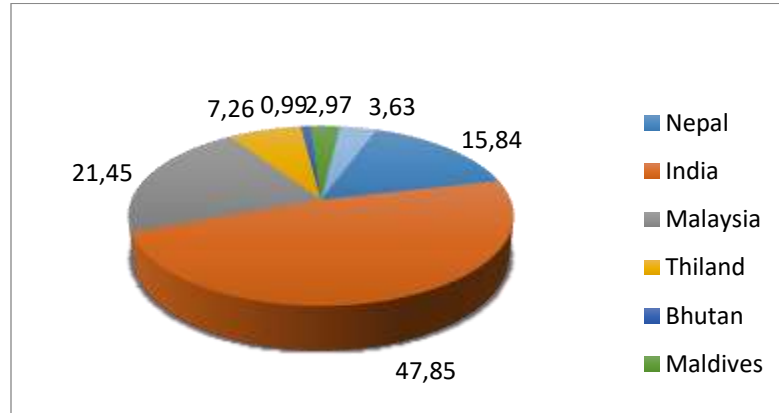

Figure 2 : Closest Competitive Destination Source: Authors own

IPA Result

Based on the internal consistency of each set of items, the grand means for the importance and performance items were measured. The average level of importance with various aspects of the destination attributes and the average performance of these attributes were estimated for the overall sample (Table 3). Afterwards, the attributes were plotted on a two-dimensional importance-performance grid by using the grand means of importance and performance. Though mean and median value plots yield a similar result (Martilla and James, 1977), grand mean was used in few previous IPA studies of the same kind (Lee et al., 2016, Murdy and Pike, 2012). The importance-performance grid positions the grand means for Importance (X =4.37) and Performance (X =2.78) which determined the placement of the axes on the grid. The mean responses to the importance and performance of the 24 items examined by the IPA framework which is displayed in Figure 3.
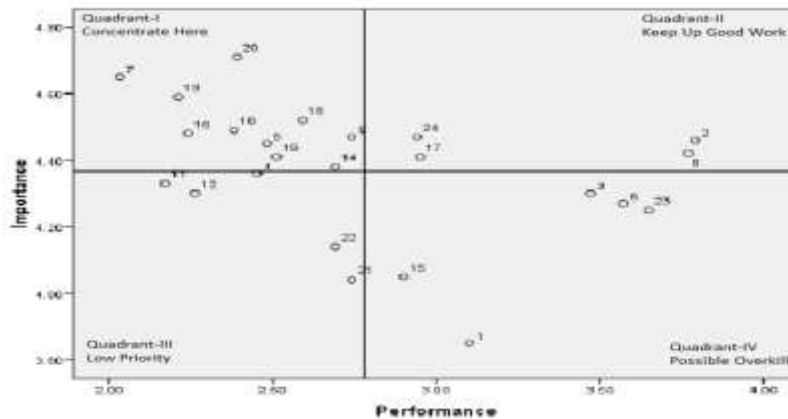

Figure 3: Importance-Performance Grid for Bangladesh (2017)

Discussion

Survey result show that India is the main perceived competitor for Bangladesh tourism. India is the neighbouring country of Bangladesh, and cultural similarities between Bangladesh and Kolkata (the capital of India's West Bengal state), especially in term of language, possibly trigger this perceived preference. However, destination India having 37 World Heritage Sites (2018f) is noticeably ahead of Bangladesh.

In Bangladesh, most of the tourism practitioners are males (97.7%) which implies that female practitioners are profoundly absent in this industry. Therefore, policy measures should be taken to attract more females gradually into this sector as is the case in competing destinations. The survey indicates that most of the practitioners are educated (87.5%) and having undergraduate or postgraduate degrees, but not from the academic realm of hospitality and tourism. Hence, importance should be given to tourism education at tertiary level to take the advantages of the growing demand of the tourism sector. Survey results also display practitioners' experiences are limited up to nine years (53.5%), which associates the necessity of highly experienced professionals. The concerned Government organisations like BTB, BPC and private associations like TOAB and ATAB should arrange continuous training and development programs for supply-side stakeholders for building skill human resources which ultimately contribute to the development of Bangladesh tourism.

Keep Up the Good Work

Tourism experience is typically related to the physical resources of a destination, and thus the physiography and climate of a destination can lead other factors of competitiveness (Ritchie and Crouch, 2010). Respondents rated the importance of **'physiography and climate'** attribute as 4.46 in a scale of 5 which indicates relatively higher importance to consider. And, the performance score of this attribute is 3.79 in a scale of 5 which displays excellent as it is much higher than the mean value 2.78. IPA result shows that 'physiography and climate' attribute fall into the "keep up good work" quadrant of Figure 3. Bangladesh is being ranked 46th among 136 countries in the number of world heritage natural sites indicator(2017c) which also supported by this study result. The climate of Bangladesh is characterised by high temperature and high humidity, heavy rainfall and marked seasonal variation (2018b). The 'games of six seasons' is played out in Bangladesh.

Since time immemorial, Bangladeshis are famous for their sense of hospitality. Even today Bangladeshi people cry at the departure of their guests. If Malaysia represents Truly Asia, Bangladesh represents Truly Asian Hospitality (Howlader, 2012). The performance score of **'hospitality of the locals'** attribute is 3.77 in a scale of 5 rated by respondents which displays an excellent performance while respondent rated the importance of this attribute as 4.42 in a scale of 5 which indicates relatively higher importance to consider. IPA result shows that 'Hospitality of the locals' attribute appears in **"keep up good work"** quadrant of Figure-3.

Nowadays, the success of tourism organisations is contingent on the integration of ICT in the tourism industry (Bethapudi, 2013). Respondents ranked the importance of **'Utilization of ICT'** as 11th out of 24 attributes whereas, they placed it at 7th by overall performance. Bangladesh's debut in the global space society by successful launching of its first communication satellite Bangabandhu-1 in May of this year (2018a) is an important step in progress. Recently, Bangladesh won the world's most prestigious IT and Innovation award 'World Summit on Information Society (WSIS) Prize-2018' for the fifth time for the Multipath, which is the national

platform for e-Learning (2018d). Besides, Bangladesh ranked 59 and 94 out of 136 countries under ICT readiness pillar in mobile network coverage and fixed-broadband internet subscriptions respectively (2017c). However, utilisation of ICT in the tourism industry is not optimal in operation. One of the perceived closest competitors of Bangladesh tourism is Malaysia which ranked 26 globally where Bangladesh is far behind ranked 125 (2017c). The secret behind the Malaysian tourism industry's success is their growing use of ICTs and upgrading of e-tourism and e-commerce that allowed Malaysia to be capable of enlarging its tourism industry. By utilising ICT, the design of a specific and comprehensive information system that replies to and fits the needs and desires of potential tourists (Meriague, 2014) success can be achieved.

The image of a destination can take time to change even though the reality at a destination no longer accords with a negative or positive image (Ritchie and Crouch, 2010). Respondents ranked the importance of **'Destination image'** as 7th out of 24 attributes whereas placed it at 8th by overall performance. Bangladesh is the fourth largest Muslim majority country in the world (2015). Traditionally a land of communal harmony, followers of other religions enjoy full freedom of worship. They have an inborn quality of open-mindedness. A communal feeling is unfamiliar to them and despite a different racial mix from pre-historic days they are, by and large, a homogeneous group. Religion is a code of life that only humans adhere to; for the true religion is sacred and essential, and in Bangladesh people of different faiths have practised their religions freely for centuries (Chowdhury, 2010).

The attributes ranked in **quadrant II (**Figure 3) is raised to be excellent performing by the respondents' perception which implies that those are the areas where Bangladesh needs same and progressively nonstop efforts to **"keep up the good work"** or at least to keep the status quo.

Possible Overkill

The survey result exhibit that five attributes are in **quadrant IV** (Figure 3) including culture and history, cuisine, geographic location, good shopping opportunities, and special events. These are some attributes where Bangladesh tourism is performing more than its importance.

Respondents ranked the '**culture and history'** as 15th important attributes out of 24 in destination competitiveness where it is rated 5 by overall performance. Bangladesh has a rich, diverse culture and its profoundly rooted heritage is thoroughly reflected in its architecture, dance, literature, music, painting, and clothing. The destination Bangladesh has a heroic history of language movement and Liberation War (*Bengali: Muktijuddho*).On 21st February 1952, Bengali students in East Pakistan (now Bangladesh) rose up for the mother tongue and protested against the decision that Urdu as the only official language of entire Pakistan. As police open fired, several students died for defending their language.The glorified sacrifice of these martyrs is now observed not only in Bangladesh, but also all over the world as International Mother Language Day (2018e).In 1971 through nine-month long Liberation Wars against Pakistan and the bloodshed of three million brave people, the country emerged as in Independent country (EFSAS, 2017).

Table 3: IPA Results of Tourism Destination Competitiveness (TDC) Attributes of Bangladesh					
Label	Attributes/Items of TDC	Overall Rank by Importance	Mean (N=303)		Overall Rank by Performance
			Importance (I) Grand Mean =4.37	Performance (P) Grand Mean=2.78	
20	Safety/Security	1	4.71	2.39	16
7	Tourism Infrastructure	2	4.65	2.03	22
13	Government Priority	3	4.59	2.21	20
18	Quality of Services	4	4.52	2.59	12
10	Accessibility	5	4.49	2.38	17
16	Professional and Skilled Manpower	6	4.48	2.24	19
9	Accommodation Quality	7	4.47	2.74	10
24	Destination Image	7	4.47	2.94	8
2	Physiography and Climate	8	4.46	3.79	1
5	Market Ties	9	4.45	2.48	14
8	Hospitality of the Locals	10	4.42	3.77	2
17	Utilization of Information and Communication Technology (ICT)	11	4.41	2.95	7
19	Tourism Marketing and Branding	11	4.41	2.51	13
14	Access to Improved Drinking Water and Sanitation	12	4.38	2.69	11
4	Mix of Activities	13	4.36	2.45	15
11	Domestic Transportation Quality	14	4.33	2.17	21
3	Culture and History	15	4.3	3.47	5
12	Health and Wellness Offers	15	4.3	2.26	18
6	Cuisine	16	4.27	3.57	4
23	Geographic Location	17	4.25	3.65	3
22	Carrying Capacity is in Sustainable Limit	18	4.14	2.69	11
15	Good Shopping Opportunities	19	4.05	2.9	9
21	Cost of Living	20	4.04	2.74	10
1	Special Events	21	3.85	3.1	6

The respondents reported that Bangladesh tourism is over-performing in **'cuisine'**. Respondents ranked 'cuisine' as 16th important attributes in destination competitiveness where it is ranked 4th by overall performance. There are some dishes that Bangladesh can boast of since they compare well with all other recipes of the world and even those of international reputation. Hilsa, the national fish of Bangladesh, got the recognition of a geographical indication (GI) product which is now registered internationally as a fish of Bangladesh (2017d). One cannot forget plain rice with light gravy of Hilsa or Hilsa fry, or even *Sorshe illish* is a Bengali dish, all of which are exceptionally delicious.

Respondents ranked '**geographic location'** as 17th important attribute out of 24 in destination competitiveness where it is ranked 3 by overall performance. Bangladesh is a low-lying, riverine country located in South Asia with a largely marshy jungle coastline of 710 km (441 mi) on the northern littoral of the Bay of Bengal (Saran, Rahman, & Yunus, 2018). Thus there is an abundance of marine food.

As **'good shopping opportunities'** become increasingly significant for tourists, this interest impacts on and pushes their destination selections. That is, shopping tourists tend to consider destinations to be more attractive and competitive if they offer key shopping resources. *Jamuna Future Park* and *Bashundhara City* are the two biggest shopping mall in Bangladesh where one can get everything.

The term '**special events'** refers to a wide range of 'happenings' that can create high levels of interest and involvement on the part of both visitors and residents (Ritchie and Crouch, 2010). Respondents ranked the 'special events' as 21st less important attributes where overall performance rank is 6th from TDC view. Bangladesh has some unique and colourful events. A unique festival named Pahela Baishakh or Bangla Nabobarsho is the first day of Bengali calendar is based on cultural significance with marking non-communal value. Some religious festivals like *Eid al-Fitr, Eid al-Adha, Durga Puja* and *Christmas day* are celebrating by the respective religion.

The items in quadrant IV indicates that they are low in importance but comparatively high in performance. The quadrant is frequently categorised as 'Possible Overkill' as some of the funds invested in enhancing the performance of attributes that fail in that quadrant may be 'wasted effort' and can be better if invested elsewhere given the comparatively low importance of the performance of a destination on these attributes.

Low Priority

On the other hand, the most left bottom **quadrant III** of **Figure 3** named "low priority" identifies attributes that are considered less critical, and where the destination is performing below the average.

While the activities within a destination may be defined in no small extent by physiography and culture, there is nevertheless considerable scope for creativity and initiative (Ritchie and Crouch, 2010). Respondents ranked the **'mix of activities'** as 13th important attributes among 24 items where overall performance rank is 15 from TDC view. In most of the instances, locations within Bangladesh tourism doesn't offer additional choices for having entertainment activities, i.e., local cultural events, nightlife activities and access to native festivals in addition to its core nature-based tourism facilities. In Bangladesh, there is a general perception among respondents that the importance of having a mix of activities is not that much higher in order to attract more tourists which is also evident in the survey results.

Respondents ranked the importance of **'domestic transportation quality'** 14th among 24 attributes while its ranking is 21st by overall performance. Thus, the relative performance of local transportation quality is not up to the mark, and it needs to be improved to achieve destination competitiveness.

In addition to these, respondents also rated **'health and wellness offers'** into the low priority category. Respondents ranked this as a 15th important attribute in destination competitiveness where it is ranked 18th by overall performance. Bangladesh also ranked 107th among 136 countries in Health and hygiene category which includes physician density, hospital beds, HIV prevalence and malaria incidence importantly. All other major competing destinations of Bangladesh are in better position in this ranking, Sri Lanka 71th, Malaysia 77th, Nepal 85th, Bhutan 96th and India ranked 104th (2017c).

The United World Tourism Organization defines **tourism carrying capacity** as "the maximum number of people that may visit a tourist destination at the same time, without destroying the physical, economic, socio-cultural environment and an unacceptable decrease in the quality of visitors' satisfaction" (Moretaza, 2017). Bangladesh currently is in a position to accommodate a perfect number of tourists without destroying the modern amenities of tourism services. Respondents ranked the **'carrying capacity'** attribute as 18th in importance as an attribute in destination competitiveness where it is ranked 11th by overall performance. According to the respondents' measure, there are many other issues which need to be improved first to achieve competitiveness. Thus, the carrying capacity is considered as a low priority activity for the development of Bangladesh tourism.

Respondents ranked **'cost of living'** as 20th in importance as an attribute out of 24 in destination competitiveness where it is ranked 10th by overall performance. In practice, the cost of living is mostly governed by economic structures within the destination and its corresponding international position. Bangladesh has always been a budget destination for travellers. Lonelyplanet.com ranked Bangladesh 7th in their meticulously-crafted list of the top ten places made for affordable adventures (2018c).

Thus, the five attributes resulted in the **quadrant III** named mix of activities, domestic transportation quality, health, and wellness offers, carrying capacity and cost of living. These attributes should be considered as **"low priority"** while designing tourism services and achieving destination competitiveness.

Concentrate Here

The **quadrant I** located in the top left (**Figure 3**) includes attributes that are high in importance but relative performance is low. It recognises the critical zones for improvement where decision makers are suggested to **"concentrate here"** and negligence to prioritise these attributes will worsen the destination competitiveness achievement.

Nothing can affect the choices of tourist more strongly and clearly as concerns over safety and security (Ritchie and Crouch, 2010). The survey result showed that the concern for **'safety/security'** is the most important of attributes among 24 attributes for the respondents and ranked 16th in the overall ranking by the performance. The Bangladesh government has already taken wide-ranging actions to protect its residents as well as international visitors. Launching a special branch of the security force dedicated for tourist spots called 'tourist police' along with covering areas under CCTV surveillance are a few of the recent initiatives in this regard. Besides, the government should always focus more on the safety issue of the tourists and ensure their safety so that they can move from one place to another, in their choice of destination.

On the other hand, respondents ranked the importance of **'tourism infrastructure'** second among 24 attributes while its ranking is 22nd by overall performance. Such a nature indicates that the current status of tourism infrastructure of Bangladesh is not up to the expectations compared to other attributes, while its importance is very significant for achieving destination competitiveness. Basic tourism infrastructure includes the quality hotel, restaurants, rental services, ATM facilities. Bangladesh needs to improve its current position compared to other major competing destinations. Bangladesh ranked 133 out of 136 countries in 'tourism service infrastructure' category (2017c). Policy makers need to concentrate here as respondents also rated it as the second highest priority for achieving destination competitiveness.

Respondents also ranked **'Government priority'** toward the tourism sector as the third most important of the attributes among 24, however it ranked 20th by overall performance. Bangladesh ranked 127 out 136 countries in 'Prioritization of Travel & Tourism' index. Parameters like government prioritisation of travel and tourism industry, the percentage of government's expenditure of total budget on T&T and comprehensiveness and timeliness of T&T data for making effective strategies are considered in this ranking. However, in all these parameters Bangladesh needs to improve its situation and concentrate here on ensuring more priority initiatives in developing and maintaining destination competitiveness (2017c).

Respondents also ranked the **'quality of services'** as 4th most important attributes in destination competitiveness where it is ranked 12th by overall performance. Like other attributes within this quadrant, more concentration is required to improve the 'quality of services' as it is performing very poorly when compared to its relative importance in achieving destination competitiveness. Quality of services includes the overall experience of tourism that comes from a broad range of factors like accommodation, transportation, food and supplies, natural attractions, mix of activities, and other tourism facilities. A positive overall experience of tourists will lead to an intention to revisit by same tourists or recommendation to other potential tourists which would be significant for achieving destination competitiveness. Therefore, policy measures are required to concentrate here on achieving improved quality of services and achieving destination competitiveness.

Respondents ranked **'accessibility'** as the 5th most important attribute for destination Bangladesh however ranked 17th among 24 attributes by overall performance. Accessibility includes availability and access to a different mode of transports like a car, bus, train, plane, etc. for both inbound and foreign tourists. Bangladesh ranked 113 out of 136 countries in air transport infrastructure and 74 in grounds and port infrastructure (2017c). Therefore, a rigorous effort is needed to improve 'accessibility' and ensure long term destination competitiveness.

Respondents also identified that policy measures are required to concentrate on **'professional and skilled manpower'** in achieving destination competitiveness. However, in the **'hiring and firing practices'** parameter, Bangladesh ranked 35 out of 136 countries (2017c). According to respondents, the professional and 'skilled manpower' attribute is ranked 6th in importance and 19th by overall performance. Lack of skilled manpower in various sectors of Bangladesh is a common problem, and the same situation is also prevailing in the tourism sector. Human Resources practices should be emphasised more on staff training, hiring and firing practices, ease of finding skilled employees, pay and productivity and female participation in the labour force. Besides, policy measures should be developed to fill up the current need of professional and skilled manpower in achieving and maintaining sustainable destination competitiveness.

According to respondents ratings the overall importance of having desired **'accommodation quality'** ranked as 7th whereas they placed it at 10th by overall performance. Good accommodation enhances the tourists' experience in any particular location and generates more satisfaction. Thus, to achieve competitiveness, policy measures need to be concentrated on improving current accommodation quality so that the performance of this criterion exceeds the average performance score of the mass respondents.

Besides, respondents ranked the importance of **'market ties'** as 9th out of 24 attributes whereas placed it at 14th by overall performance. The term, market ties, includes several dimensions along which a destination establishes and builds linkages with the residents of tourism originating regions (Ritchie and Crouch, 2010). Undesirably, Bangladesh has lacked in cooperation among the tourism related bodies, so needless to say that more concentration and effort is required. The two significant associations like TOAB and ATAB and the government bodies like BTB and BPC

should work closely together to improve the competitive position of Bangladesh tourism in world competition.

Respondents ranked **'tourism marketing and branding'** as 11th among 24 attributes on importance and 13th on overall performance. Bangladesh ranked 123 out of 136 countries in the effectiveness of marketing and branding to attract tourists. However, Bangladesh ranked 97 in the country brand strategy parameter (2017c). Respondents ratings indicate that though tourism marketing and branding is significant for achieving destination competitiveness, Bangladesh has more scope in this regard to improve its current efforts. Thus, more initiatives are required from both government and private sectors to ensure effective tourism marketing and branding.

Respondents also indicate that more concentration is needed over '**access to improved drinking water and sanitation'**. Respondents ranked the importance of access to improved drinking water and sanitation as 12th out of 24 attributes whereas placed it at 11th by overall performance. The importance and performance ranking both indicate that access to improved drinking water and sanitation has an average position in both criteria which need to be improved to achieve competitiveness. Thus **quadrant 1** consists of these ten attributes (Figure 3) considered as **"concentrate here"** while designing tourism services and achieving destination competitiveness.

Conclusion

This study offers the implications of the findings for the Bangladesh government and private destination managers, tour operators and travel agents to develop a dedicated action plan to achieve and maintain destination competitiveness for Bangladesh tourism. The government had taken steps to prepare a new master plan through the Bangladesh Tourism Board (BTB) for its tourism industry in 2016 which is yet to be declared. In this connection, the findings of this study will be helpful and contribute to the development of any new plan or strategy on Bangladesh tourism in the light of resource requirements, concentration areas or the status quo. Indeed, policy measures require a focus on areas where respondents urge importance, but Bangladesh currently cannot perform up to the desired mark. Hence, Government must consider tourism as one of the top priorities of their development agenda. Greater attention should be given on how to improve tourism marketing and branding and to develop a professional and skilled workforce dedicated to tourism service. Current government spending on tourism infrastructure has to be increased to some similar fashion of the competing nations. More institutions can be established for training, and a dedicated team can be formed to design effective marketing and branding strategies.

Moreover, strategic decisions should also address the availability and access to a different modes of transports like a car, bus, train, plane, etc., and access to improved drinking water and sanitation and accommodation quality is also needed. The current status of tourism infrastructure and accessibility is relatively very poor compared to that of competing countries, and immediate upgrading is required to improve the situation. Though few five-star hotel and resorts are available in Bangladesh, more of this type need to be established to ensure good accommodation quality with international standards. Besides, more establishments are also required for access to improved drinking water and sanitation. Furthermore, strategic decisions should also concentrate on improving the quality of tourism services, developing market ties, and ensuring safety/ security. For providing safety/security in tourist areas and preventing and investigating crimes against tourists, the Bangladesh Government formed a special unit named tourist police in 2009. In February 2017, the unit launched a smartphone app, Hello Tourist, which contains relevant information for tourists in Bangladesh (2017b). A collaborative network has to be built up among

all the relevant tourism stakeholders in Bangladesh so that more effective and efficient services can be offered and strong market ties can be formed.

However, there are few other areas in which strategic decisions should be maintaining the status quo as Bangladesh is performing relatively better in these areas according to its required importance. Thus, strategic decisions in this regards should be keeping the status quo of its current destination image, protecting its physiography and climate, continuing erecting contemporary hospitality for the locals, and upholding utilisation of information and communication technology. Moreover, there are also other areas, where it is also doing well but these tend to have limited significance on the destination competitiveness for Bangladesh. Thus, strategic decisions should be withdrawing the concentration on these areas and shifting resources to other critical areas.

Areas from which strategic efforts need to withdraw as they might be the possible overkill for Bangladesh tourism are culture and history, cuisine, geographic location, good shopping opportunities, special events. In all these areas, Bangladesh is currently doing very well compared to their required importance. Moreover, there are few other attributes of destination competitiveness like the mix of activities, domestic transportation quality, health, and wellness offers, carrying capacity and cost of living which are considered less critical and Bangladesh is also performing below the average. As it has little significance presently, strategic decisions should be keeping these activities as it is, rather than investing and upgrading current status.

Limitations and Issues for Further Research

While the results are attention-grabbing concerning a new context in Bangladesh, a few possible limitations of the study must be acknowledged. First, respondents were not sufficiently clear as to what precise measures to use when rating the importance of attributes. In this study, 'importance for what?' was explained to the respondents as "importance for tourism development that attains destination competitiveness." Second, only 24 attributes were used in this research that could have been further extended; however, this limitation does not change the validity of the study findings for the identified attributes.

Survey result shows that Bangladeshi tourism stakeholders ranked each of the important attributes reasonably highly. High importance ratings are a common problem happening in practical applications of IPA (Oh and Parks, 1998). Finally, this study opens the scope for exploring further interest in the similar field, more attributes can be added and can develop a TDC model by considering both supply and demand side and to examine the impact of TDC on destination performance.

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